HOUSING LAND SUPPLY AT 30 September 2017

1.1 This statement sets out information on development sites which contribute to the housing land supply in Leeds. These figures relate only to the supply of housing units on allocated sites and those with planning permission.

1.2 The table and schedule show outstanding capacity by planning status, development progress and previous use. Unallocated sites are split into those in the City Centre, in the rest of the Main & Smaller Urban Areas (MUA) or elsewhere. Allocated sites are currently those in the Unitary Development Plan Review (2006) Policy H3[1] which will be replaced by sites in the Site Allocations Plan.

1.3 The Aire Valley Leeds Area Action Plan (AVLAAP) was adopted at Council on 8th November 2017. The boundary of the AAP includes 1,300 hectares of land to the south east of the city centre along the river corridor from close to Leeds railway station to beyond Junction 45 of the M1 motorway (including all or parts of the following areas: South Bank, East Bank, Richmond Hill, Cross Green, Leeds Enterprise Zone, Stourton and Hunslet). The AAP is a development plan document so it now forms part of the statutory development plan and should be given full weight in planning decisions. The following table illustrates the position at 30 September in advance of adoption.

Table 1: Outstanding capacity at 30 September 2017

Site	Planning Permission			Development Status		Previous Use		Total
	None	Outline	Detailed	Under con	Not yet started	B'field	G'field	
City Centre	0	1,034	4,054	449	4,639	4,893	195	5,088
Rest of MUA	0	2,876	6,252	1,180	9,267	9,026	1,426	10,452
Outside MUA	0	607	2,284	665	2,226	789	2,102	2,891
Total	**0**	**4,517**	**12,590**	**2,299**	**16,132**	**14,708**	**3,723**	**18,431**
H3-1	650	0	2,132	135	2,647	2,498	284	2,782
H3-2	327	0	624	211	740	7	944	951
H3-3	6,140	0	112	52	6,200	0	6,252	6,252
AVLAAP	5,947	758	566	5	7,266	5,275	1,996	7,271
Total	**13,064**	**758**	**3,434**	**403**	**16,853**	**7,780**	**9,476**	**17,256**
Total land	**13,064**	**5,275**	**16,024**	**2,697**	**32,985**	**22,488**	**13,199**	**35,687**

1.4 Table 1 shows that 21,299 units have planning permission with a further 13,064 units available to gain planning permission on allocated land including nearly 6,000 on new allocations in the Aire Valley. Of the 21,299 units, 16,024 have detailed planning permission. Considering that 2,697 units are under construction, this leaves 13,327 units with detailed planning permission that have not yet started.

[1] The Local Development Framework Site Allocations Plan was submitted to the Secretary of State by the City Council on 5th May 2017.

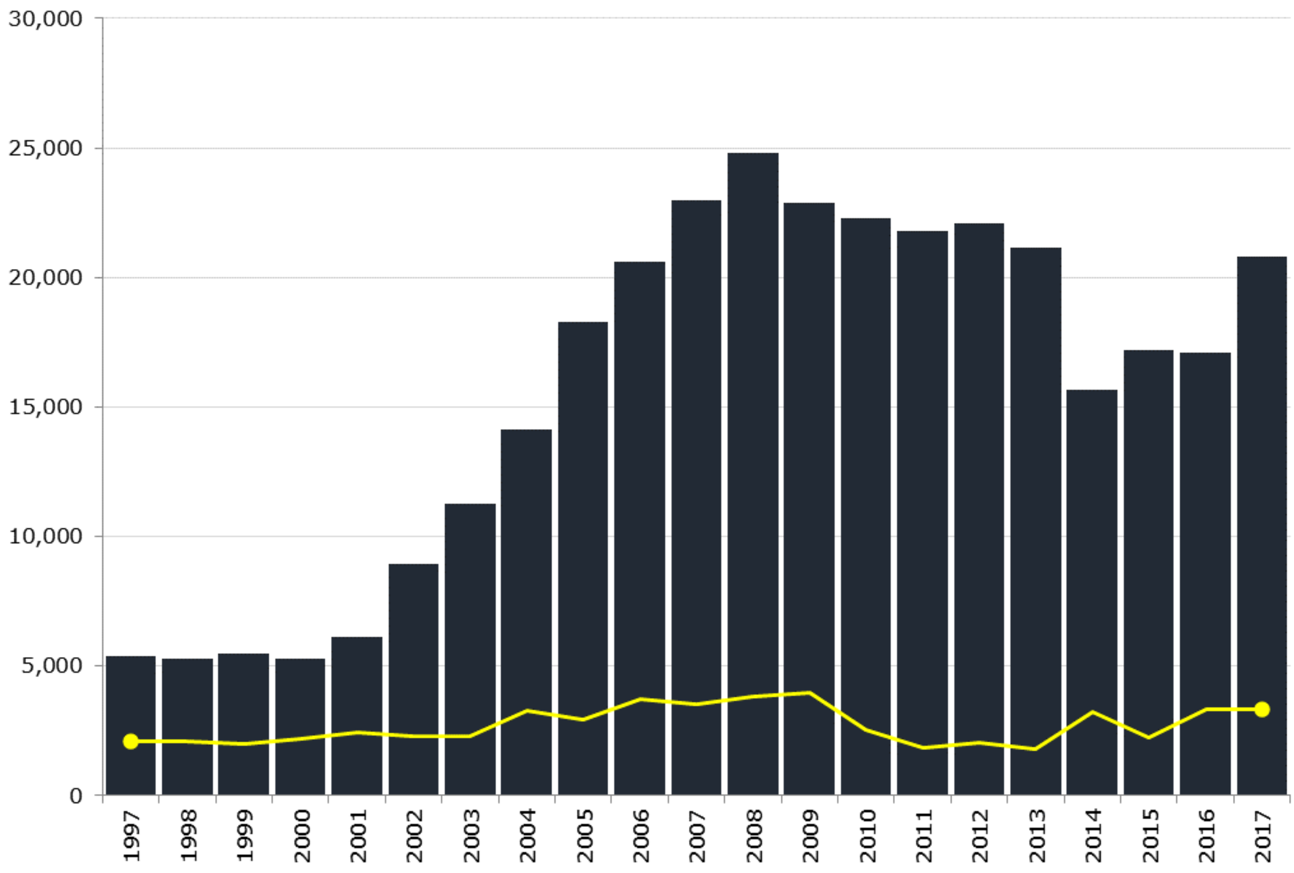
1.5 Total outstanding capacity has increased by 119 units in the last six months with new approvals replacing completed units and planning permissions that expired in the same period. The number of new homes on sites under construction has increased by 676 units.

1.6 The Council's Executive Board agreed to release UDP Policy H3 Phase 2 and 3 housing allocations on 22 June 2011. These are greenfield sites that are attractive to the market and still provide capacity for up to 7,203 units on 30 September 2017.

1.6 There has been a large amount of units with planning permissions in the land supply for the last five years. For a decade until March 2001, stocks of permissions were within a range of between 5,300 and 6,300 dwellings. Then there was a seven year period of expansion, reaching a peak of 24,800 dwellings in March 2008. After three years of decline, the stock increased to 22,061 in 2011/12 but dropped to 15,643 in March 2014 increasing to 17,111 in March 2016 and 20,774 in 2017. This is illustrated in Figure 1 below.

1.7 The chart also includes house building completion figures and shows that although these had increased since 2001, the rate of increase in delivery has not kept pace with the growth in supply. The stock of permissions has grown around 400% since 2001, whereas completions only grew to 165% the 2001 level. The ratio of permissions to completions has expanded from 3:1 or less in the 1990s to approximately 6:1 in 2008 and stands at 7:1 in 2017.

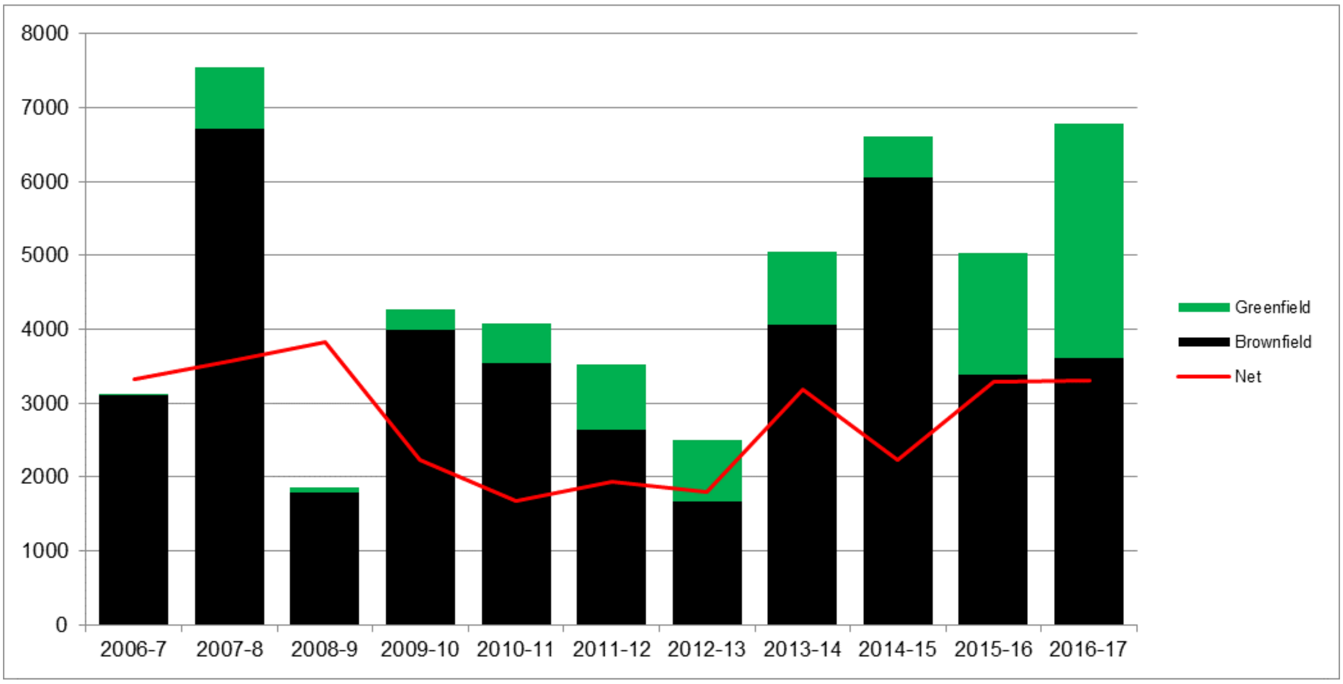
Figure 1: Stocks of planning permissions and completions 1997-2017



1.8 The decrease in the overall stock of planning permissions between 2013 and 2014 reflected a number of adjustments in the Leeds housing market including 43 proposals with an overall capacity of just over 3,250 dwellings that expired during 2013-14. The expired permissions, largely in the city centre, remain a part of the Leeds housing land supply and have begun to re-emerge as new proposals in the rising market.

1.9 Figure 2 shows that 2016/17 was a record year for greenfield site approvals and for new permissions granted on both brown and greenfield sites in the post-recession market. The total stock of houses with full permission now rests at 22,332 units with 14,675 outstanding across 369 sites.

Figure 2: Planning permissions approved on brownfield and greenfield sites against completions since 2006/07



1.10 The housing market in Leeds is showing clear signs of recovery and adjusting as a result. Trends of a recovering house building sector have continued with higher output in 2016/17. However, completions remain below the Core Strategy target of 3,660 (between 2012/13 and 2017/18) and in 2016/17 were 3,306 (net).

1.11 There are over 68 current schemes in the city centre, 16 of which are on sites that are under construction including the final homes at Roberts Wharf on Neptune Street. There are over 8,000 units with outstanding planning permission in the city centre and fringe including approvals for over 1,000 at City Reach on Kirkstall Road, over 700 at both Dandarra on Sweet Street and Hunslet Mill in the Aire Valley, and over 300 at Low Fold on South Accommodation Road. In the last 12 months alone, 28 new schemes have been approved in the city centre as part of detailed planning permissions with total capacity for almost 2,400 new homes.

Appendix 1 - Identified sites at 30 September 2017

This schedule lists sites of five or more dwellings that have been identified for housing in planning terms. These are sites that either had outstanding planning permission at 30 September 2017 or are proposed for housing in the UDP Review.

The schedule shows the outstanding capacity on each site in under each policy. This is then broken down by planning status, development progress and former land use. The capacities are as specified in planning permissions.

The sites are grouped by Review plan policy below.

A	Unallocated sites with permission in the City Centre
B	Unallocated sites with permission in the rest of the Main & Smaller Urban areas
C	Unallocated sites with permission outside the Main & Smaller Urban areas
H3-1	Phase 1 allocations
H3-2	Phase 2 allocations
H3-3	Phase 3 allocations