Glenigan

Reclassification and development of Greenbelt Land

Prepared for CPRE

July 2019

Contents

Charts

Tables

About Glenigan

Established in 1973, Glenigan currently invests £3.1million and makes over a million research telephone calls per year to provide details on every construction project in the UK. This enables us to provide the most up-to-date and comprehensive construction sales leads and analysis, to help companies win new business.

We also have exclusive partnerships with key industry associations such as the Builders' Conference and the Building Research Establishment (BRE), enabling us to offer project data that's not available elsewhere in the market.

Background

Local authorities can reclassify areas as Greenbelt and also remove areas form the Greenbelt. A number of local authorities have moved their Greenbelt boundaries since 2010/11. This report analyses development in activity in these areas following their declassification as Greenbelt land.

The Ministry of Housing, Communities and Local Government has published polygon datasets showing each English local authority's Greenbelt land for each financial year from 2010/11 to 2017/18, with the exception of 2012/13.

These datasets have been cross-referenced with Glenigan's construction project database to identify development activity in areas following their removal from the Greenbelt.

The report analyses:

- Planning applications made following declassification or made the two years prior to declassification if the planning decision was made after declassification.
- Planning decisions made on former Greenbelt land.
- Projects completed on former Greenbelt land.

The analysis includes a breakdown of projects into brownfield and greenfield sites.

The analysis covers planning applications for residential and large industrial & commercial new build projects in the Greenbelt and analyses the number and success rate of such applications over the ten financial years from 2009/10 to 2018/19. The analysis is based upon residential and non-residential planning applications and projects tracked and researched by Glenigan.

Chart 1: English Greenbelt Areas

Main Findings

Local authorities have responsibility for designating areas of Greenbelt in their jurisdiction. Several local authorities have amended the areas covered by Greenbelt protection since 2010/11, adding and removing areas from the Greenbelt.

The research does not cover the reason behind local authorities' decisions to amend their Greenbelt boundaries.

Our analysis found, that in the last four years there has been a marked increase in development activity on land where the Greenbelt protections have been lifted.

This may in part reflect wider economic conditions. During the first half of the period under review the UK economy and the new housing market were gradually recovering from the 2008 financial crisis. The second half of the period coincides with strong growth nationally in new housing activity.

The number of applications for residential developments on former Greenbelt land has risen sharply over the last four years.

Greenfield sites account for the majority of residential sites proposed and taken forward for residential development. Thirty-two percent of applications (47 applications) made on released Greenbelt land have been for brownfield sites and 94 applications (65%) were on greenfield sites.

The average size of proposed greenfield sites is also greater than for brownfield sites and 76% of proposed residential units have been on greenfield applications.

The success rate of residential planning applications is high. Excluding applications that are still awaiting a decision, the approval rate of greenfield planning applications has been 84%. This compares with 91% for brownfield sites and 100% for brownfield/greenfield sites.

During the period, planning permission was granted for a total of 13,593 residential units. Of these 75% of units were on greenfield sites.

Few of the applications for developments on former Greenbelt land covered by the study have been completed. This is due to the higher proportion of the proposals being made during the last four years and the time taken to gain planning consent and then build out the site. The low number of completed projects in relation to planning approvals points to a potential increase in development activity and completions over the next few years.

In contrast to residential developments, brownfield sites account for the majority of industrial and commercial planning applications and approvals. Over half (56%) of applications are for developments on brownfield sites with the remaining 44% being on greenfield land. Brownfield sites also accounted for 62% of industrial & commercial projects securing planning approval.

The breakdown of commercial sites to reach completion during the period was similarly split with almost 56% of completions being on brownfield sites.

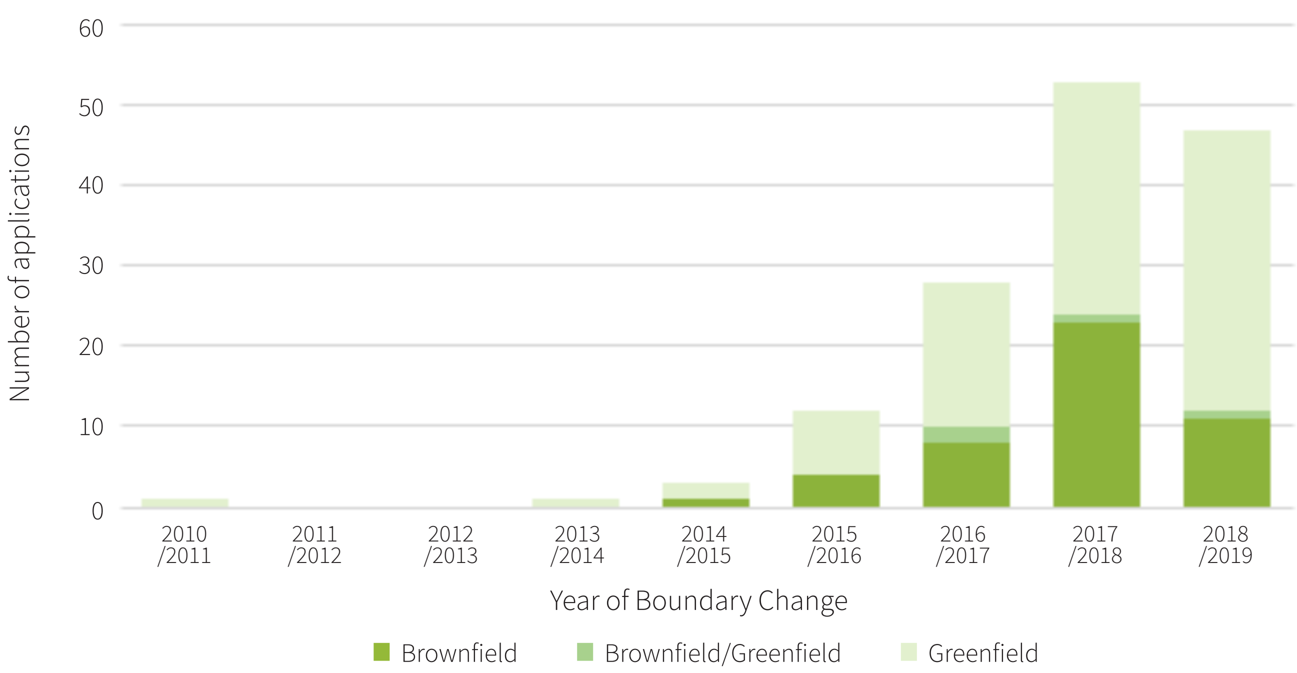
Residential

APPLICATIONS

The number of applications for residential developments on former Greenbelt land has risen sharply over the last four years. There were 145 residential planning applications submitted between April 2010 and March 2019, 97% of which (140 applications) have been made during the last four financial years.

Thirty-two percent of applications (47 applications) made on released Greenbelt land have been on brownfield sites, 94 applications (65%) were on greenfield sites and 4 applications (3%) were identified as being for brownfield/greenfield sites.

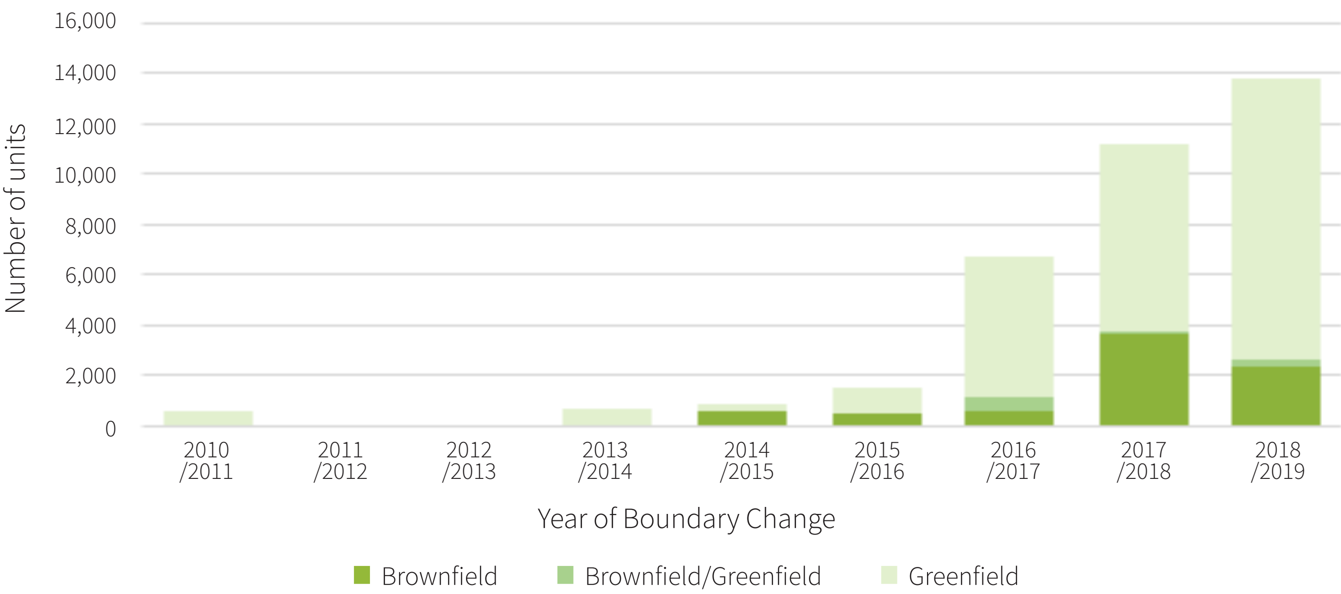
Chart 2: Residential planning applications on land released from the Greenbelt by type of site



There has been a sharp rise in the number of applications for both greenfield and brownfield sites over the last four years, but greenfield sites have consistently accounted for the majority of applications. This is in contrast to the pattern of applications for sites that have remained in the Greenbelt, where brownfield sites account for the largest share of applications.

A total of 35,273 residential units were included in applications during the period under review. The number of residential units has recently grown rapidly as the number of applications has risen; 94% of units on applications made since 2010/11 have been in the last four financial years.

Chart 3: Number of residential units on applications for land released from the Greenbelt by type of site



At 26,653 residential units, greenfield sites accounted for 76% of units on residential applications. At 7,635 units, brownfield sites accounted for 22% of units on applications and brownfield/greenfield sites accounted for 3% (975 units).

Table 1: Residential planning applications by year of Greenbelt boundary change and type of site

	BROWNFIELD		BROWNFIELD/ GREENFIELD		GREENFIELD	
Year	Applications	Units	Applications	Units	Applications	Units
2010/2011	0	0	0	0	1	601
2011/2012	0	0	0	0	0	0
2012/2013	0	0	0	0	0	0
2013/2014	0	0	0	0	1	632
2014/2015	1	551	0	0	2	292
2015/2016	4	525	0	0	8	1,012
2016/2017	8	563	2	594	18	5,532
2017/2018	23	3,689	1	75	29	7,407
2018/2019	11	2,317	1	306	35	11,177
Total:	**47**	**7,645**	**4**	**975**	**94**	**26,653**

PLANNING DECISIONS

Of the 145 residential applications submitted since April 2010, 33 (23%) are still awaiting a planning decision. All of the undecided applications were submitted during the last four financial years. The analysis of planning applications below excludes those projects that are still awaiting a planning decision in order to analyse the relative success rate of planning applications on greenfield and brownfield sites. Projects where the planning application has been withdrawn are included.

Table 2: Residential planning approvals by year of application and by type of site

	BROWNFIELD		BROWNFIELD/ GREENFIELD		GREENFIELD		TOTAL
Year	Number	Proportion	Number	Proportion	Number	Proportion	Number
2010/2011	0	0%	0	0%	601	100%	601
2011/2012	0	0%	0	0%	0	0%	0
2012/2013	0	0%	0	0%	0	0%	0
2013/2014	0	0%	0	0%	632	100%	632
2014/2015	551	65%	0	0%	292	35%	843
2015/2016	525	42%	0	0%	722	58%	1,247
2016/2017	332	9%	12	0%	3,351	91%	3,695
2017/2018	1,595	29%	75	1%	3,784	69%	5,454
2018/2019	355	32%	0	0%	766	68%	1,121
Total:	**3,358**	**25%**	**87**	**1%**	**10,148**	**75%**	**13,593**

Of the 99 residential applications made since 2010/11 that have either been subject to a planning decision or withdrawn, 34 were applications for projects on brownfield sites. There were 61 applications for greenfield sites and 4 applications were classified as brownfield/greenfield over the period of the study.

At total of 86 residential planning applications have been granted since 2010/11, an overall approval rate of 87%. Of these 31 (36% of approvals) were granted for brownfield sites, 51 (59%) for greenfield sites and 4 (5%) on mixed greenfield/ brownfield sites.

Table 3: Residential planning applications by year of application, type of site and planning outcome

	BROWNFIELD			BROWNFIELD/ GREENFIELD			GREENFIELD		
Year	Granted	Refused	Withdrawn	Granted	Refused	Withdrawn	Granted	Refused	Withdrawn
2010/2011	0	0	0	0	0	0	1	0	0
2011/2012	0	0	0	0	0	0	0	0	0
2012/2013	0	0	0	0	0	0	0	0	0
2013/2014	0	0	0	0	0	0	1	0	0
2014/2015	1	0	0	1	0	0	2	0	0
2015/2016	4	0	0	1	0	0	6	2	0
2016/2017	6	2	0	0	0	0	13	1	1
2017/2018	15	0	0	0	0	0	20	0	2
2018/2019	5	1	0	2	0	0	8	1	3
Total:	**31**	**3**	**0**	**4**	**0**	**0**	**51**	**4**	**6**

The high proportion of approvals granted for greenfield sites reflects the greater number of planning applications (61% of applications) for such sites and was despite the success rate being lower that for other types of site.

Table 4: Proportion of residential applications approved, refused and withdrawn by type of site and year of application

	BROWNFIELD			BROWNFIELD/ GREENFIELD			GREENFIELD		
Year	Granted	Refused	Withdrawn	Granted	Refused	Withdrawn	Granted	Refused	Withdrawn
2010/2011	-	-	-	-	-	-	100%	0%	0%
2011/2012	-	-	-	-	-	-	-	-	-
2012/2013	-	-	-	-	-	-	-	-	-
2013/2014	-	-	-	-	-	-	100%	0%	0%
2014/2015	100%	0%	0%	100%	0%	0%	100%	0%	0%
2015/2016	100%	0%	0%	100%	0%	0%	75%	25%	0%
2016/2017	75%	25%	0%	-	-	-	87%	7%	7%
2017/2018	100%	0%	0%	-	-	-	91%	0%	9%
2018/2019	83%	17%	0%	100%	0%	0%	67%	8%	25%
Total:	**91%**	**9%**	**0%**	**100%**	**0%**	**0%**	**84%**	**7%**	**10%**

The approval rate of greenfield planning applications has been 84%. This compares with 91% for brownfield sites and 100% for brownfield/greenfield sites. The lower success rate for greenfield sties appears to be due to 10% of applications being withdrawn; no brownfield or mixed sites were withdrawn. The refusal rates for greenfield and brownfield sites was similar at 7% and 9% respectively.

The 99 planning applications made since April 2010 that were either subject to a planning decision or withdrawn included the potential creation of 14,972 residential units.

Of these, 3,603 units (24%) were on brownfield sites, 11,282 units (75%) were on greenfield sites and 87 residential units (1%) were on sites classified as brownfield/greenfield.

Table 5: Residential units on planning applications by type of site and planning outcome

	BROWNFIELD			BROWNFIELD/ GREENFIELD			GREENFIELD		
Year	Granted	Refused	Withdrawn	Granted	Refused	Withdrawn	Granted	Refused	Withdrawn
2010/2011	0	0	0	0	0	0	601	0	0
2011/2012	0	0	0	0	0	0	0	0	0
2012/2013	0	0	0	0	0	0	0	0	0
2013/2014	0	0	0	0	0	0	632	0	0
2014/2015	551	0	0	0	0	0	292	0	0
2015/2016	525	0	0	0	0	0	722	290	0
2016/2017	332	231	0	12	0	0	3,351	124	84
2017/2018	1,595	0	0	75	0	0	3,784	0	150
2018/2019	355	14	0	0	0	0	766	200	286
Total:	**38,089**	**11,580**	**12,503**	**2,940**	**524**	**107**	**24,081**	**9,669**	**2,768**

A similar proportion of units on brown and greenfield applications were refused planning consent. In percentage terms, 7% of units proposed on brownfield sites were rejected. On greenfield sites, 5% were rejected and 5% were withdrawn.

Table 6: Proportion of residential units on applications approved, refused and withdrawn by type of site and year of application

	BROWNFIELD			BROWNFIELD/ GREENFIELD			GREENFIELD		
Year	Granted	Refused	Withdrawn	Granted	Refused	Withdrawn	Granted	Refused	Withdrawn
2010/2011	-	-	-	-	-	-	100%	0%	0%
2011/2012	-	-	-	-	-	-	-	-	-
2012/2013	-	-	-	-	-	-	-	-	-
2013/2014	-	-	-	-	-	-	100%	0%	0%
2014/2015	100%	0%	0%	100%	0%	0%	100%	0%	0%
2015/2016	100%	0%	0%	100%	0%	0%	75%	25%	0%
2016/2017	75%	25%	0%	-	-	-	-	-	-
2017/2018	100%	0%	0%	-	-	-	-	-	-
2018/2019	83%	17%	0%	100%	0%	0%	67%	8%	25%
Total:	**91%**	**9%**	**0%**	**100%**	**0%**	**0%**	**84%**	**7%**	**10%**

Between April 2009 and March 2019, planning permission was granted for a total of 13,593 residential units. Of these 3,358 units (25%) were on brownfield sites, 10,148 units (75%) were on greenfield sites and 87 units (1%) were on mixed sites.

The high proportion of units on approved projects that are for greenfield locations compared to the number of applications (75% of units against 59% of planning applications), reflects the larger average size of greenfield projects compared to brownfield sites.

The average size of greenfield residential projects securing planning approval during the period was 199 units, compared to 108 units on brownfield sites. The average size of mixed sites with both greenfield and brownfield land was 22 units.

Table 7: Residential units on approved planning applications by type of site

	BROWNFIELD		BROWNFIELD/ GREENFIELD		GREENFIELD		TOTAL
Year	Number	Proportion	Number	Proportion	Number	Proportion	Number
2010/2011	0	0%	0	0%	601	100%	601
2011/2012	0	-	0	-	0	-	0
2012/2013	0	-	0	-	0	-	0
2013/2014	0	0%	0	0%	632	100%	632
2014/2015	551	65%	0	0%	292	35%	843
2015/2016	525	42%	0	0%	722	58%	1,247
2016/2017	332	9%	12	0%	3,351	91%	3,695
2017/2018	1,595	29%	75	1%	3,784	69%	5,454
2018/2019	355	32%	0	0%	766	68%	1,121
Total:	**3,358**	**25%**	**87**	**1%**	**10,148**	**75%**	**13,593**

COMPLETIONS

Few of the applications for developments on former Greenbelt land covered by the study have been completed. This is due to the higher proportion of the proposals being made during the last four years and the time taken to gain planning consent and then build out the site.

Table 8: Residential projects completed by type of site

	BROWNFIELD		BROWNFIELD/ GREENFIELD		GREENFIELD		TOTAL
Year	Number	Proportion	Number	Proportion	Number	Proportion	Number
2010/2011	0	-	0	-	0	-	0
2011/2012	0	-	0	-	0	-	0
2012/2013	0	-	0	-	0	-	0
2013/2014	0	-	0	-	0	-	0
2014/2015	0	-	0	-	0	-	0
2015/2016	0	0%	0	0%	1	100%	1
2016/2017	0	-	0	-	0	-	0
2017/2018	2	50%	0	0%	2	50%	4
2018/2019	1	20%	1	20%	3	60%	5
Total:	**3**	**30%**	**1**	**10%**	**6**	**60%**	**10**

Ten projects have been completed, all during the last four years. Three of the projects have been on brownfield sites, one on a brownfield/ greenfield site and six were greenfield developments. The low number of completed projects in relation to planning approvals points to a potential increase in development activity and completions over the next few years.

Residential projects completed on former Greenbelt land since 2010/11 have created 1,063 new homes. Of these, 23% of were built on brownfield land and 76% on greenfield land. The balance of units (1%) has been built on sites that were a combination of greenfield and brownfield.

Table 9: Residential units on completed projects by type of site

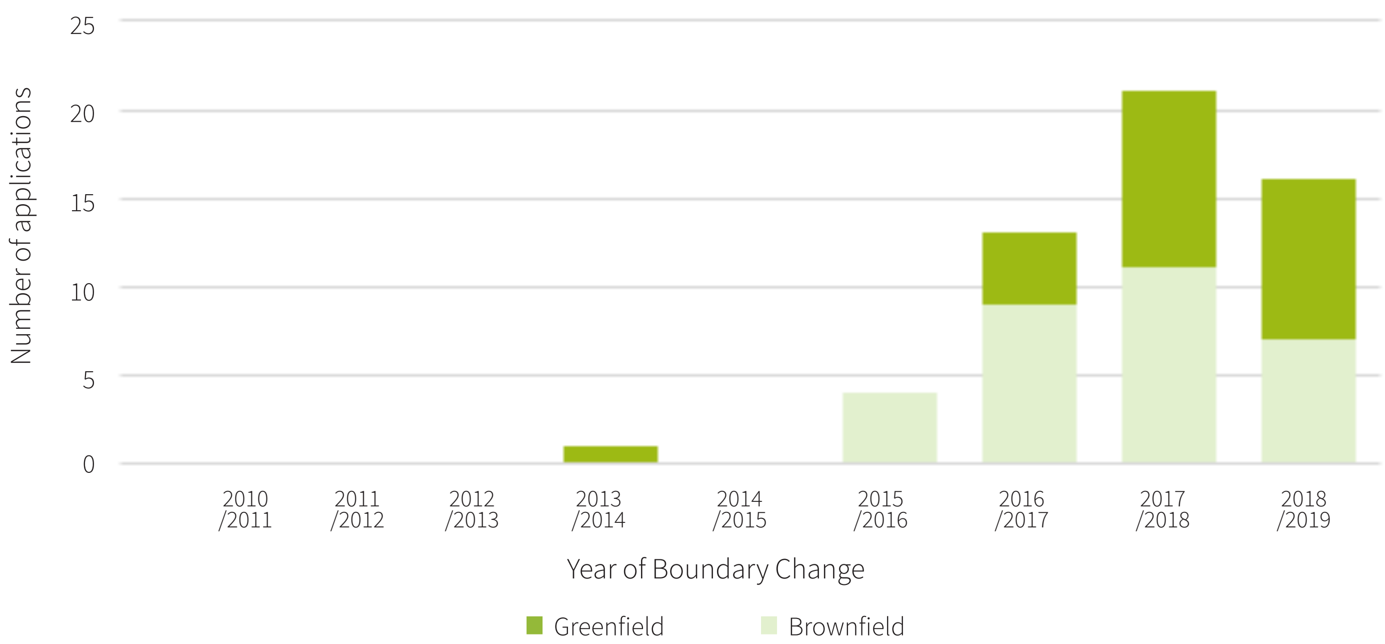
	BROWNFIELD		BROWNFIELD/ GREENFIELD		GREENFIELD		TOTAL
Year	Number	Proportion	Number	Proportion	Number	Proportion	Number
2010/2011	0	-	0	-	0	-	0
2011/2012	0	-	0	-	0	-	0
2012/2013	0	-	0	-	0	-	0
2013/2014	0	-	0	-	0	-	0
2014/2015	0	-	0	-	0	-	0
2015/2016	0	0%	0	0%	12	100%	12
2016/2017	0	-	0	-	0	-	0
2017/2018	150	22%	0	0%	546	78%	696
2018/2019	97	27%	12	3%	246	69%	355
Total:	**247**	**23%**	**12**	**1%**	**804**	**76%**	**1,063**

Commercial & Industrial

APPLICATIONS

The number of applications for commercial & industrial developments on former Greenbelt land has risen sharply over the last four years, although applications were lower in 2018/19 than during the previous year.

Chart 4: Commercial and industrial planning applications on land released from the Greenbelt by type of site



There have been 55 commercial & industrial planning applications submitted since 2010/11, with all but one of being made since 2015/16. Over half (56%) of applications are for developments on brownfield sites, with the remaining 44% being on greenfield land. This contrasts with the majority of residential applications which has been on greenfield sites.

PLANNING DECISIONS

Of the 55 commercial & industrial applications submitted since April 2010, 13 (24%) are still awaiting a planning decision. The analysis below excludes those projects that are still awaiting a planning decision in order to analyse the relative success rate of planning applications on greenfield and brownfield sites. Projects where the planning application has been withdrawn are included.

Table 10: Commercial & Industrial planning approvals by type of site

	BROWNFIELD		BROWNFIELD/ GREENFIELD		GREENFIELD		TOTAL
Year	Number	Proportion	Number	Proportion	Number	Proportion	Number
2010/2011	0	-	0	-	0	-	0
2011/2012	0	0%	0	0%	0	0%	0
2012/2013	0	0%	0	0%	0	0%	0
2013/2014	0	0%	0	0%	1	100%	1
2014/2015	0	-	0	-	0	-	0
2015/2016	3	100%	0	0%	0	0%	3
2016/2017	9	69%	0	0%	4	31%	13
2017/2018	10	56%	0	0%	8	44%	18
2018/2019	4	57%	0	0%	3	43%	7
Total:	**26**	**62%**	**0**	**0%**	**16**	**38%**	**42**

During the period under review, 26 (62%) of commercial & industrial projects approved were on brownfield land, while 16 projects (38%) were on greenfield land.

Table 11: Commercial & Industrial planning applications by type of site and planning outcome

	BROWNFIELD			BROWNFIELD/ GREENFIELD			GREENFIELD		
Year	Granted	Refused	Withdrawn	Granted	Refused	Withdrawn	Granted	Refused	Withdrawn
2010/2011	0	0	0	0	0	0	0	0	0
2011/2012	0	0	0	0	0	0	0	0	0
2012/2013	0	0	0	0	0	0	0	0	0
2013/2014	0	0	0	0	0	0	1	0	0
2014/2015	0	0	0	0	0	0	0	0	0
2015/2016	3	1	0	0	0	0	0	0	0
2016/2017	9	0	0	0	0	0	4	0	0
2017/2018	10	0	0	0	0	0	8	0	1
2018/2019	4	0	0	0	0	0	3	0	0
Total:	**26**	**1**	**0**	**0**	**0**	**0**	**16**	**0**	**1**

The success rate for both brownfield and greenfield sites is high with only one brownfield sites being refused and one greenfield application being withdrawn.

COMPLETIONS

The vast majority (91%) of industrial and commercial projects completed on former Greenbelt land since 2010/11 have been completed during the last three financial years.

Table 12: Commercial & Industrial Projects Completed by type of site

	BROWNFIELD		BROWNFIELD/ GREENFIELD		GREENFIELD		TOTAL
Year	Number	Proportion	Number	Proportion	Number	Proportion	Number
2010/2011	0	-	0	-	0	-	0
2011/2012	0	-	0	-	0	-	0
2012/2013	0	-	0	-	0	-	0
2013/2014	0	0%	0	0%	1	100%	1
2014/2015	0	-	0	-	0	-	0
2015/2016	4	100%	0	0%	0	0%	4
2016/2017	9	69%	0	0%	4	31%	13
2017/2018	11	52%	0	0%	10	48%	21
2018/2019	7	44%	0	0%	9	56%	16
Total:	**31**	**56%**	**0**	**0%**	**24**	**44%**	**55**

Over half (56%) of commercial & industrial projects reaching completion were on brownfield sites, with the remaining 44% on greennfield land.

For further information, contact us on the details below

Christina Vickers
Sales Manager
Call **01202 786 753**
email **christina.vickers@glenigan.com**

Allan Wilén
Economics Director
Call **020 7715 6433**
email **allan.wilen@glenigan.com**

Call **0800 060 8698**
Email **info@glenigan.com**
Visit **www.glenigan.com**
80 Holdenhurst Road,
Bournemouth BH8 8AQ