



Belfast Housing Land Availability Summary Report

2019/2020

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Belfast
City Council

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1. Introduction

As part of the preparation of a new Local Development Plan (LDP) for Belfast, 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's (referred to as the 'Housing Monitor') is to inform the formulation of the Council's new 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. As the Council are currently preparing the first new LDP for Belfast under this new legislation, the production of Annual Monitoring Reports has not yet commenced. Instead, annual Housing Monitor reports are being published by the Council until the new LDP is adopted.

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.

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 2019 to 31 March 2020 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.

It should be noted that these cumulative totals will reflect the total since the Council gained statutory responsibility for planning until such time as an up-to-date Local Development Plan for the new district is adopted, establishing appropriate targets to monitor delivery against.

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 2019 to 31 March 2020** – the area of land in hectares (ha) developed during the current monitor year;
- **Area Developed 1 April 2015 to 31 March 2020** – 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 2019 to 31 March 2020** – the number of dwellings completed during the current monitor year;

- **Units Complete 1 April 2015 to 31 March 2020** – 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 2020; and
- **Available Potential (Dwelling Units)** – the estimated number of dwellings that could be accommodated on the available potential land as at 31 March 2020.

During the 2019/20 monitoring year 698 units were completed on 18.5 ha of land across the District. 378.4 ha of land remains, with potential capacity for 21,692 units. Within Belfast City, 593 units completed were within Outer Belfast, with a further 103 units completed within the City Centre. 13,148 of the available potential units are within Outer Belfast, whilst 5,383 and 3,138 potential dwelling units remain in the City Centre and Harbour Area respectively. There were a further 2 completions in Hannahstown with a total of 23 potential dwelling units available across the 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 15.9% from 830 in 2018/19 to 698 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 as described in Table 1 above, the **Units within the Urban Footprint (%)** row calculates the proportion of dwellings completed 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 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.

76.4% of the 696 units completed within Belfast City were built on land within the Urban Footprint. Of the remaining potential dwelling units, 93.5% are within the Urban Footprint.

Figure 2 shows the proportion of dwellings 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 decreased from 84.1% in 2018/19 to 76.4% 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.

27.7% of the dwelling units completed during 2019/20 have been delivered on zoned land within Belfast City. The number of units completed on all other land was 505 dwellings.

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 increased from 25.8% in 2018/19 to 27.7% in the current monitor year. Figure 4 shows the total number of units completed on all other land. This 'windfall' provision has decreased by 18.0% from 616 units in 2018/19 to 505 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, 38.7% is currently zoned for housing or mixed use. 4,270 of the available 21,692 potential dwelling units can be delivered on land zoned for housing and 4,125 units on land zoned for mixed use. In comparison, 13,297 of the remaining potential units can be provided on all other land.

Table 1: Settlement Summary 2019/20

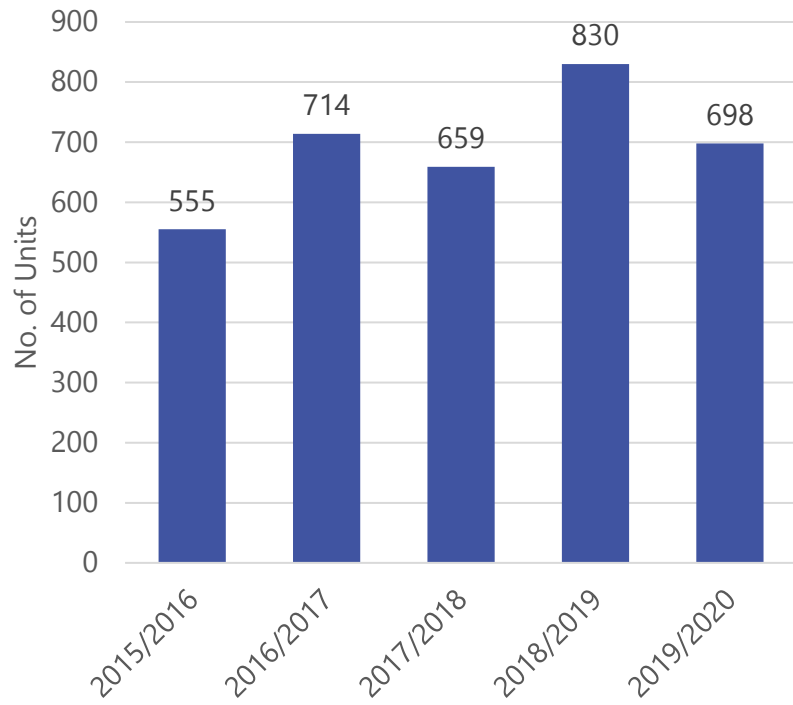
Settlement	Area Developed (Hectares)		Units Complete		Available Potential (Hectares)	Available Potential (Dwelling Units)
	01-04-19 to 31-03-20	01-04-15 to 31-03-20	01-04-19 to 31-03-20	01-04-15 to 31-03-20		
Belfast City						
Outer Belfast	17.8	90.9	593	3,128	254.9	13,148
City Centre	0.4	2.1	103	305	36.4	5,383
Harbour Area	0.0	0.0	0	0	85.9	3,138
Belfast City Total	18.3	93.1	696	3,433	377.2	21,669
Small Settlements						
Edenderry	0.0	0.0	0	0	0.7	20
Hannahstown	0.2	1.0	2	23	0.3	2
Loughview	0.0	0.0	0	0	0.2	1
Small Settlement Total	0.2	1.0	0	23	1.2	23
DISTRICT TOTAL	18.5	94.1	698	3,456	378.4	21,692

Note – Hectare values may not tally due to rounding

Table 2: Urban Footprint Summary 2019/20

Settlement / Area	Area Developed (Hectares)		Units Complete		Available Potential (Hectares)	Available Potential (Dwelling Units)
	01-04-19 to 31-03-20	01-04-15 to 31-03-20	01-04-19 to 31-03-20	01-04-15 to 31-03-20		
Urban Footprint	10.4	67.0	532	2,916	324.2	20,270
<i>Units within the Urban Footprint (%)</i>	-	-	76.4%	84.9%	-	93.5%
Greenfield	7.9	26.1	164	517	53.0	1,399
Belfast City Total	18.3	93.1	696	3,433	377.2	21,669

**Figure 1: Total Dwellings Completed
2015-2020**



**Figure 2: Proportion of Dwellings Within the Urban Footprint
2015-2020**

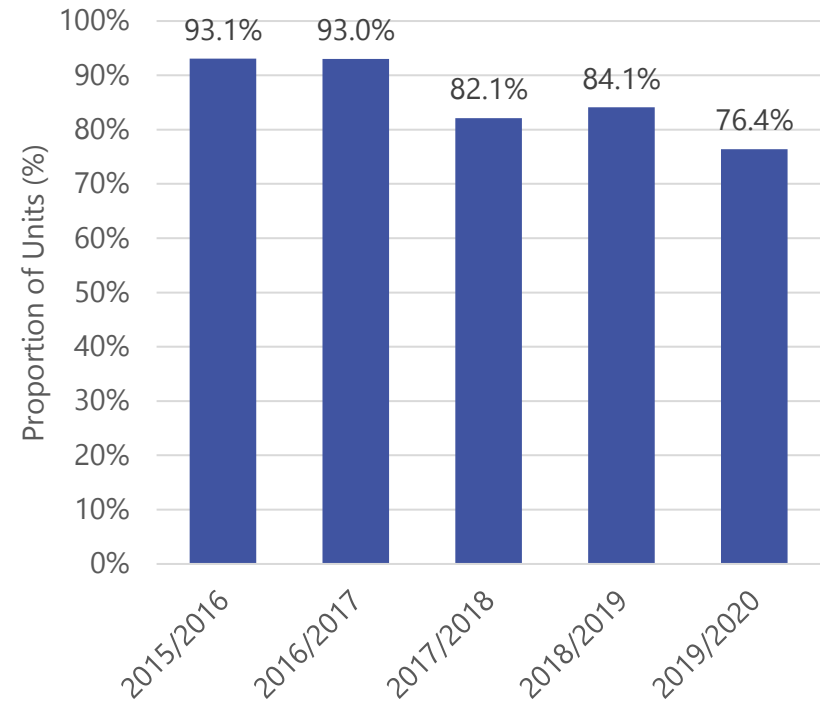
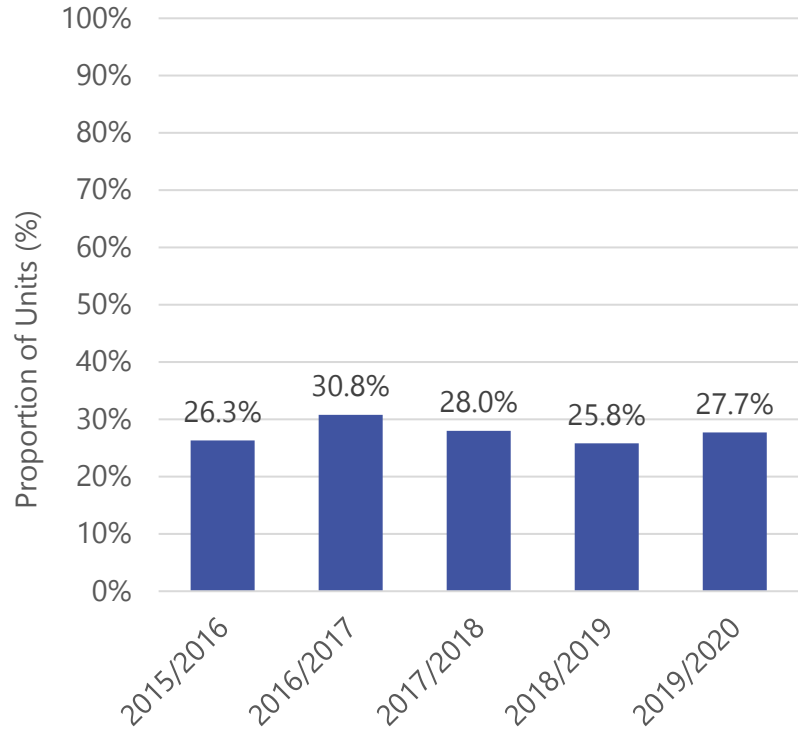


Table 3: Land Use Zoning Completed Units 2019/20

Settlement / Area	Units Complete									
	Land Zoned for Housing		Land Zoned for Mixed Use		All other land		Total		Proportion on Zoned Land (%)	
	01-04-19 to 31-03-20	01-04-15 to 31-03-20	01-04-19 to 31-03-20	01-04-15 to 31-03-20	01-04-19 to 31-03-20	01-04-15 to 31-03-20	01-04-19 to 31-03-20	01-04-15 to 31-03-20	01-04-19 to 31-03-20	01-04-15 to 31-03-20
Belfast										
Outer Belfast	193	918	0	60	400	2,150	593	3,128	32.5%	31.3%
City Centre	0	4	n/a	n/a	103	301	103	305	0.0%	1.3%
Harbour Area	n/a	n/a	0	0	0	0	0	0	0.0%	0.0%
Belfast Total	193	922	0	60	503	2,451	696	3,433	27.7%	28.6%
Small Settlements										
Edenderry	n/a	n/a	n/a	n/a	0	0	0	0	n/a	n/a
Hannahstown	n/a	n/a	n/a	n/a	2	23	2	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	2	23	2	23	n/a	n/a
DISTRICT TOTAL	193	922	0	60	505	2,474	698	3,456	27.7%	28.4%

**Figure 3: Proportion of Units Complete on Zoned land
2015-2020**



**Figure 4: No. of Units Complete on All Other Land
2015-2020**

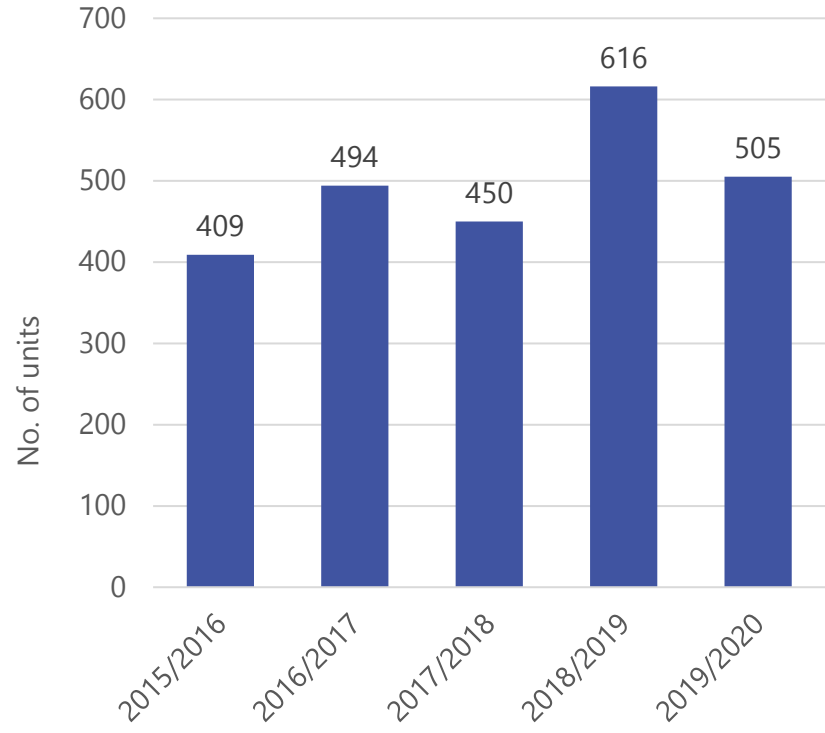


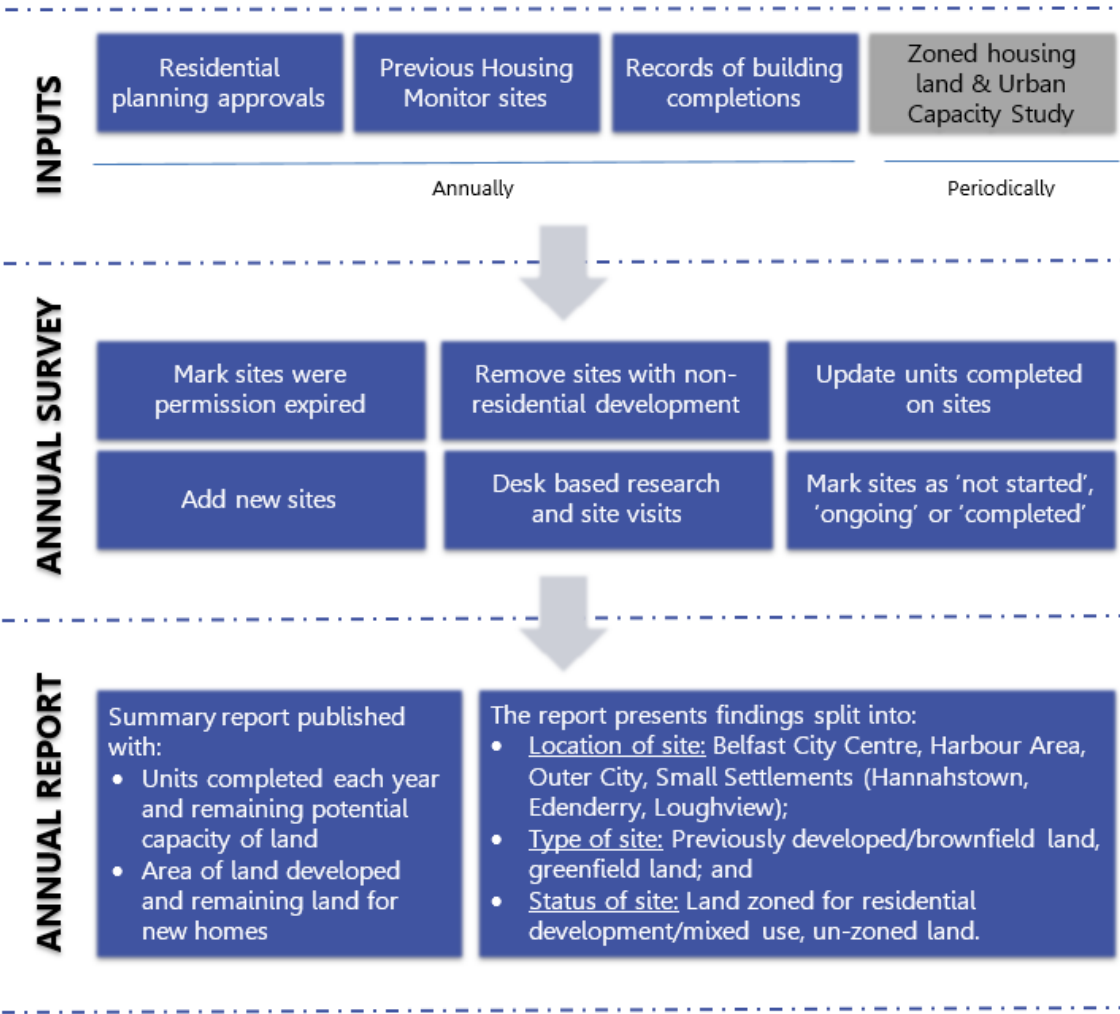
Table 4: Land Use Zoning Remaining Potential Units 2019/20

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	3,518	1,100	8,530	13,148	35.1%
City Centre	752	n/a	4,631	5,383	14.0%
Harbour Area	n/a	3,025	113	3,138	96.4%
Belfast City Total	4,270	4,125	13,274	21,669	38.7%
Small Settlements					
Edenderry	n/a	n/a	20	20	n/a
Hannahstown	n/a	n/a	2	2	n/a
Loughview	n/a	n/a	1	1	n/a
Small Settlement Total	n/a	n/a	23	23	n/a
DISTRICT TOTAL	4,270	4,125	13,297	21,692	38.7%

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.



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