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HOUSING DELIVERY AND SUPPLY REPORT 2020

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This document sets out the housing position for each local authority in Kent, using the indicators of supply (5YHLS) and delivery (Housing Delivery Test) as set out in the National Planning Policy Framework (NPPF). Taking account of delivery and supply, this document provides an outlook for housebuilders and developers.

SUPPLY:

Local Planning Authorities (LPA) are required to maintain a 5-year housing land supply (enough land to deliver their annualised housing requirement for a 5-year period).

The sites should be deliverable within that period. Where a LPA cannot demonstrate a 5YHLS, as per paragraph 11d of the NPPF, the presumption in favour of sustainable development applies, i.e. planning permission for housing (in sustainable locations) should be granted unless there are significant or demonstrable adverse impacts.

Information is obtained from LPA’s most recent publication either Authority Monitoring Report, Housing Delivery Test Action Plan or even SHLAA – this is hyper-linked in the figure with the date of the document’s publication (which is not necessarily the point in time when figure was calculated).

DELIVERY:

The Housing Delivery Test (HDT) is a how many homes were delivered in the last 3 years against the homes required in that same period.

From 2019, LPAs are penalised for not delivering housing by either Action Plan (<95%), Buffer (<85%) or Presumption (<45%).

In short, Action Plan requires a plan from LPA to boost housing delivery, Buffer requires 20% added to 5YHLS requirement, Presumption means presumption in favour of sustainable development applies.

LOCAL PLANS:





Local Plans play a fundamental role in maintaining housing land supply.

A new Local Plan will ensure that sufficient sites are allocated to meet the housing requirement over the plan period (for a short while at least).

Older LPs / Core Strategy’s tend to be based on out-dated housing requirement figures (i.e. not standard methodology), as such contain less allocations to meet up-to-date requirements (any plan which is over 5 year’s old must use standard method number).

FORECAST:

The forecast is a quick assessment of the situation with regards to the figures. The better the outlook, the better it is for developer looking to bring forward housing proposals. The forecast outline is as follows;

-  Sunny
-  Sunny spells
-  Cloudy
-  Rain

PI have experience in nearly all of the LPA, a few, we do not. The commentary is indicative to best of our knowledge and experience.



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LOCATION	HDT 2018	HDT 2019	HDT MEASURE	5YHLS	ADOPTED LOCAL PLAN	FORECAST
Ashford BC	110%	88% (-22%)	Action Plan	5.12 (5% buffer) – Nov 2019	Local Plan (2019) 1 year old	An unconvincing 5.12 years HLS. Many of the strategic sites within the supply haven't yet commenced, clearly some potential to challenge figures, particularly if bringing forward large-scale housing proposals. Expect supply will run below 5 years very soon, this will certainly be the case if delivery falls and 20% buffer is added.
Canterbury CC	117%	87% (-30%)	Action Plan	6.79 (5% buffer) – 2018/19 AMR	Local Plan (2017) 3 years old	A high 5YHLS figure. About one third of their housing requirement, c. 4,000 units, to be delivered via one site – Land South of Canterbury – any delays could dramatically affect delivery and supply. One to monitor.
Dartford BC	181%	161% (-20%)	None	5.64 (5% buffer) – July 2019	Core Strategy (2011) 9 years old	Old Core Strategy however, DBC have a 5YHLS using updated housing need figures. Dartford benefitting from progressing strategic sites as identified through their Core Strategy – this includes Ebbsfleet Garden City.
Dover DC	131%	92% (-41%)	Action Plan	5.3 (5% buffer) – December 2019	Core Strategy (2010) 10 years old	Dover have a well-balanced supply from existing consents, allocations and windfalls. Should reinforce their good performance through additional allocations in the new Local Plan, adoption expected in 2022.
Folkestone and Hythe DC	139%	n/a	n/a	7.19 (5% buffer) – April 2018	Core Strategy (2013) 7 years old	Slightly out-dated 5YHLS information, however a high figure from 2018. The 5YHLS has been not been updated using standard method number (as would be required as Core Strategy is over 5 years old). This could change the level of supply dramatically. No figures for HDT in 2019 (not sure why) – so no confirmation on whether 20% will be applied. One to monitor and update.
Gravesham BC	64%	75% (+11%)	Buffer	4.1 (20% buffer) – February 2018	Core Strategy (2014) 1 year old	20% buffer has been imposed and brought down HLS to 4.1. The Council attribute the lack of delivery to the delays in strategic sites within the Ebbsfleet Development Corporation Area. Will be a difficult task to bring delivery and supply back up to required levels.
Maidstone BC	112%	135% (+23%)	None	6.3 (5% buffer) – April 2019	Local Plan (2017) 3 years old	Recently adopted LP, robust 5YHLS and high delivery. Unlikely to fall below required levels in short-term.



LOCATION	HDT 2018	HDT 2019	HDT MEASURE	5YHLS	ADOPTED LOCAL PLAN	FORECAST
Medway Council	47%	46% (-1%)	Buffer	3 (20% buffer) – February 2020 (via appeal)	Local Plan (2019) 17 years old	The Council have not published their 5YHLS in their Authority Monitoring Report, however, from recent appeal decisions, we understand that this is about 3 years including a 20% buffer and using the standard methodology number. New Local Plan still in very early stages, draft expected later in 2020.
Sevenoaks DC	94%	71% (-23%)	Buffer	5 (5% buffer) – April 2019	Core Strategy (2011) 9 years old	Sevenoaks have supply for 9 more units than required. Expect this to fall under 5 years when figures are updated in April 2020 and 20% buffer. The new Local Plan Examination hearings have been cancelled by Inspector, Council do not wish to withdraw LP, one to watch for further developments.
Swale BC	74%	77% (+3%)	Buffer	4.6 (20% buffer) – February 2019	Local Plan (2017) 3 years old	Swale are underperforming on delivery and supply, despite recently adopted LP. There have been some political issue in the borough which have hindered schemes coming forward, also some delays on strategic sites. The 4.6 figure is slightly out-dated and it is expected that the figure will be lower once updated in Spring 2020. Presumption applies and sustainable sites should be granted.
Thanet DC	44%	35% (-9%)	Presumption	5.8 (20% buffer) – April 2019	Local Plan (2006) 14 years old	Council claim to have 5.8 HLS, however this is based on a very 'backloaded' housing trajectory, historically completions are much lower those projected in coming years. Notwithstanding this, the presumption is in place due to significant under-delivery. Local Plan slowly going through Examination, one of the main issues delaying adoption is housing numbers.
Tonbridge and BC	155%	117% (-38%)	None	2.6 (5% buffer) – March 2020	Core Strategy (2007) 13 years old	High level of delivery however very low housing land supply. Presumption likely to be in place until new Local Plan adopted, Hearings taking place in Spring 2020.
Tunbridge Wells BC	88%	86% (-2%)	Action Plan	4.7 (5% buffer) – April 2019	Core Strategy (2010) 10 years old	At present Council do not have a 5YHLS, Council will seek to address this through new Local Plan Submission draft which will be published later in 2020. Until then they cannot demonstrate that they have sufficient land to meet their requirement.