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ASSESSMENT OF DELIVERY OF HOUSING SITES AS AT NOVEMBER 2015

For:

Patrick Conroy
Strategic Planning Policy & Specialist Advice Manager
South Gloucestershire Council.

Prepared by:

Tim Cann MBA Dip (Est Man) FRICS, Senior Director,
Residential Development Consulting.
BNP Paribas Real Estate, Bristol Office.

19th November 2015

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Residential Development Consulting

Private and Confidential
For the attention of Patrick Conroy
Strategic Planning Policy & Specialist Advice Manager
South Gloucestershire Council
Castle Street
Thornbury
South Gloucestershire
BS35 1HT

Tim Cann
Senior Director
BNP Paribas Real Estate
Portwall Place
Portwall Lane
Bristol
BS1 6NA

Tel: +44 (0) 117 984 8405
Fax: +44 (0) 117 984 8401
E-mail: tim.cann@bnpparibas.com

Our Ref: TJC/lg

19th November 2015

Dear Sir

RE-ASSESSMENT OF DELIVERY OF HOUSING SITES AS AT SEPTEMBER 2015

1.0 EXPERIENCE AND QUALIFICATIONS

1.1 I am John Timothy Robert Cann, a Senior Director with BNP Paribas Real Estate ('BNPPRE'), one of the UK's leading real estate consultancies with seven regional offices in addition to its London offices.

1.2 I have responsibility Regionally for BNP Paribas Real Estate's Development Consultancy Business that specialises in residential development agency, appraisal, valuation and consultancy. I am based in Bristol.

1.3 I qualified as an associate with the Royal Institution of Chartered Surveyors in 1987 and became a fellow of the Institution in 2000 practising in the South West Region of the UK while based in Bristol where I still live close by. I have been qualified as a surveyor and involved in the appraisal of residential development land for 25 years. I was until February 2005 the National Director responsible for Chesterton's residential development and consultancy team covering the UK. I am a registered valuer with the RICS.

1.4 I have extensive experience in the residential sector undertaking valuation, advisory and agency roles, and in terms of valuation both in connection with dispute resolution and development funding or decision making.

1.5 I have accepted appointments as Joint Receiver under the Law of Property Act 1925 on portfolios of residential properties and sites. I have given expert opinion in the County, High Court and at the Land Tribunal on residential valuation and development land dispute resolution matters, providing independent determinations, and appeared at Public Local Inquiries as a witness

1.6 I am currently involved in exercising development land options within the UK and have recently sold and am acquiring large residential development sites via exercising development land option agreements within the South West and specifically the Greater Bristol Region.

1.7 BNPPRE's residential land and new homes business is a national enterprise and I am responsible for its regional business including the team based in Bristol covering the South West. I spend the majority of my working time in our Bristol office and live a short distance south of Bristol.

1.8 I currently act for both land owners and national house builders in addition to public sector bodies and believe my experience provides a balanced insight into the residential development market. I believe I am well placed to provide an assessment of the deliverability over the next five years from April 2014 to March 2019 of the sites relied upon by the Council.

2.0 INSTRUCTIONS

2.1 I am instructed by Patrick Conroy of South Gloucestershire Council, to review the new assumptions made by the Council's Planning Officers of the Housing Delivery Estimates for the period April 2015 to March 2020 and by way of an update to my earlier assessment of The Core Strategy in June 2013 and June 2014.

2.2 I am specifically asked drawing upon my experience in this sector to review the existing major sites and the Core Strategy strategic allocations in the South Gloucestershire area to determine the supply aspect in order to assist in a determination by the Council as to whether or not the housing supply policies of the Council's Core Strategy remain up-to-date and should accordingly form the starting point for the determination of planning applications.

2.3 I have also been asked to give an overview on changes to the new homes development market and key influences since 2014 as an understanding of the current housing market is material to the consideration of the Council’s supply forecasts.

2.4 In undertaking my assessment and as a starting point I have considered information relating to housing supply provided by the Council in their July 2015 Residential Land Availability Survey RLS recently updated to the 30th September 2015 incorporating my suggested changes (included at **Appendix 1)**. This document is useful in that it sets out individual site capacity, unit mix, planning status and take up. That RLS identifies in different categories sites currently active and delivering units to the market, those allocated or resolved to grant consent and in the pipeline and other categories dependent upon size or new opportunities.

2.5 I requested and have interviewed the relevant Case Officers and Council Housing Officers to discuss the current planning status and expected delivery timetable, and made general enquiries of the landowners, promoters or house builders where I have deemed it necessary. I have as well drawn upon my own knowledge and experience, including information held by BNP Paribas Real Estate, in forming my opinions on likely housing supply. In all respects I have sought to be consistent in approach to previous assessments and reviews.

2.6 At **Appendix 2** to this report I include my summary schedule on housing delivery of the main sites where I have made adjustments along with a short statement on delivery.

3.0 SOUTH GLOUCESTERSHIRE NEW HOMES MARKET/RESIDENTIAL LAND MARKET

3.1 The new homes market has generally seen an increase in confidence with the recent re-election of the Conservative party. Demand for new homes continues to rise and the Chancellor's announcement that' Help To Buy' will continue past 2016 to 2020 has served to strengthen the market. This is important given the greater majority of the volume new homes sites rely upon these products making up on average 30% of the private market new homes sales.

3.2 The RICS Residential Market Review as at September 2015 indicates that rising prices are matched by new buyer enquiries increasing for the fifth month in succession. The South West in particular is demonstrating a solid growth in transactions. While this is a survey of the wider residential market, the regional and national house builders generally report increasing levels of new build transactions.

3.3 There is clear evidence of a pick-up in house purchase activity. The Council of Mortgage Lenders recently reported the highest lending month in August 2015 since 2007. While there are encouraging signs of growth in demand there is still evidence that supply is not meeting demand and prices as a result are set to increase further. It is widely expected that increasing the delivery of units through greater numbers of outlets should be the response.

3.4 The National House Builders within the South Gloucestershire Region are evidencing improving sales rates since the election on their volume sites. At GHQ Emersons Green and the Emersons Gateway site sales are likely to exceed 280 units in 2015/16, up from 229 in 2014/15. Projected delivery for 2016/17 is likely to be 375 units. Notwithstanding this increase in delivery in the same location it is invariably the case that when the larger volume sites are established they deliver ever quicker their allocations.

3.5 I do not see any signs that the current market trend of improving activity falter. The demand for residential development land is strong in the areas close to the major conurbations but land values are not rising (in the Deep South West and areas some distance to the conurbations land values are stagnating or falling). This is more than likely due to good levels of supply of ready to go sites (in some areas over supply) and the nature of the market now changing from a seller's market to a buyer's one.

3.6 There is considerable frustration being shown by the house builders in the market relating to delays in delivery of major housing schemes where a combination of factors is in play. There has been increasing pressure on resource within the house builders, and greater complexity and time spent in achieving a suitable and implementable consent. However, in my opinion, the evolving and predominant reason for the delays are challenging land acquisition processes where unsuitable historic or incomplete arrangements create commercial pressures as increasingly values are not matching landowner expectations, with resulting disputes causing delay. As a result I have adopted a robust view that where there are signs of these commercial pressures that caution be taken when forecasting.

3.7 In the Budget the Chancellor announced changes limiting during the term of the government the rental growth in Social Rented and Affordable Rented stock. The Immediate effect was felt in the market with RP's bids falling by between 10 and 15%. It has had a significant effect on land values with a number of scheme's values I am selling or acquiring having to be altered. In some cases RP's are refusing to make bids while they re-plan their budgets. The effect of a freeze on affordable rents on delivery of housing completions in 2015/16 is difficult to predict, but there will certainly be added downward pressure on land values which will not be helpful to the earlier points made on landowner expectations.

3.8 The situation and location of the strategic housing site allocations (in the adopted Core Strategy) across the South Gloucestershire area as extensions to the Bristol suburbs and in market town locations, in my opinion offer a good mix of volume housing sites to accommodate future demand. It has been straightforward for home owners to target areas within easy commuter reach of the employment areas surrounding and within Bristol via the motorway network and this has given rise to large residential allocations in places such as Weston-Super-Mare. The introduction of good value choice sites within the Greater Bristol area will no doubt readily capture those commuters that have been buying in North Somerset and other areas of Bristol.

4.0 MY ASSESSMENT OF THE COUNCIL'S HOUSING SUPPLY

4.1 I have utilised the Council's RLS as a basis of my review, included at **Appendix 2**. I have concentrated on the key or large sites when arriving at my conclusions. I have prepared my own assessment of the likely delivery timetable and take up rates of the large site allocations in South Gloucestershire based upon today's market strength and my opinion of the likely planning timetables/site specific constraints reflected in an individual sites market appeal/stage of delivery concerning both planning and acquisition to a start on site. I have reflected the natural progression of the larger sites as they establish themselves to accommodate more outlets or higher sales rates from existing outlets.

4.2 In 2014 I assessed the likely level of delivery for 2014/15 at 1,261 units and it in fact came in at 1,224. This remains significantly above the height of the market in 2007 when the level was 1,003 units. There was a noticeable slowing in the market before the election in May 2015 and while activity has picked up since that reaction to the election is unlikely to have been significant enough to distort the past or projected delivery of housing this year in South Gloucestershire. This short fall is more likely explained by delays in delivery due to other circumstance.

4.3 General lead in times for the delivery of housing units has been extending. Below is an assessment of South Gloucestershire Council's experience for the period 1st January 2010 to the 30th September 2015:

Application type	Number	Average time to determine (days)	Average time to determine (weeks)	Average time to determine (months approx)
Full major applications	249	172	25	6
Reserved matters major apps	62	153	22	6
Outline majors	49	384	55	14

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4.4 When considering the larger allocations the following timetable has been evidenced and is likely for those yet to start on site:

	From date of Submission	
Outline Application to resolution to grant	- 8 months	
Complete Section 106	- 6 months	(14 months)
Design Stage	- 3 months	(17 months)
Reserved matters (Infrastructure/housing first phase)	- 6 months	(23 months)
Pre-start period to prepare works contracts	- 3 months	(26 months)
Major site enabling infrastructure works	- 4 months	(30 months)
Period to first house completion	- 3 months	(33 months)

And in summary an estimated total of 33 months to first housing completion.

4.5 My findings on the larger sites are summarised at **Appendix 2** and cover the 5-year period April 2015 to March 2020. In reviewing the Council's RLS I understand that the findings of my report are to be used by the Council to provide an independent audit of the Council's current housing land supply estimates to compare against their current minimum requirement as notified to me at 10,741 units.

4.6 **Summary of My Findings at Appendix 2**

April to March	15/16	16/17	17/18	18/19	19/20	5 years
Total Completions	1,001	1,476	2,052	2,115	2015	**8,659**

4.7 Forecasting is all about judgements and in terms of the delivery of strategic land you can only make that judgement based upon your experience in handling development sites, and the best evidence you have in front of you. The timing of delivery of housing from strategic sites is inherently difficult to predict accurately, and there are numerous variables, such as delays from negotiation of planning agreements, the landowner delaying the sale of the consented land, unresolved/unforeseen abnormal infrastructure/works, and even poor weather.

4.8 I have judged that the Councils updated forecast for 1,001 completions in 2015/16 ignoring small site windfalls be robust. This is some 500 units below my earlier forecast for this period. The main reasons for this shortfall in 2015/16 and in terms of the knock on for the 5 year likely trajectory for housing supply are not the suitability of the sites but delivery issues leading to delay. In a number of cases given further sites rely on infrastructure from the neighbouring site there is a knock on effect.

4.9 The main contributing reason for the likely 500 unit's shortfall in 2015/16 is significant delays to unresolved land owner positions relating to value. For example:

- East Harry Stoke – due to lack of co-operation between landowners - a 2 year delay likely,
- South of Harry Stoke (later phase) – dispute between landowners and developers - a likely 3 year delay,
- Cribbs Patchway West A4018 – Land owner agreement delays likely to be 2 years,
- Cribbs Patchway Fishpool Hill – land owner dispute – 1 years delay,
- Filton Airfield – change in ownership and speculator purchase – estimated 1 year delay.

Other factors relate to viability or technical issues to achieve a suitable planning consent:

- North Park Farm, Thornbury – resolution to a drainage solution – delay of 1 year.
- Land at North Yate - resubmission of planning in relation a major technical infrastructure change – delay of 1 year.
- Land East of Coldharbour – viability argument – 1 year delay.

4.10 While it is clear that delays do not mean the schemes are lost it does generate a short term shortfall in the target.

4.11 The Council is calling for sites to meet the shortfall likely in the 5 year period and necessarily have to be consented and built out within that period. There is little prospect of large complex site allocations performing in the period as there will be at least a 33 month lead in all being well. In my opinion self-contained sites will at best deliver 2.25 years of housing after the lead in period at circa 77 private and affordable housing units per annum (based upon 35% affordable). Within the remaining 2.25 years of the 5 year period this would suggest the equivalent of a maximum of circa 175 units for an outlet or small site. This is based on schemes delivering in the main urban area and market towns. Therefore a lower average maximum would be reasonable should schemes from across South Gloucestershire, including the rural areas be considered. This is because the annual rate of completions on sites within the rural areas is likely to be lower.

4.12 The risk that South Gloucestershire faces however is that the residential development sector is highly unlikely to be able to respond to the growth required and build at rates above the current forecast given it would require the medium to large house builders to virtually double their output. The current forecast is already suggesting significant growth beyond previously evidenced levels. The sector is not achieving significant new entrants (in fact at a regional level it is shrinking) and while materials are now readily available, skilled workers are already in short supply.

4.13 In my opinion the South Gloucestershire large sites allocations gives a good spread and mix of sites in both market towns, and Greater Bristol/urban edge locations to suit the likely range and value choice required for home purchase. It should also be noted that the combined totality of a significant number of these sites offer unit numbers well in excess of those that are targeted within the 5 year period. In terms of improved future demand these schemes are well placed to react to that demand by each outlet delivering higher numbers of homes for sale. Home production is capable of being increased to meet the demand and that increased demand can be accommodated in the allocations already made.

4.14 Affordable Housing delivery forms a significant portion of the take up in the area. In the period 2014/15 326 new affordable homes were completed (187 social rent, 49 affordable rent and 90 intermediate affordable housing), representing just under 27% of overall dwelling completions. In addition to the affordable housing to be provided through planning policy the HCA has allocated funding to RP's to deliver just over 600 new affordable homes in SGC in the period 2015/18.

5.0 CONCLUSIONS

5.1 I have concluded that the council should update their 2015 RLS by the revised delivery rates set out in my **Appendix 2**.

5.2 My previous conclusions stated that there was more than adequate allocated housing supply in the 5 year period and that there was more than adequate strategic capacity in the larger sites to accommodate increased demand akin to historical take up in previous stronger market cycles. Given delays in the delivery of the larger volume housing sites there is reason to change that earlier opinion.

5.3 As a result of my current review I am of the opinion that with regard to the key sites and despite the evidence of positive market movement over the last 12 months, that there is now less than adequate allocated housing supply in the 5 year period.

5.4 Given the indicators to date in 2015/16 of delays and from the conversations I have had I believe there is an opportunity to seek to mitigate that shortfall in 2015/16 but more particularly in the period 2016/2020 by engaging with the national house builders in exploring means of earlier delivery on the major sites, and increased production on active sites.

Yours Faithfully

Tim Cann MBA Dip (Est. Man) FRICS
RICS Registered Valuer
Regional Head of Residential Development Consulting
For and on behalf of BNP Paribas Real Estate

APPENDIX 1

South Gloucestershire Residential Land Availability Survey (RLS)

Appendix A: Actual and Expected House Completions - South Gloucestershire 2006 to 2027 (Net)

(See Appendix B for Commentary on Expected Completions)

(Please note that the figures shown incorporate the most upto date information available including large site completions and large site planning permissions/resolutions to grant planning permissions at 30th September 2015)

			Past Completions									Years 1 to 5					Years 5 to 10					Years 11 to 12		2027+	
			06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	20/21	21/22	22/23	23/24	24/25	25/26	26/27	27+	Total
RLS Ref.	Planning Application Number	Address																							
0002hn		Bradley Stoke		56	34	32																			122
0002hk		Bradley Stoke	147	35																					182
0003		Dragon Road, Winterbourne			1																				1
0005		Hortham		77	107	52	25	9																	270
0006a		Stoke Park Hospital	1																						1
0007		Filton College, Filton	51	26																					77
0008a		Charlton Hayes (PT09/1271/RM) - Bovis [H18]					8	43																	51
0008b		Charlton Hayes (PT09/0765/RM) - Bovis [H21, H22, H23]					75	18	18																111
0008c		Charlton Hayes (PT10/0042/RM) - Bovis [H19, H20]						26	27	7															60
0008d		Charlton Hayes (PT12/1137/RM) - Bovis [LC1]								33															33
0008e		Charlton Hayes (PT11/1766/RM) - Bovis [Part MU5, Part MU6]							40																40
0008f		Charlton Hayes (PT11/2687/RM) - Bovis [Part H50, Part H51]							25	28															53
0008h		Charlton Hayes (PT12/0656/RM) - Barratt [H30]							31	15															46
0008i		Charlton Hayes (PT12/1849/RM) - David Wilson [H27, H32]								34	6														40
0008j		Charlton Hayes (PT12/0521/RM) - David Wilson [H31]							22	2	1														25
0008k		Charlton Hayes (PT12/2470/RM) - Barratt [H28, H29, H33]								85	16														101
0008m		Charlton Hayes (PT13/1003/RM) - Bovis [H25, H26]								10	65														75
0008o		Charlton Hayes (PT13/0446/RM) - Bovis [H35, MU3]								65															65
0008r		Charlton Hayes (PT13/4370/RM) - Bovis [H39]									54														54
0010a		Wallscourt Farm (Phase 1)			40	60																			100
0010b		Wallscourt Farm (Phase 2)				6	72	56	17	9															160
0010c		Wallscourt Farm (Phase 3)					42	27	63	61															193
0010d		Wallscourt Farm (Phase 4)					28	28	21																77
0010e		Wallscourt Farm (Phase 5 part)									137														137
0010f		Wallscourt Farm (Phase 7)							22	50	25														97
0012		162-164 Gloucester Road, Patchway	-5		4	12																			11
0015		Toghill Lane, Doynton	10																						10
0017		46-92 Milton Road, Yate	16																						16
0018		Land at Broad Lane, Yate	23																						23
0020		Coopers Site, Westerleigh Road, Yate							14	46	7														67
0022		472-478 Filton Avenue, Filton		21																					21
0023		New Road, Filton			6	66																			72
0024		West End, Marshfield		12	5																				17
0025		Whiteshill House, Hambrook	10																						10
0026		New Road, Rangeworthy	16	5																					21
0027		The Galleon, Conygre Road, Filton	12																						12
0028		The Lawns, Yate			14																				14
0029		Fishpool Hill, Easter Compton	-1		14																				13
0033		Land at Siston Hill, Siston	77	211	96	63	57																		504
0036aa		GHQ Emersons Green (PK13/2790/RM) - Linden									45														45
0037		North of Douglas Road, Kingswood	35	96																					131
0038		Former Woodstock Special School, Courtney Road						66																	66
0040		Cloverdale Drive, Longwell Green	2																						2
0041		Land Off Southway Drive, Warmley		13					14	14															41
0046		Mounthill Nursery, Kingswood		8	6																				14
0047		Summit Youth Centre, Kingswood		20	51																				71
0048		Hanham Road DSO, Kingswood	21	3																					24
0054		Church Road, Kingswood	23																						23
0060		Carsons Road, Kingswood			4																				4
0063		Depot Downend Road, Kingswood	14																						14
0064		29-35 High Street, Kingswood	14																						14
0065		R/O 1, 3 and 7 Tower Road South, Kingswood			13																				13
0066		65 Cadbury Heath Road, Kingswood	1	12																					13

0067		Jubilee Road, Kingswood		-1	24																			**23**
0068		1-3 Colston Street, Soundwell		14																				**14**
0069		21 Portland Street, Soundwell	4	9																				**13**
0070		Crossroads Service Station, Downend		13																				**13**
0071		Downend Lower School, Northview, Downend			9	30	13																	**52**
0073		Kingsway Engineering, Hanham		14																				**14**
0074		Lintham Drive, Kingswood			20	48																		**68**
0075		36 High Street, Staple Hill		13																				**13**
0076		Rear of Cossham Street, Mangotsfield			13																			**13**
0077		Former Courtaulds Factory, Staple Hill			21	24																		**45**
0079		Bath Road, Thornbury			30	15																		**45**
0080		Cambrian Drive/Wellington Road, Yate					60	10																**70**
0081		Cattle Market, Thornbury			22																			**22**
0082		Siblands, Gillingstool, Thornbury			15	8																		**23**
0084		BFS Diecutting, 27 Hanham Road, Kingswood						14																**14**
0085		Adj.22 Memorial Road, Hanham				14																		**14**
0086		Queens Road, Cadbury Heath			9																			**9**
0088		Priory Court, Hanham				28																		**28**
0090		Broad Street/Beaufort Road, Staple Hill			14																			**14**
0091		Passage Road, Almondsbury						10	2															**12**
0092		Adjacent to Southmead Road, Filton						65																**65**
0093		23 Stanbridge Road, Downend								-1	12													**11**
0094		Factory, Morley Road, Staple Hill						3	29															**32**
0097		Wall Tyning Nursing Home, Bitton			-2	11																		**9**
0099		95 High Street, Kingswood					10																	**10**
0100		148 Hanham Road, Kingswood			14																			**14**
0101		Former Police Station, High Street, Kingswood					14																	**14**
0102		17 and 25a Overnhill Road, Downend				-1	-1	38																**36**
0105		Power Electrics, Morley Road, Staple Hill						14																**14**
0107		Roseacre, Harry Stoke Road, Stoke Gifford					14																	**14**
0110		Soundwell Centre, Soundwell						11																**11**
0111		67-73 Bath Road, Longwell Green				-3	29																	**26**
0112		The Rotunda Club, Moravian Road, Kingswood							14															**14**
0114		894-896 Filton Avenue, Filton							-2	10														**8**
0115		Fiveways, New Cheltenham Road, Kingswood						40																**40**
0116		Factory Site, Portland Street, Staple Hill						30																**30**
0117		Sir Bernard Lovell Playing Fields, Oldland Common								13														**13**
0118		Former School, Beaufort Road, Downend					63																	**63**
0119		Land adjacent Hares Farm, Mapleridge Lane				10																		**10**
0120		Land at Abbots Road, Hanham							14															**14**
0122		The Meads, Frampton Cotterell						88	73	27														**188**
0123		Sea Stores, Kennedy Way, Yate					4	111	60	53														**228**
0124		Land at Parkway North, Stoke Gifford					2	32																**34**
0130		Land at junction of Whittucks Road and Abbots Road, Hanham						15	19															**34**
0131		Land off Catbrain Hill, Cribbs Causeway							2	42	6													**50**
0139		Former Coopers Works, Westerleigh Road, Yate								82	10													**92**
0140		Rear of 60 Wotton Road, Charfield							6	10														**16**
0141		Land at Savages Wood Road, Bradley Stoke							74															**74**
0143		Frome Court, Thornbury								14														**14**
0144		Land off Broad Lane, Yate								14														**14**
0149		Prinknash Court, Abbotswood, Yate									-4													**-4**
0150		28-50 Gloucester Road, Patchway							-12															**-12**
0154		Police Station, Thornbury									36													**36**
0157		Moravian Road, Kingswood									16													**16**
0159a		University of the West of England - Student housing									38													**38**
0174d		Oldlands/Newlands, Coalpit Heath - Merlin schemes (PT14/0943/PND)									-10													**-10**
0174j		Oldlands/Newlands, Coalpit Heath - Merlin schemes (PT14/4451/PND)									-8													**-8**
		Small Sites fewer than 10 dwellings - North Fringe of Bristol	27	67	49	46	35	21	22	30	43													**340**
		Small Sites fewer than 10 dwellings - East Fringe of Bristol	76	150	172	121	67	75	101	66	104													**932**
		Small Sites fewer than 10 dwellings - Chipping Sodbury	1	1	0	0	4	1	2	15	6													**30**
		Small Sites fewer than 10 dwellings - Yate	6	10	17	2	16	7	5	12	2													**77**
		Small Sites fewer than 10 dwellings - Thornbury	10	18	2	9	8	2	5	9	6													**69**
		Small Sites fewer than 10 dwellings - Elsewhere	98	100	92	89	67	63	70	70	66													**715**
0008	PT03/3143/O	Charlton Hayes											89	131	212	115								**547**
0008l	PT12/3040/RM	Charlton Hayes (PT12/3040/RM) - Bovis [Part H52]								6			3											**9**
0008n	PT12/4119/RM	Charlton Hayes (PT12/4119/RM) - Bellway [H34, H36]								25	56	5												**86**
0008p	PT13/0559/RM	Charlton Hayes (PT13/0559/RM) - Bovis [Part H51, Part H52 to H56]								23	78	36												**137**
0008q	PT13/4148/RM	Charlton Hayes (PT13/4148/RM) - Goodman [MU5, MU6]												28	28									**56**
0008s	PT13/4443/RM	Charlton Hayes (PT13/4443/RM) - Bovis [H8, H9, H10]									5	110												**115**

0008t	PT14/4954/RM	Charlton Hayes (PT14/4954/RM) - Bellway [H40, H47, H48]										30	60	30											**120**
0008u		Charlton Hayes (Pre. App.) - Barratt [H37, H38, H41 to H46, H49]											60	60	60	57									**237**
0008v	PT15/1349/RM	Charlton Hayes (PT15/1349/RM) - Bovis [MU2]											36												**36**
0008w	PT15/3344/RM	Charlton Hayes (PT15/3344/RM) - Linden [H38]											14	14											**28**
0008x		Charlton Hayes (Awaiting PT15/1676/RM) - Bovis [H15, H17]											38	37											**75**
0009	PT02/3497/F	Former Lime Works, Itchington											9	8											**17**
0010g	PT15/0870/RM	Wallscourt Farm (Phase 5 part) (PT15/0870/RM)											32												**32**
0011a	PT15/1179/O	East of Coldharbour Lane - Phase 1 (PT15/1179/O)											75	120	175	175									**545**
0011b	PT15/1179/O	East of Coldharbour Lane - Phase 2 (PT15/1179/O)															100	49							**149**
0021	PT06/1001/O	Land at Harry Stoke, Stoke Gifford														50	100	150	150	150	150	150	100	34	**1,034**
0021a	PT12/1302/RM	Land at Harry Stoke, Stoke Gifford (PT12/1302/RM)								54	68	44													**166**
0034	PK08/3230/F	Hanham Hall Hospital, Hanham					2		25	58	78	22													**185**
0035	PK10/1057/F	South of Douglas Road, Kingswood														50	50	100	100	34					**334**
0036a	PK04/1965/O	GHQ Emersons Green											58	168	275	275	275	106							**1,157**
0036ab	PK13/2741/RM	GHQ Emersons Green (PK13/2741/RM) - Barratt									46	83													**129**
0036ac	PK13/2648/RM	GHQ Emersons Green (PK13/2648/RM) - Taylor Wimpey									68	18													**86**
0036ad	PK13/2646/RM	GHQ Emersons Green (PK13/2646/RM) - Persimmon									52	4													**56**
0036ae	PK13/2647/RM	GHQ Emersons Green (PK13/2647/RM) - Persimmon									61	18													**79**
0036af	PK13/2649/RM	GHQ Emersons Green (PK13/2649/RM) - Taylor Wimpey									2	83	50												**135**
0036ag	PK14/4110/RM	GHQ Emersons Green (PK14/4110/RM) - Persimmon										39	60												**99**
0036ah	PK15/0681/RM	GHQ Emersons Green (PK15/0681/RM) - Barratt											48	48											**96**
0036ai	PK14/3540/RM	GHQ Emersons Green (PK14/3540/RM) - Bellway											59	59											**118**
0036b	PK09/1009/O	Gateway Site Emersons Green											50	59	65										**174**
0036ba	PK14/2715/RM	Gateway Site Emersons Green (PK14/2715/RM) - Linden										35	50	41											**126**
0039	PK04/1724/O	Waterworks Site, Soundwell Road															25	25	25						**75**
0095	PK08/1530/F	Kingswood Trading Estate, Kingswood											25	32											**57**
0109	PT11/3811/F	Rear of 13, 14 and 15 Harry Stoke Road, Stoke Gifford								4	3	6													**13**
0127	PK10/2627/F	Mount Pleasant Farm, Longwell Green												35	35										**70**
0129a	PK12/1828/F	Barnhill Quarry, Chipping Sodbury										60													**60**
0129b	PK14/0612/RM	Barnhill Quarry, Chipping Sodbury										30	40	39											**109**
0132	PT11/1442/O	North of Park Farm, Thornbury (PT11/1442/O)													48	100	51	52	52	51	19				**373**
0132a	PT13/0919/RM	North of Park Farm, Thornbury (PT13/0919/RM)											25	50	52										**127**
0133	PK12/1913/O	Land at North Yate - Heron (PK12/1913/O)												125	250	250	250	250	250	250	250	250	250	75	**2,450**
0133a	PK13/1185/RM	Land at North Yate (PK13/1185/RM) - Peg Hill									6	60	60	60	49										**235**
0137	PK15/0718/RM	Hill View and Hill Top, Woodstock Road, Kingswood											6	6											**12**
0138	PT13/0002/O	Frenchay Hospital												50	50	50	50	50	50	50	50	50	40		**490**
0145	PK14/4698/F	Minelco site, Randolph Avenue, Yate											17	17											**34**
0146	PK13/2792/RM	Blackhorse Day Centre, Mangotsfield									27	4													**31**
0147	PK14/0120/F	Rodford Primary School, Yate (PK14/0120/F)										27	30												**57**
0151	PT12/2395/O	North of Morton Way, Thornbury											41	50	50	50									**191**
0151a	PT12/2395/O	North of Morton Way, Thornbury									31	78													**109**
0153	PT13/0510/F	Adj.The Burltons, Cromhall											6	5											**11**
0155	PT13/0404/O	Cedar Lodge, Charlton Common, Patchway												13											**13**
0156	PT12/3707/O	Eastwood Park, Falfield											-10	20											**10**
0158	PT13/0870/O	Alexandra Way, Thornbury												15	15										**30**
0160	PK13/2851/F	Former Police Station, Staple Hill										16	16	16											**48**
0161	PK14/4964/F	Wapley Court, Yate (PK14/4964/F)											12	12											**24**
0162	PT13/3396/F	Former Police Station, Filton									3	15													**18**
0163	PK13/2981/R3O	Cadbury Heath Youth Centre, Park Road, Warmley											12	13											**25**
0164	PK13/1956/F	Concrete Plant, Quarry Road, Chipping Sodbury												6	5										**11**
0165	PT13/3101/F	Pound Mill, Lower Morton, Thornbury											12												**12**
0166	PT14/4961/F	Alexandra, Midland Way, Thornbury											12	11											**23**
0174a	PT14/1490/F	15 Oldlands Ave. Coalpit Heath - Merlin scheme (PT14/1490/F)											-2	6											**4**
0174b	PT14/1489/F	Bell Rd. Coalpit Heath - Merlin scheme (PT14/1489/F)									-2		4												**2**
0174c	PT14/1518/F	Ridings Rd. Coalpit Heath - Merlin scheme (PT14/1518/F)											-4	8											**4**
0174e	PT14/1496/F	Willow Way, Coalpit Heath - Merlin scheme (PT14/1496/F)											-6	8											**2**
0174f	PT14/1836/F	Ware Court, Winterbourne - Merlin scheme (PT14/1836/F)										-4													**-4**
0174g	PT14/0344/F	Newleaze House, Filton - Merlin scheme (PT14/0344/F)									-37	16													**-21**
0174h	PK14/4994/F	Algars Drive, Iron Acton - Merlin scheme (PK14/4994/F)											-8	14											**6**
0174i	PK14/4995/F	Nibley Lane, Iron Acton - Merlin scheme (PK14/4995/F)											-8	13											**5**
0174k	PT14/1492/F	7 Oldlands Ave. Coalpit Heath - Merlin scheme (PT14/1492/F)											22												**22**
0174l	PT14/1517/F	12 Oldlands Ave. Coalpit Heath - Merlin scheme (PT14/1517/F)										-2	17												**15**
0174m	PK14/3334/PND	Algars/Chilwood, Iron Acton - Merlin scheme (PK14/3334/PND)											-2												**-2**
0174n	PT15/1262/F	Newlands Ave. Coalpit Heath - Merlin scheme (PT15/1262/F)											-6	11											**5**
0174o	PT15/1265/F	Newlands Ave. Coalpit Heath - Merlin scheme (PT15/1265/F)											-4	4											**0**
0174p	PT15/2099/F	Coalville Rd. Coalpit Heath - Merlin scheme (PT15/2099/F)												4											**4**
0174q	PK15/1640/F	Garage site, James Road, Soundwell (PK15/1640/F)												5											**5**
0175	PT14/0760/F	Extra Care scheme Charlton Hayes (PT14/0760/F) [H24, LC3]											53												**53**
0177	PT14/3203/F	Charlton House, Filton (PT14/3203/F)											22												**22**

0178	PK14/2628/F	17-19 Edgeware Road, Staple Hill (PK14/2628/F)											-2	12											**10**
0182	PT14/4404/F	98 Gloucester Road, Filton (PT14/4404/F)										-1	10												**9**
0183	PK15/0579/F	47 Broad Street, Staple Hill (PK15/0579/F)											10												**10**
0184	PK15/1645/F	2-4 Hanham Road, Kingswood (PK15/1645/F)											10												**10**
0185	PT13/4182/O	South of Wotton Road, Charfield (PT13/4182/O)												10	48	48									**106**
0186	PT14/2849/F	Bonnigton Walk, Stoke Gifford (PT14/2849/F)										15	30	30	20										**95**
0187	PT14/2778/O	Land at Wotton Road, Charfield												16	15										**31**
0036c		Safeguarded land, Emersons Green																50	50	100	150	100	50		**500**
0128	PK15/0532/F	Intier Site, Bitton (PK15/0532/F)											10	60	43										**113**
0133		Land at North Yate - Taylor Wimpey																			30	150	120		**300**
0134a	PT14/0565/O	Cribbs/Patchway NN - West of A4018 (PT14/0565/O)													100	100	100	100	100	100	100	100	100	100	**1,000**
0134ba	PT12/1930/O	Cribbs/Patchway NN - Wyke Beck Rd/Fishpool Hill (PT12/1930/O)												100	150	150	150	150	150	150	100				**1,100**
0134bb		Cribbs/Patchway NN - Charlton Common (Pre-App)														100									**100**
0134c	PT14/3876/O	Cribbs/Patchway - Former Filton Airfield (PT14/3876/O)													100	150	250	250	250	250	250	250	250	750	**2,750**
0134d		Cribbs/Patchway NN - Remainder of Area															50	50	100	100	100	100	100	150	**750**
0135		New Neighbourhood - East of Harry Stoke														50	100	150	200	250	250	250	250	100	**1,600**
0148		The Heath/Newton House, Cadbury Heath												60											**60**
0169	PT14/5028/O	Goodmans additional land "Northfield Park" (PT14/5028/O)												35	50	35									**120**
0179		Hollies Farm, Rangeworthy												10	10										**20**
0174?	PK15/1651/F	Irving Close, Staple Hill (PK15/1651/F)										-20	25												**5**
0174?		Phase 2 - Merlin schemes (Little Stoke)										-12		18											**6**
0174?		Phase 2 - Merlin schemes (Filton)										-24		40											**16**
		Small Sites *										**210**	**210**	**210**	**210**	**210**	**210**	**210**	**210**	**210**	**210**	**210**	**210**	**1,890**	**4,410**
			689	**1,003**	**916**	**742**	**714**	**923**	**823**	**1,095**	**1,224**	**1,001**	**1,476**	**2,052**	**2,115**	**2,015**	**1,761**	**1,742**	**1,687**	**1,695**	**1,659**	**1,610**	**1,470**	**3,099**	**31,511**

Total 2006 to 2015	Total 2015 to 2020	Total 2020 to 2025	Total 2025 to 2027
8,129	8,659	8,544	3,080
28,412			

Key

(white) Sites fully complete. This category comprises Large sites of 10 homes or more which are listed individually and Small sites of less than 10 dwellings which are aggregated by area.

(green) Sites with planning permission. This category comprises Large sites of 10 homes or more with outline, detailed, and/or reserved matters permission which are listed individually.

(orange) Sites awaiting the completion of a S106 agreement, allocated in the South Gloucestershire Local Plan, identified in the Core Strategy, or allocated in the Policies Sites and Places Plan.

(pink) Sites currently progressing through the development management process.

Note

*** Small Sites** Small sites are sites fewer than 10 homes and total 721 with planning permission (outline, detailed, and/or reserved matters) of which 247 are under construction (April 2015). Monitoring of past completions of small sites reveals an annual average of 185 units for the period 1996 to 2015 and since the start of the SGC Core Strategy period in 2006 annual average of 241 units. To reflect these averages a conservative allowance of 210 dwellings per annum, falling between the two figures, has been assumed.

BNP PARIBAS REAL ESTATE

APPENDIX 2

Summary schedule on housing delivery of the main sites where adjustments made and a short statement on delivery

South Gloucestershire Housing Trajectory 29th September 2015

Key Site Projections				**April to March**	**15/16**	**16/17**	**17/18**	**18/19**	**19/20**		**Comment**
0021a	Harry Stoke		Highbrook Park		44						Outlet on site and selling well - forecast by Crest that complete all new build by end March 2016 is robust
0021	Harry Stoke		Later phases						50		Delayed in delivery due to land ownership dispute effecting balance of 1034 unit allocation - scheme capable of a minimum of two outlets
0095	Kingswood Trading Estate					25	32				Strongvox Ltd - spring 2016 start on site after viability matters resolved housing delivery within one year
0132 & 0132a	North Park Farm, Thornbury					25	50	100	100		Delayed due to technical drainage issue (now resolved) - started on site and show home release estimated July 2016 and first Completions Sept 16. Likely second outlet next to land at Butt lane (0132a) delayed till 2018/19
0133	Land at North Yate						125	250	250		Delay given resubmission of planning concerning pylons. Section 106 signed and options being exercised, period for design and reserved matters likely complete Aug 16. First phase infrastructure start Oct 16 first sales begin Jul 17. source BNPPRE acting consultant
0133a	Peg Hill North Yate				60	60	60	49			Scheme successfully trading 78 units sold or reserved to date after Feb 15 release.
'0151	North of Morton Way, Thornbury					41	50	50	50		Bloor's expect to overlap schemes and trade as a single outlet
0151a	North of Morton Way, Thornbury				78						Under Construction - Bloor's expect to trade at average of 50/annum given single outlet -
0011a	Land East Coldharbour					75	120	175	175		Affordable viability concluded, Taylor Wimpey targeting first sales April 2016, includes additional outlet for an extra care scheme alongside market housing
0035	South of Douglas Road, Kingswood								50		Likely to proceed only as a small single block conversion in the period as landowner unlikely to progress remainder. There has been a fire in Douglas House. Viability was addressed at planning stage and so available.
0134ba	Cribbs/Patchway		Fishpool Hill				100	150	150		Delayed delivery due to land owner dispute. Persimmon have a signed Section 106 and are progressing their acquisition process which is not likely to conclude till early 2016, first infrastructure completion Oct 16 first sales April 17
0134bb	Cribbs/Patchway		Charlton Common						100		Redrow requires Persimmon at Fishpool Hill to complete first phase infrastructure which will create a delay in delivery
0134c	Cribbs/Patchway		Filton Airfield					100	150		Sale in progress to speculator/investor with residential development land delivery likely to fall behind neighbouring sites
0134a	Cribbs/Patchway West of A4018							100	100		Taylor Wimpey have land acquisition and planning challenges which are causing delays and envisage first sale no earlier than April 2018.
0135	East Harry Stoke - Area North and South or Railway								50		SGC/Crest/Private land owner - Master planning Stage pre-application but constrained by delays due to a lack of landowner cooperation
0138	Frenchay Hospital						50	50	50		Redrow to start demolition in the coming weeks and then a period for urban design but likely starting housing construction Q3 2016 sales latest end Q1 2017
0128	Former Intier Site, Bitton					10	60	43			St Congar - recent new owner resetting viability - with agreement to trade to Linden on consent. Sub structure work required. New scheme 113 units expected consent end 2015 and first sales end first quarter 2017