



Belfast Housing Land Availability Summary Report

2024/2025

www.belfastcity.gov.uk/LDP



Belfast
City Council

Energising
Belfast

Contents

1. Introduction	1
2. Methodology.....	2
3. Summary Tables and Graphs	3
3.1 Settlement Summary.....	3
3.2 Urban Footprint Summary.....	4
3.3 Land Use Zoning Summary	5
Appendix A: Summary Methodology	13

1. Introduction

The Strategic Planning Policy Statement (SPPS) for NI (September 2015) outlines a 'plan, monitor and manage' approach to ensure that, as a minimum, a 5 year supply of land for housing is maintained. It states that monitoring should be an ongoing process with annual reporting and review. As a minimum, it states that monitoring must include:

- The housing land supply at the beginning and end of the annual reporting period;
- The number of net additional units built during the annual reporting period; and
- The number of net additional housing units built in the period since adoption of the local plan.

The primary purpose of the Housing Land Availability Monitor (referred to as the 'Housing Monitor') is to inform the formulation of the Council's new Local Development Plan (LDP). However, it will also help the Council identify where a shortfall in potential land supply might exist and can inform house-builders on the availability of land that may be suitable for housing.

The information collated will allow a clear view of the overall progress in meeting the housing objectives of the existing development plan and in identifying issues likely to require intervention. For example, a need to release phased housing sites in order to maintain a 5 year supply of available housing land, or the release of a site providing for a particular housing need.

The Planning Act (NI) 2011 requires Belfast City Council to make an annual report to the Department for Infrastructure outlining the extent to which the objectives set out in the LDP are being achieved. In accordance with this legislation the Council are currently preparing the first new LDP for Belfast which will comprise two documents; the Plan Strategy (PS) and the Local Policies Plan (LPP). The PS was formally adopted on 2 May 2023 and work has now commenced on the LPP.

Although this report relates to the period following adoption of the PS it continues to take the form of an annual Housing Land Availability Monitor report and is not intended to fulfil the requirements of an Annual Monitoring Report.

2. Methodology

The Housing Land Availability Monitor (the “Monitor”) measures net gains in housing within the Belfast City Council boundary. It provides a snapshot of the amount of land available for new homes as of 1st April each year. The process followed to produce the Annual Housing Monitor is summarised at Appendix A.

The Monitor presents a register of potential housing land, based on current planning policy designations¹ and planning permissions, rather than an accurate picture of viable housing land. It is the role of an Urban Capacity Study (UCS), which will be undertaken from time to time, to assess the suitability, availability and achievability of monitored sites to contribute to a viable supply of land. The most recent UCS² was completed in March 2018 and, although new sites identified are not included in the Monitor, the outcomes are summarised within the 2017/2018 Belfast Housing Land Availability Summary Report.

Work has commenced on preparation of an updated UCS which will form part of the evidence base for the LPP. Preliminary findings derived from this work which have implications for existing housing monitor sites are reflected in the figures presented in this report. However, no new sites have been added to this report as a result of the UCS work.

¹ *For the purposes of the Housing Land Availability Monitor, the draft Belfast Metropolitan Area Plan (BMAP) 2015 is utilised rather than the former Belfast Urban Area Plan (BUAP) 2001. The adopted BMAP was quashed as a result of a judgement in the Court of Appeal delivered on 18 May 2017 and, although this means the BUAP is now the statutory development plan for the area, the draft BMAP, in its most recent, pre-examination, form remains a significant material consideration in future planning decisions. Draft BMAP therefore refers to that which was purported to be adopted and not the pre-examination draft published in 2004.*

² [Belfast City Council Urban Capacity Study – Final, 20 March 2018](https://bit.ly/324Ny8i) or <https://bit.ly/324Ny8i>

3. Summary Tables and Graphs

The following summary tables detail the supply of housing for the Belfast district from 1 April 2024 to 31 March 2025 and provide a snapshot of the land remaining for housing and its associated potential capacity to accommodate new homes. Cumulative totals are also provided since the Council's housing monitor was established – i.e. 1 April 2015, the date at which the Council gained statutory responsibility for planning.

3.1 Settlement Summary

Table 1 provides a breakdown of the housing supply, land availability and capacity for future housing units for each Settlement within the District, including Belfast City and the Small Settlements of Edenderry, Hannahstown and Loughview.

Belfast City is then further sub-divided into a number of settlement areas or sectors based on key designations within the prevailing development plan. These areas include Belfast City Centre, the Belfast Harbour Estate and Outer Belfast, which is defined as the area covered by the Settlement Limit of Belfast City outside of the City Centre and Harbour Area.

The data within the table is divided into the following columns:

- **Area Developed 1 April 2024 to 31 March 2025** – the area of land in hectares (ha) developed during the current monitor year;
- **Area Developed 1 April 2015 to 31 March 2025** – the cumulative area of land in hectares (ha) developed to date from 1 April 2015 (the date at which the Council gained statutory responsibility for planning);
- **Units Complete 1 April 2024 to 31 March 2025** – the number of dwellings completed during the current monitor year;
- **Units Complete 1 April 2015 to 31 March 2025** – the cumulative total number of dwellings completed to date from 1 April 2015 (the date at which the Council gained statutory responsibility for planning);
- **Available Potential (Hectares)** – the area of land estimated as available for additional dwelling completions within monitored sites as at 31 March 2025; and
- **Available Potential (Dwelling Units)** – the estimated number of dwellings that could be accommodated on the available potential land as at 31 March 2025.

During the 2024/25 monitoring year 531 units were completed on 9.7 ha of land across the District. 338.6 ha of land remains, with potential capacity for 20,246 units. Within Belfast City, 435 units completed were within Outer Belfast, with a further 88 units completed within the City Centre. 10,895 of the available potential units are within Outer Belfast, whilst 6,141 and 3,197 potential dwelling units remain in the City Centre and Harbour Area respectively. There were 8 completions in Edenderry, no completions in Hannahstown or Loughview with a total of 13 potential dwelling units available across these three Small Settlements.

Figure 1 shows the total dwellings completed for the district from 2015/16 to present, to allow for an analysis of trends over a longer timeframe. The total number of dwellings completed in the district has decreased by 9.4% from 586 in 2023/24 to 531 in the current monitor year.

3.2 Urban Footprint Summary

Table 2 provides a breakdown of the housing supply, land availability and capacity for future housing units within Belfast City, further categorised into land within the identified 'Urban Footprint'³ or Greenfield land. This only refers to Belfast City, given that the Urban Footprint is only defined in relation to settlements with a population greater than 5,000 people. This excludes Belfast's three Small Settlements.

In addition to the columns featured in Table 1 (as described in Section 3.1), the **Units within the Urban Footprint (%)** row calculates the proportion of dwellings completed within the Urban Footprint during the current monitor year and the cumulative total number of dwellings completed to date from 1 April 2015 (the date at which the Council gained statutory responsibility for planning), expressed as a percentage of the total number of dwellings completed over the respective time periods.

89.1% of the 523 units completed within Belfast City were built on land within the Urban

³ The Urban Footprint is defined within the Regional Development Strategy 2035 as "the continuous built-up area of the settlement". The Urban Footprint boundary was updated as part of the UCS (March, 2018) as explained in the 2017/2018 Belfast Housing Land Availability Summary Report. The 2018 Urban Footprint forms a revised baseline position for the 2017/2018 monitor period onwards.

Footprint. Of the remaining potential dwelling units, 96% are within the Urban Footprint.

Figure 2 shows the proportion of dwellings completed within the Urban Footprint for the district from 2015/16 to present, to allow for an analysis of trends over a longer timeframe. The proportion of dwellings completed within the Urban Footprint has increased from 80.8% in 2023/24 to 89.1% in the current monitor year.

3.3 Land Use Zoning Summary

Table 3 provides a breakdown of the dwelling units completed by type of land use zoning within the prevailing development plan within each settlement or settlement area. The data within this table is divided into the following columns:

- **Land Zoned for Housing** – the number of units completed and the remaining potential units on land allocated for residential use within the prevailing development plan;
- **Land Zoned for Mixed Use** – the number of units completed and the remaining potential units on land zoned for mixed use development, which includes an element of residential development within key site requirements;
- **All other land** – the number of units completed and the remaining potential units on any other land not falling within the first two, which include non-zoned land and land zoned for non-residential uses; and
- **Proportion of Zoned Land (%)** – the proportion of units completed on either housing or mixed use zoned land expressed as a percentage of the total number of dwellings completed.

Figure 3 shows the proportion of units completed for the district on both housing or mixed use zoned land expressed as a percentage of the total number of dwellings completed from 2015/16 to present. This proportion has decreased from 26.8% in 2023/24 to 24.9% in the current monitor year. Figure 4 shows the total number of units completed on all other land. This 'windfall' provision has decreased by 7% from 429 units in 2023/24 to 399 in the current monitor year.

Table 4 provides details of the capacity for future dwelling units on the same basis as Table 3. Of the remaining potential available for future dwellings, 29.8% is currently zoned for housing or mixed use. 2,508 of the available 20,246 potential dwelling units can be delivered on land zoned for housing and 3,534 units on land zoned for mixed use. In comparison, 14,204 of the remaining potential units can be provided on all other land.

Table 1: Settlement Summary 2024/25

Settlement	Area Developed (Hectares)		Units Complete		Available Potential (Hectares)	Available Potential (Dwelling Units)
	01-04-24 to 31-03-25	01-04-15 to 31-03-25	01-04-24 to 31-03-25	01-04-15 to 31-03-25		
Belfast City						
Outer Belfast	8.9	161.5	435	6,085	211.9	10,895
City Centre	0.5	3.2	88	521	38.8	6,141
Harbour Area	0.0	0.0	0	0	86.4	3,197
Belfast City Total	9.4	164.7	523	6,606	337.1	20,233
Small Settlements						
Edenderry	0.3	0.6	8	15	0.6	6
Hannahstown	0.0	1.0	0	23	0.9	6
Loughview	0.0	0.0	0	0	0.2	1
Small Settlement Total	0.3	1.6	8	38	1.7	13
DISTRICT TOTAL	9.7	166.3	531	6,644	338.6	20,246

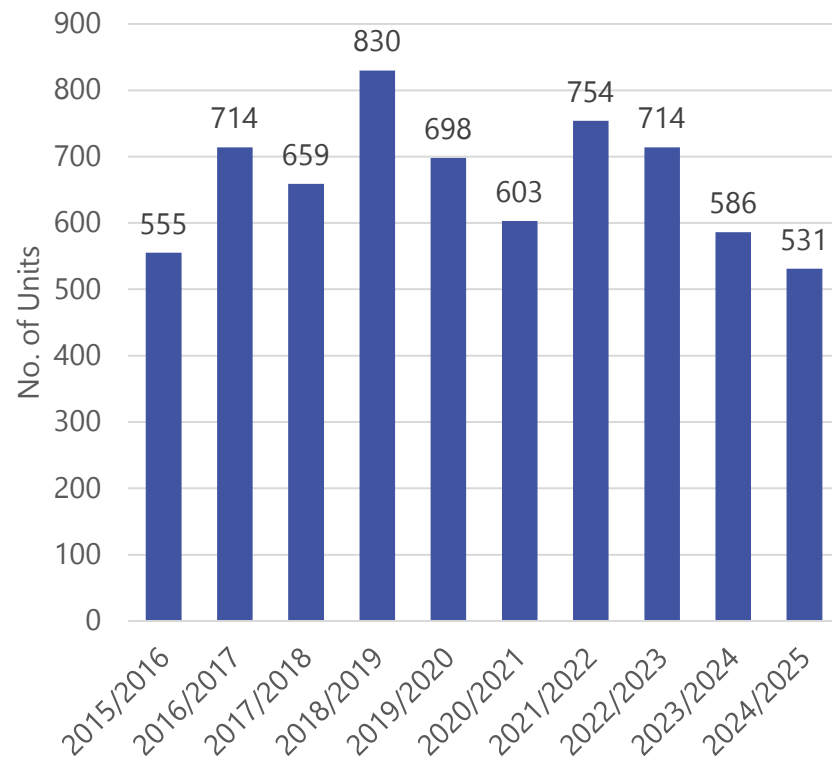
Note – Hectare values may not tally due to rounding

Table 2: Urban Footprint Summary 2024/25

Settlement / Area	Area Developed (Hectares)		Units Complete		Available Potential (Hectares)	Available Potential (Dwelling Units)
	01-04-24 to 31-03-25	01-04-15 to 31-03-25	01-04-24 to 31-03-25	01-04-15 to 31-03-25		
Urban Footprint	6.8	117.7	466	5,616	304.7	19,431
<i>Units within the Urban Footprint (%)</i>	-	-	<i>89.1%</i>	<i>85%</i>	-	<i>96%</i>
Greenfield	2.7	47.1	57	990	32.2	802
Belfast City Total	9.4	164.7	523	6,606	337.1	20,233

Note – Hectare values may not tally due to rounding

**Figure 1: Total Dwellings Completed
2015-2025**



**Figure 2: Proportion of Dwellings Completed
within the Urban Footprint 2015-2025**

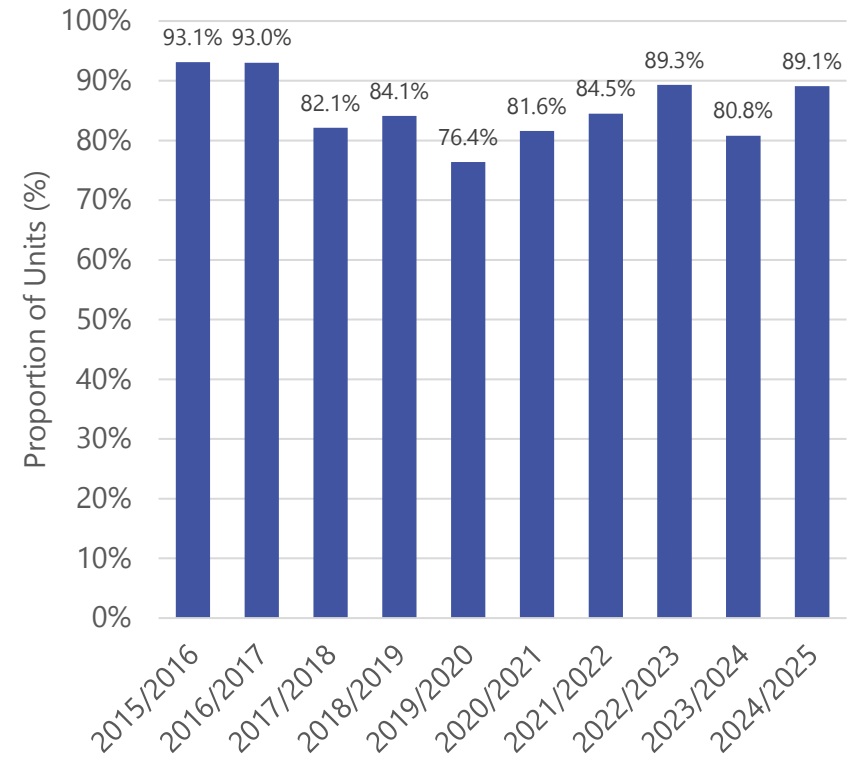
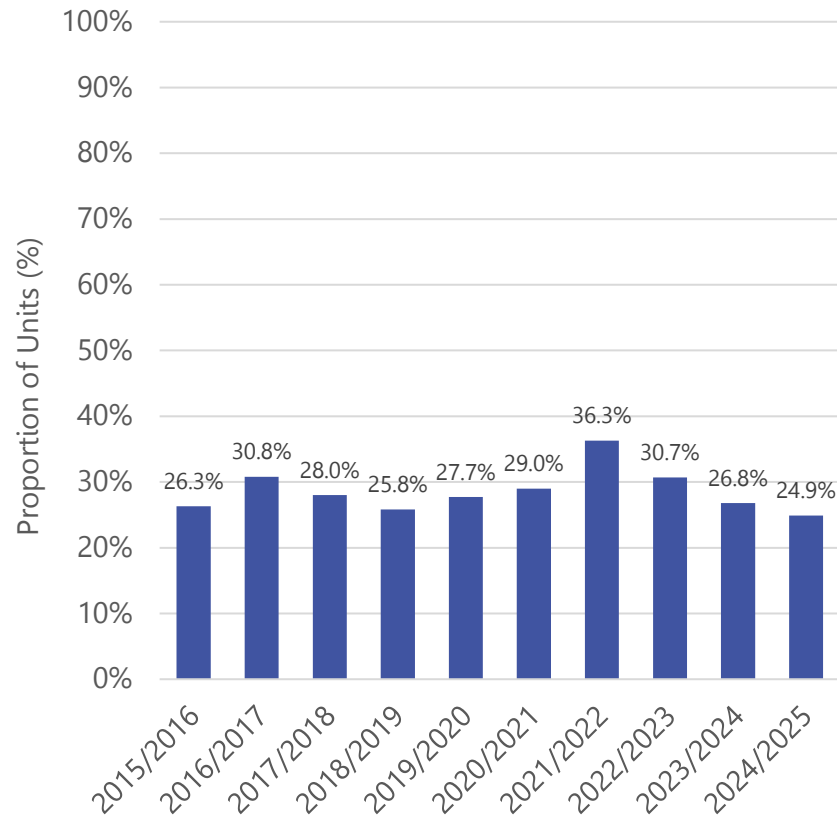


Table 3: Land Use Zoning Completed Units 2024/25

Settlement / Area	Units Complete									
	Land Zoned for Housing		Land Zoned for Mixed Use		All other land		Total		Proportion on Zoned Land (%)	
	01-04-24 to 31-03-25	01-04-15 to 31-03-25	01-04-24 to 31-03-25	01-04-15 to 31-03-25	01-04-24 to 31-03-25	01-04-15 to 31-03-25	01-04-24 to 31-03-25	01-04-15 to 31-03-25	01-04-24 to 31-03-25	01-04-15 to 31-03-25
Belfast										
Outer Belfast	60	1,699	63	194	312	4,192	435	6,085	28.3%	31.1%
City Centre	9	46	n/a	n/a	79	475	88	521	10.2%	8.8%
Harbour Area	n/a	n/a	0	0	0	0	0	0	0.0%	0.0%
Belfast Total	69	1,745	63	194	391	4,667	523	6,606	25.2%	29.4%
Small Settlements										
Edenderry	n/a	n/a	n/a	n/a	8	15	8	15	n/a	n/a
Hannahstown	n/a	n/a	n/a	n/a	0	23	0	23	n/a	n/a
Loughview	n/a	n/a	n/a	n/a	0	0	0	0	n/a	n/a
Small Settlement Total	n/a	n/a	n/a	n/a	8	38	8	38	n/a	n/a
DISTRICT TOTAL	69	1,745	63	194	399	4,705	531	6,644	24.9%	29.2%

**Figure 3: Proportion of Units Complete on Zoned land
2015-2025**



**Figure 4: No. of Units Complete on All Other Land
2015-2025**

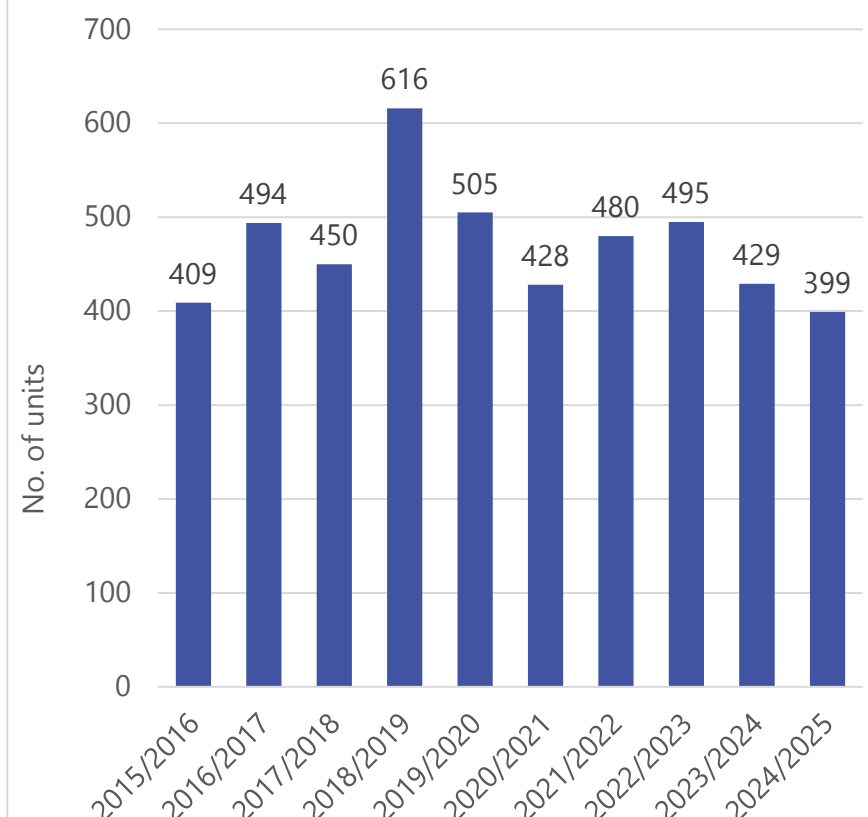


Table 4: Land Use Zoning Remaining Potential Units 2024/25

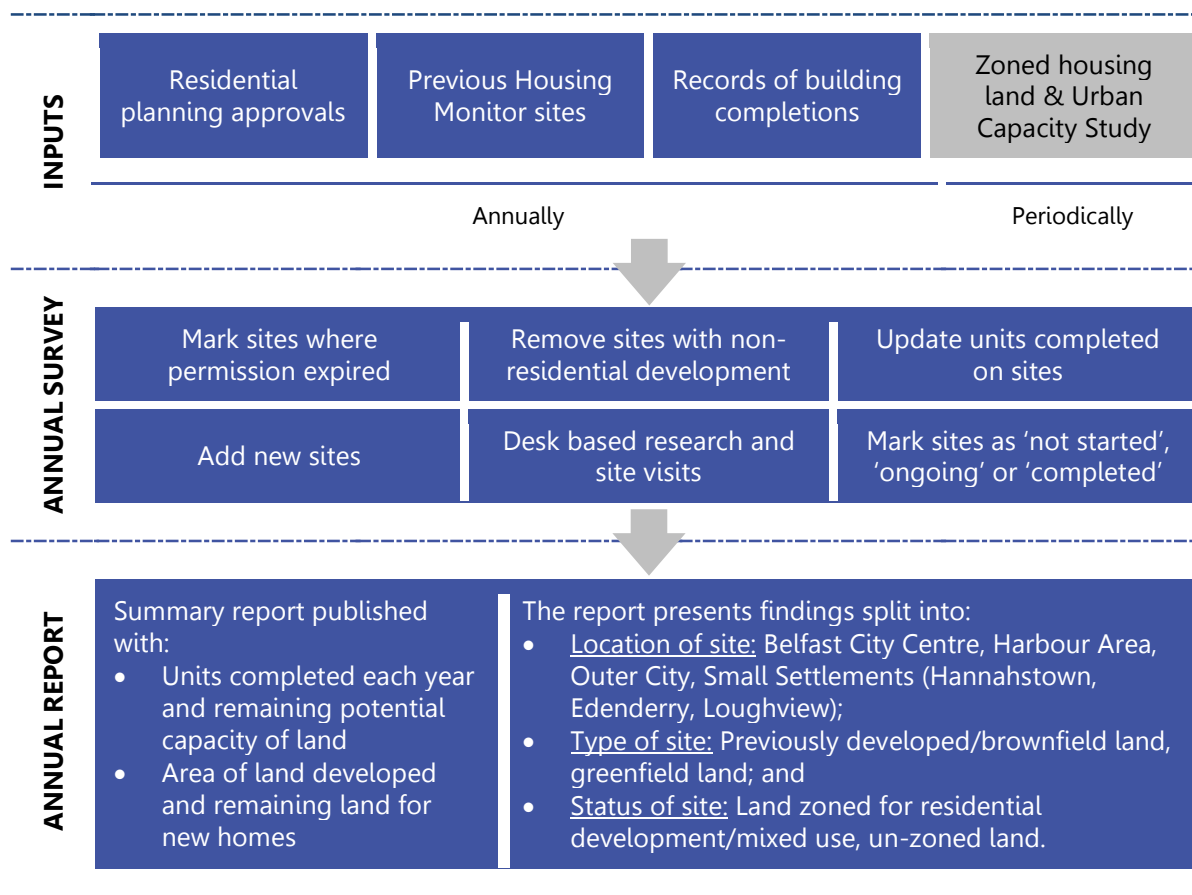
Settlement / Area	Remaining Potential Units				
	Land Zoned for Housing	Land Zoned for Mixed Use	All other land	Total	Proportion on Zoned Land (%)
Belfast City					
Outer Belfast	2,329	519	8,047	10,895	26.1%
City Centre	179	n/a	5,962	6,141	2.9%
Harbour Area	n/a	3,015	182	3,197	96.3%
Belfast City Total	2,508	3,534	14,191	20,233	29.9%
Small Settlements					
Edenderry	n/a	n/a	6	6	n/a
Hannahstown	n/a	n/a	6	6	n/a
Loughview	n/a	n/a	1	1	n/a
Small Settlement Total	n/a	n/a	13	13	n/a
DISTRICT TOTAL	2,508	3,534	14,204	20,246	29.8%

Appendix A: Summary Methodology

The Housing Land Availability Monitor measures net gains in housing within the Belfast City Council area. It provides a snapshot of the amount of land available for new homes as of 1st April each year. The Monitor demonstrates the presence of an adequate and continuous supply of housing land in the city and provides evidence to inform the preparation of the Local Development Plan and to make planning decisions.

The Monitor presents a register of potential housing land, based on current planning policy designations and planning permissions, rather than an accurate picture of viable housing land. An Urban Capacity Study will be undertaken from time to time to assess the suitability, availability and achievability of monitored sites to contribute to a viable 5 year supply of land. An Urban Capacity Study for Belfast was published in March 2018.

Work has commenced on preparation of an updated UCS which will form part of the evidence base for the LPP. Preliminary findings derived from this work which have implications for existing housing monitor sites are reflected in the figures presented in this report. However, no new sites have been added to this report as a result of the UCS work.



Belfast Planning Service

Belfast City Council
Cecil Ward Building
4-10 Linenhall Street
Belfast BT2 8BP

 www.belfastcity.gov.uk/LDP

 localdevelopmentplan@belfastcity.gov.uk

 028 9050 0510

Text phone: 028 9027 0405

 @belfastcc

 @belfastcitycouncil

 Belfast City Council



Belfast
City Council