State of Brownfield 2025

An updated analysis on the potential of brownfield land for housing

September 2025

The countryside charity

Contents

1. Summary

CPRE regularly presents the 'State of Brownfield' showing how much previously developed land is available and suitable for new development, or shovel-ready. In 2025, a large proportion of England's housing need could be met swiftly using brownfield land that has planning permission, without encroaching on undeveloped greenfield or Green Belt land.

Our conservative calculation shows that there is enough brownfield land to build 1.48 million homes in England, based on data from Local Planning Authorities' most updated brownfield land registers up to 2024. More than half (55%) of these sites already have planning permission (either outline permission or better) meaning over 800,000 new homes could be built rapidly.

There is also more brownfield land now than in previous years. Between 2023 and 2024, England's total minimum net dwelling capacity on brownfield land increased by 15%, from 1.29 million to 1.48 million. 'Minimum net dwellings' refer to the lowest number of homes determined by the local planning authority the land can support.

We found that in a substantial number of local authorities, there is enough brownfield land with planning permission to meet the targets set by the government's standard method for calculating housing need for at least the next five years.

CPRE is calling for the government to take action in the following areas:

Brownfield first

Introduce a comprehensive 'brownfield first' planning policy in the National Planning Policy Framework (NPPF) to enforce Ministerial commitments. This should allow for the true prioritisation and harnessing of the full potential of brownfield land development before any undeveloped greenfield land is considered. Local authorities should also have increased control of the order in which development land is built so that suitable brownfield sites are developed first and speculative greenfield proposals are rejected in all but exceptional cases.

Brownfield targeted housing funds

Incentivise brownfield first through focusing the New Towns Programme and Homes England support on developments that deliver on brownfield land and provide affordable homes. This will enable brownfield land to support regeneration and serve the needs of communities.

Diversity of housing tenures

Amend the NPPF so that national planning policy requires all new developments to have diversity of housing tenures and types as outlined by the 2018 Independent Review of Build Out led by Sir Oliver Letwin[1]. This policy should be backed up by Homes England funding where necessary.

Regularly update brownfield land registers

The future planning performance regime for local authorities should include annual updating of brownfield registers as a key element.

Centralised system of brownfield data collection

There should be a centralised, standardised system of brownfield data collection sitting within the government's emerging planning data hub to enable more accurate, efficient, and transparent analysis.

[1] Independent review of build out: final report - GOV.UK

2. Overview of national brownfield land 2018-2024

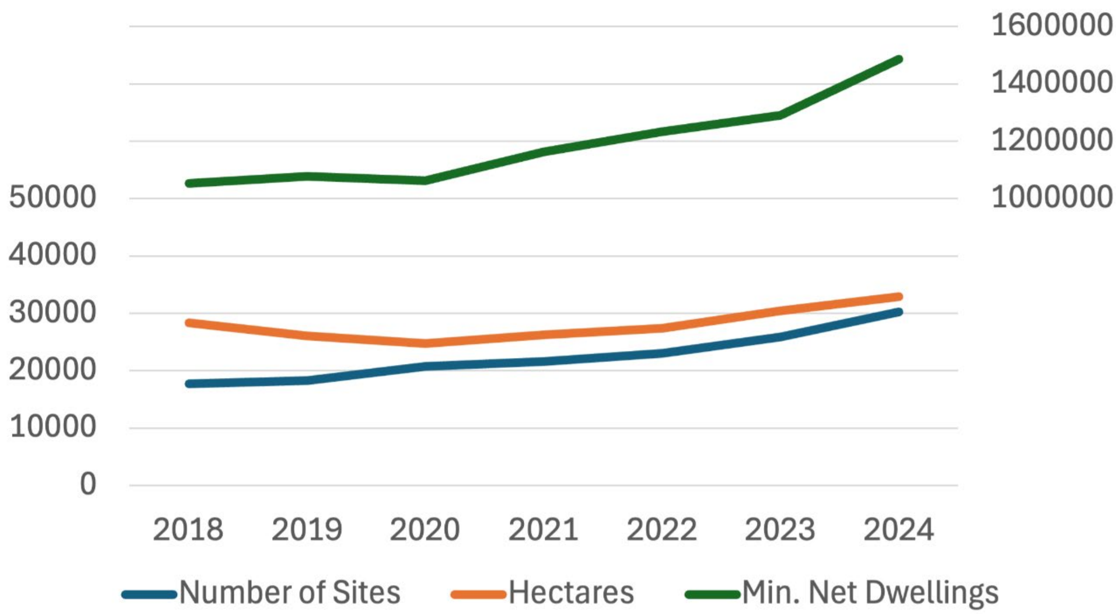
England's brownfield land can accommodate a minimum of 1.48 million homes (see Table 1). We have used 'minimum net dwellings' as equivalent to the number of homes, as this refers to the lowest number of homes determined by the local planning authority the land can support. It provides a conservative estimate of the housing capacity of brownfield land. This figure is based on data contained in Part 1 of local brownfield registers — sites deemed available and suitable for development. Since the total excludes longer-term or unregistered sites, actual capacity is probably higher.

Table 1: England's brownfield sites, land area and number of potential homes (minimum net dwellings) 2018-2024

Year	Number of sites	Hectares	Min. net dwellings
2018	17,656	28,349	1,052,124
2019	18,277	26,002	1,077,292
2020	20,750	24,684	1,061,346
2021	21,566	26,256	1,162,969
2022	23,002	27,342	1,232,592
2023	25,775	30,309	1,287,952
2024	**30,220**	**32,821**	**1,484,794**
% change 2018 to 2024	**+71%**	**+16%**	**+41%**

England's brownfield land has steadily grown over time (see Figure 1). Between 2018 and 2024, brownfield sites have increased by 71%, brownfield land area has grown by 16%, and minimum net dwelling capacity has risen by 41%. This growth suggests more comprehensive coverage and an encouraging growth in recognition of brownfield land potential. Brownfield land is a constantly renewing resource, and more sites are coming forward all the time, as more former retail sites in town centres become available and opportunities arise to rebuild low-density housing estates at higher densities. However, the slower growth in land area and net dwellings may indicate that the newer sites are smaller than before.

Figure 1: England's brownfield sites, land area and number of potential homes (minimum net dwellings) 2018-2024



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2.1. Regional analysis of brownfield land

The map in Figure 2 shows the spatial distribution of housing capacity across the 9 regions in England. London leads with nearly 535,000 homes, over one-third (36%) of the national total (see Table 2). West Midlands and South East follow with significant capacity as well.

Figure 2: Map of regional distribution of minimum net dwellings on brownfield land 2024

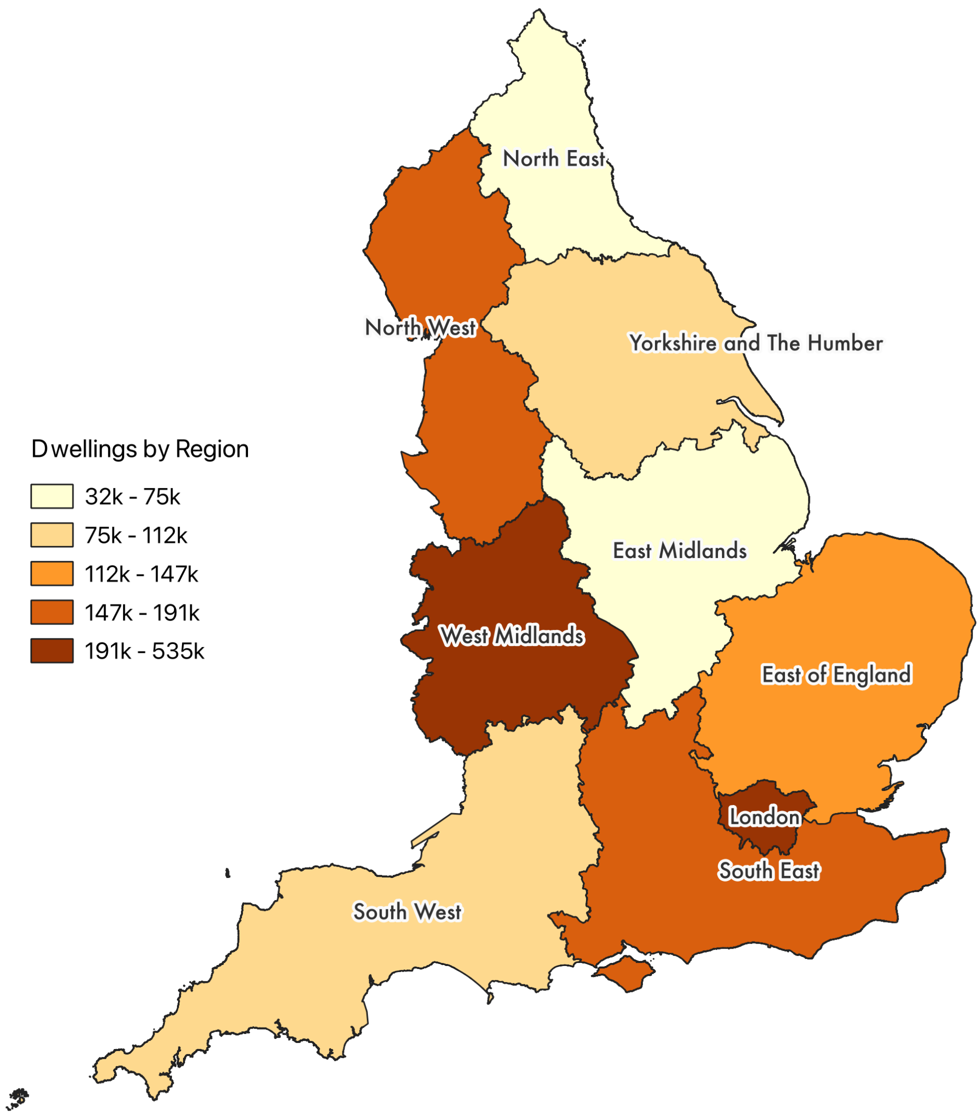

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Table 2: Regional distribution of minimum net dwellings on brownfield land 2024

Region	Sum of total minimum net dwellings 2024	Percentage of dwellings to national total
London	534,904	36%
West Midlands	191,004	13%
South East	190,814	13%
North West	148,728	10%
East	132,338	9%
Yorkshire and the Humber	106,421	7%
South West	77,540	5%
East Midlands	70,796	5%
North East	32,250	2%

Between 2023 and 2024, England's total minimum net dwelling capacity on brownfield land increased by 15% (see Table 3), rising from 1.29 million to 1.48 million homes. The West Midlands showed the most significant growth, with a 59% increase—adding over 70,000 potential dwellings—likely due to improved register coverage or new site identification. London also saw a substantial rise of 21%, reinforcing its position as the region with the highest overall capacity.

Other regions, such as the South East, East Midlands, and East of England experienced steady growth between 13% and 18%. In contrast, Yorkshire and the Humber saw only a marginal increase of 1%, while the North East and North West recorded declines of 8% and 11% respectively, possibly due to completed developments or register updates removing previously listed sites.

(continued overleaf)

Table 3: Increase in Minimum Net Dwellings on Brownfield Land by Region 2023- 2024

Region	Percentage Increase in Dwellings from 2023 to 2024
West Midlands	59%
London	21%
East Midlands	18%
South East	14%
East	13%
South West	5%
Yorkshire and the Humber	1%
North East	-8%
North West	-11%
National	15%

3. Brownfield land with planning permission

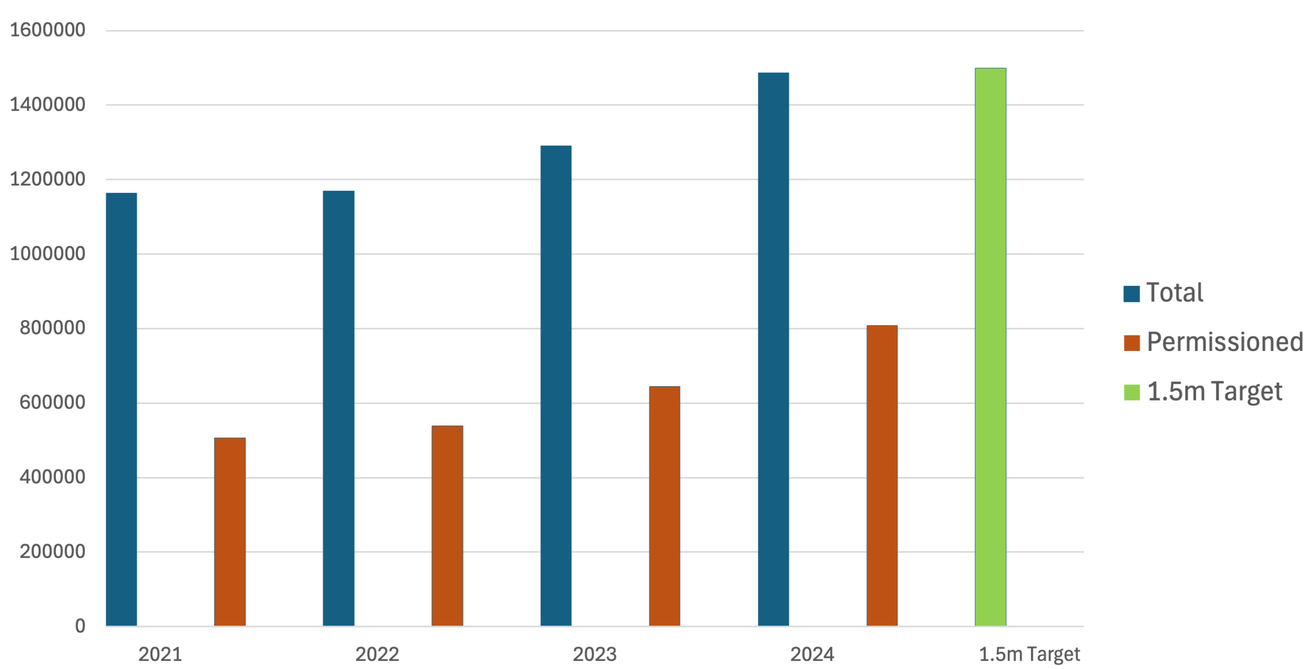
In 2024, 55% of the identified potential brownfield homes have received planning permission (see Table 4). This represents the challenges of planning permission bottlenecks to housing delivery, as illustrated in Figure 3 which compares potential dwellings with and without planning permission to the government's 1.5 million housing delivery target. Throughout the years, there has been a persistent gap between identified housing capacity and permissioned development — there needs to be a focus on enabling use and bringing sites through the planning process quickly, on top of just identifying land.

(continued overleaf)

Table 4: Percentage of potential Minimum Net Dwellings with Planning Permission on brownfield land 2018-2024

Year	Total number of potential dwellings	Number of dwellings with planning permission	Percentage of potential dwellings with planning permission
2024	1,484,794	809,826	55%
2023	1,287,952	643,917	50%
2022	1,169,735	539,571	46%
2021	1,162,969	507,016	44%
2020	1,061,346	565,564	53%
2019	1,077,292	535,785	50%
2018	1,052,124	613,052	58%
Average			**51%**

Figure 3: Number of Minimum Net Dwellings on brownfield: total vs with Planning Permission 2021-2024



It has often been argued by the housebuilding industry and some planning consultants that there is insufficient brownfield land to meet housing targets, particularly in the areas where levels of market demand suggest houses are most needed (see, for example, the 2022 Lichfields report Banking on Brownfield)[2]. Not all of the need for new housing can be met on brownfield sites. For example, in some cases, building may need to take place on 'exception sites' to meet the specific affordable housing needs of rural areas, and such sites are usually small greenfield sites on the edge of villages.

The arguments made by the industry do not acknowledge how much land is already being made available for development through the planning system. A 2024 analysis of all planning permissions for housing, compared to completions, suggests that planning permissions have been granted for almost 2.7 million houses in total (on both greenfield and brownfield sites) since 2015, but only approximately 1.5 million homes have been completed[3]. Table 4 shows that just over 800,000 brownfield plots identified in registers have planning permission, so this suggests, therefore, if one also considers the annual data on planning permissions for housing, that there are a further 400,000 unused planning permissions on greenfield sites.

CPRE believes that a stronger brownfield-first policy – as well as stronger direction to use or lose sites with planning permission – is needed to focus the attention of local authorities and developers on bringing brownfield sites forward, rather than promoting more damaging greenfield options that are easier for developers.

The government's method for calculating housing targets is based on flawed assumptions that giving more planning permissions for housing, regardless of whether the housing is genuinely affordable or not, will lead to prices falling. The continued use of this method, without a stronger brownfield-first policy, will lead to brownfield opportunities being neglected while developers cherry-pick more profitable greenfield sites instead. In our view, targets should be focused on delivering increased numbers of affordable housing and, in particular, social rented housing, and that, as far as possible, investment in new housing should be focused on brownfield sites to help regenerate and support existing communities.

Some commentators have also raised issues around increased costs of brownfield development arising from 'weak effective demand from first-time buyers, pressure on viability due to additional policy costs, and persistent delays within the planning process' (see for example HBF, 'Mind the Gap', September 2025)[4]. CPRE believes that the government should consider a range of measures to better support development on brownfield sites and bring them through the

[2] https://lichfields.uk/content/insights/banking-on-brownfield
[3] https://ecab.planningportal.co.uk/uploads/The_Planning_Portal_Application_Index_Report.pdf, pp.12-13
[4] https://www.hbf.co.uk/research-insight/mind-the-gap/

planning process more quickly, including more focused planning policies and Homes England support, including financial support where needed to address any initial viability issues (see recommendations below). There should be support for a range of housing tenures other than housing for sale to prevent an over-reliance on first-time buyers to occupy new housing. There have also been calls for weakening affordable housing or safety requirements on new brownfield developments, but this would come at the expense of using brownfield regeneration to create more mixed and inclusive communities.

3.1. Regional analysis of brownfield land with planning permission

Regionally, the average percentage of potential homes with planning permission is 57%, with South West and Yorkshire and the Humber leading with 59% (see Figure 4 and Table 5). Local planning authorities such as Leicester and Trafford (Greater Manchester) demonstrate strong potential to meet housing delivery targets on brownfield land, but much of this land currently lacks planning permission (see Table 7 in the Annex), aligning with the broader regional trend where the proportion of potential homes with planning permission is among the lowest in North West and East Midlands (see Figure 4).

Figure 4: Percentage of potential homes on brownfield with planning permission by region 2024

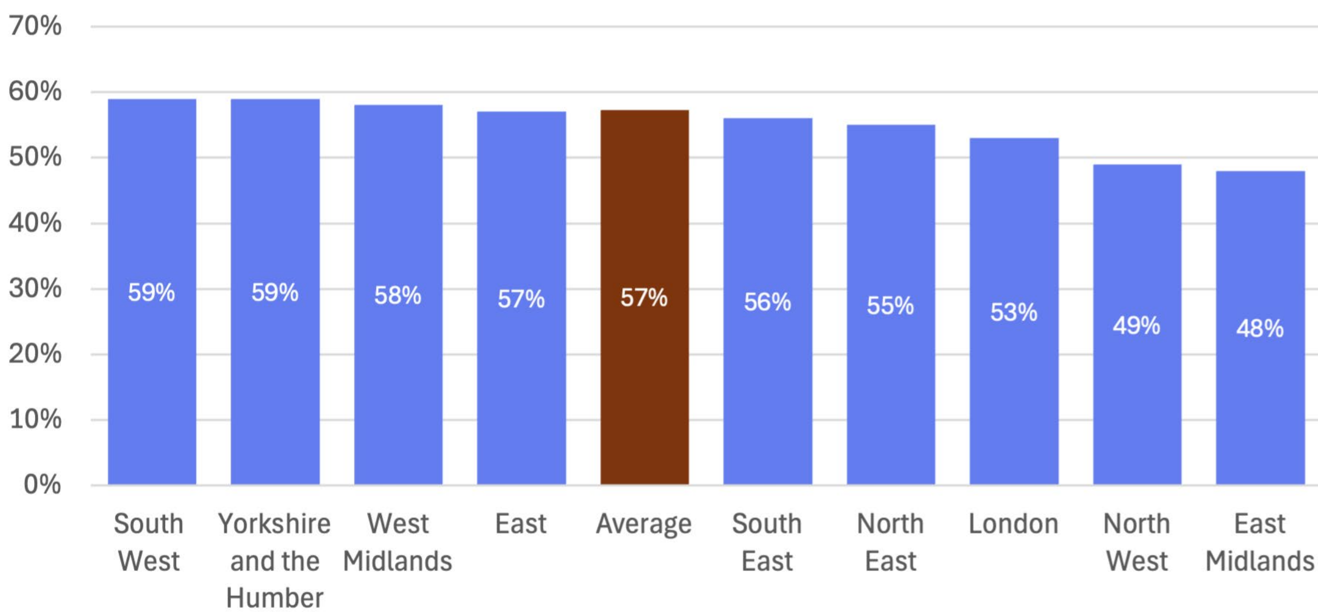


Table 5: Percentage of potential homes on brownfield with planning permission vs total by region 2024

Region	Total potential minimum net dwellings on brownfield	Number with planning permission	Percentage of minimum net dwellings with planning permission
East	132,338	75,212	57%
East Midlands	70,796	33,987	48%
London	534,904	285,125	53%
North East	32,250	17,883	55%
North West	148,728	72,490	49%
South East	190,814	106,249	56%
South West	77,540	46,027	59%
West Midlands	191,004	110,250	58%
Yorkshire and the Humber	106,421	62,603	59%

4. Number of potential homes by local planning authority area

24 local authorities have enough brownfield land with planning permission to meet government housebuilding targets for the next five years (Annex, Table 6). These include urban centres like Birmingham, Middlesbrough, Peterborough, Sheffield and Stoke and Trent, as well as seven London boroughs, including the City of London and Southwark. This is likely due to their extensive availability of underused land and capacity for high-density redevelopment.

Annex, Table 7, identifies the 25 local authorities that have the largest identified stocks of suitable brownfield land lacking any kind of planning permission. These include urban centres like Bolton, Bournemouth, Bradford, Leicester, Plymouth, Portsmouth, Reading, and Trafford (Greater Manchester), as well as London boroughs including Bexley, Brent, Croydon, Havering and Redbridge. CPRE believes that the Government can do more to prioritise and encourage investment in these areas, including through its forthcoming New Towns programme, which it has stated can include urban regeneration schemes.

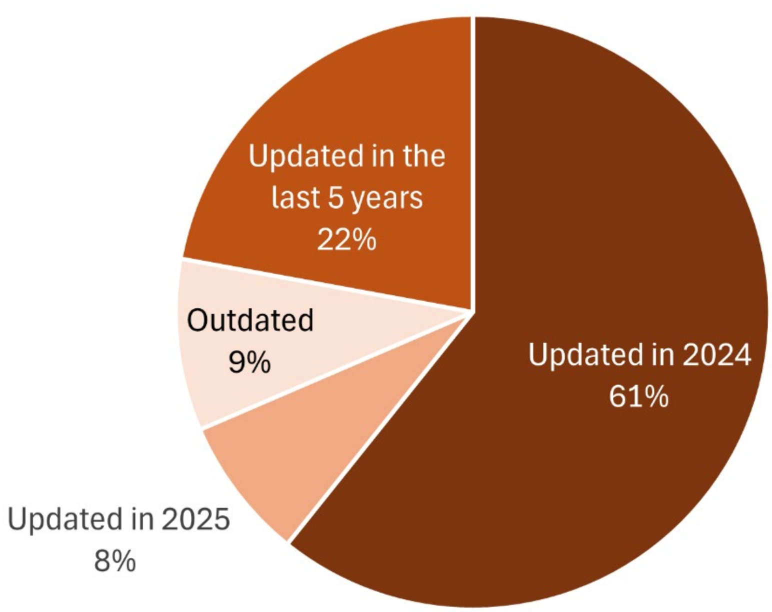
5. Number of updated brownfield registers

The national picture of brownfield capacity remains incomplete. Only two-thirds of local authorities are operating on registers updated in 2024 or 2025. For data accuracy, registers updated in 2025 have been excluded in our analysis as this report focuses specifically on 2024 data. Nearly 10% of local planning authorities have not updated their registers in the last five years. This data gap underscores the urgent need for a centralised, regularly updated brownfield database to support evidence-based planning and policy decisions.

Table 8: Percentage and Number of Local Planning Authorities (LPAs) with updated brownfield registers

	Number of Local Planning Authorities	Percentage of Local Planning Authorities
Updated in 2024	195	61%
Updated in 2025	25	8%
Updated in the last 5 years	71	22%
Outdated (last updated >5 years ago)	30	9%

Figure 5: Ratio of updated and outdated brownfield registers



6. Recommendations

CPRE is calling for the government to take action in the following areas:

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Regularly update brownfield land registers

The future planning performance regime for local authorities should include annual updating of brownfield registers as a key element.

Centralised system of brownfield data collection

There should be a centralised, standardised system of brownfield data collection sitting within the government's emerging planning data hub to enable more accurate, efficient, and transparent analysis.

7. Methodology

While this report primarily focuses on findings from 2024, data from 2023 was also collected and compiled to maintain continuity with our previous State of Brownfield update in 2022. The newly collected data from 2023 and 2024 were then compared against our archived brownfield data spanning 2018 to 2022. Our analysis was based on brownfield registers retrieved individually from each local planning authority's website. Figures were extracted from Part 1 of the registers, which list sites deemed suitable and available for housing, also known as shovel-ready. This data was compiled to produce the national and regional figures presented. The accompanying map was created using QGIS, using a base map sourced from the Office for National Statistics[5]. Data was also retrieved from the official UK government website to compare our findings with local housing delivery targets[6].

Registers updated in 2025 were excluded to maintain a consistent 2024 reporting window, which means some recent data may be missing. In such cases where available data extended beyond our targeted timeframe, the most recent prior recording was used. Consequently, some entries may not align with their actual year of update, underscoring the importance of Local Planning Authorities maintaining an archive of previous registers to enable meaningful temporal comparisons. Many registers were also poorly formatted, with inconsistencies and inaccuracies that limited reliability. These challenges highlight the urgent need for a centralised, standardised system of brownfield data collection to enable more accurate, efficient, and transparent analysis.

[5] https://geoportal.statistics.gov.uk/datasets/f6b1e11a73b84741bbd7a2158c83eebb_0/explore?location=52.736248%2C-2.486998%2C6.71

[6] https://assets.publishing.service.gov.uk/media/675aaeca9f669f2e28ce2b91/lhn-outcome-of-the-new-method.ods

8. Annex: Data tables

Table 6: Highest permissioned brownfield housing capacity against local housing need targets 2024

Local Planning Authority	Annual Local Housing Need (ALHN) under the New Standard Method	5-year Target (ALHN x 5)	Dwellings with Planning Permission (PP)	Percentage of 5-year Target on Brownfield with PP
City of London	169.53	847.64	37,818	4,461.58%
Barking and Dagenham	1,325.34	6,626.72	28,409	428.70%
Birmingham	4,448.41	2,2242.03	59,575	267.85%
South Cambridgeshire	1,173.72	5,868.61	14,541	247.78%
Southwark	2,914.49	14,572.45	25,874	177.55%
Salford	1,307.54	6,537.71	11,213	171.51%
Fareham	799.94	3,999.71	6,831	170.79%
Greenwich	2,575.36	12,876.8	21,306	165.46%
Sandwell	1,345.66	6,728.32	9,569	142.22%
Peterborough	1,005.98	5,029.92	6,963	138.43%
Newcastle-under-Lyme	545.06	2,725.29	3,695	135.58%
Dartford	712.02	3,560.08	4,788	134.49%
Doncaster	1,198.32	5,991.6	7,874	131.42%

Lichfield	745.02	3,725.1	4,759	127.75%
York	1,216.9	6,084.5	7,452	122.48%
Folkestone and Hythe	858.58	4,292.89	5,226	121.74%
Leeds	3,810.82	19,054.11	21,945	115.17%
Dover	746.3	3,731.49	4,243	113.71%
Wandsworth	4,383.36	21,916.82	24,772	113.03%
Stoke-on-Trent	947.6	4,738	5,276	111.36%
Hounslow	2,052.48	10,262.38	10,619	103.48%
Lewisham	2,643.77	13,218.87	13,603	102.91%
Middlesbrough	521.89	2,609.44	2,679	102.67%
Sheffield	23,90.07	11,950.33	12,121	101.43%

(continued overleaf)

Table 7: Non-permissioned brownfield housing capacity against local housing need targets 2024

Local Planning Authority	Annual Local Housing Need (ALHN) under the New Standard Method	5-year Target (ALHN x 5)	Total Minimum Net Dwellings	Dwellings with Planning Permission (PP)	Percentage of 5-year Target on Brownfield with PP	Pipeline Without PP
Waltham Forest	2,534.84	12,674.2	36,899	12,211	96.35%	24,688
Brent	3,079.61	15,398.04	29,626	15,023	97.56%	14,603
Haringey	2,956.39	14,781.96	25,667	11,589	78.40%	14,078
Leicester	1,557.44	7,787.2	14,190	3400	43.66%	10,790
Trafford	1,598.58	7,992.88	12,226	4,043	50.58%	8,183
Portsmouth	1,021.45	5,107.26	11,498	3,606	70.61%	7,892
Redbridge	2,406.78	12,033.88	11,498	3,606	29.97%	7,892
Havering	1,978.97	9,894.83	13,161	5,376	54.33%	7,785
Wirral	1,602.21	8,011.05	11,283	4,295	53.61%	6,988
Watford	830.54	4,152.71	8,440	1,469	35.37%	6,971
Hillingdon	2,291.66	11,458.28	9,268	2,520	21.99%	6,748
Bournemouth, Christchurch and Poole	2,957.63	14,788.17	12,424	6,028	40.76%	6,396
North Yorkshire	4,076.95	20,384.74	6,390	1,325	6.50%	5,065
Barnet	4,057.07	20,285.35	21,996	15,656	77.18%	6,340

Oldham	910.43	4,552.13	8,010	1,678	36.86%	6,332
Warrington	1,064.42	5,322.11	8,632	2,478	46.56%	6,154
Tonbridge and Malling	1,095.57	5,477.84	6,198	201	3.67%	5,997
Bradford	1,827.69	9,138.43	5,844	16	0.18%	5,828
Hammersmith and Fulham	2,783.26	13,916.29	8,150	2,494	17.92%	5,656
Plymouth	1,289.58	6,447.91	9,663	4,446	68.95%	5,217
Croydon	2,887.05	14,435.23	10,587	5,421	37.55%	5,166
Reading	1,027.69	5,138.43	10,013	5,088	99.02%	4,925
Cheshire West and Chester	1,914.06	9,570.31	12,258	7,628	79.70%	4,630
Bolton	1,184.19	5,920.96	8,567	3,944	66.61%	4,623
Bexley	1,859.78	9,298.91	8,756	4,157	44.70%	4,599