



Background Paper

Housing Supply and Trajectory

Development Plans

July

2024

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2. Executive Summary

- 2.1. This paper is part of a number of background documents which will update the evidence base for the Local Development Plan 2 (LDP2). Housing is an extremely important aspect of Pembrokeshire's economy. Future Wales recognises its importance to the spatial strategy and identifies four regions within Wales, with Pembrokeshire forming part of the South-West Region.
- 2.2. A key strategic priority is to develop as a Regional Growth Area. This has to be balanced against another key strategic priority which is to protect and enhance Pembrokeshire's important environmental assets. Planning has a key role to play in balancing these priorities ensuring sufficient supply for housing exists within the context of a healthy and thriving natural environment.
- 2.3. This document focuses on housing components in Pembrokeshire. It assesses past trends in housing completions in PCC's planning jurisdiction. The current LDP policy approach is reviewed and changes are recommended for the LDP2 policy approach.

3. Purpose of the Report

The purpose of this paper is to provide further detail and context in relation to the housing land supply and deliverability of housing as set out in the housing trajectory. It considers all components of housing supply, including completions to date, land bank commitments with planning permission, a large and small windfall site allowance and new housing allocations. The resultant housing trajectory is the key mechanism to demonstrate how all sites will be delivered in the identified timescales, throughout the whole Plan period, to meet the housing requirement. This paper has been developed alongside and should be read in conjunction with the Housing Requirement Background Paper (2023), and the Demographic Analysis and Forecasts Report (2019) and the LDP Demographics Update (2020).

4. Introduction

- 4.1. The Replacement Local Development Plan 2 (LDP2) has a key strategic role in relation to housing delivery. As required by Planning Policy Wales (PPW), the LDP must ensure an adequate and continuous supply of deliverable housing to meet the identified requirement, throughout the Plan period. This Paper has been produced to identify, explain, and justify the components of housing supply to meet the housing requirement over the lifetime of the plan (5,840 dwellings up to 2033, as justified in the Housing Requirement Background Paper).
- 4.2. There are several housing supply components, all of which must be assessed in combination, to inform delivery of the housing requirement. All housing supply components included in this Background Paper, and resultant trajectory have the same base date, of 31 March 2023. The components include:
- i. Dwelling Completions (to 31 March 2023)**

All residential completions since the start of the Replacement LDP review period commenced (2017/18), split by large sites (5 or more units) and small sites (under 5 units) for clarity of presentation and analysis.
 - ii. Dwellings Under Construction (as surveyed for the 2022/23 Housing Delivery Assessment)**

All residential units under construction, as surveyed for the 2022/23 Housing Delivery Assessment. This is based on a ground survey of all sites and a cross-check with building regulation applications where applicable. Further analysis was undertaken as the figures showed higher numbers of units under construction than recorded by previous surveys. This suggested a high proportion of sites with technical starts made but had since become dormant, which may be inappropriate to count within the housing supply.
 - iii. Land Bank Commitments (Units with Planning Permission)**

All residential applications with planning consent in place that have commenced development or are due to commence development in the short-term. This element also contains a high number of sites/units with potential technical starts that had since become dormant, which may also be inappropriate to count within the housing supply.
 - iii. Large Windfall Sites and Small Windfall Sites**

Windfall sites are not specifically allocated for housing but come forward for housing development in accordance with Plan policies. They are split into two categories: large windfalls (sites of 5 or more units) and small windfalls (sites of less than 5 units). The rates have been calculated based on past delivery over the entirety of the existing LDP period and further analysis to remove anomalous data.
 - iv. New Housing Allocations**

New sites for residential development that have been submitted as Candidate Sites, are supported by robust deliverability and viability information and have been subject to a rigorous Candidate Site Assessment. This component also includes two Strategic Housing Allocations from the existing LDP that have been 'rolled forward', although only because there has been a substantial change in circumstances to demonstrate these sites can be delivered. All potential 'rollover' sites were subject to the same Candidate Site process as new sites i.e., they had to demonstrate their sustainability and deliverability credentials to justify their inclusion in the Replacement LDP.

- 4.3. As referenced in the Development Plans Manual, it is acknowledged that “*there may be instances where site specific circumstances, unknown at the plan making stage, delay the delivery of sites*” and “*a development plan will not be effective if it cannot accommodate changing circumstances*” (WG, 2020, para 5.59). As such, a flexibility allowance has been embedded into the Plan as detailed in Section 12 of this Paper. An appropriate allowance has been specified following assessment of each component of housing supply to ensure “*there is sufficient flexibility above the housing requirement to account for non-delivery and unforeseen issues, demonstrating delivery of the Anticipated Annual Build Rate (AABR) throughout the plan period*” (Development Plans Manual 2020).
- 4.4. Each component of housing supply will now be outlined in turn, before detailing how these components will enable development of housing, as set out in the trajectory. In order to ensure that the timing and phasing of sites is robust and based on up-to-date information, the associated trajectory phasing tables have been developed through effective engagement with site promoters and the Housing Trajectory Stakeholder Group (see Appendix 1 and 2).

5. Dwelling Completions

5.1. The LDP requires 5,840 new dwellings to be accommodated in the County during the 17-year LDP period from 2017- 2033. Of this amount, 2,017 units have already been delivered since 2017/18 (base date of LDP2) as summarised in Table 1 for reference.

Table 1: Dwelling Completions, Replacement LDP Period

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	Total
Large Site Completions	231	299	226	286	261	283	1586
Small Site Completions	55	120	41	54	77	84	431

5.2. The completions data documented within Table 1 was collected through site surveys by Council Officers and verified by the respective developers, where necessary. The Housing Trajectory Stakeholder Group also verified the accuracy of the data and approved the completions in Table 1 (refer to Appendix 1 and 2). A site-specific breakdown of completions is provided in Appendix 3.

6. Dwellings Under Construction

6.1. Dwellings currently under construction need to be included as a component of the housing supply, as these units are not captured by other components but will make a contribution towards completions in the first few years of the Plan period. This data is recorded as part of the Council's annual Housing Delivery Assessment, with a breakdown between units recorded as being newly under construction and those recorded as being under construction since a previous annual survey. The results for 2022/23 showed a high level of units recorded as being under construction from a previous survey with no additional units under construction nor any completions. This suggested that work had commenced on-site but construction had paused or had become dormant. Whilst the Development Plans Manual advises to include all units under construction as surveyed, it was considered that this would give an overinflated figure as some of these sites may not deliver any completions over the plan period. The below table 2 shows the raw data collected by the housing survey for 2022/23.

Table 2: Dwellings Under Construction (as surveyed for 2022/23 Housing Delivery Assessment)

Total Units Under Construction	Open Market Units Under Construction recorded by a previous survey	Open Market Units Under Construction first recorded in 2022/23	Affordable Units Under Construction recorded by a previous survey	Affordable Units Under Construction first recorded in 2022/23
299	113	112	2	72

6.2. The breakdown between open market and affordable units showed that there were only 2 affordable units recorded as first under construction from a previous survey with 72 units being recorded for the first time, whilst for open market, the split was almost 50:50 with 113 from a previous year and 112 recorded for this year. This demonstrates that Registered Social Landlords (RSLs) and other developers have been consistently delivering affordable

dwellings without pausing construction. As the other 2 units were both Rural Enterprise Dwellings first commenced in 2021 that are likely to be self-build style construction.

6.3. For the 113 open market units first recorded as being under construction from a previous survey year, analysis was undertaken to establish which survey year the units were first recorded as having commenced and when the Building Regulations file last recorded progress at the site. The results found that 35 units commenced prior to the Council’s monitoring software established in 2014, with the oldest site having obtaining planning permission in 1998. Building Regulation file data was used to consider site progress and establish when the most recent activity took place at a given site. Having analysed the results, it was considered that 2019 would be an appropriate cut-off date to consider the site dormant and therefore unlikely to contribute to the housing supply for the next Plan period. This was on the basis that any site that last had activity in 2018 would not be significantly affected by the pandemic almost two years later, which affected the cost of materials/labour. Such site are considered most likely to have made technical starts to preserve planning permission. This removes 67 units, mainly from the rural areas, leaving a total of **232 units** being counted as under construction in the housing supply.

7. Land Bank Commitments

7.1. Land Bank Commitments include all residential applications with planning permission that have commenced development or are due to commence development in the short-term as at the base date of this Paper (31st March 2023). The starting point for this component of the housing supply was the 2024 Housing Trajectory, updated to take account of the more recent completions data (outlined in the previous section), new sites granted planning permission and analysis into whether the sites previously included in the trajectory have progressed as anticipated.

7.2. After considering all sites that demonstrate a high prospect of short-term delivery, a total of 1,022 dwellings are considered Land Bank Commitments. Most dwellings within this total stem from sites that have commenced or are shortly due to commence development as confirmed by the respective developers.

Table 2: Land Bank Commitments (Units with Planning Permission)

Year	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033	Units beyond the Plan Period
Forecasted Dwelling Completions	245	278	176	97	67	40	31	43	25	10	10	539

7.3. As shown in the Table above, the majority of these completions are expected to come forward in the three financial years 2023/24/25. Expected completions after this point are likely to reduce over the remaining Plan period. The Housing Trajectory Stakeholder Group raised no objections to including the entire forecast of Land Bank Commitments within the housing trajectory (refer to Appendix 1 and 2) and approved the forecast of completions within Table 2. A site-specific breakdown of Land Bank Commitments (Units with Planning Permission) is provided in Table 3.

Table 3: Housing Commitments:

DM Ref	Site Name	Settlement / Growth Zone	Site Total	Units under construction	Commitment Units Remaining in plan period	Open Market Unit Number	Affordable Housing Unit Number	Delivery timescale Year 1-5 (ST), Year 6-10 (MT), Year 11-16 (LT)	Units beyond the plan period	Area (ha)
040/00431	Scarrowscant	Haverfordwest	181	9	0	0	0	ST/MT	0	0.85
040/00397	141, Portfield	Haverfordwest	20	0	20	15	5	MT	0	0.42
040/00077	Area of land behind City Rd	Haverfordwest	133	3	2	5	0	ST/MT	44	1.68
040/00373	Calvary Church	Haverfordwest	8	0	8	6	2	MT	0	0.16
040/00430	Snooker Club	Haverfordwest	16	0	8	8	0	MT	8	0.06
040/00106	Brooklands Park	Haverfordwest	21	0	18	13	5	ST/MT	0	0.72
040/00445	7, Dew Street	Haverfordwest	5	0	5	5	0	MT	0	0.02
086/00129	Steynton Beaconing Field	Milford Haven	81	2	28	30	0	ST/MT	0	2.45
086/00223	Thornton Rd	Milford Haven	10	10	0	0	10	ST/MT	0	0.57
086/00377	Land at Milford Marina	Milford Haven	190	0	45	43	2	MT/LT	145	23.12
086/00378	132 Robert Street	Milford Haven	8	0	8	8	0	MT	0	0.02
086/00381	72-78 Charles Street	Milford Haven	15	0	15	0	15	MT	0	0.09
086/00282	Woodlands Park	Milford Haven	7	0	4	4	0	ST/MT	0	0.31

DM Ref	Site Name	Settlement / Growth Zone	Site Total	Units under construction	Commitment Units Remaining in plan period	Open Market Unit Number	Affordable Housing Unit Number	Delivery timescale Year 1-5 (ST), Year 6-10 (MT), Year 11-16 (LT)	Units beyond the plan period	Area (ha)
096/00373	Imble Lane	Pembroke Dock	100	30	70	0	100	MT	0	3.58
096/00274	Land N of Cleddau Bridge Hotel	Pembroke Dock	5	1	2	3	0	MT	2	0.22
096/00375	Land N of Cleddau Bridge Hotel	Pembroke Dock	14	0	7	7	0	MT/LT	7	0.92
096/00230	Hampshire Drive	Pembroke Dock	6	2	4	6	0	ST/MT	0	1
095/00147	Land adjacent to Long Mains and Monkton Priory	Pembroke	208	0	70	70	0	MT/LT	138	7.45
095/00180	Green Haven, Monkton	Pembroke	30	0	11	11	0	ST/MT	12	0.87
095/00240	Springfield	Pembroke	5	0	2	2	0	ST/MT	0	0.15
034/00165	West of Clos-Y-Bigney	Fishguard	50	0	50	0	50	MT	0	1.87
034/00165	Maesgwynne Farm Complex	Fishguard	5	1	2	3	0	MT	2	0.39
034/00099	Delfryn, Heol Penlan, Stop & Call	Goodwick	9	0	5	5	0	MT	4	0.26

DM Ref	Site Name	Settlement / Growth Zone	Site Total	Units under construction	Commitment Units Remaining in plan period	Open Market Unit Number	Affordable Housing Unit Number	Delivery timescale Year 1-5 (ST), Year 6-10 (MT), Year 11-16 (LT)	Units beyond the plan period	Area (ha)
034/00292	Main Street	Goodwick	26	0	26	26	0	MT	0	1.02
088/00077	Rushacre Gardens	Narberth	54	0	27	22	5	MT	27	2.35
088/00074	Dingle Farm	Narberth	33	0	16	16	0	LT	17	1.22
088/00360	Old Narberth CP School	Narberth	11	0	8	8	0	ST/MT	0	0.11
030/00043	Between the School and Station Road	Crymych	56	0	56	0	56	MT	0	2.55
030/00019	Crug yr Efydd	Crymych	26	2	5	5	2	ST/MT	0	0.37
048/00017	Pond Bridge Farm	Johnston	123	14	40	54	0	ST/MT	0	1.73
050/00043	Land to rear of Newton Hall	Kilgetty	19	0	19	15	4	MT	0	0.98
053/00034	Parc Maen Hir	Letterston	26	0	26	0	26	MT	0	0.78
053/00009	Phase 2, Court Meadow	Letterston	27	0	27	27	0	MT	26	1.28
053/00052	Former Go Cart Track	Letterston	23	2	11	13	0	ST/MT	11	0.75

DM Ref	Site Name	Settlement / Growth Zone	Site Total	Units under construction	Commitment Units Remaining in plan period	Open Market Unit Number	Affordable Housing Unit Number	Delivery timescale Year 1-5 (ST), Year 6-10 (MT), Year 11-16 (LT)	Units beyond the plan period	Area (ha)
007/00047	Old Station Yard	Boncath	30	0	20	20	0	MT	10	1.34
003/00040	North of New Road	Begelly	70	0	35	32	3	ST/MT	35	3.01
003/00025	Barley Park Close	Begelly	26	3	17	28	2	ST/MT	0	0.87
025/00028	South of Tinker's Fold	Cosheston	6	2	4	6	0	ST/MT	0	0.69
028/00012	North of the Forge	Croescoch	22	0	22	22	0	ST/MT	0	0.82
029/00013	Dingle Lane	Crundale	40	0	1	1	0	ST/MT	0	0.29
029/00026	Woodholm Farm	Crundale	5	1	2	3	0	LT	2	0.25
033/00035	South West of Eglwysrw School	Eglwysrw	23	23	0	0	23	MT	0	1.23
035/00021	Poplar Meadow	Freystrop	7	1	0	1	0	ST/MT	0	0.19
035/00030	Will Meadows	Freystrop	28	2	11	13	0	ST/MT	0	2.34

DM Ref	Site Name	Settlement / Growth Zone	Site Total	Units under construction	Commitment Units Remaining in plan period	Open Market Unit Number	Affordable Housing Unit Number	Delivery timescale Year 1-5 (ST), Year 6-10 (MT), Year 11-16 (LT)	Units beyond the plan period	Area (ha)
042/00013	North of Cartref	Hermon	15	0	8	8	0	ST/MT	7	0.78
044/00050	Leven Close	Hook	13	0	1	1	0	ST/MT	0	0.1
044/00063	Cyfin Barn Farm	Hook	11	1	3	4	0	ST/MT	0	0.35
044/00015	Harcourt Close	Hook	40	0	14	14	0	MT	14	0.88
046/00015	Bowett Close	Hundleton	29	0	5	5	0	ST/MT	0	0.25
081/LDP/01	Ger Y Lein Fach	Maenclochog	13	0	2	2	0	ST/MT	0	0.43
081/LDP/01	Maes Roslyn	Maenclochog	13	0	13	13	0	MT	0	0.51
085/00022	Parc Yr Odyn	Mathry	7	1	4	5	0	ST/MT	0	0.3
099/00045	Sycamore Close	Pentlepoir	6	0	3	2	1	ST/MT	0	0.43
015/00024	Cornfields Walk	Sageston	100	30	0	30	0	ST/MT	0	0.85
015/00022	Sageston Fields	Sageston	38	0	7	7	0	ST/MT	0	0.75

DM Ref	Site Name	Settlement / Growth Zone	Site Total	Units under construction	Commitment Units Remaining in plan period	Open Market Unit Number	Affordable Housing Unit Number	Delivery timescale Year 1-5 (ST), Year 6-10 (MT), Year 11-16 (LT)	Units beyond the plan period	Area (ha)
119/LDP/01	East of Hill Lane	Simpson Cross	20	0	20	16	4	MT	0	0.75
119/00028	Old Smithy Craft Centre	Simpson Cross	4	4	0	4	0	MT	0	0.12
119/00030	Pembrokeshire Motor Museum	Simpson Cross	26	0	13	13	0	MT	13	1.27
123/00045	Ash Grove Gardens	St Florence	11	2	3	3	2	ST/MT	0	0.37
131/00021	Land adj Blaenffynnon Farm	Tegryn	30	1	13	14	0	MT	12	1.53
011/00011	Hawn Lake	Burton	13	0	1	1	0	ST/MT	0	0.18
012/00004	Land to the S of Kiln Park	Burton Ferry	8	1	6	7	0	ST/MT	0	1.55
110/00015	Maes Elwyn John	Reynalton	7	1	1	2	0	ST/MT	0	0.24
125/00009	St Twynnells Farm	St Twynnells	5	2	0	2	0	ST/MT	3	0.25
000/01202	Bluebell Lane	Wolfsdale	7	1	0	1	0	ST/MT	2	0.32

Table 4: Housing Commitments partially included in housing land supply figures

The following list includes commitments that have been partially discounted Most have a lawful start but no or slow active delivery to date:

DM Ref	Site Name	Settlement / Growth Zone	Original site Total	Units remaining (including under construction)	Units under construction	Commitment units counted within the plan period	Reason for discounting units
040/00077	Kensington Gardens	Haverfordwest	133	49	3	2	03/1008/PA approved 18/04/2005. Discounted due to history of pauses in construction, low annual build rate and a S.106 trigger that is likely to pause delivery at 59 th units within this particular consent.
086/00377	Land at Milford Marina	Milford Haven	190	190	0	45	Outline 14/0158/PA approved 01/11/2019. No reserved matters for residential element. Discounted due to lack of reserved matters and ability to deliver within the plan period given the large number of units.
096/00375	Land N of Cleddau Bridge Hotel	Pembroke Dock	14	14	0	7	Outline 13/0619/PA approved 22/11/2014. S.73 22/0137/PA to extend timeframe for submission of reserved matters approved 11/11/2022. Discounted due to long history of non-delivery since outline approval.
096/00274	Land N of Cleddau Bridge Hotel	Pembroke Dock	5	5	1	2	13/0785/PA approved 28/01/2015. Potentially technical start December 2016, with no further progress.
095/00147	Land adjacent to Long Mains and Monkton Priory	Pembroke	238	208	0	70	Phase 1: Outline 05/0221/PA approved 24/03/2009. Reserved Matters 10/1252/PA approved 70 units 21/09/2011. Potentially technical start made September 2012. Phase 2: Outline 04/0780/PA approved 28/07/2010. Reserved Matters 13/0377/PA approved 169 units

DM Ref	Site Name	Settlement / Growth Zone	Original site Total	Units remaining (including under construction)	Units under construction	Commitment units counted within the plan period	Reason for discounting units
							18/12/2014, of which 139 open market and 30 affordable housing. The AH element completed 2016 with no further delivery, although candidate site submitted in 2018. Discounted OM of phase 2 due to history of non-delivery and ability to deliver the total site within the plan period due to the high unit numbers.
034/00165	Maesgwynne Farm Complex	Fishguard	5	5	1	2	04/1395/PA approved 14/12/2005. Potential technical start December 2010 and no further progress, so partially discounted.
034/00099	Delfryn, Heol Penlan, Stop & Call	Goodwick	9	9	0	5	15/0203/PA approved 21/01/2016. S.73 20/0815/PA to extend timescale for implementation registered 18/12/2020 yet to be determined. Partially discounted due to non-delivery but S.73 application shows continued intension to develop.
088/00077	West of Rushacre	Narberth	54	54	0	27	09/0419/PA approved 19/03/2014. S.73 18/0769/PA approved 26/11/2019. Potential technical start due to formation of access prior to July 2020. Partial discount to history of non-delivery.
088/00074	Dingle Farm	Narberth	33	33	0	16	17/1173/CL determined 27/04/2018 confirms lawful commencement of works following outline 08/0098/PA and reserved matters 15/0060/PA. Discounted due to history of non-delivery.

DM Ref	Site Name	Settlement / Growth Zone	Original site Total	Units remaining (including under construction)	Units under construction	Commitment units counted within the plan period	Reason for discounting units
003/00040	North of New Road	Begelly	70	70	0	35	Outline 11/0687/PA approved 27/03/2015 and reserved matters 17/0936/PA approved 26/07/2018. Planning permission has potentially not been implemented. Included 50% as site lies within the proposed settlement boundary, so could come forward in the future.
007/00047	Old Station Yard	Boncath	30	30	0	20	Outline 02/0324/PA approved 11/03/2004 and reserved matters 05/1443/PA approved 07/11/2006. Potentially technical start in 2013. Section 73 application had been awaiting environmental permit review of wastewater treatment works to proceed. Some uncertainty due to this water quality issue, so discount applied.
029/00026	Woodholm Farm	Crundale	5	5	1	2	11/0575/PA approved 02/03/2012. Potential commencement of works April 2015. Access via LDP allocation HSG/029/00014, which itself cannot proceed due to easement for water main running through the site. Allocated area being changed for LDP2, but uncertainty regarding delivery of commitment during plan period due to complexity and link to adjacent allocation.
042/00013	North of Cartref	Hermon	15	15	0	8	Outline 03/0914/PA approved 01/11/2010 and reserved matters 18/1258/PA approved 22/05/2019. Potential commencement of works May

DM Ref	Site Name	Settlement / Growth Zone	Original site Total	Units remaining (including under construction)	Units under construction	Commitment units counted within the plan period	Reason for discounting units
							2021. Discounted due to history of non-delivery.
044/00015	Harcourt Close	Hook	40	28	0	14	Outline 05/1499/PA approved 18/12/2006 and reserved matters 07/0390/PA approved 16/07/2009. 12 affordable houses complete summer 2012 with no further progress. New applications being submitted on site, showing renewed interest from new owner, but partially discounted due to history of non-delivery.
119/00030	Pembrokeshire Motor Museum	Simpson Cross	26	26	0	13	18/1031/PA approved 07/05/2020. No progress to date and site up for sale, so discounted.
131/00021	Land adj Blaenffynnon Farm	Tegryn	30	26	1	13	Outline 06/0363/PA approved 21/08/2006 and reserved matters 08/0968/PA approved 19/02/2009. 2 units complete circa 2009 and further 2 technically complete 2010 but not habitable. Activity re-commenced 2023 with previous 2 complete, continued work on 1 previously under construction plus a further 5 units. Discounted due to history of previous non-delivery.
125/00009	St Twynnells Farm	St Twynnells	5	5	2	2	07/0391/PA approved 16/04/2008. S.73 21/0188/PA approved 15/11/2021 for amended plans on plot 2 and S.73 22/0375/PA approved 13/07/2023 for amended plans on plot 1. Discounted other units due to history of non-delivery.

DM Ref	Site Name	Settlement / Growth Zone	Original site Total	Units remaining (including under construction)	Units under construction	Commitment units counted within the plan period	Reason for discounting units
000/01202	Bluebell Lane	Wolfsdale	7	3	1	0	Original consent ref. 04/1445/PA granted 11/04/2006. Discounted 63% (2 units) due to slow delivery.

Table 5: Housing commitments not included in housing land supply figures

The following list includes commitments that have been fully discounted and the reasons for discounting them:

DM Ref	Site Name	Settlement / Growth Zone	Site Total	Total Units Remaining	Units under construction	Notes
096/00011	Pennar Park	Pembroke Dock	78	30	0	Sewerage pumping station needs upgrading before any more units can be occupied. Cost prohibitive.
095/00119	Land to the rear of 100, South Road	Pembroke	5	5	0	Potential technical start previously made in 2018 and no progress since. 21/1023/PA also refused
034/00257	The Old Frenchmans Motel, Dyffryn	Goodwick	10	10	0	Potential technical start made 2007 and no further progress
088/00352	Eastgate House	Narberth	6	6	0	The retail element took place in 2016. No work to create the 5 flats has ever been undertaken and also confirmed by owner that there is no intention to create them
122/00008	Land adjoining Green Meadow, Pilot Street	St Dogmaels	16	16	0	Unclear on whether technical start has been made.

DM Ref	Site Name	Settlement / Growth Zone	Site Total	Total Units Remaining	Units under construction	Notes
003/00012	Church Close	Begelly	7	1	0	Last plot cannot be built as adjoining property has purchased and built a large garage instead
015/00006	Hays Lane (Land adjacent to Runway Lodge)	Carew / Sageston	8	3	0	No longer possible to build 3 remaining plots due to overlap with 015/00024 Stover Avenue/Cornfields Walk
113/00013	Robeston Court	Robeston Wathen	5	1	0	Last unit discounted as no active delivery since completion of 4 th plot in 2018
001/00008	Penrhiw	Abercych	16	16	0	Potential technical start circa 2009 and no progress since.
154/00001	Barnlake Point	Barnlake	22	22	0	Outline consent (18/0219/PA) granted 19/07/2018 and reserved matters (18/0511/PA) granted 29/08/2019. Unclear if technical start has been made, as consent would have lapsed 29/08/2021.
000/00768	Park House Court	Countryside (South of New Hedges)	160	132	0	Original outline consent ref. 10/0696/PA granted 19/11/2013. No active delivery since end of phase 1 in 2019.
000/01043	Denant Farm, Dreenhill	Countryside (West of Haverfordwest)	9	5	0	Alternative scheme utilising some of the barns implemented instead, so only 4 barns available for conversion. No progress since 2018.
000/01122	Fforest Farm	Countryside (North of Cilgerran)	6	5	0	The refurbishment of the farmhouse took place in 2011. No work to create the 5 barns has ever been undertaken.

DM Ref	Site Name	Settlement / Growth Zone	Site Total	Total Units Remaining	Units under construction	Notes
000/01231	Plas Whitchurch	Countryside (Northwest of Crymych)	6	1	5	Potential technical start for 5 units in 2012, with no start ever made on 6 th unit.
000/01287	Former Brynawelon Hotel	Countryside (South of Letterston)	20	9	11	11 units under construction by 2014 but whole site abandoned in 2015.

8. Large Windfall Sites

8.1. Large Windfall Sites are sites with a capacity of 5 or more residential dwellings that are not specifically allocated for housing, but come forward in accordance with Plan policies. Assessing the likely contribution that such sites can make to the housing land supply begins with considering the sites that have come forward under existing LDP policies in recent years. Given the very nature of windfall sites, it is considered most realistic to monitor the total number of units completed annually to establish trends and provide a realistic estimate of the likely contribution Windfall Sites may make to the land supply. Table 3 provides an overview of Windfall Site completions over the existing adopted LDP period (2013-2023).

Table 6: Large Windfall Site over the existing adopted LDP

Year	Large Windfall Site Completions (>5 units)	Urban Large Windfall Completions	Rural Large Windfall Completions
2013/14	232	130	61
2014/15	170	33	137
2015/16	46	23	23
2016/17	102	47	55
2017/18	102	25	77
2018/19	230	92	138
2019/20	132	20	112
2020/21	120	80	40
2021/22	120	41	79
2022/23	144	28	116

- 8.2. Evidently, Windfall Site completions have proved to be changeable over the life of the existing LDP period, ranging from 46 to 232 dwellings per annum, with significant spatial variability from year to year between urban and rural areas. It was therefore considered necessary to break the data down to individual settlements to understand the contributing factors and produce realistic figures.
- 8.3. In the Main Towns, whilst there was a wide range of completions from year to year, it was considered that as this was based on 10 years of data, the average figure was reasonable for some of the Main Towns to deliver over for the replacement LDP. The exceptions to this are Haverfordwest, Milford Haven, Narberth, Neyland and Goodwck:
- Between 2018/19 and 2020/21, a large windfall site of 87 units was built in Haverfordwest, which was allocated in the former Joint Unitary Development Plan (JUDP) for Pembrokeshire (2006-2013). This was a high outlier in the trend data and was therefore excluded.
 - In 2013/14, there were 108 completions in Milford Haven due to the delivery of an affordable housing exception site outside of the settlement boundary, which delivered affordable units in lieu of on-site units at an adjacent allocation. This outlying year was therefore excluded from the average because even with this site excluded, this was still an exceptional year, as the range of completions per annum for the remaining years was between 0 and 26.
 - At Narberth, there have been high levels of delivery due to a few brownfield and greenfield opportunities being taken up, along with a former JUDP allocation being delivered during the lifetime of LDP1. As the opportunities for future windfall have been

largely depleted, a number of these comparatively large windfalls have been excluded to produce a more realistic figure for Narberth.

- iv. For Neyland, in most years no units were produced apart from 2014/15 and 2019/20 that provided 5 units each, along with 31 units in 2022/23. The 31 units were all produced from one brownfield site, which is considered an exception to the typical delivery from this settlement, so this was excluded for this reason and also because the built form of Neyland is high-density terraced streets with few white land opportunities for large windfall.
- v. In Goodwick, only one site of 5 units came forward during the plan period and as the average is based over 10 years, it returned a figure of 0.5 dwellings, which times by 8 would only be 4 units. As this is less than one large windfall site, it should be noted that the figure has been artificially inflated to 5 units.

8.4. In Service Centres, the villages of Johnston and Crymych were the largest contributors to housing delivery.

- i. In the case of Crymych, one site has been delivering the majority of completions, so some higher years have been discounted but it is still anticipated that it will continue to deliver a reasonable level of windfall development in the future.
- ii. For Johnston, there's also been a similar case of one large site formerly allocated in the JUDP that has resulted in high levels of completions with particularly high levels of delivery in 2013/2014 and 2018/19 that have been discounted. Again, it is anticipated that the settlement will continue to produce windfall, albeit at a lower level.

8.5. For the Service Village tier of the hierarchy, it was found that 6 of the 45 villages were producing the vast majority of new dwellings and at an exceptionally high level for villages in this tier. Analysis showed that in the cases of Keeston, Sageston and to a lesser extent Begelly, the delivery was coming from locations allocated in the former JUDP, which were subsequently excluded from the settlement boundary for LDP1. As such, this is not true windfall as the sites had previously been allocated and subsequently were located outside of the settlement boundary. On the basis that these areas of white land would therefore not normally be available, JUDP sites were excluded from the trend data in rural areas. It should be noted that some of the delivery in Main Towns were from former JUDP allocations but these were comfortably within the settlement boundaries, so were not dependant on being allocated by the former JUDP and were retained to establish the trends.

- i. In the cases of Templeton and Begelly, it was considered that the adopted LDP afforded a few white land opportunities that had been taken up and that there were no obvious opportunities remaining within the settlement boundary. The completion data from these settlements were therefore discounted.
- ii. In the case of Freystop, a historic planning permission (ref.HR/11263/74/33) granted 28 units, which re-commenced delivery of dwellings in 2022/23 due to a certificate of lawfulness confirming implementation, as a result of some units being built within 5 years of 1974. Freystop is a Large Local Village in the adopted LDP, so on the basis that this level of development would not be granted under the current policy regime, the site was discounted.
- iii. Finally, a Registered Social Landlord (RSL) known as Wales and West delivered 20 units in Llandissillio that was considered to be a high outlier for that village.

- 8.6. When all of the above exceptional cases are removed, the completions vary from 1 to 15 units and give an average of 8/9 units per annum. As successive settlement boundaries from numerous development plans have now matured and white land opportunities have been taken up in many cases, this lower figure is considered to be more likely going forward.
- 8.7. For Local Villages, including Cluster Local Villages, the delivery of units over the course of LDP1 has been very low as the current policy regime makes it unlikely that developments of 5 units or more could come forward. Almost all delivery has been as a result of planning permission obtained during previous development plans. As the policy position remains stable for the replacement LDP, it is assumed that there will be no delivery of sites of 5 or more units in these locations. In the Countryside, the policy regime for the adopted LDP would not allow developments of 5 units, apart from through barn conversions. The number of traditional buildings suitable for conversion to residential use has diminished over the years and, based on recent completion data, larger windfall developments in the countryside are decreasing in number. This conclusion is evident in the recent completion data, that two of the last four years had no completions from large windfall in the countryside.
- 8.8. Table 4 takes into account of the above factors and shows the completions by year once they are removed from each tier of the settlement hierarchy.

Table 4: Large Windfall Site over the existing adopted LDP, with outlying data removed

Year	Large Windfall Site Completions (>5 units)	Large Windfall Site Completions (>5 units) with anomalies removed	Main Town Large Windfall Completions with anomalies removed	Service Centre Windfall Completions with anomalies removed	Service Village Windfall Completions with anomalies removed
2013/14	191	38	24	1	13
2014/15	170	20	11	0	9
2015/16	46	26	23	0	3
2016/17	102	37	25	7	5
2017/18	102	37	25	3	9
2018/19	230	72	62	4	6
2019/20	132	30	20	2	8
2020/21	122	38	26	3	9
2021/22	120	26	10	1	15
2022/23	142	45	30	3	12
Average	135.7	36.9	25.6	2.4	8.9

- 8.9. The average has been calculated to one decimal point for accuracy, as the result is multiplied by the number of years remaining in the Plan period, minus two years, as set out by the Development Plans Manual (2020) to avoid any double counting with existing landbank commitments in the next two years. This would produce a projected windfall allowance of 407 dwellings over the final 8 years of the Replacement LDP period.

9. Small Windfall Sites

9.1. Small Windfall Sites are sites that can accommodate less than 5 dwellings. Such sites make an important contribution to the overall housing land supply, introducing an element of choice and flexibility into the housing market. An allowance therefore needs to be made for Small Windfall Sites that are likely to be delivered over the Replacement LDP period based on an assessment of past trends. Table 5 outlines the number of Small Windfall Site completions over the existing LDP period for reference.

Table 7: Small Windfall Site over the existing adopted LDP

Financial Year	Small Windfall Site Completions (<5 units)	Urban Large Windfall Completions	Rural Large Windfall Completions
2013/14	146	62	84
2014/15	179	67	112
2015/16	161	93	68
2016/17	74	27	47
2017/18	78	39	39
2018/19	68	35	33
2019/20	47	21	26
2020/21	53	28	25
2021/22	67	33	34
2022/23	83	27	56

9.2. The collated small windfall completions show high levels of small-scale development in the first three years, averaging 162 units that falls to 67 units over the remaining Plan period. The results were analysed on an individual settlement basis to understand why there has been such variability.

9.3. In Main Towns, there has been a degree of variance year on year for each location.

- i. For Pembroke Dock the first two years of the plan produced exceptionally high levels of completions that were not replicated thereafter, so were discounted.
- ii. In the case of Milford Haven, the data shows some variability ranging from 0 to 35, although the next highest figure was 19 units, so the year that resulted in 35 units was discounted to leave an average of 7.8, which is reasonable in the context of changes to town centre policies. This is likely to lead to a number of changes of uses of retail to residential developments of 1 to 4 units.
- iii. At Narberth, the first year of the Plan period produced a high outlier, which was discounted.

9.4. The remaining Main Towns had more consistent completion data that was considered reasonable for each Town to replicate for the replacement LDP.

9.5. In Service Centres, the villages of St Dogmaels and Kilgetty were the largest contributors to housing delivery. However, the collective group of settlements produced a particularly high level of delivery in 2014/2015, which was discounted. The village of Letterston also produced a high outlying year in 2013/2014 that was also discounted. This reduced the collated average from 6.6 units per annum to 4.4 units. This lower level of delivery is considered reasonable, as development in St. Dogmaels is dependent on upgrades to waste water treatment works due in 2027.

- 9.6. For service villages, Hook and Houghton produced 4 or more completions in a single year, which was considered exceptional, so these units were discounted. This recognises that whilst these locations are likely to deliver units in the future, it is expected to be at a reduced rate, due to there being fewer opportunities within the settlement boundary. Once this is taken into account, 2013/2014 and 2014/2015 remain as exceptional years that has also been removed from the average to adjust it from 18.4 units per annum to 13.9 units.
- 9.7. The level of small-scale development in Cluster Local Villages has been low, due to the restrictive policies of the adopted LDP that are applied to the current Large Local Village and Small Local Village tiers. Nevertheless, the collective total produced a high outlier in 2014/2015. When this is removed the average falls from 2.9 units per annum to 2.3 units.
- 9.8. For Local Villages (excluding Cluster Local Villages), the analysis found no outlying data. However, the villages of Ambleston, Treffgarne and Walton East were excluded from the trend, as these locations are affected by phosphate targets in the River Cleddau SAC that at the time of writing are not due to receive upgrades to their waste water treatment works.
- 9.9. In the Countryside, the first five years of the plan produced high levels of new residential units, averaging 32 units per annum, which reduced to 11.4 units for the following 5 years. It shows that there has been a clear downward trend over the Plan period, which is likely to be for two reasons. Firstly, the policy framework for the Joint Unitary Development Plan (JUDP) for Pembrokeshire (2006-2013) enabled more planning permissions to be granted for residential units in the countryside compared to LDP1, which is likely to have resulted in some units granted planning permission under the JUDP completing early in the LDP1 Plan period. Secondly, LDP1 policies allow the conversion of historic agricultural buildings and as there is a finite number of barns that meet this policy, there is inevitably a reduction in the potential for planning permissions being granted that translate into completions. On this basis, an exponential curve has been applied to the entire dataset to reveal that on current projections, an average of 7 units per annum will be completed in the countryside in the future.
- 9.10. **To note**, since the change from undertaking Joint Housing Land Supply (JHLAS) studies to the Housing Assessment, Rural Enterprise Dwellings have been monitored as a separate component of countryside completions and it shows that on average 1 unit per annum is being delivered, which is included in the countryside total.
- 9.11. Table 8 takes into account all of the above factors and shows the completions by year once they are removed from each tier of the settlement hierarchy.

Table 8: Small Windfall Site over the existing adopted LDP, with outlying data removed

Financial Year	Small Windfall Site Completions (<5 units)	Small Windfall Site Completions (<5 units) with anomalies removed	Main Town Small Windfall Completions with anomalies removed	Service Centre Small Windfall Completions with anomalies removed	Service Village Small Windfall Completions with anomalies removed	Cluster Village Small Windfall Completions with anomalies removed	Local Village Small Windfall Completions with anomalies removed	Countryside Small Windfall Completions used to inform exponential downward trend
2013/14	146	78	23	3	0	3	2	41
2014/15	179	78	40	0	0	0	3	47
2015/16	161	108	58	8	18	3	4	29
2016/17	74	51	24	4	19	1	0	23
2017/18	78	58	39	4	8	3	4	20
2018/19	68	54	35	3	12	2	2	14
2019/20	47	34	21	1	11	0	1	12
2020/21	53	48	28	3	15	2	0	4
2021/22	67	51	33	2	11	4	1	15
2022/23	83	63	27	12	17	3	4	12
Average	95.6	58.9	32.8	4.4	13.9	2.3	2.1	7*

*Figure derived from exponential downward trend, not an average of the historic completions

10. Spatial Distribution of Large and Small Windfall

10.1. The Development Plans Manual requires all components of housing supply (including large windfall and small windfall sites) to be numerically attributed to each tier of the settlement hierarchy. As these particular components are not, by their very nature, attributable to specific housing allocations within the Plan, an estimation is required to this end. The results of this exercise are outlined in Table 9.

Table 9: Estimated Spatial Distribution of Large and Small Windfall Sites

Tier	Percentage of Total Windfall	Large Windfall Site Estimated Distribution (Dwellings)	Small Windfall Site Estimated Distribution (Dwellings)	Average number of units per settlement
Tier 1 Main Towns	60.1%	220	350	71.2
Tier 2a Service Centres	6.5%	19	43	7.7
Tier 2b Service Villages	21.6%	69	135	4.5
Tier 2c Local Villages (including Cluster Local Villages)	4.6%	0	43	0.6
Countryside (including Rural Enterprise Dwellings)	7.2%	0	68	N/A
Total		307	640	

10.2. Table 9 helps provide more certainty regarding the spatial distribution of potential small and large windfall sites, whilst acknowledging that these sites may come forward through slightly different proportionate weightings in practice. It suggests, however, that the windfall component of the housing supply is in alignment with the Plan strategy to have 60% of dwellings in urban areas and 40% in rural areas. Whilst the percentage attributed to the Service Village tier appears high compared to the other rural tiers, it should be noted that this is spread across 45 villages. When the windfall by tier is divided by the number of settlements within each tier, it suggests each Main Town would contribute 71 dwellings, a Service Village would contribute 8 dwellings and a Service Village would produce 5 dwellings. Not all Local Villages would produce a single unit as it averages 0.6 units per settlement.

11. New Housing Allocations

- 11.1. The remaining component of housing supply stems from new housing allocations, assessed through the Candidate Site Assessment and supported by robust evidence on suitability, delivery, phasing, infrastructure requirements and viability. All allocations have been selected based on the outcome of the Assessment, their compatibility with the National Sustainable Placemaking Outcomes and the Sustainable Transport Hierarchy, supplemented by a Sustainability Appraisal (incorporating Strategic Environmental Assessment) analysis. All new proposed allocations are considered to demonstrate delivery in accordance with the requirements set out in the Development Plans Manual. All strategic sites key to the delivery of the plan have been subject to greater evidence requirements to support their delivery, including schematic frameworks, phasing details, highway mitigation, critical access requirements, design parameters, S106 requirements, infrastructure and costs. This process provides a high degree of confidence that the sites included within Table 8 are realistically deliverable, considering the full plethora of associated development requirements, infrastructure provision and placemaking principles necessary to deliver high-quality new communities.
- 11.2. All 'rolled forward' allocations have been subject to robust re-assessment of sustainability, deliverability, and viability credentials in the same manner as all other candidate sites.
- 11.3. All proposed housing allocations are detailed in Table 8 overleaf, which collectively represent the final component of housing supply to deliver the Replacement LDP's housing requirement.

Table 10: New Housing Allocations

LDP2 Reference	Site Name	Settlement	Minimum Units In Plan Period	Indicative Affordable Housing Requirement		Delivery timescale Year 1-5 (ST)*, Year 6-10 (MT), Year 11-16 (LT)	Units Beyond The Plan Period	Area Ha	Potential For Self Build Indicated By Site Promoter
				Percentage (%)	Unit Number				
HSG/040/LDP2/1	Former Community Education Centre, Dew Street	Haverfordwest	22	100%	22	MT	0	0.63	No
S/HSG/040/LDP2/6	Slade Lane	Haverfordwest	330	83%	275	MT/LT	680	38.88	Not Known
HSG/040/LDP2/3	Rear of 76 Pembroke Road	Merlins Bridge	51	20%	10	LT	0	1.71	Yes
HSG/086/00222	South West of The Meads	Milford Haven	93	100%	93	MT/LT	0	3.1	Not Known
HSG/086/LDP2/1	Land at Myrtle Meadows, Steynton	Milford Haven	60	15%	9	LT	0	3.07	No
HSG/086/LDP2/2	East of Castle Pill Road Steynton	Milford Haven	23	10%	2	MT/LT	0	0.78	Yes
HSG/086/LDP2/4	Former Hakin Infants' School	Milford Haven	14	100%	14	LT	0	0.49	No
HSG/086/LDP2/5	Former Hubberston VC School, Hakin	Milford Haven	26	100%	26	MT	0	0.9	No
HSG/086/LDP2/6	Former Hakin Junior School	Milford Haven	43	100%	43	LT	0	1.46	No

LDP2 Reference	Site Name	Settlement	Minimum Units In Plan Period	Indicative Affordable Housing Requirement		Delivery timescale Year 1-5 (ST)*, Year 6-10 (MT), Year 11-16 (LT)	Units Beyond The Plan Period	Area Ha	Potential For Self Build Indicated By Site Promoter
				Percentage (%)	Unit Number				
HSG/086/LDP2/7	North East of Beaconing, Steynton	Milford Haven	14	7.5%	1 (as an off-site contribution)	MT	0	0.49	Yes
S/HSG/086/LDP2/3	South of Conway Drive, Castle Pill Road, Steynton	Milford Haven	117	17.5%	20	LT	163	9.32	No
HSG/095/00144	North of Gibbs Way	Pembroke	43	20%	8	MT/LT	43	2.86	No
HSG/095/LDP2/1	Between St Daniels Hill & Norgans Hill	Pembroke	147	25%	36	LT	0	4.9	Yes
HSG/095/LDP2/2	SW of Southlands, St. Daniels Hill	Pembroke	19	12.5%	2	LT	0	0.64	No
HSG/095/LDP2/4	East of Golden Hill Road	Pembroke	50	20%	10	MT/LT	0	1.68	No
HSG/095/LDP2/5	SE of Southlands St.Daniels Hill	Pembroke	26	15%	3	LT	0	0.87	Yes
HSG/096/00238	North of Pembroke Road	Pembroke Dock	38	7.5%	2	MT/LT	0	1.52	Not Known
HSG/096/LDP2/1	Land at Hampshire Drive	Pembroke Dock	33	7.5%	2	MT/LT	0	1.12	No

LDP2 Reference	Site Name	Settlement	Minimum Units In Plan Period	Indicative Affordable Housing Requirement		Delivery timescale Year 1-5 (ST)*, Year 6-10 (MT), Year 11-16 (LT)	Units Beyond The Plan Period	Area Ha	Potential For Self Build Indicated By Site Promoter
				Percentage (%)	Unit Number				
HSG/096/LDP2/2	West of Stranraer Road	Pembroke Dock	59	15%	8	LT	0	1.99	Yes
S/HSG/034F/LDP2/1	Maesgwynne	Fishguard	175	10%	17	MT/LT	167	11.39	No
HSG/093/00066	East of Poppy Drive	Neyland	101	100%	101	MT/LT	0	3.39	No
HSG/088/LDP2/1	West of Bloomfield Gardens and North of Adams Drive & Highfield Park	Narberth	89	30%	26	MT/LT	64	5.75	Yes
Urban Settlements Total			1576	46%	730		1117	96.86	
Urban Settlements Total as percentage of total allocations			67%				85%	68%	
HSG/020/LDP2/1	Land at Tan Ffynnon Fields	Cilgerran	50	15%	7	LT	40	3.95	No
HSG/030/LDP/01	East of Waunaeron	Crymych	28	Off-site contribution		LT	0	1.23	Yes
HSG/048/00038	North of Hayston View	Johnston	50	6%	3	MT/LT	42	4.01	Yes
HSG/048/LDP2/1	Maes yr Ysgol	Johnston	13	Off-site contribution		MT/LT	0	0.58	No
HSG/050/LDP2/1	South of Rock Park	Kilgetty	19	12.5%	2	MT/LT	0	0.85	Yes
HSG/052/00011	South of Cleggars Park	Lamphey	55	20%	11	MT/LT	0	2.43	Yes

LDP2 Reference	Site Name	Settlement	Minimum Units In Plan Period	Indicative Affordable Housing Requirement		Delivery timescale Year 1-5 (ST)*, Year 6-10 (MT), Year 11-16 (LT)	Units Beyond The Plan Period	Area Ha	Potential For Self Build Indicated By Site Promoter
				Percentage (%)	Unit Number				
HSG/052/LDP2/1	Adjacent to Lamphey School	Lamphey	40	20%	8	LT	0	1.75	No
HSG/053/LDP2/1	Between Longstone Court and 62, St. Davids Road	Letterston	38	Off-site contribution		LT	0	1.69	No
HSG/063/00024	North of The Kilns	Llangwm	66	10%	6	MT	0	2.89	Yes
HSG/122/00035	Awel y Mor extension	St Dogmaels	28	12.5%	3	LT	0	1.23	Not Known
Service centre Total			387	10%	40		82	20.58	
Service centre Total as percentage of total allocations			16%				6%	15%	
HSG/003/LDP2/01	North of Begelly Farm	Begelly	46	100%	46	MT/LT	0	2.58	Yes
HSG/006/00003	Adjacent to Hafod	Blaenffos	6	Off-site contribution		MT	9	0.93	No
HSG/022/LDP2/1	Land at Dungleddy Court	Clarbeston Road	19	Off-site contribution		MT/LT	0	0.83	Yes
HSG/152/LDP2/1	South of Bro'r Dderwen	Clunderwen	31	25%	7	LT	31	2.71	No
HSG/029/00014	Opposite Woodholm Close	Crundale	15	12.5%	1 (as an off-site contribution)	MT/LT	0	0.66	Yes

LDP2 Reference	Site Name	Settlement	Minimum Units In Plan Period	Indicative Affordable Housing Requirement		Delivery timescale Year 1-5 (ST)*, Year 6-10 (MT), Year 11-16 (LT)	Units Beyond The Plan Period	Area Ha	Potential For Self Build Indicated By Site Promoter
				Percentage (%)	Unit Number				
HSG/029/LDP2/1	West of Ashford Park	Crundale	22	15%	3	MT/LT	18	1.77	Yes
HSG/043/LDP2/1	Adjacent to Brackenhurst	Hill Mountain	15	Off-site contribution		MT/LT	11	1.16	Yes
HSG/046/LDP2/1	Land at West End Cottages	Hundleton	14	12.5%	1 (as an off-site contribution)	LT	0	0.65	Yes
HSG/047/LDP2/1	South of The Crown	Jeffreyston	8	Off-site contribution		LT	0	0.42	Yes
HSG/049/LDP2/1	East of Brookfield Close and West of Bridge Lane	Keeston	27	15%	4	MT/LT	0	1.21	No
HSG/060/LDP2/1	Adjacent to Maesybryn	Llandissilio	26	100%	26	LT	17	1.9	No
HSG/066/LDP2/1	East of Hazelbank	Llanstadwell	10	Off-site contribution		LT	0	1.04	No
HSG/081/LDP2/1	West of Globe Inn	Maenclochog	15	100%	15	MT/LT	21	1.57	No
HSG/099/LDP2/1	Land at Coppins Park	Pentlepoir	11	12.5%	1 (as an off-site contribution)	LT	0	0.49	Yes
HSG/113/LDP2/01	South of Robeston Court	Robetson Wathen	5	Off-site contribution		MT	0	0.27	No
HSG/114/LDP/01	East of Pilgrim's Way	Roch	52	13%	4		0	2.19	Not Known

LDP2 Reference	Site Name	Settlement	Minimum Units In Plan Period	Indicative Affordable Housing Requirement		Delivery timescale Year 1-5 (ST)*, Year 6-10 (MT), Year 11-16 (LT)	Units Beyond The Plan Period	Area Ha	Potential For Self Build Indicated By Site Promoter
				Percentage (%)	Unit Number				
HSG/119/LDP2/1	Between Cornerways and Austalise	Simpson Cross	18	12.5%	2	MT/LT	0	0.8	Yes
HSG/120/00018	NW of Wesley Way	Spittal	10	Off-site contribution		MT/LT	10	0.89	Not Known
HSG/123/LDP/01	North of Parsons Green	St Florence	20	30%	6	MT/LT	0	0.88	Yes
HSG/132/LDP2/1	West of Kings Park Farm	Templeton	14	25%	3	LT	0	0.61	No
HSG/135/LDP2/1	North of Bulford Road Bypass	Tiers Cross	6	Off-site contribution		LT	0	0.28	Yes
HSG/149/LDP2/1	Land at Ford Farm	Wolfscastle	14	Off-site contribution		LT	0	0.61	No
Service Village Total			404	29%	116		117	25.03	
Service Village Total as percentage of total allocations			17%				9%	17%	
Housing Allocation Total			2605				1075	142	

12. Total Components and Spatial Distribution of Housing Supply

- 12.1. With this overview in mind, this section of the Paper provides a 'balance sheet' that details how each component of housing supply collectively contributes to the total Plan provision. Table 9 provides also provides an overview of spatial distribution by Settlement Tier. As stated in the Development Plans Manual, "*this is particularly important when linking the actual provision of sites to the strategy and objectives, giving clarity to the plan and ensuring effective monitoring of the spatial strategy*" (WG, 2020, para 5.60).
- 12.2. Each proposed allocation is underpinned by detailed technical evidence that considers site-specific costs, constraints and requirements to demonstrate the sites are both viable and deliverable. This provides certainty that the Plan will deliver. Nevertheless, a flexibility allowance (of 10%) has been included within Table 11 and the housing trajectory, to be embedded in the Replacement LDP. This recognises the fact that there may be certain specific circumstances, unknown at the Plan-making stage, that delay the delivery of sites, notwithstanding the robust frontloading of site delivery evidence. This flexibility allowance has been chosen to enable the Replacement LDP's housing requirement to remain deliverable if a significant unforeseen scenario, such as delays to several strategic sites, should occur (see Appendix 3). Given the extent and robustness of evidence underpinning each proposed allocation, 10% is considered sufficient to ensure the Anticipated Annual Build Rate (AABR) will remain deliverable throughout the plan period.

Table 11: Summary of Spatial Distribution of Housing

	A) Total completions (Housing survey small and large)	B) Units under construction (as at April 2023)	C) Units with planning permission based on housing assessment 2023 with adjustment	D) Total allocations	E) Large windfall sites (5+) for 2026-2033 based on past trends	F) Small windfall sites (under 5 units) for 2024-2033 based on past trends	G) Total Housing Provision
Haverfordwest	387	17	61	406	62	77	1010
Milford Haven	256	14	100	390	44	76	880
Pembroke Dock	70	40	83	130	42	50	415
Pembroke	111	6	83	285	37	65	588
Fishguard	60	2	52	175	9	26	324
Goodwick	43	7	31	0	5	23	109
Narberth	175	0	51	89	12	18	346
Neyland	43	3	0	101	9	14	169
Main Towns Total	1145	89	461	1576	220	350	3840
Service Centres	192	20	184	387	19	43	845
Service Villages	479	86	221	404	69	135	1394
Cluster Local Villages	23	5	7	0	0	23	58
Local Villages	18	4	1	0	0	20	43
Countryside	160	28	0	0	0	68	256
Total for Rural Area	872	143	413	791	88	290	2597
Total for Plan Area	2017	232	874	2367	307	640	6437
Urban percentage	57%	38%	53%	67%	72%	55%	60%
Rural percentage	43%	62%	47%	33%	28%	45%	40%

13. Development of the Housing Trajectory

13.1. The total housing provision, and spatial distribution thereof, has also been subject to site-specific phasing analysis to enable development of the housing trajectory. The trajectory was prepared initially through close dialogue with the respective site-promoters, followed by effective collaboration with a range of stakeholders at several annual Stakeholder Group Meetings. The Stakeholder Group was established prior to Deposit Stage to discuss the timing and phasing of all sites with planning permission or allocated in the Plan, specifically to:

- Ensure completion figures are up to date and recorded correctly for large and small sites
- Consider the anticipated annual delivery rates for sites with planning permission
- Consider the anticipated annual delivery rates for housing allocations

13.2. At the last Stakeholder Group session (27/05/2022), no objections were raised regarding the completion figures, anticipated annual delivery rates for sites with planning permission and the anticipated annual delivery rates for the proposed housing allocations. As such, there are no outstanding matters of disagreement on the completion figures or the timing and phasing of sites in the plan period, all of which have been approved by the Stakeholder Group.

Appendix 1 Housing Trajectory

Table 1: The Timing and Phasing of Allocations (2023-2033)

Settlement Tier	LDP 2 Reference	Site Name	Settlement	Total Units to be delivered in Plan period	Time lag to construction start			Phasing of Development (2023 to end of 2033)													Units beyond the plan period	
					Time period for pre-application discussions / PAC consultation	Time period for submission of planning application and determination	Time period for the discharge of relevant conditions to enable site construction	Number of units complete	Number of units UC	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-2033	2033		
Urban	HSG/040/LDP2/1	Former Library Dew Street	Haverfordwest	22	Completed 2023	2024	2024	N/A	N/A	0	0	22	0	0	0	0	0	0	0	0	0	0
Urban	S/HSG/040/LDP2/6	Slade Lane	Haverfordwest	330	N/A	N/A	N/A	N/A	N/A	0	50	50	15	35	35	35	30	30	30	20	680	
Urban	HSG/040/LDP2/3	Rear of 76 Pembroke Road, Merlins Bridge	Haverfordwest	51	2027	2028	2028	N/A	N/A	0	0	0	0	0	20	20	11	0	0	0		
Urban	HSG/086/LDP2/1	Land at Myrtle Meadows, Steynton	Milford Haven	60	2027	2028	2028	N/A	N/A	0	0	0	0	0	5	20	20	15	0	0		
Urban	HSG/086/LDP2/2	East of Castle Pill Road Steynton	Milford Haven	23	2025	2026	2026	N/A	N/A	0	0	0	0	8	10	5	0	0	0	0		
Urban	S/HSG/086/LDP2/3	South of Conway Drive, Castle Pill Road, Steynton	Milford Haven	117	2027	2028	2029	N/A	N/A	0	0	0	0	0	0	27	30	30	30	163		
Urban	HSG/086/LDP2/4	Former Hakin Infants' School	Milford Haven	14	2025	2026	2026	N/A	N/A	0	0	0	0	0	5	9	0	0	0	0		

Settlement Tier	LDP 2 Reference	Site Name	Settlement	Total Units to be delivered in Plan period	Time lag to construction start			Phasing of Development (2023 to end of 2033)													Units beyond the plan period	
					Time period for pre-application discussions / PAC consultation	Time period for submission of planning application and determination	Time period for the discharge of relevant conditions to enable site construction	Number of units complete	Number of units UC	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-2033	2033		
Urban	HSG/086/LDP2/5	Former Hubberston VC School, Hakin	Milford Haven	26	2024	2025	2025	N/A	N/A	0	0	0	13	13	0	0	0	0	0	0	0	
Urban	HSG/086/LDP2/6	Former Hakin Junior School	Milford Haven	43	2025	2026	2026	N/A	N/A	0	0	0	0	0	3	15	15	10	0	0		
Urban	HSG/086/LDP/7	Land NE Beaoning, Steynton	Milford Haven	14	2024	2024	2025	N/A	N/A	0	0	4	5	5	0	0	0	0	0	0		
Urban	HSG/086/00222	Land SW of The Meads	Milford Haven	93	2024	2024	2025	N/A	N/A	0	0	10	20	20	20	23	0	0	0	0		
Urban	HSG/096/LDP2/1	Land at Hampshire Drive	Pembroke Dock	33	2024	2024	2025	N/A	N/A	0	0	3	4	4	4	4	4	4	4	2		
Urban	HSG/096/LDP2/2	West of Stranraer Road, Pennar	Pembroke Dock	59	2027	2028	2028	N/A	N/A	0	0	0	0	0	0	14	15	15	15	0		
Urban	HSG/096/00238	North of Pembroke Road	Pembroke Dock	38	2025	2026	2026	N/A	N/A	0	0	0	8	8	8	8	6	0	0	0		
Urban	HSG/095/LDP2/1	Between St Daniels Hill & Norgans Hill	Pembroke	147	2027	2028	2028	N/A	N/A	0	0	0	0	0	30	30	30	30	27	0		

Settlement Tier	LDP 2 Reference	Site Name	Settlement	Total Units to be delivered in Plan period	Time lag to construction start			Phasing of Development (2023 to end of 2033)													Units beyond the plan period
					Time period for pre-application discussions / PAC consultation	Time period for submission of planning application and determination	Time period for the discharge of relevant conditions to enable site construction	Number of units complete	Number of units UC	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-2033	2033	
Urban	HSG/095/LDP2/2	SW of Southlands, St. Daniels Hill	Pembroke	19	2029	2030	2030	N/A	N/A	0	0	0	0	0	0	0	0	0	10	9	
Urban	HSG/095/LDP2/4	East of Golden Hill Road	Pembroke	50	2026	2027	2027	N/A	N/A	0	0	0	0	10	15	15	10	0	0	0	
Urban	HSG/095/LDP2/5	SE of Southlands, St. Daniels Hill	Pembroke	26	2029	2030	2030	N/A	N/A	0	0	0	0	0	0	0	0	10	16	0	
Urban	HSG/095/00144	North of Gibbas Way	Pembroke	43	Completed 2023	2024	2024	N/A	N/A	0	0	5	5	5	5	5	5	5	5	3	43
Urban	S/HSG/034F/LDP2/1	Maesgwynne	Fishguard	175	2024	2025	2025	N/A	N/A	0	0	0	23	22	22	22	22	22	22	20	167
Urban	HSG/088/LDP2/1	North of Highfield Park & Parc Roberts	Narberth	89		Submitted 2024	2025	N/A	N/A	0	0	11	20	20	20	18	0	0	0	0	64
Urban	HSG/093/00066	East of Poppy Drive	Neyland	101	2024	2024	2025	N/A	N/A	0	0	10	20	20	20	20	11	0	0	0	
Service Centre	HSG/020/LDP2/1	Land at Tan Ffynnon Fields	Cilgerran	50	2026	2027	2028	N/A	N/A	0	0	0	0	0	10	10	10	10	10	0	40
Service Centre	HSG/030/LDP/01	East of Waunaeron	Crymych	28	2027	2028	2028	N/A	N/A	0	0	0	0	0	0	8	10	10	0	0	
Service Centre	HSG/048/00038	North of Hayston View	Johnston	50	2025	2026	2026	N/A	N/A	0	0	0	15	15	15	5	0	0	0	0	42

Settlement Tier	LDP 2 Reference	Site Name	Settlement	Total Units to be delivered in Plan period	Time lag to construction start			Phasing of Development (2023 to end of 2033)													Units beyond the plan period
					Time period for pre-application discussions / PAC consultation	Time period for submission of planning application and determination	Time period for the discharge of relevant conditions to enable site construction	Number of units complete	Number of units UC	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-2033	2033	
Service Centre	HSG/048/LDP2/1	Maes yr Ysgol	Johnston	13	2026	2026	2027	N/A	N/A	0	0	0	0	6	7	0	0	0	0	0	
Service Centre	HSG/050/LDP2/1	South of Rock Park, Kilgetty	Kilgetty	19	2026	2026	2027	N/A	N/A	0	0	0	0	5	7	7	0	0	0	0	
Service Centre	HSG/052/00011	South of Cleggars Park	Lamphey	55		Submitted 2024	2024	N/A	N/A	0	0	15	15	15	10	0	0	0	0	0	
Service Centre	HSG/052/LDP2/1	Adjacent to Lamphey School	Lamphey	40	2027	2028	2028	N/A	N/A	0	0	0	0	0	0	8	8	8	8	8	
Service Centre	HSG/053/LDP2/1	Between Longstone Court and 62, Station Road	Letterston	38	2027	2028	2028	N/A	N/A	0	0	0	0	0	0	8	10	10	10	0	
Service Centre	HSG/063/LDP2/1	North of The Kilns	Llangwm	66		Submitted 2024	2025	N/A	N/A	0	0	10	15	15	15	11	0	0	0	0	
Service Centre	HSG/122/00035	Awel y Mor extension	St Dogmaels	28		Submitted 2024	2025	N/A	N/A	0	0	0	0	0	0	4	8	8	8	0	
Service Village	HSG/003/LDP2/1	North of Begelly Farm	Begelly	46	2026	2027	2027	N/A	N/A	0	0	0	0	0	6	8	8	8	8	8	
Service Village	HSG/006/00003	Adjacent to Hafod	Blaenffos	6	2024	2024	2025	N/A	N/A	0	0	0	3	3	0	0	0	0	0	0	9
Service Village	HSG/022/LDP2/1	Land at Dungleddy Court	Clarbeston Road	19	2026	2027	2027	N/A	N/A	0	0	0	0	6	7	6	0	0	0	0	
Service Village	HSG/152/LDP2/1	South of Bro'r Dderwen	Clunderwen	31	2026	2027	2028	N/A	N/A	0	0	0	0	0	7	8	8	8	0	0	31

Settlement Tier	LDP 2 Reference	Site Name	Settlement	Total Units to be delivered in Plan period	Time lag to construction start			Phasing of Development (2023 to end of 2033)													Units beyond the plan period
					Time period for pre-application discussions / PAC consultation	Time period for submission of planning application and determination	Time period for the discharge of relevant conditions to enable site construction	Number of units complete	Number of units UC	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-2033	2033	
Service Village	HSG/114/LDP/01	East of Pilgrim's Way	Roch	52		Submitted 2024	2024	N/A	N/A	0	0	6	8	8	8	8	8	6	0	0	
Service Village	HSG/119/LDP2/1	Land between Cornerways and Austalise	Simpson Cross	18	2026	2027	2027	N/A	N/A	0	0	0	0	4	4	4	4	2	0	0	
Service Village	HSG/120/00018	NW of Wesley Way	Spittal	10	2025	2026	2026	N/A	N/A	0	0	0	2	2	2	2	2	0	0	0	10
Service Village	HSG/123/LDP/01	North of Parsons Green	St Florence	20	2024	2024	2025	N/A	N/A	0	0	0	4	4	4	4	4	0	0	0	
Service Village	HSG/132/LDP2/1	West of Kings Park Farm	Templeton	14	2027	2028	2028	N/A	N/A	0	0	0	0	0	0	4	4	4	0	0	
Service Village	HSG/135/LDP2/1	North of Bulford Road Bypass	Tiers Cross	6	2027	2028	2028	N/A	N/A	0	0	0	0	0	0	3	3	0	0	0	
Service Village	HSG/149/LDP2/1	Land at Ford Farm	Wolfscastle	14	2027	2028	2028	N/A	N/A	0	0	0	0	0	0	4	4	4	2	0	
Totals				2364						0	50	148	203	275	351	408	329	279	212	107	

Settlement Tier	Development Monitoring Reference	Site Name	Settlement	Total Units	Number of units complete	Number of units remaining (NS + U/C - Post 2033)	Number of units UC	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033	Units beyond plan period
Service Centre	030/00019	Crug yr Efydd	Crymoch	26	20	7	2	3	4										
Service Centre	048/00017	Pond Bridge Farm	Johnston	123	69	54	14	20	15	15	4								
Service Centre	050/00043	Land to rear of Newton Hall	Kilgetty	19	0	19	0	0	5	7	7								
Service Centre	053/00034	Parc Maen Hir	Letterston	26	0	26	0	0	6	10	10								
Service Centre	053/00009	Phase 2, Court Meadow	Letterston	53	0	27	0	5	5	5	5	7							26
Service Centre	053/00052	Former Go Cart Track	Letterston	23	1	11	2	2	2	2	2	3							11
Service Village	007/00047	Old Station Yard	Boncath	30	0	20	0			7	7	6							10
Service Village	003/00040	North of New Road	Begelly	70	0	35	0								5	10	10	10	35
Service Village	003/00025	Barley Park Close	Begelly	26	6	20	3	10	10										
Service Village	025/00028	South of Tinker's Fold	Cosheston	6	0	4	2	2	2										
Service Village	028/00012	North of the Forge	Croesgoch	23	0	23	0				6	8	8						
Service Village	029/00013	Dingle Lane	Crundale	40	39	1	0		1										
Service Village	029/00026	Woodholm Farm	Crundale	5	0	5	1							1	2				2
Service Village	033/00035	South West of Eglwysrw School	Eglwysrw	23	0	23	23	23											
Service Village	035/00030	Will Meadows	Freystrop	28	15	13	2	7	6										
	035/00021	Poplar Meadow	Freystrop	7	6	1	1	1											
Service Village	042/00013	North of Cartref	Hermon	15	0	8	0			2	3	3							7

Settlement Tier	Development Monitoring Reference	Site Name	Settlement	Total Units	Number of units complete	Number of units remaining (NS + U/C - Post 2033)	Number of units UC	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033	Units beyond plan period
Cluster Local Village	012/00004	Kiln Park	Burton Ferry	8	1	7	1	2	3	2									
Local Village	110/00015	Maes Elwyn John	Reynalton	7	5	2	1	2											
Local Village	125/00009	St Twynnels Farm	St Twynnels	5	0	2	2	2											3
Local Village	000/01202	Bluebell Lane	Wolfsdale	7	5	2	1	1	1										
Totals				2086	830	1069	152	245	278	176	97	67	40	31	43	25	10	10	539

Appendix 2 Anticipated Annual Build Rate and Housing Trajectory

Table 3: Anticipated Annual Build Rate Calculation

	LDP Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
A	Year	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-2033	2033
B	Remaining Years	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
C	Total Housing Provision	6425	6425	6425	6425	6425	6425	6425	6425	6425	6425	6425	6425	6425	6425	6425	6425	6425
D	Total LDP Housing Requirement	5840	5840	5840	5840	5840	5840	5840	5840	5840	5840	5840	5840	5840	5840	5840	5840	5840
E	Actual Completions Large	231	299	226	286	261	283											
F	Actual Completions Small	55	120	41	54	77	84											
G	Anticipated Allocated Site Completions							0	50	148	203	275	351	408	329	279	212	107
H	Anticipated Landbank Completions*							245	278	176	97	67	40	31	43	25	10	10
I	Anticipated Completions Large Windfall							0	0	40	40	40	40	40	40	40	40	30
J	Anticipated Completions Small Windfall							66	66	66	66	66	66	66	66	66	66	49
K	Total Completions	286	419	267	340	338	367	311	394	429	405	447	496	544	477	409	327	196
L	Average Annual Build Rate							269	341	372	351	388	430	472	414	355	284	170
M	Total Projected Cumulative Completions	286	705	972	1312	1650	2017	2328	2721	3151	3556	4003	4499	5044	5521	5930	6257	6453
N	Remaining Housing Completions	6139	5720	5453	5113	4775	4408	4097	3704	3274	2869	2422	1926	1381	904	495	168	-28

Figure 1: Housing Development Trajectory

