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## HOUSING MONITORING REPORT 1999-2009

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Development Plans  
September

2010

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## Introduction

This paper presents information on a range of indicators for the housing market in Pembrokeshire between 1999 and 2009. This paper is one of a number which make up the evidence base for Pembrokeshire County Council's Local Development Plan and has helped to inform the development of that Plan. The monitoring work included in this paper covers Pembrokeshire County Council's planning area and does not include Pembrokeshire Coast National Park data. For ease, Pembrokeshire within this paper should be taken to mean the area of Pembrokeshire excluding the National Park, unless explicitly stated otherwise.

This paper includes evidence of the number of dwellings built each year (completions) in Pembrokeshire and the numbers of dwellings with outstanding planning permission (commitments). Local planning policy in Pembrokeshire changed in 2006 with the adoption of the Joint Unitary Development Plan, so this paper examines the effect of the introduction of this Plan on patterns of development in Pembrokeshire. This paper also includes some secondary data on aspects such as prices and sales, to provide a picture of the broader housing market. Pembrokeshire County Council's housing completions and commitments are updated annually following the Joint Housing Land Availability housing survey. This report should be read in conjunction with the current Joint Housing Land Availability Study and the Population Households Projection paper. A **glossary** of terms is included at the end of this document.

In the years 2005 to 2008 Pembrokeshire County experienced increasing pressure for housing during a boom period followed by a recession commencing in 2008.

## Methodology

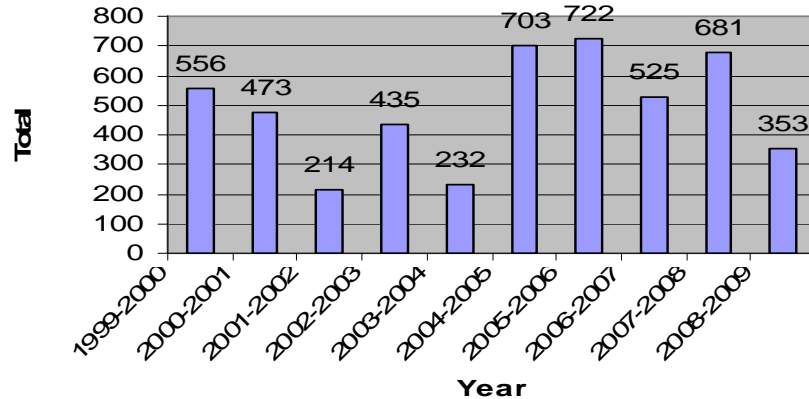
Prior to 2008 a full survey was carried out every other year and this included all areas in Pembrokeshire. (Main towns, rural areas and sporadics). During the alternate years, only the main towns were surveyed. The data for the rural areas during these alternate years was not apportioned for the rural figures. Surveying fully every other year up until the adoption of the Joint Unitary Development Plan in 2006 has been very useful for Development Management purposes and since then the survey has been conducted every year.

Only sites that have Approval of Reserved Matters or Full planning permission are included within the survey, undertaken each year from the Joint Housing Land Availability study base date of 1<sup>st</sup> April. The survey had a June base date up until 2007, changing

to April from 2008 onwards. Sites with outline permission or allocations cannot be developed so they are not included in the surveys. Site records are made of units that are under construction or completed and cross checked against previous records, planning application records and the housing database. A unit is considered complete if it appears to be physically complete on the exterior, i.e. if roof, windows, doors etc are fitted. The unit does not need to be furnished or inhabited to be considered complete. If the foundations are laid then the unit is recorded as under construction. A note is also made of the site condition even if no construction has started as it is useful to know whether the ground has been cleared and if there is any machinery/builders on site. A brief description of the type of dwellings and layout is recorded and photographs of each site are taken.

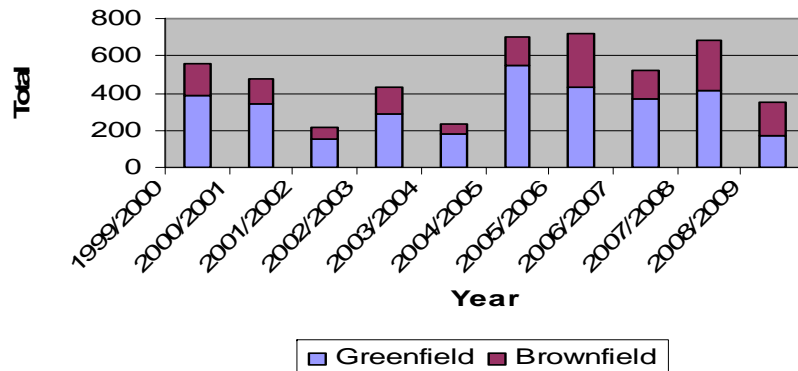
## Annual Completions 1999 – 2009 and Greenfield/Brownfield Classifications

**Total Annual Completions 1999-2009**



From 1999 onwards PCC undertook surveys regularly with a full survey every other year. In the individual years there was some variation with totals fluctuating. This may be due to the fact that in alternate years rural areas were not fully surveyed. However, when looking at the 5 year rolling averages which even out such variations in the survey, a steadily increasing trend in completions is visible over the ten year period. There was however a drop in the 2009 completions, with the total number almost half of the total for 2008, despite a full survey being conducted, demonstrating clearly the impact of the downturn in the housing market, between 2008 and 2009.

**Greenfield/Brownfield Classification For All Area Completions 1999-2009**



**5 Year Rolling Average For Annual Completions 1999-2009**

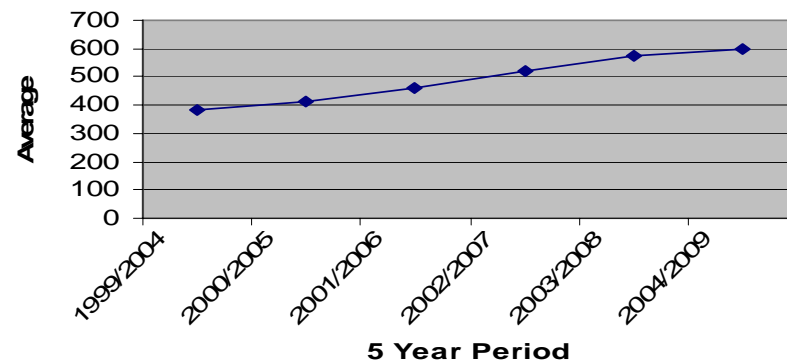


Table for all annual completions and Brownfield Greenfield classifications

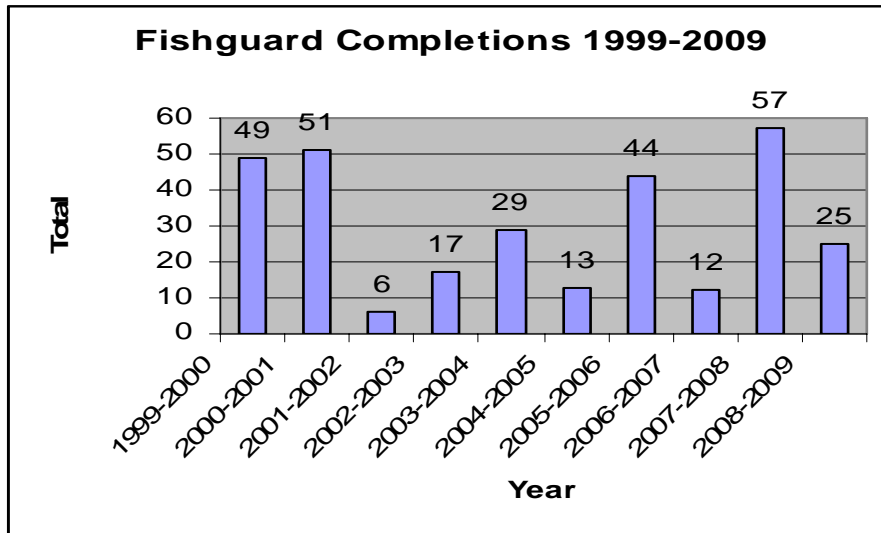
<b>All Areas</b>	<b>Greenfield</b>	<b>Brownfield</b>	<b>Total</b>	<b>Greenfield %</b>	<b>Brownfield %</b>
1999-2000	389	167	556	70%	30%
2000-2001	341	132	473	72%	28%
2001-2002	152	62	214	71%	29%
2002-2003	285	150	435	66%	34%
2003-2004	179	53	232	77%	23%
2004-2005	544	159	703	77%	23%
2005-2006	435	287	722	60%	40%
2006-2007	371	154	525	71%	29%
2007-2008	409	271	680	60%	40%
2008-2009	167	187	354	47%	53%
<b>Total</b>	<b>3272</b>	<b>1622</b>	<b>4894</b>	<b>67%</b>	<b>33%</b>

Brownfield completions across all years are consistently lower than Greenfield with an average of 33% for Brownfield over the ten year period and 67% for Greenfield. However annual completions on Brownfield land show an increasing trend which indicates that the County is achieving better use of previously developed land.

Table for Five Year Rolling Average of Annual Completions

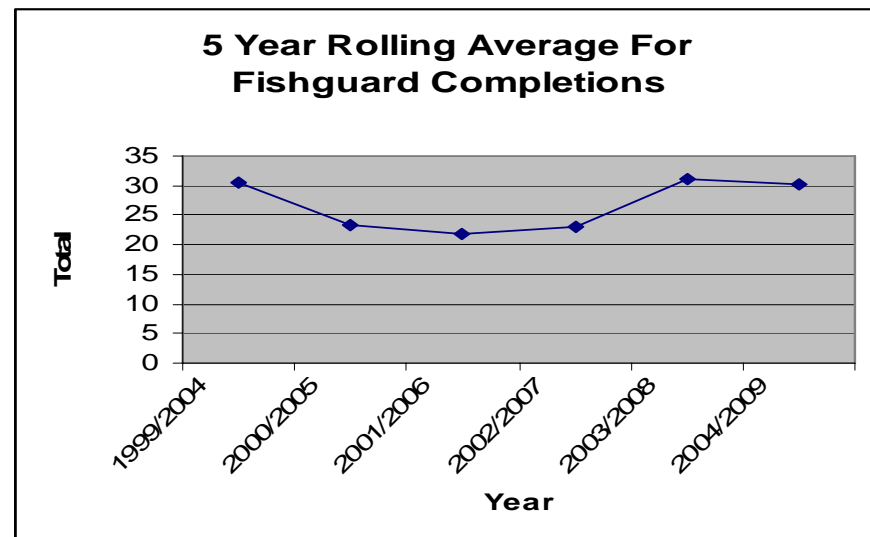
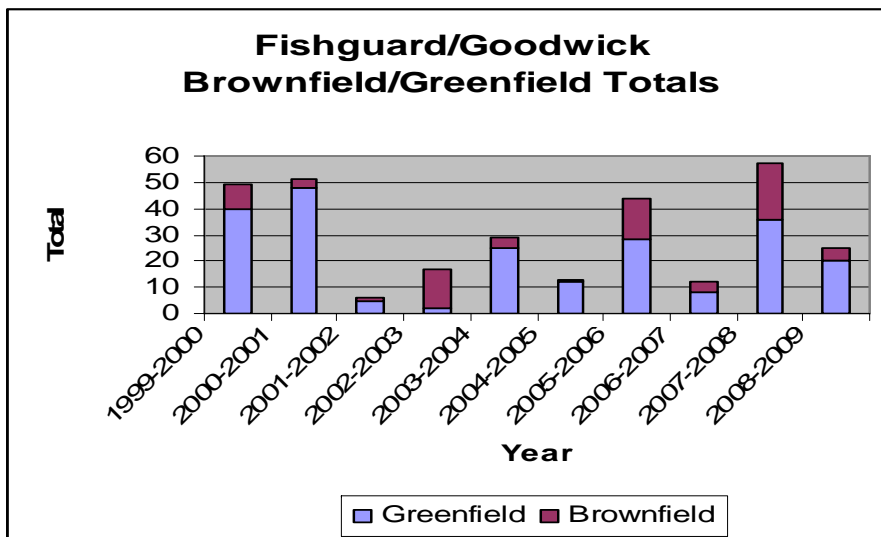
<b>5 Yr Period</b>	<b>Average</b>
1998/2003	382
1999/2004	411.4
2000/2005	461.2
2001/2006	523.4
2002/2007	572.6
2002/2007	596.8

## Completions by Town

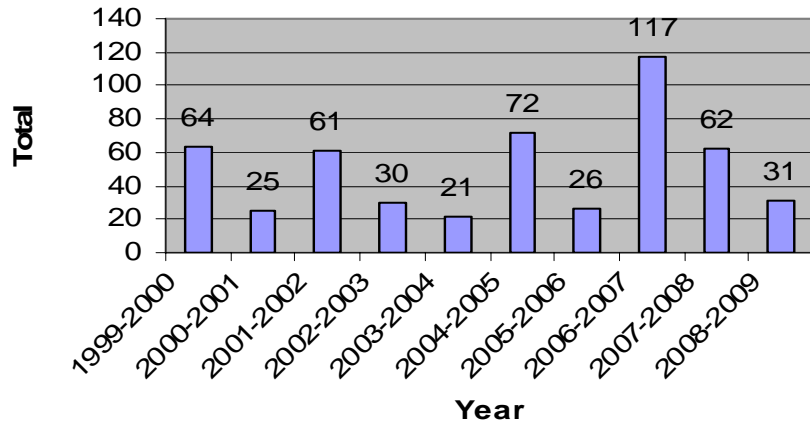


### Fishguard

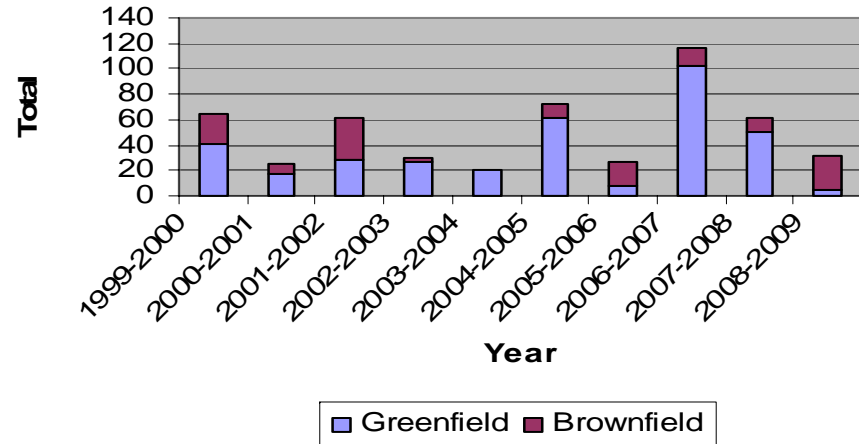
Fishguard annual completions have varied between 1999 and 2009. The 5 year rolling average has remained fairly steady from 2000 to 2007, rising fairly rapidly in 2008 and steadying off in 2009. This may be due to all sites being surveyed in 2008/2009. Brownfield completions have (with 2002/2003 as an exception) been far lower than Greenfield with the totals for each year shown above.



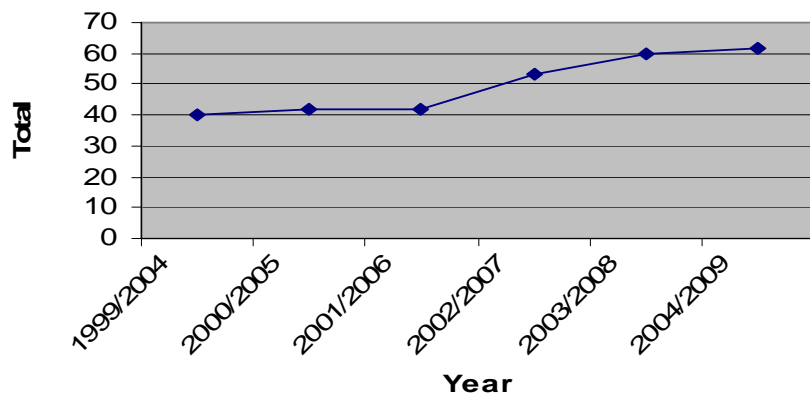
### Haverfordwest Completions 1999-2009



### Haverfordwest Greenfield/Brownfield Totals



### 5 Year Rolling Average For Haverfordwest Completions

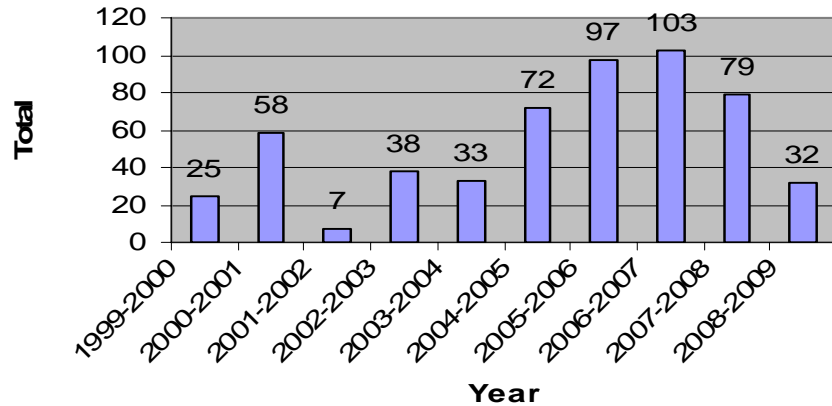


### Haverfordwest

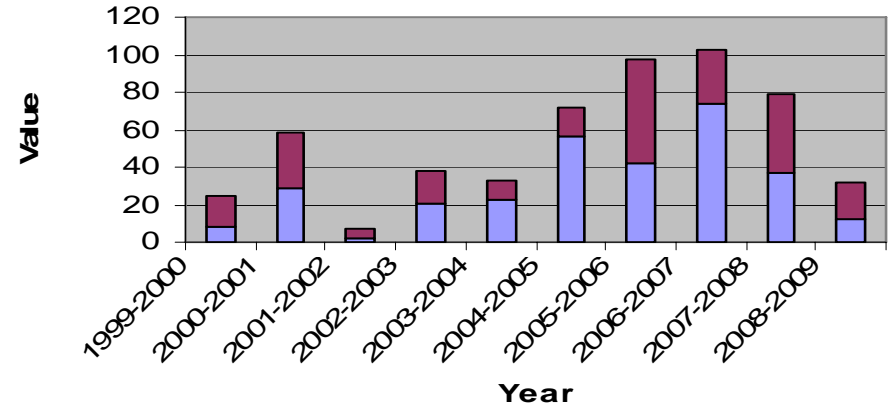
Haverfordwest has seen a steady 5 year rolling average from 1999 to 2006 with a more rapid increase in 2007 to 2008 and then a steadying off. Annual completions have declined slowly and then fluctuated, rising noticeably in 2006/2007. Brownfield rates have been noticeably lower than Greenfield, with the exception of 2008-2009.



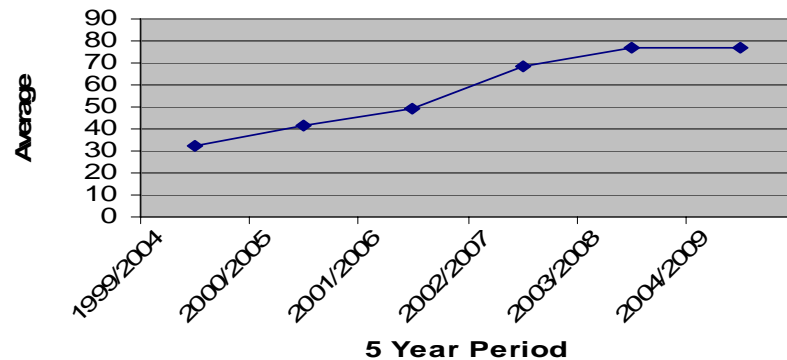
**Milford Haven Completions 1999-2009**



**Milford Haven Brownfield/Greenfield Totals**



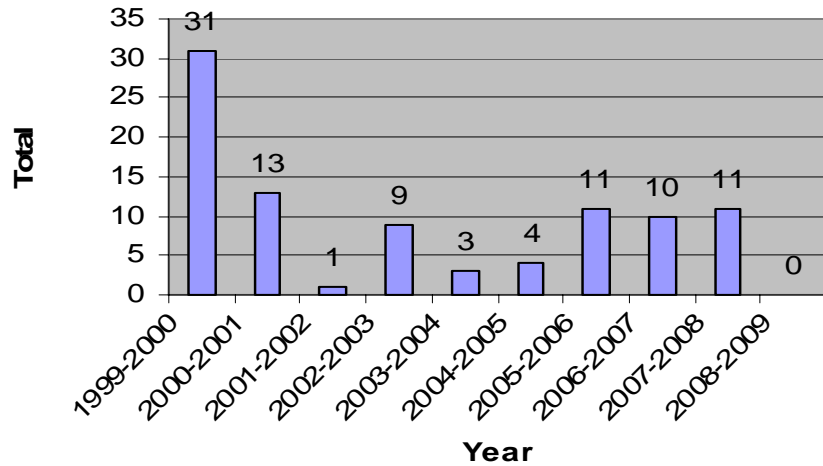
**Milford Haven 5 Year Rolling Average**



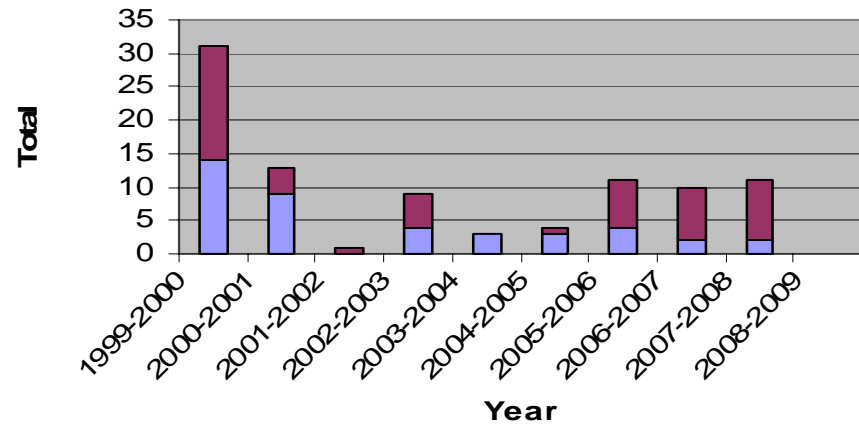
**Milford Haven**

Completions in Milford Haven have shown variation in the earliest years of the study but show a steadily increasing completion rate from 2005 to 2008. When the 5 year rolling average is considered, a clear and steady increase in completions is evident across the whole 10 year period of the study. Greenfield completions are generally still higher than the Brownfield completions but in some years the gap is much lower when compared with Haverfordwest and Fishguard completions.

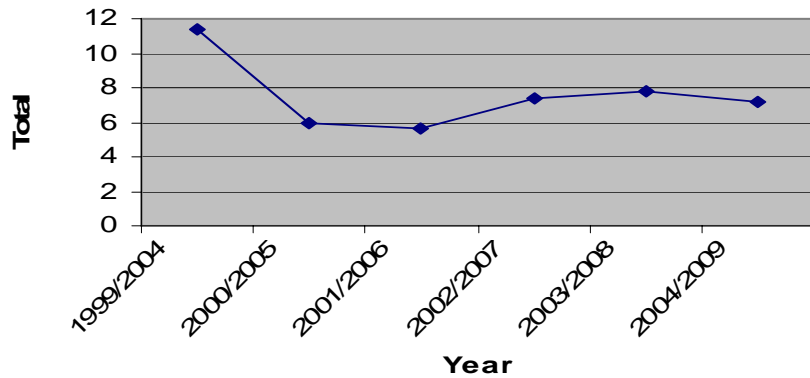
### Narberth Completions 1999-2009



### Narberth Brownfield/Greenfield Totals



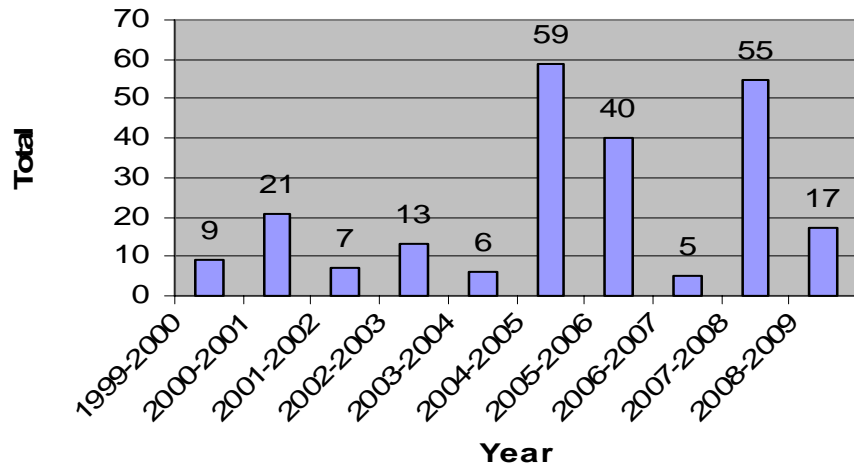
### 5 Year Rolling Average For Narberth Completions



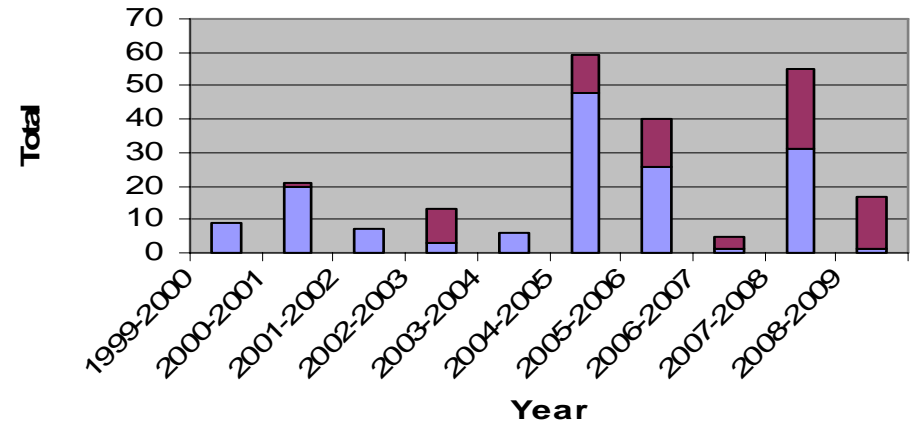
### Narberth

Completions in Narberth show a rapid decline followed by a levelling over the ten year period, illustrated both by the 5 year rolling average. The annual completions show a decline and then periods of fluctuation with the gap between totals lessening from 2005-2008. Brownfield percentages are higher than many other towns, but this may be partially due to the low totals.

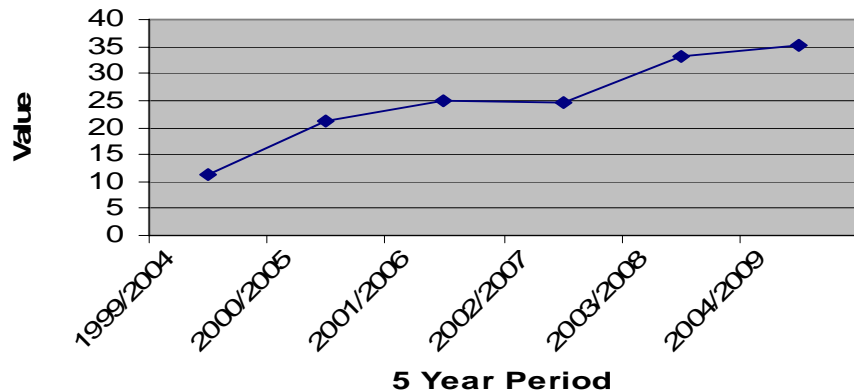
**Neyland Completions 1999-2009**



**Neyland Brownfield/Greenfield Totals**



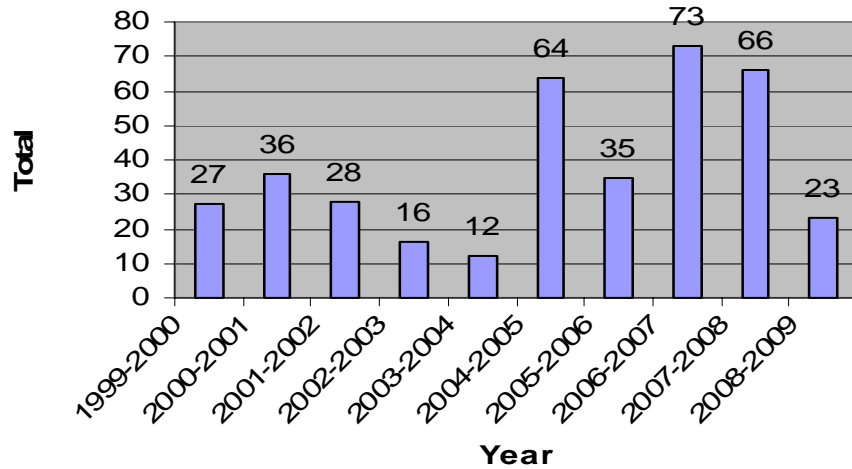
**5 Year Rolling Average For Neyland Completions**



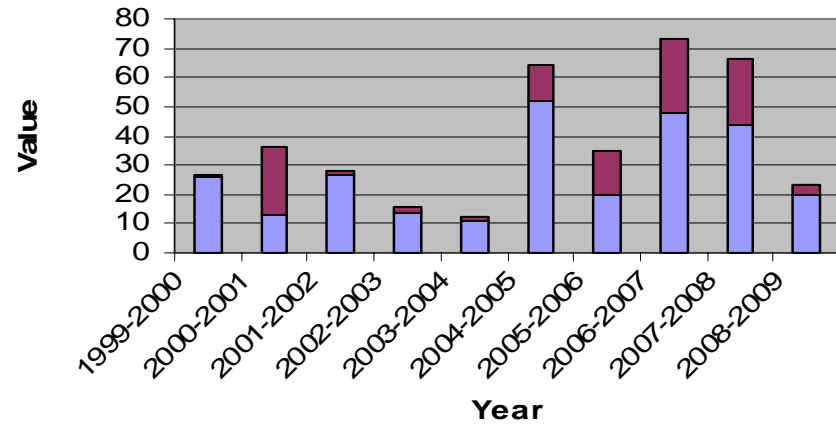
**Neyland**

Neyland appears to show a fluctuating trend when looking at the annual completion totals. Completions rose rapidly in 2004-2005 and again in 2007-2009. It is clear from the 5 year rolling average that completions have risen fairly constantly. Brownfield site totals are consistently low.

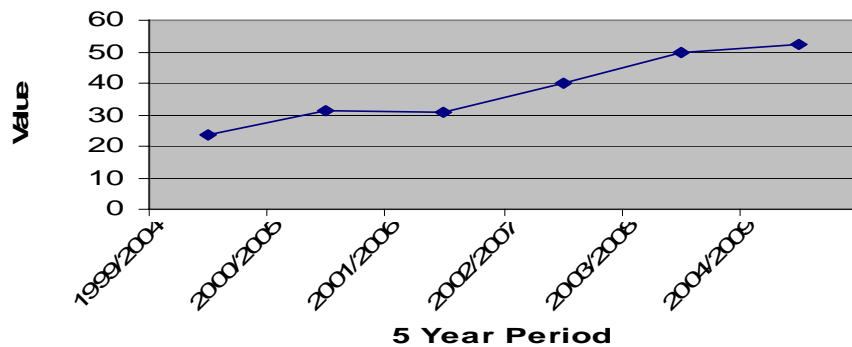
**Pembroke Completions 1999-2009**



**Pembroke Brownfield/Greenfield Totals**



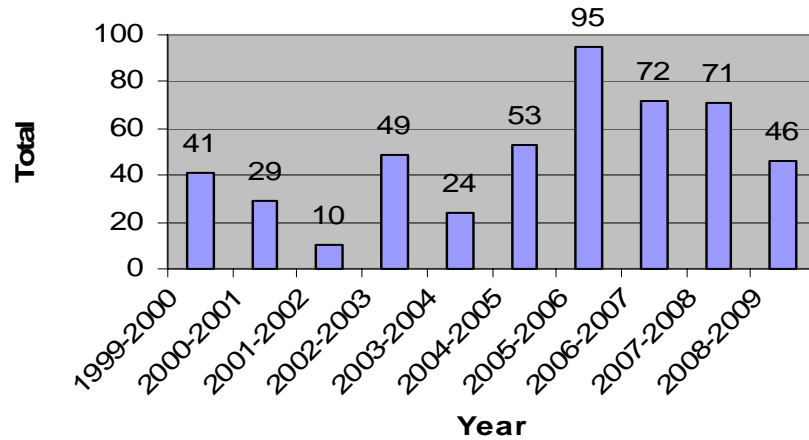
**5 Year Rolling Average For Pembroke**



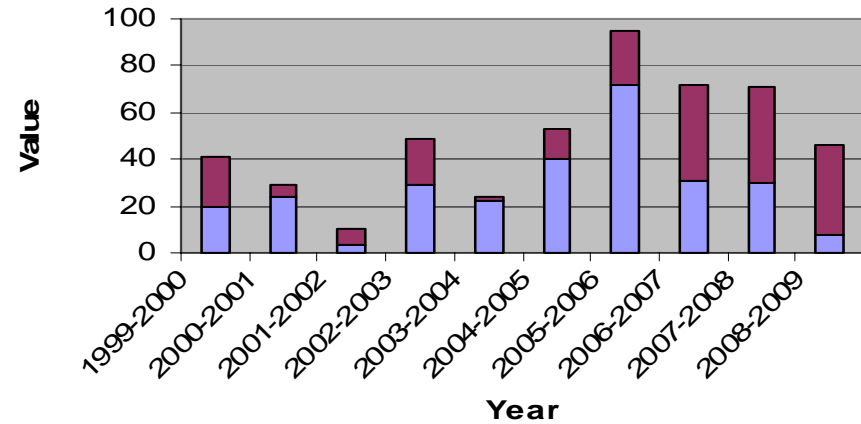
**Pembroke**

Pembroke shows a steady rise then fall in annual completions which then fluctuates from 2005 onwards. From the 5 year rolling average we can see a steady increase in site completions. Brownfield percentages are very low or non-existent in some periods (1999, 2000, 2002, 2003 and 2004).

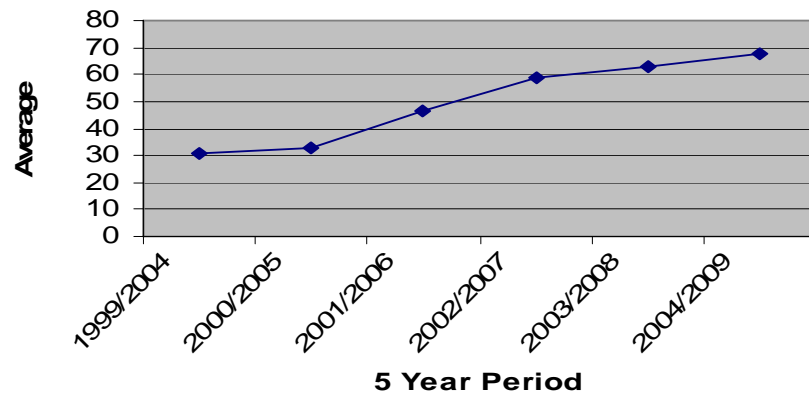
### Pembroke Dock Completions 1999-2009



### Pembroke Dock Brownfield/Greenfield Totals



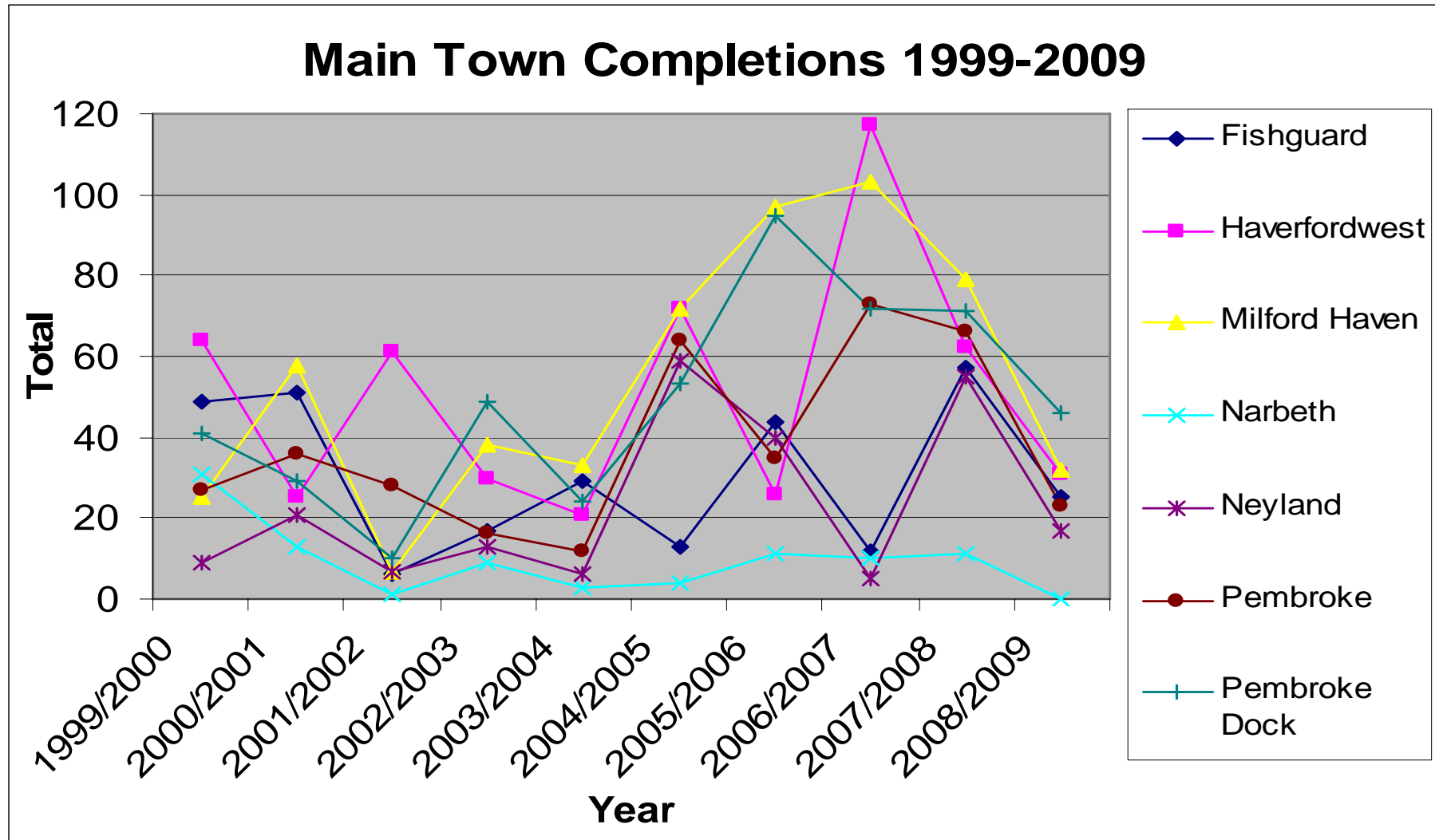
### 5 Year Rolling Average For Pembroke Dock Completions



### Pembroke Dock

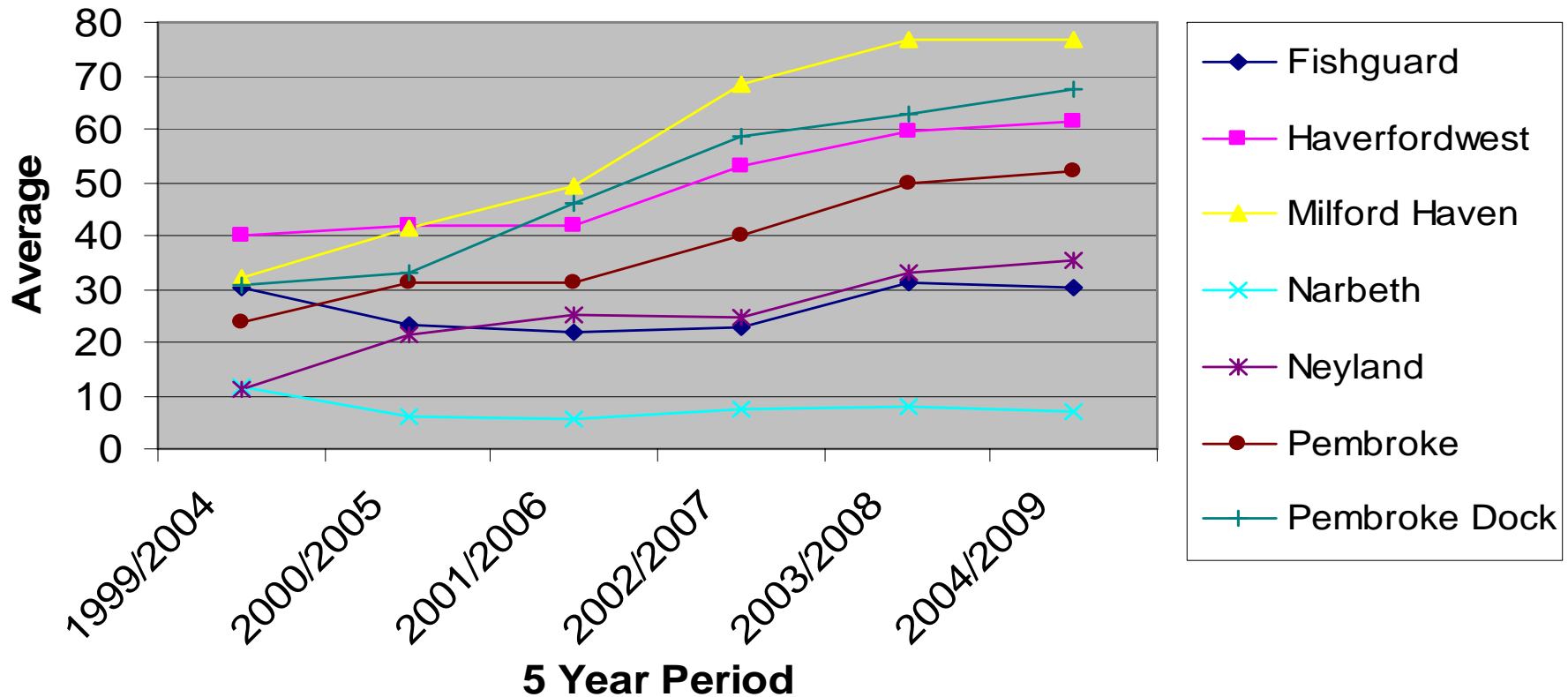
Pembroke Dock's annual completions show a trend of rising and then falling throughout the period. The 5 year average completions have remained steady throughout the first half of the study and risen more rapidly in later years. Brownfield percentages are higher than most of the other main towns.

## Main Town Completions

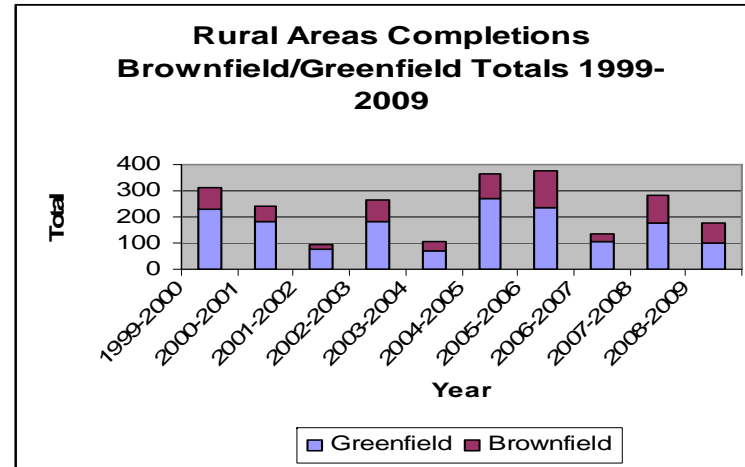
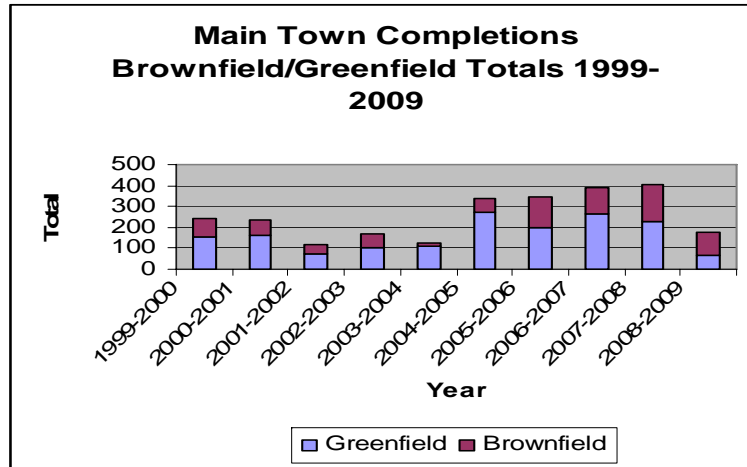


For the main towns on one graph it is clear that the rolling averages do tend to mirror each other, staying steady in the first 5 years of the period and then rising during the later years of the study. From the annual completions graph it is clear that in any year some of the main towns can experience an increase while others experience a decline. There is a lot of fluctuation in the annual completion totals. Narberth has the lowest annual completions totals; this is to be expected as it is the smallest of all the main towns. The rolling average for all main towns apart from Narberth has increased since the adoption of the Joint Unitary Development Plan in 2006.

### 5 Year Rolling Average For Main Towns



## Breakdown of Brownfield/Greenfield Completions



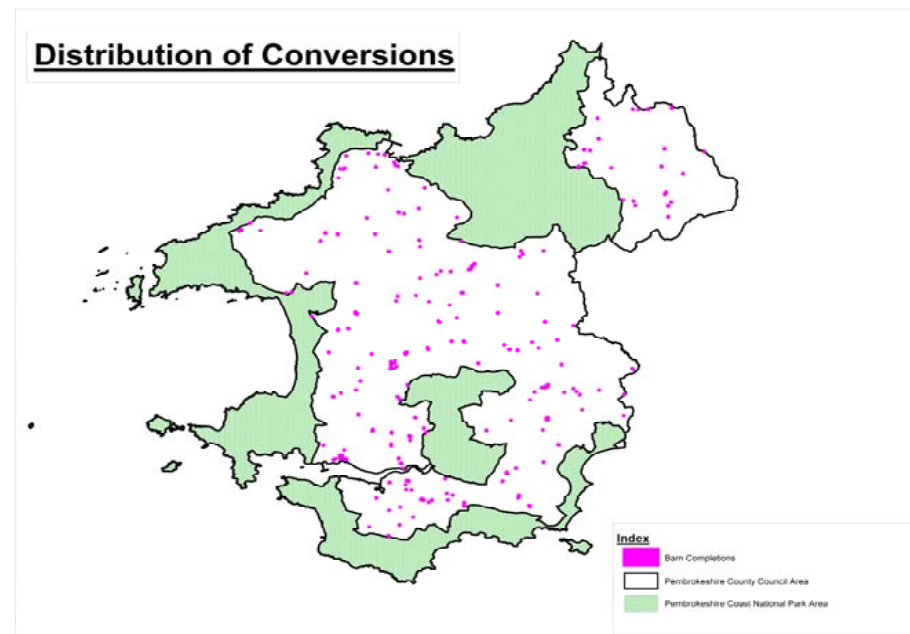
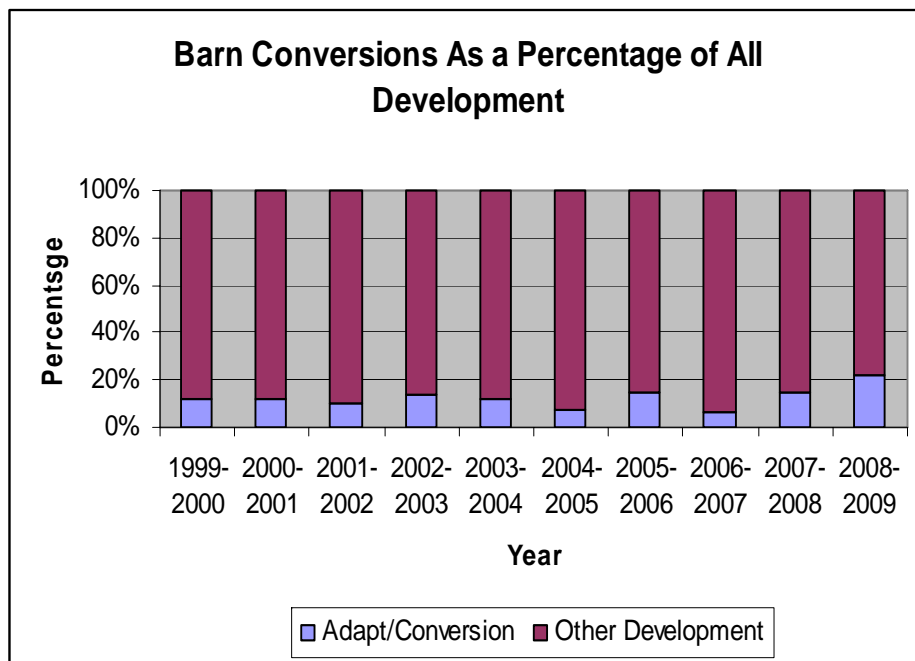
Main Towns	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	Total	%
Greenfield	158	161	73	100	110	273	200	267	231	65	1638	64%
Brownfield	88	72	47	72	18	64	148	125	170	109	913	36%
<b>Total</b>	<b>246</b>	<b>233</b>	<b>120</b>	<b>172</b>	<b>128</b>	<b>337</b>	<b>348</b>	<b>392</b>	<b>401</b>	<b>174</b>	<b>2551</b>	

Rural Areas	1998-1999	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	Total	%
Greenfield	231	180	79	185	69	271	235	104	178	102	1634	70%
Brownfield	79	60	15	78	35	95	139	29	102	77	709	30%
<b>Total</b>	<b>310</b>	<b>240</b>	<b>94</b>	<b>263</b>	<b>104</b>	<b>366</b>	<b>374</b>	<b>133</b>	<b>280</b>	<b>179</b>	<b>2343</b>	

**Note:** Main Towns used for calculations are: Fishguard/Goodwick, Haverfordwest/Merlins Bridge, Milford Haven, Narberth, Neyland, Pembroke and Pembroke Dock. All other areas are considered rural.

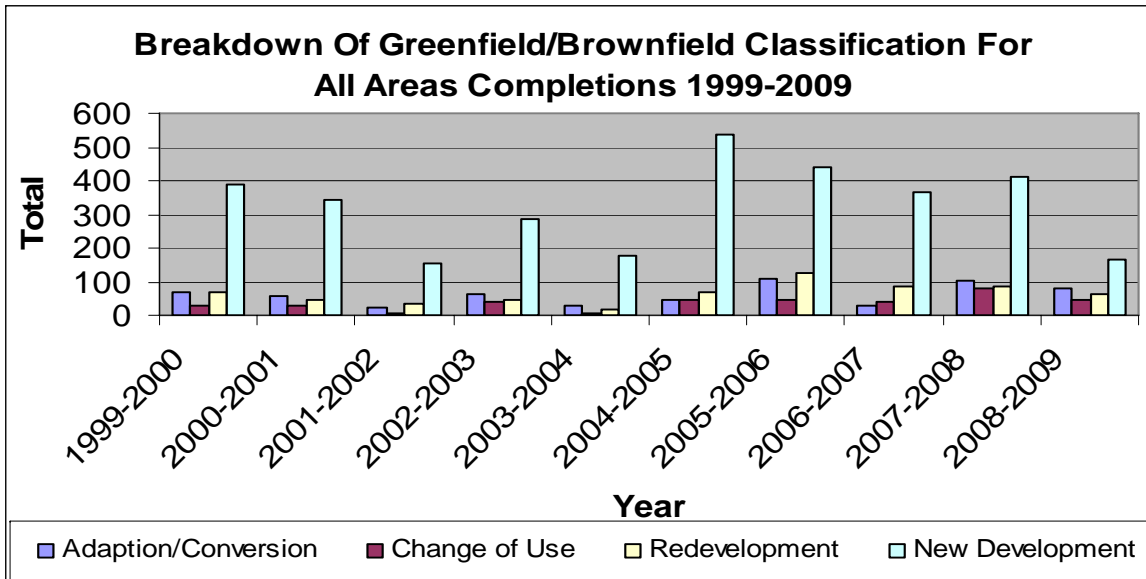
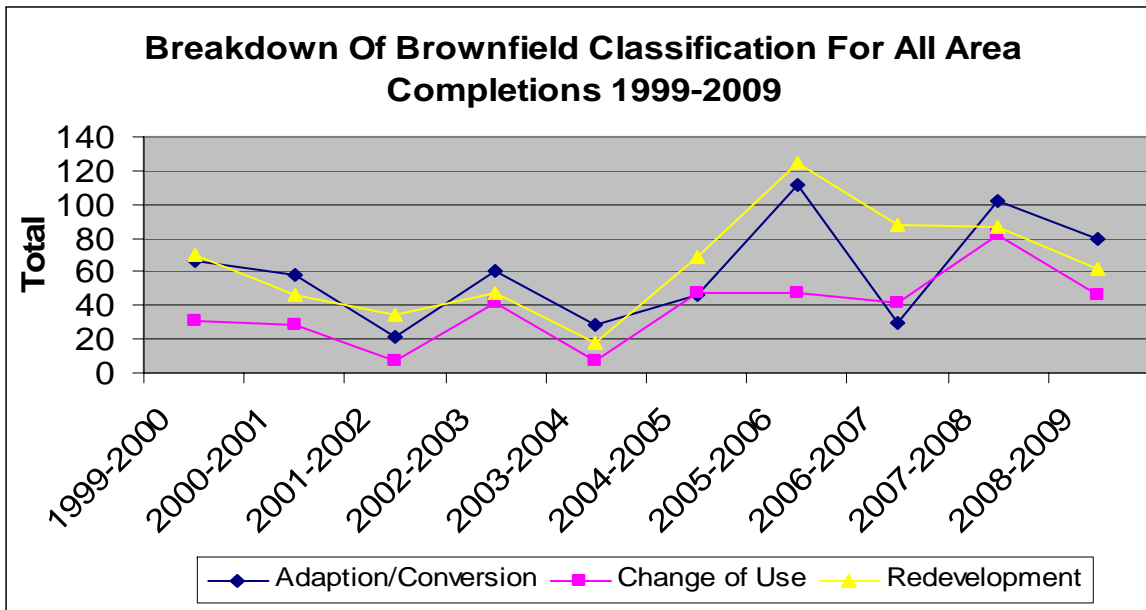


The proportion of Brownfield development is very similar in the main towns and in the rural areas, (36% compared with 30%). This is probably due to the fact adaption/conversion of a building is classified as Brownfield development and in rural areas there were high rates of conversions of farm buildings. In 2008-2009 barn conversions made up 12% of all development. Annual monitoring (and map below right) shows that barn conversions are fairly evenly distributed across the Pembrokeshire County Council planning area.



	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	Total
<b>Adapt/Conversion</b>	<b>12%</b>	<b>12%</b>	<b>10%</b>	<b>14%</b>	<b>12%</b>	<b>7%</b>	<b>15%</b>	<b>6%</b>	<b>15%</b>	<b>22%</b>	<b>12%</b>
<b>Other Development</b>	<b>88%</b>	<b>88%</b>	<b>90%</b>	<b>86%</b>	<b>88%</b>	<b>93%</b>	<b>85%</b>	<b>94%</b>	<b>85%</b>	<b>78%</b>	<b>88%</b>

**Note: New Development is classified as Greenfield- all other categories are classified as Brownfield**



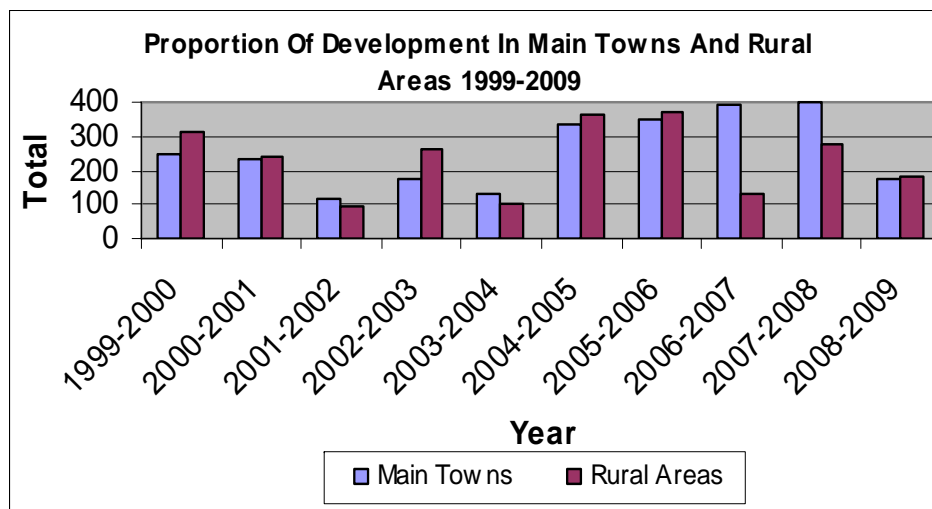
	1999/ 2000	2000/ 2001	2001/ 2002	2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007	2007/ 2008	2008/ 2009	<b>Total</b>	Average	%
<b>Adaption/Conversion</b>	66	58	21	61	28	46	111	30	102	79	<b>602</b>	60.2	12%
<b>Change Of Use</b>	31	28	7	41	7	48	48	41	82	46	<b>379</b>	37.9	8%
<b>Redevelopment</b>	70	46	34	48	18	69	125	88	87	62	<b>647</b>	64.7	13%
<b>New Development</b>	389	341	152	285	179	540	438	366	409	168	<b>3267</b>	326.7	67%
<b>Total</b>	<b>556</b>	<b>473</b>	<b>214</b>	<b>435</b>	<b>232</b>	<b>703</b>	<b>722</b>	<b>525</b>	<b>680</b>	<b>355</b>	<b>4895</b>		

New development is significantly higher than any other type of development across all years. To give a clearer idea of the distribution of other types of development, they are shown again without new development on the first graph on the previous page. From the graphs and percentages it is clear that redevelopment and adaption/conversion of buildings accounts for the greatest proportion of Brownfield development (13% and 12%).

## Trends since the adoption of the JUDP

### JUDP Plans and Policies

The Joint Unitary Development Plan was adopted in 2006. This replaced the former Local Plans. The JUDP allocations were primarily based in the main towns (70%) with the remainder in larger villages (30%). An infill and rounding off policy permitted small scale development in smaller settlements without boundaries. When viewing the trends in completions since the adoption of the JUDP, these policies must be considered.

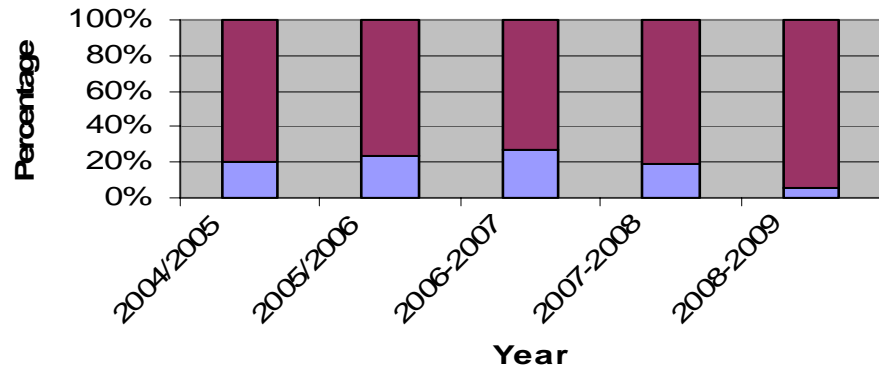


### Urban/Rural Development

Development has remained roughly consistently split between the main towns and rural areas. From 1999 to 2007 the rolling average is very similar for both the main towns and rural areas. In more recent years there is much more of a gap between main town and rural completions with the main town completions rising much more rapidly in the years 2006-2008 when looking at the annual totals. This may reflect the JUDP allocations which were primarily in the main towns, although completions in rural areas have remained high.

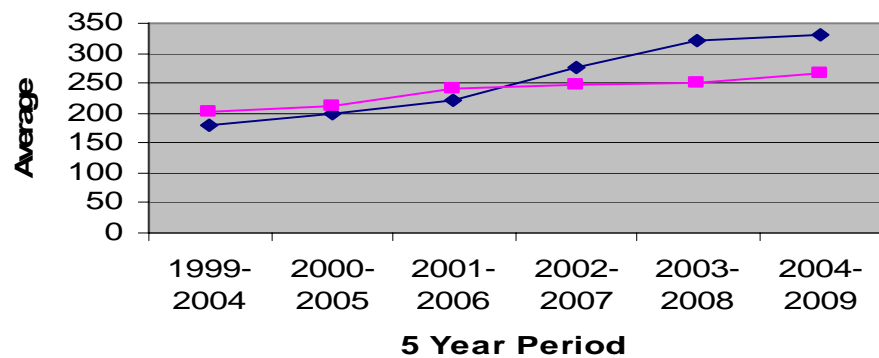
Percentages for completions in the period 1999-2009 in rural areas were 48% and 52% in the main towns.

### Windfall Development Totals for Last Five Years



■ Completions- Allocated in JUDP ■ Completions- Windfall

### 5 Year Rolling Average Shown For Main Towns And Rural Completions



◆ Main Towns Average ■ Rural Average

### Windfall Development

It is clear over the last five years that a high percentage of completions were on windfall sites (that is sites not specifically allocated for housing in a development plan).

In 2007-2008 80% of completions were on windfall sites. This rose to 94% of housing site completions on windfall sites in 2008 -2009.

Some of the windfall sites may have gained planning permission under the earlier Local Plans and been implemented following adoption. It also takes a longer period of time for large housing allocation sites to be developed. Instead smaller sites that are easier to develop and redevelopment to flats in urban areas have been developed in preference to the larger allocations. Larger sites can be more complicated to develop because of a greater need for infrastructure to the sites.

**Table Showing Main Towns and Rural Completions**

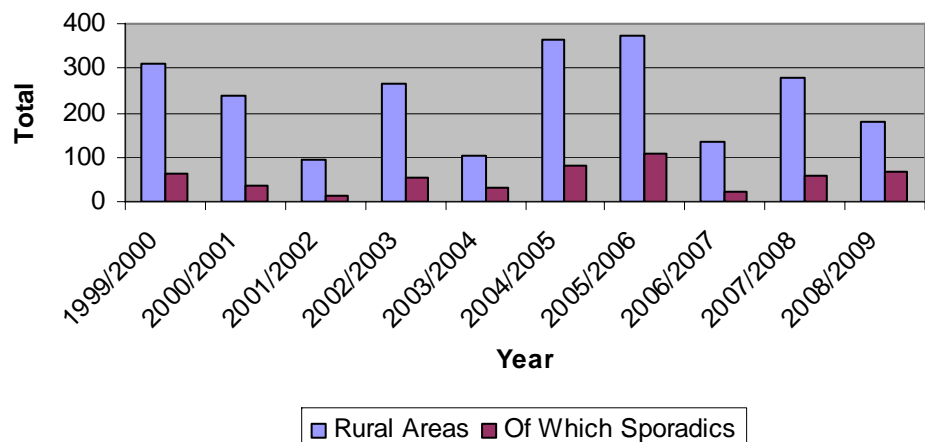
<b>Year</b>	<b>Main Towns</b>	<b>Main Towns %</b>	<b>Rural Areas</b>	<b>Rural Areas %</b>	<b>Total</b>
1999/2000	246	44%	310	56%	556
2000/2001	233	49%	240	51%	473
2001/2002	120	56%	94	44%	214
2002/2003	172	40%	263	60%	435
2003/2004	128	55%	104	45%	232
2004/2005	337	48%	366	52%	703
2005/2006	348	48%	374	52%	722
2006/2007	392	75%	133	25%	525
2007/2008	401	59%	280	41%	681
2008/2009	174	49%	179	51%	353
<b>Total</b>	<b>2551</b>	<b>52%</b>	<b>2343</b>	<b>48%</b>	<b>4894</b>

The percentage of completions in Main Towns increased slightly from 2006 until 2008 following the adoption of the JUDP. However in the year 2008/2009 the completions in Main Towns and Rural areas were once again broadly similar, perhaps reflecting the fact that it was easier to develop small sites in rural areas during the recent housing downturn.

**Windfall Completions**

<b>Year</b>	<b>Completions- Allocated in JUDP</b>	<b>%</b>	<b>Completions- Windfall</b>	<b>%</b>	<b>Total Completions</b>
2004/2005	142	20%	561	80%	703
2005/2006	175	24%	547	76%	722
2006/2007	140	27%	385	73%	525
2007/2008	129	19%	552	81%	681
2008/2009	20	6%	333	94%	353

### Sporadics As A Proportion Of Development In Rural Areas



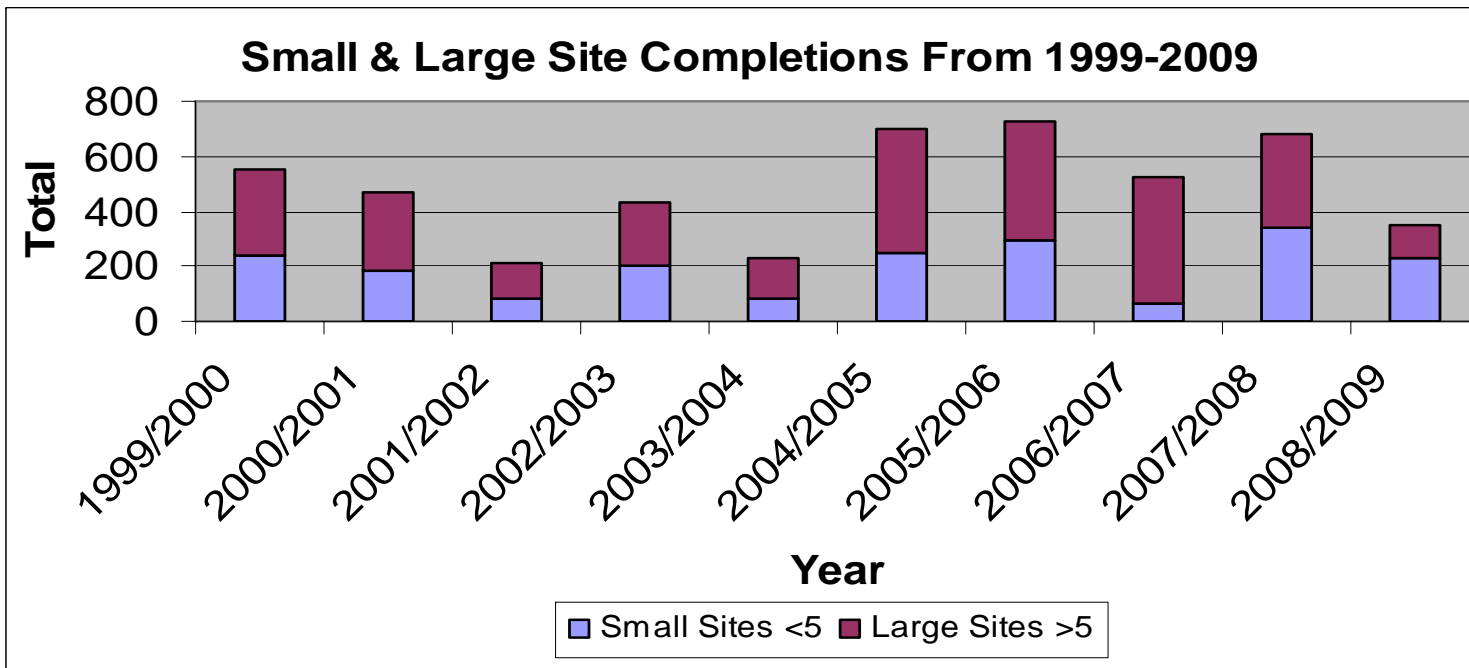
Year	Rural	Of Which Sporadic	Percentage
1999/2000	310	63	20%
2000/2001	240	36	15%
2001/2002	94	12	13%
2002/2003	263	53	20%
2003/2004	104	31	30%
2004/2005	366	82	22%
2005/2006	374	107	29%
2006/2007	133	24	18%
2007/2008	280	58	21%
2008/2009	179	69	38%
<b>Total</b>	<b>2343</b>	<b>535</b>	<b>23%</b>

### Sporadics

Any residential development that occurs outside a settlement boundary is classed as a sporadic.

Over the ten year period, sporadics make up approximately one-fifth of the development in rural areas (23%).

The JUDP adopted in 2006 has a significant number of settlements without a settlement boundary where development for infill or rounding off is permitted, which form part of those completions identified as sporadics. Others come from barn conversions and forestry/farm workers dwellings.



#### Small/Large Sites

The number of completions on small sites as a proportion of total completions has fluctuated over the ten year period. Large sites have made up 60% of the total and small sites have made up 40% of the total annual completions over the ten year period. However there has been great variation between the years. The adoption of the JUDP in 2006 appears to have increased the proportion of sites of over 5 being developed (with the exception of 2008/2009).



### Completions on Small/Large Sites in Rural/Urban Areas

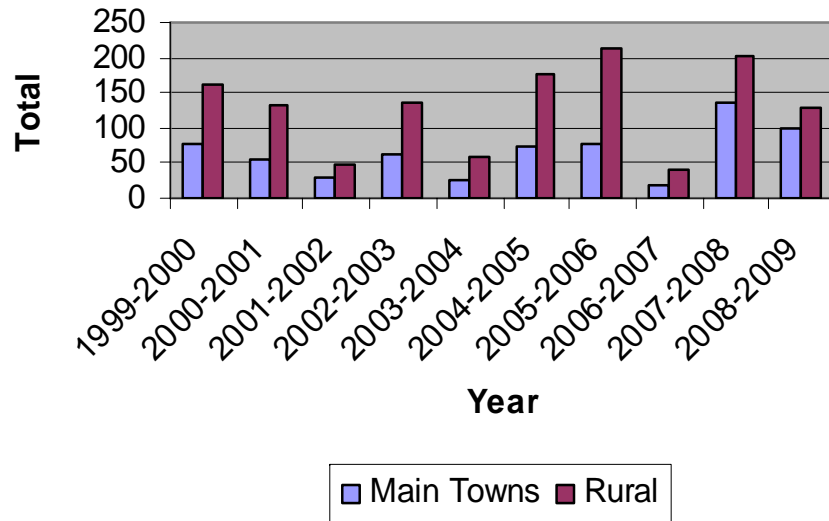
	<b>Small Sites &lt;5</b>	<b>Large Sites &gt;5</b>	<b>All Sites</b>	<b>Small Site % total</b>	<b>Large Site % total</b>
1999/2000	237	319	556	43%	57%
2000/2001	187	286	473	40%	60%
2001/2002	79	135	214	37%	63%
2002/2003	199	236	435	46%	54%
2003/2004	84	148	232	36%	64%
2004/2005	247	456	703	35%	65%
2005/2006	292	430	722	40%	60%
2006/2007	61	464	525	12	88%
2007/2008	340	341	681	50%	50%
2008/2009	227	126	353	64%	36%
<b>Total</b>	<b>1953</b>	<b>2941</b>	<b>4894</b>	<b>40%</b>	<b>60%</b>

<b>Small Sites</b>	<b>Main Towns</b>	<b>Rural</b>	<b>Total</b>
1999-2000	76	161	237
2000-2001	56	131	187
2001-2002	31	48	79
2002-2003	62	137	199
2003-2004	24	60	84
2004-2005	72	175	247
2005-2006	77	215	292
2006-2007	20	41	61
2007-2008	136	204	340
2008-2009	100	127	227
<b>Total</b>	<b>654</b>	<b>1299</b>	<b>1953</b>

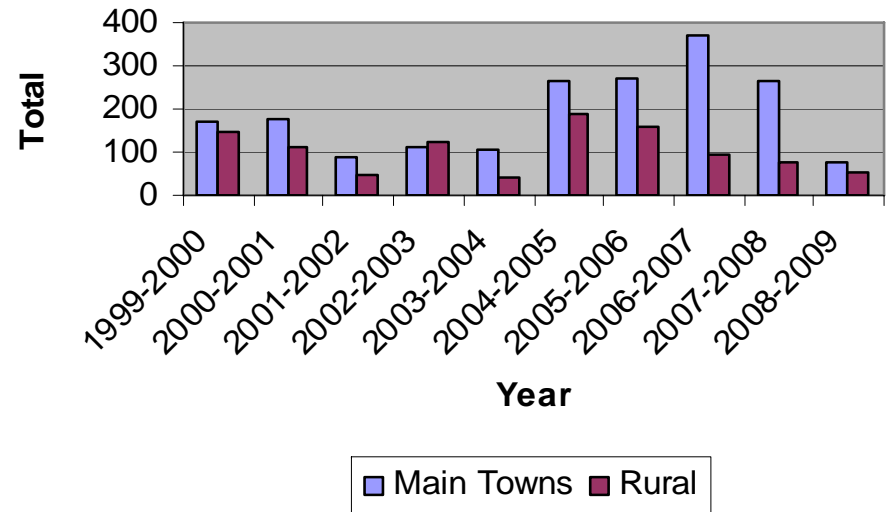
<b>Large Sites</b>	<b>Main Towns</b>	<b>Rural</b>	<b>Total</b>
1999-2000	170	149	319
2000-2001	177	109	286
2001-2002	89	46	135
2002-2003	110	126	236
2003-2004	104	44	148
2004-2005	265	191	456
2005-2006	271	159	430
2006-2007	372	92	464
2007-2008	265	76	341
2008-2009	74	52	126
<b>Total</b>	<b>1897</b>	<b>1044</b>	<b>2941</b>

As demonstrated by the graphs and tables, the general trend is for large site developments to be situated in the main towns and for small site developments to be situated in the rural areas.

**Proportion Of Completions For Small Sites (<5) In Main Towns And Rural Areas 1999-2009**



**Proportion Of Completions For Large Sites (>5) In Main Towns And Rural Areas 1999-2009**



## Completed JUDP Allocations

(Please note the base date for the data below is the 1<sup>st</sup> April 2010).

Out of 100 JUDP sites within Pembrokeshire (excluding the area of the National Park) 11 JUDP sites have now been entirely completed. These have delivered 397 dwellings in total.

JUDP Site Reference	Site Name	Dwellings
001/00024	Abercych- OS 9736 (part)	4
040/00227	Haverfordwest-adjacent to Priory Cottage, Ellis Avenue	10
048/00022	Johnston-between Fairfield & the railway	33
053/00011	Letterston-OS 5574 St David's Road	23
086/00118	Milford Haven-Land at the Grove Estate	60
086/00221	Milford Haven- Westhill Estate	90
093/00029	Neyland-adjacent to Bluebell Close	86
093/00068	Neyland-Neyland Vale (Honeyborough Farm)	48
096/00004	Pembroke Dock-adjacent to Fairway's, Pennar	16
096/00236	Pembroke Dock-west of Ferry Road, Lower Pennar	17
096/00242	Pembroke Dock-East of Sycamore Street	10
Total		397

In addition to these 11 sites, a further 21 sites are under construction and have 504 units which have been completed. In some instances a single plot remains incomplete (for example at Haverfordwest – Cardigan Road).

JUDP Site Reference	Site Name	Dwellings Allocated	Under Construction	Completed	Not Started
025/00014	Cosheston-west of Woodfield Grove	7	1	1	5
029/00012	Crundale-south of Elm Park	23	23	0	0
029/00013	Crundale-adjacent to Greenwell	35	35	0	0

	Park				
034/00167	Goodwick-adjacent to Dyffryn Garage	13	1	4	8
034/00214	Fishguard – East of Vergam Terrace	33	0	28	8
040/00230	Haverfordwest – Cardigan Road	67	0	66	1
040/00077	Haverfordwest-behind City Road	140	6	67	67
040/00106	Haverfordwest-Scarrowscant	204	4	38	162
048/00017	Johnston-adjacent to the Filling Station	132	4	0	128
053/00009	Letterston-adjacent to Court House	66	0	9	57
053/00029	Letterston-adjacent to 47 Station Road	7	0	3	4
053/00034	Letterston-OS 8975, Station Road	31	21	0	10
086/00122	Milford Haven-Milford Docks	103	0	89	14
086/00226	Milford Haven-East of Bunkers Hill	75	2	0	73
122/00035	St Dogmaels-site at the rear of Longdown St & adjoining Mwtshwr	28	0	11	17
127/00012	Stepaside-land opposite the school	10	1	5	4
015/00022	Carew/Sageston-South of Ashleigh Heights	40	1	11	28
034/00165	Fishguard-Maesgwynne Farm	120	0	22	98
095/00144	Pembroke – adjacent to Lords	98	2	45	5

	Meadow				
096/00011	Pembroke Dock-Pennar Park	138	2	45	91
096/00230	Pembroke Dock-Llanion Park extension	56	0	42	14
096/00232	Pembroke Dock-north of Essex Road, West Llanion	30	0	18	12
<b>Totals</b>		<b>1456</b>	<b>103</b>	<b>504</b>	<b>851</b>

### Remaining JUDP Allocations

There are 67 remaining JUDP Site Allocations with a potential to provide 4345 dwellings in total which have not yet been completed. Many of these allocations however do have full or reserved matters planning permission and could be built at any point over the next few years (469 with full planning permission and 94 with reserved matters). (Note figures are as at April 1<sup>st</sup> 2010).

JUDP Site Reference	Site Name	Dwellings	Full or Reserved Matters	Outline?
049/00024	Keeston-Land adjacent to West Lane Close	35	Full	Yes
086/00117	Milford Haven-land adjacent to the Kings Function Centre, Dale Road	168	Full	Yes
086/00129	Milford Haven-Greenmeadow, Steynton	98	Full	Yes
086/00225	Milford Haven-Kings Function Centre, Dale Road	168	Full	Yes
		469	Full Total	
003/00024	Begelly-North of New Road	45	No	No
003/00025	Begelly-Barley Park Cottages Site	35	No	No
003/00026	Begelly-extension to the New Road site	35	No	No
006/00024	Blaenffos-Opposite Lodge Fach	16	No	No
014/00026	Camrose-Land South of Beech Grove	8	No	Yes

015/00024	Carew/Sageston-National Park Caravan Site	75	No	No
020/00062	Cilgerran-OS parcel 0386 adjacent to Holly Lodge	18	No	No
022/00012	Clarbeston Road-OS 6879 & OS 6871 (part)	20	No	Yes
028/00012	Croesgoch-OS 7445, North of the Forge	25	No	Yes
028/00013	Croesgoch-East of the Forge	39	No	No
029/00014	Crundale-opposite Woodholm Close	13	No	Yes
029/00017	Crundale-land at Cardigan Slade	55	No	Yes
030/00043	Crymych-Between the school & Station Road	80	No	No
034/00215	Fishguard-North of Maesgwynne	120	No	No
040/00161	Haverfordwest-Hawthorn Rise	36	No	No
040/00269	Haverfordwest-Hermitage Farm	23	No	No
040/00273	Haverfordwest-Slade Lane North	446	No	No
040/00274	Haverfordwest-Slade Lane South	516	No	Yes
040/00275	Haverfordwest-between Shoalshook Lane & the bypass	277	No	No
040/00324	Haverfordwest-Gas Depot Site, Lower Cambrian Place	16	No	No
040/00325	Haverfordwest-Land South of Thomas Parry Way	29	No	No
044/00050	Hook-r/o Pill Road	12	No	No
046/00015	Hundleton-East of Bentlass Road	30	No	Yes
048/00038	Johnston-adjacent to Milford Road	119	No	No
050/00041	Kilgetty-West of Stepside School	19	No	Yes
050/00042	Kilgetty-extension to James Park & Cotswold Gardens	36	No	Yes
050/00043	Kilgetty-land to the rear of Newton Hall	24	No	No
050/00044	Kilgetty-land to the South of Kivelgy Park	12	No	No

052/00011	Lamphey-South of Cleggar's Park	30	No	No
052/00015	Lamphey-South of Cleggar's Park-extension site	40	No	No
086/00095	Milford Haven-Land West of Silverstream, Hubberston	49	No	No
086/00222	Milford Haven-South of the Meads	70	No	No
086/00223	Milford Haven-Thornton Road	224	No	No
086/00227	Milford Haven-East of Lilcac Close	75	No	No
088/00072	Narberth-East of B4313, Redstone Road	50	No	No
088/00074	Narberth-Dingle Farm	90	No	No
088/00075	Narberth-N of Station Road OS 5673	63	No	No
088/00077	Narberth-West of OS 9933, Rushacre	54	No	No
088/00078	Narberth-West of Bloomfield Gardens	50	No	No
088/00089	Narberth-East of Northmead	52	No	No
093/00066	Neyland- east of Poppy Drive	101	No	No
095/00149	Pembroke-adjacent to Long Mains & North East of Marshall Lane	40	No	No
095/00151	Pembroke- South of South Terrace (density increase)	36	No	No
095/00153	Pembroke-adjacent to Monkton Swifts	62	No	No
095/00154	Pembroke-North & West of Railway Tunnel	150	No	No
096/00005	Pembroke Dock-Stranraer Road, Pennar	40	No	No
096/00160	Pembroke Dock-adjacent to Southampton Row	17	No	No
096/00231	Pembroke Dock-North of Imble Lane	40	No	No
096/00233	Pembroke Dock-East of Hill Farm, Imble	38	No	No
096/00234	Pembroke Dock-South west of Nelson Street, Pennar	15	No	No
096/00238	Pembroke Dock-North of Pembroke Road	60	No	No

096/00239	Pembroke Dock-S of Pembroke Rd/W of Pembroke School	60	No	No
096/00240	Pembroke Dock-South of Stranraer Road	10	No	No
099/00043	Pentlepoir-land to the south of Valley Road	13	No	No
100/00008	Penybryn-North East of Llys Gwyn	7	No	No
118/00010	Scleddau-part OS 4200, N of Cefn Coed	15	No	No
120/00018	Spittal-adjacent to the New School	14	No	Yes
132/00030	Templeton-land South of the B4315	8	No	Yes
135/00004	Tiers Cross-North of Bulford Road	22	No	No
146/00017	Waterston-Land North of Main Road	8	No	No
		3782	No Total	
001/00008	Abercych-adjacent to Penrhiw	16	Reserved Matters	Yes
007/00047	Boncath-Old Station Yard	30	Reserved Matters	Yes
095/00150	Pembroke-North of Monkton Priory	48	Reserved Matters	Yes
		94	Reserved Matters Total	
		<b>4345</b>	<b>Grand Total</b>	

## Completions from JUDP allocations

Between 2006 and 2009 901 units were completed on JUDP allocated sites. This is out of a potential total of 6198, meaning that 14.5% of allocations have been completed. A significantly higher proportion (39%) had gained planning consent.

These figures indicate that there are a significant number of units allocated which have planning consent but have not yet been completed and also a significant number of units which have not yet gained planning consent.



## House Price Trends 2000 - 2009

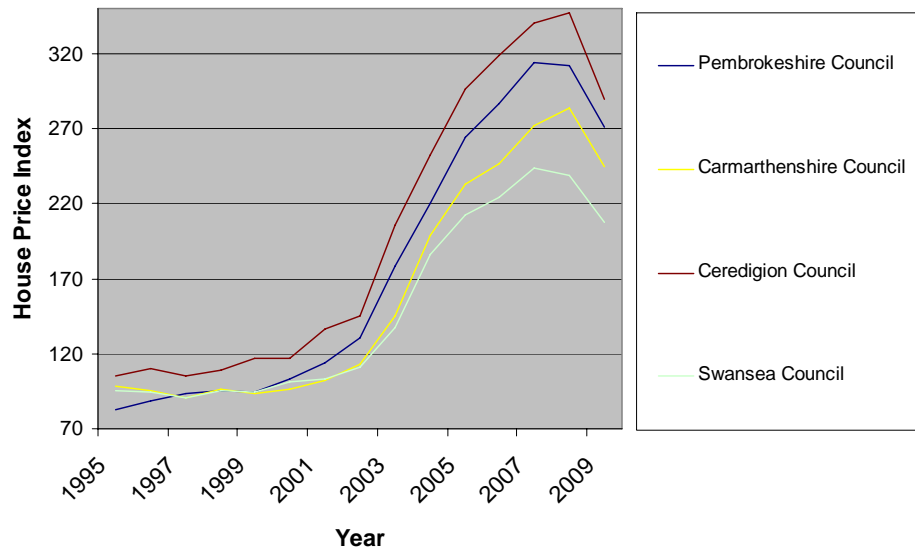
Average Price of Residential Property Sales Completed 2000-2009 (Source: Land Registry)

Town Area	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
	All Types	All Types	All Types	All Types	All Types	All Types	All Types	All Types	All Types	All Types
Fishguard/Goodwick	£54,896	£66,811	£81,767	£101,623	£138,217	£151,526	£158,315	£158,451	£153,822	£174,401
Haverfordwest/Merlin's Bridge	£53,609	£57,482	£75,903	£98,596	£126,490	£136,362	£152,604	£164,063	£142,898	£151,913
Milford Haven	£41,244	£47,289	£58,098	£76,443	£104,903	£127,759	£137,324	£138,041	£136,709	£122,711
Narberth	£60,673	£63,476	£87,700	£104,004	£139,559	£155,931	£219,706	£167,035	£183,046	£131,000
Neyland	£51,764	£56,435	£61,358	£87,198	£113,277	£118,406	£139,659	£149,409	£150,858	£131,891
Pembroke	£56,904	£64,271	£84,791	£103,706	£125,536	£143,845	£145,763	£171,177	£178,003	£153,758
Pembroke Dock	£43,173	£50,033	£66,680	£81,341	£105,925	£126,936	£137,471	£143,249	£133,191	£132,054

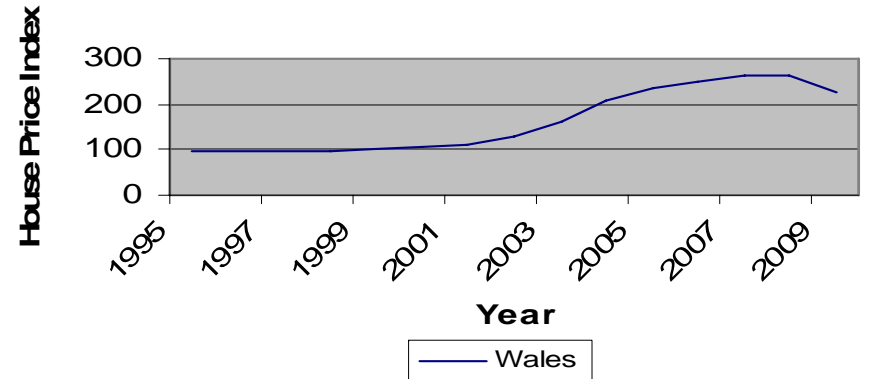
Sales 2000-2009 (Source: Land Registry)

Town Area	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
	All Types	All Types	All Types	All Types	All Types	All Types	All Types	All Types	All Types	All Types
Fishguard/Goodwick	76	91	82	74	69	65	89	79	63	51
Haverfordwest/Merlin's Bridge	237	311	305	250	261	242	249	203	157	116
Milford Haven	166	213	201	214	163	162	234	239	114	86
Narberth	39	44	47	33	36	32	35	27	24	18
Neyland	56	81	75	69	53	62	82	69	32	23
Pembroke	110	133	149	130	111	109	106	98	46	66
Pembroke Dock	165	172	179	193	179	137	153	184	112	76

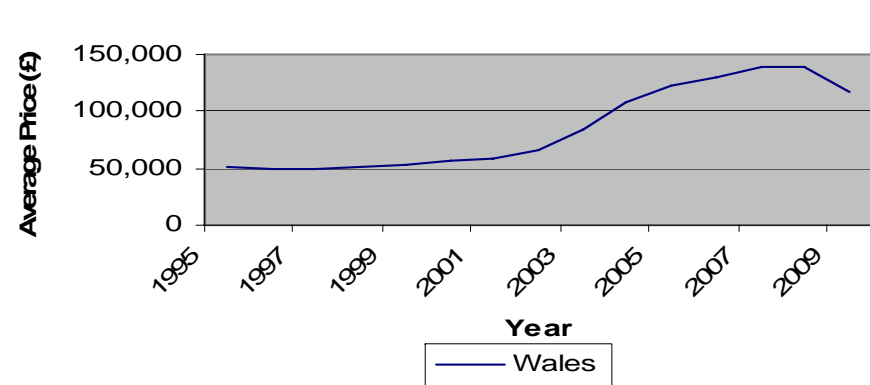
**House Price Index Comparison**



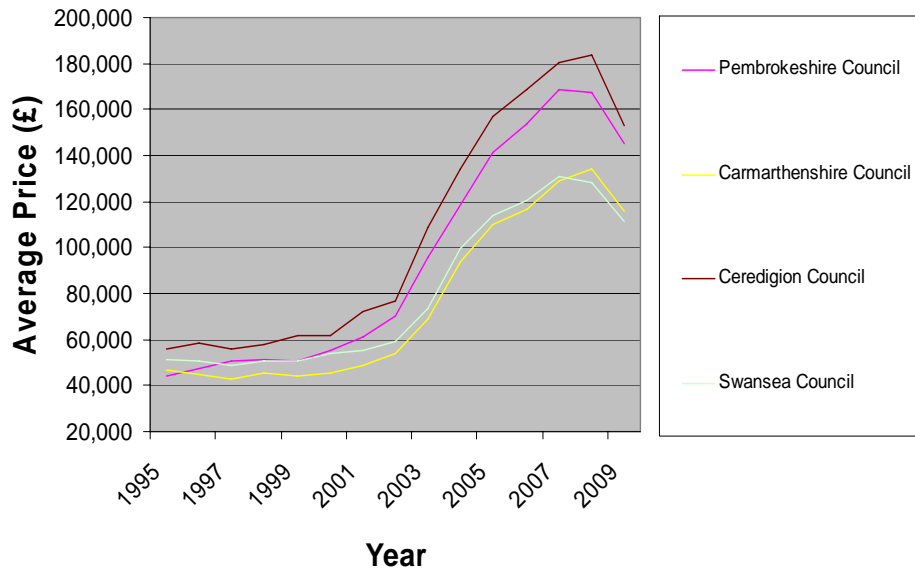
**House Price Index Across Wales**



**Average House Price Across Wales**



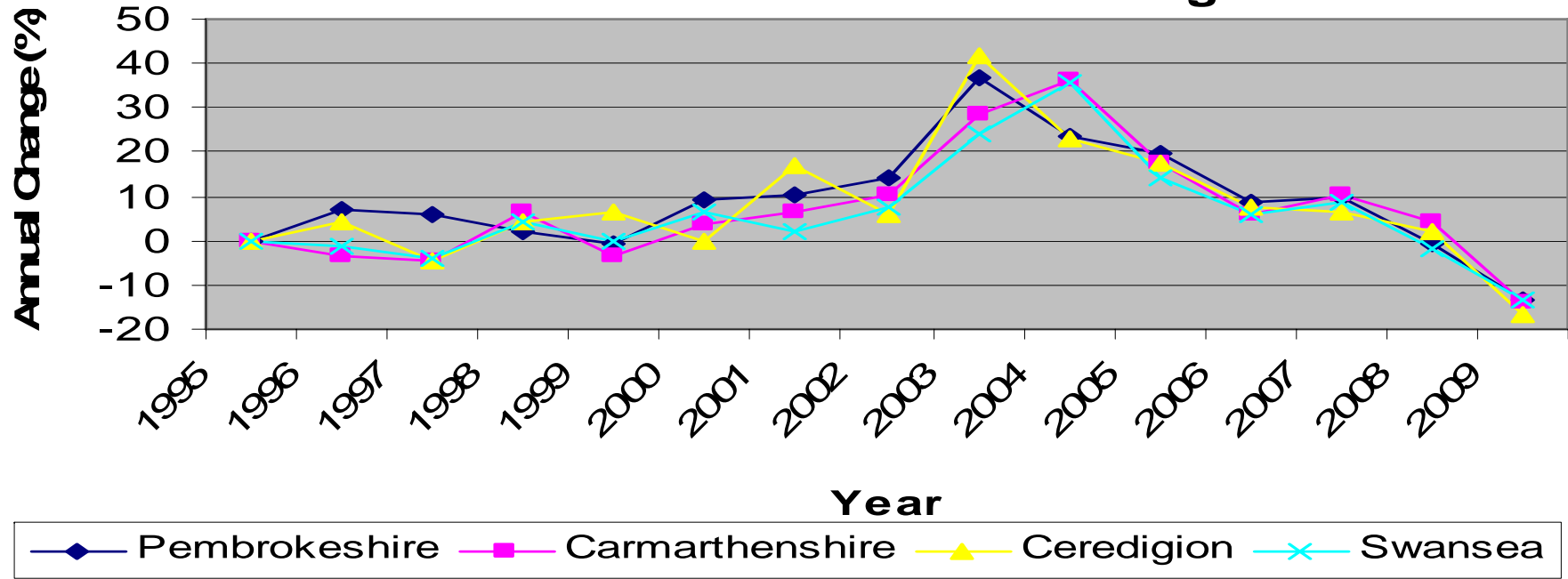
**Average House Price**



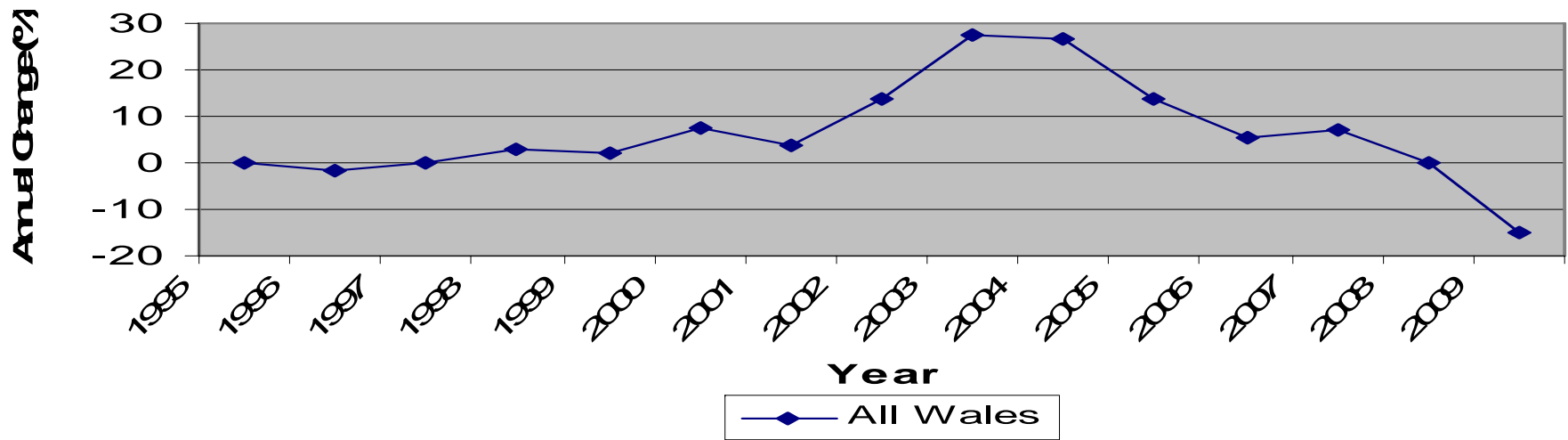
**House Prices**

The graphs on this page and next clearly show the rising housing markets up until 2008, then a recession hitting.

### House Price Index Annual Change

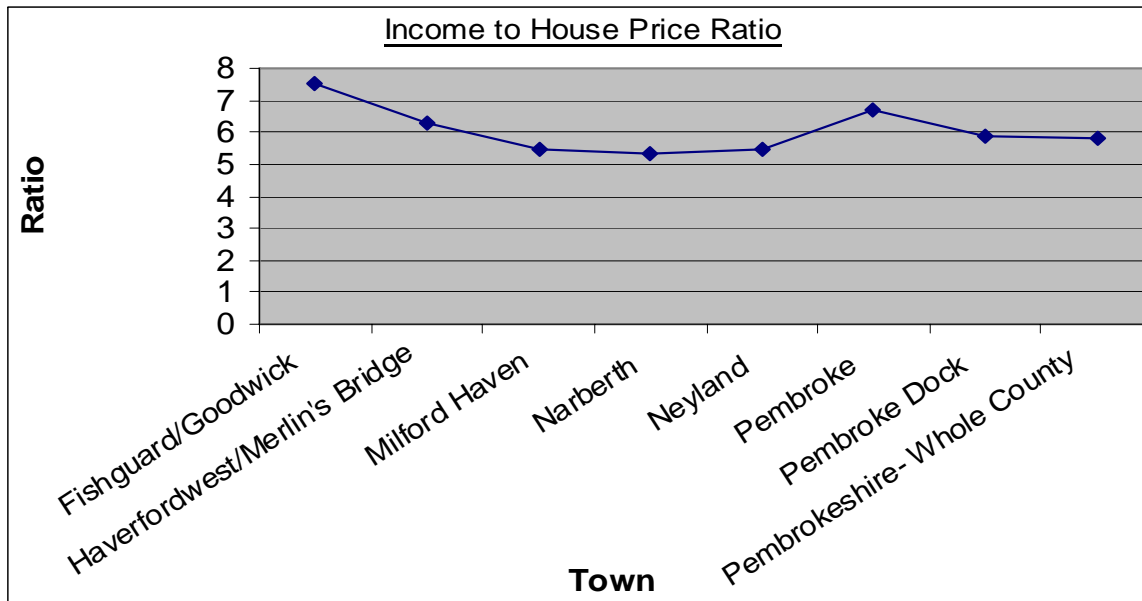


### House Price Index Annual Change



## House Price to Income Ratio

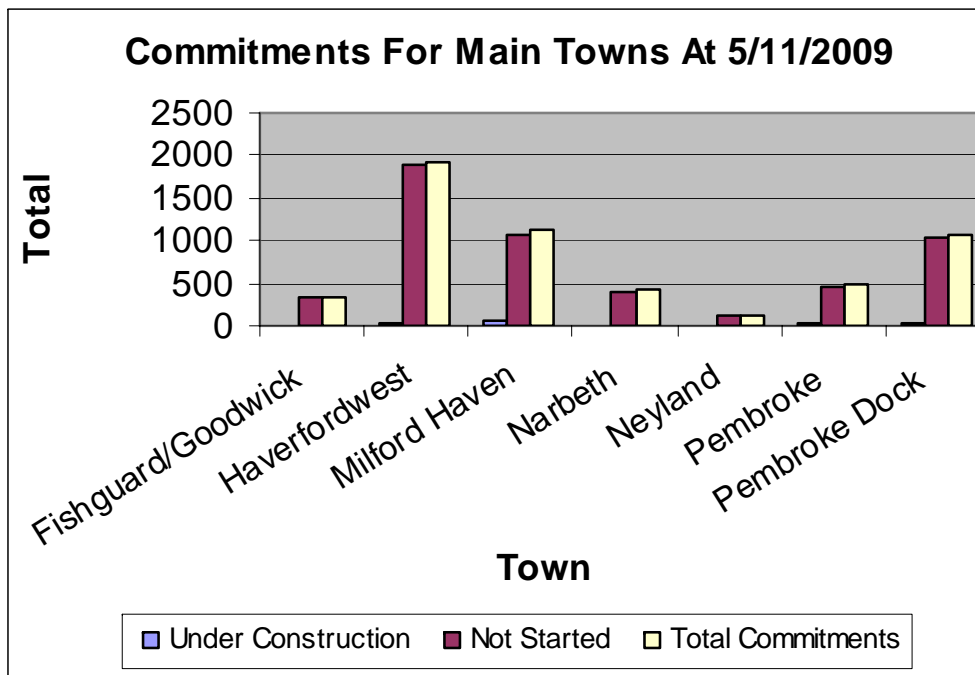
Town Area	Median Income 2009 (Source: CACI 2009 Paycheck data)	Average Price of Residential Property Sales 2009 (Source: Land Registry 2009)	House Price to Income Ratio 2009
Fishguard/Goodwick	£23,219	£174,401	7.5
Haverfordwest/Merlin's Bridge	£24,111	£151,913	6.3
Milford Haven	£22,058	£122,711	5.5
Narberth	£24,384	£131,000	5.3
Neyland	£23,948	£131,891	5.5
Pembroke	£22,834	£153,758	6.7
Pembroke Dock	£22,080	£132,054	5.9
Pembrokeshire- Whole County	£24,735	£145,265	5.8



From the table above and graph opposite we can see that Fishguard/Goodwick has the highest house price to income ratio in 2009 and Narberth has the lowest. Pembrokeshire as a whole in 2009 had a ratio of 5.8:1. Meaning the typical house price was more than 5 times the median income.

## Planning Commitments

Town	Under Construction	Not Started	Total Commitments	UC %	NS%
Fishguard/Goodwick	11	333	344	3%	97%
Haverfordwest	26	1897	1923	1%	99%
Milford Haven	73	1063	1136	6%	94%
Narberth	3	409	412	1%	99%
Neyland	1	117	118	1%	99%
Pembroke	16	469	485	3%	97%
Pembroke Dock	25	1045	1070	2%	98%
<b>Total</b>	<b>155</b>	<b>5333</b>	<b>5488</b>	<b>3%</b>	<b>97%</b>

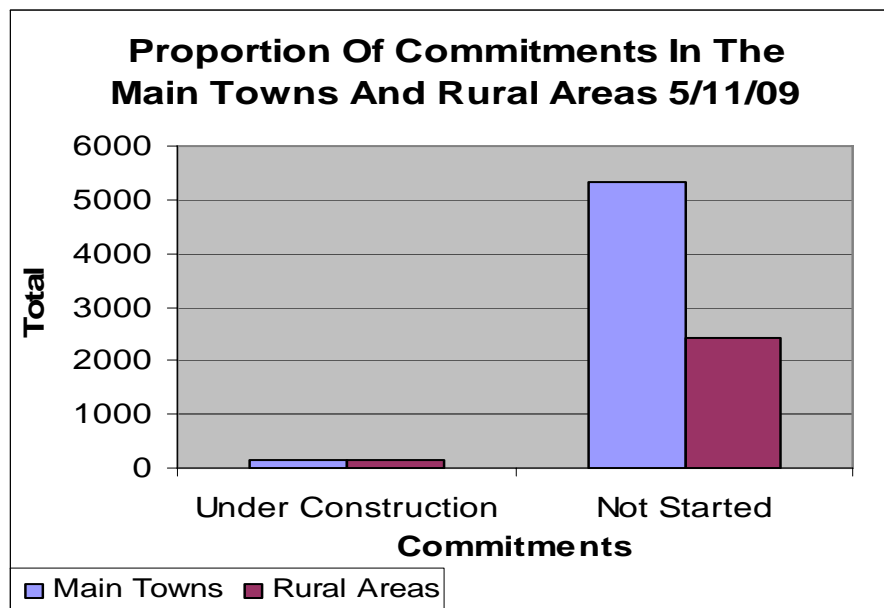


### Commitments for Main Towns

The majority of commitments in all towns have not yet been started (97%) with a small percentage under construction (3%). Milford Haven is the town with the highest percentage of units already under construction at 6%, with the totals for the other main towns being considerably lower. Haverfordwest is the town with the greatest number of commitments (1923), as would be expected given its position as the county's principal market town. Milford Haven is the town with the second greatest number of commitments at 1136 which is considerably higher than any other of the main towns, excluding Haverfordwest and Pembroke Dock (1070). Pembroke Docks commitments have increased significantly with the addition of the Martello Quays development which in itself is expected to make up 480 units.

	<b>Under Construction</b>	<b>UC %</b>	<b>Not Started</b>	<b>NS %</b>	<b>Total Commitments</b>	<b>Total %</b>
Main Towns	155	3%	5333	97%	5488	68%
Rural Areas	148	6%	2436	94%	2584	32%
<b>Total</b>	<b>303</b>	<b>4%</b>	<b>7769</b>	<b>96%</b>	<b>8072</b>	<b>100</b>

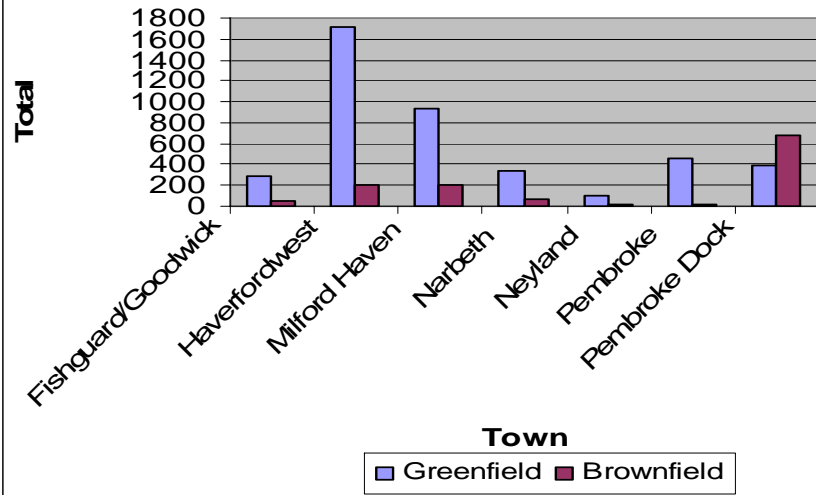
**Total commitments in both rural and urban areas add up to 8072 units. However, these include outline permissions which cannot be developed without reserved matters consent and allocations which may not have planning permission.**



### Commitments in Main Towns & Rural Areas

Of future commitments in Pembrokeshire 68% are located in the main towns and 32% within the rural areas. These figures are not surprising as housing commitments include allocations which are found mostly on large sites, outline, reserved matters and full planning permissions. The vast majority of these have not yet been started. Allocations and outlines cannot be built on until they have received reserved matters or full planning permission. There are also a higher percentage of those under construction within the rural areas.

### Greenfield/Brownfield Proportion Of Commitments In Main Towns

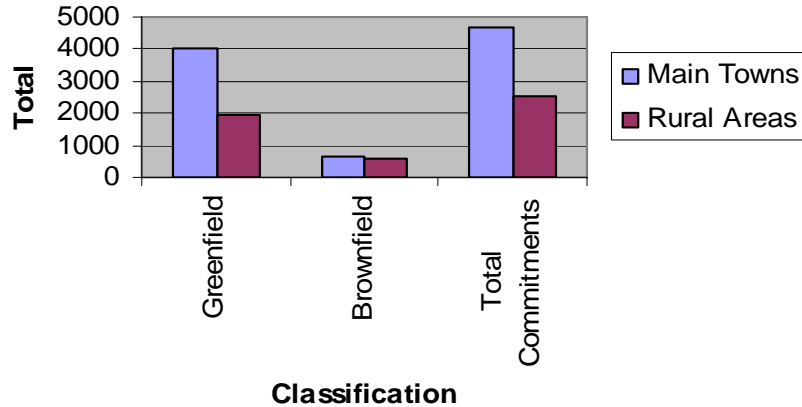


### Greenfield/Brownfield Commitments in Main Towns

As with the completion totals, there was a far higher number of Greenfield than Brownfield commitments in the main towns. The towns with the highest percentage of Brownfield commitments are Milford Haven, Pembroke Dock Narberth and Fishguard, although Fishguard and Narberth have comparatively low totals. Pembroke has the lowest percentage of Brownfield development of all the main towns. Pembroke Dock is the only town to have more Brownfield than Greenfield sites.

Town	Greenfield	Greenfield %	Brownfield	Brownfield %	Total Commitments
Fishguard/Goodwick	296	86%	48	14%	344
Haverfordwest	1720	89%	203	11%	1923
Milford Haven	933	82%	203	18%	1136
Narberth	348	84%	64	16%	412
Neyland	109	92%	9	8%	118
Pembroke	466	96%	19	4%	485
Pembroke Dock	398	37%	672	63%	1070
<b>Total</b>	<b>4270</b>	<b>78%</b>	<b>1218</b>	<b>22%</b>	<b>5488</b>

**Greenfield/Brownfield Commitments  
For Main Towns And Rural Areas**



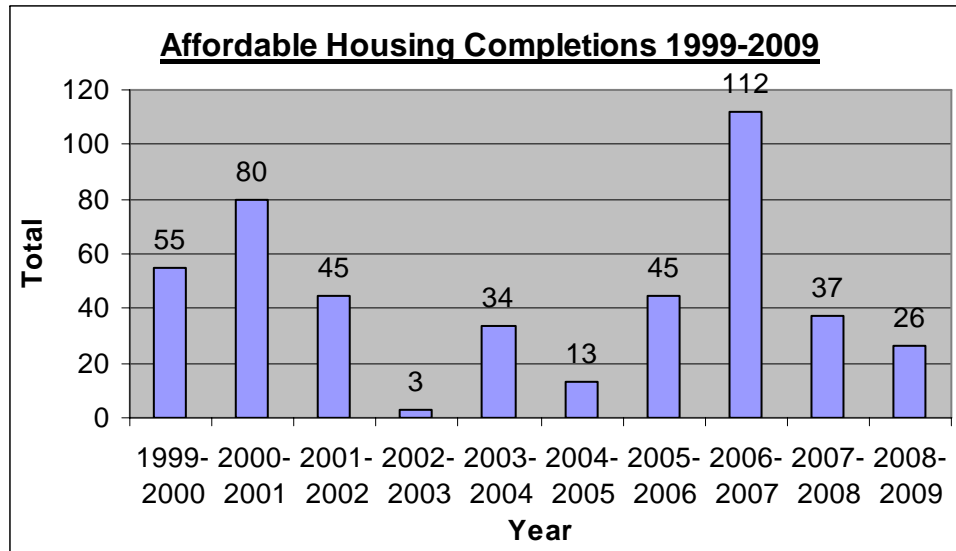
**Greenfield/Brownfield Commitments Main Town & Rural**

As with the completions, the proportion of Greenfield proposed development is far higher in both the main towns and the rural areas than Brownfield. The percentage of Brownfield commitments in rural areas is 26% which is higher than the proportion of Brownfield in the main towns which is 22%. This may well be the result of the high number of conversions in the rural areas.

	Greenfield	Greenfield %	Brownfield	Brownfield %	Total Commitments
Main Towns	4270	78%	1218	22%	<b>5488</b>
Rural Areas	1966	74%	718	26%	<b>2584</b>
					<b>8072</b>



## Affordable Housing



In 2008-2009 26 units of affordable housing were built. The total numbers of applications pending affordable housing section 106 agreements are 16 applications as of April 2010. In 2008/2009 there were 6 applications with affordable housing contributions attached and a total of 60 units for affordable housing gained planning permission. There was also one off site contribution.

## Glossary

<b>Adaption/Conversion</b>	Changing the existing use of a building by adaptation or conversion. In countryside locations buildings must be of permanent and substantial construction and capable of conversion or adaptation without major or complete reconstruction.
<b>Affordable Housing</b>	Permanent housing provided for sale or rent at prices below the market rate. Affordable housing is provided to meet a specific local housing need which cannot be met by housing on the open market. Such housing will be reserved in perpetuity for those who need it.
<b>Annual Monitoring Report (AMR)</b>	A report submitted to the government by local planning authorities or regional planning bodies assessing progress with and the effectiveness of a Local Development Framework.
<b>Brownfield Land/Sites</b>	Land which is, or was, previously occupied by a permanent structure (excluding agriculture or forestry buildings) and associated fixed surface infrastructure. This includes the curtilage of development, defence buildings and land used for mineral extraction and waste disposal where provision for restoration has not been made. See also detailed explanatory notes in Planning Policy Wales – Section 2.7.
<b>Change of Use</b>	A change in the way that land or buildings are used (see Use Classes Order). Planning permission is usually necessary in order to change from one 'use class' to another.
<b>Commitments</b>	Sites where a planning permission exists for housing development but the development has not been completed.
<b>Greenfield Land/Sites</b>	Land which has never been built on, usually grassland, farmland or heath.
<b>Infill Development</b>	The development of a relatively small gap between existing buildings.
<b>Joint Housing Land Availability Study (JHLAS)</b>	Joint Housing Land Availability Studies are conducted annually from 1 <sup>st</sup> April and records the number of housing site completions. One of the purposes of the study is to provide an agreed 5 year forward statement of residential land availability for development planning and development control purposes.

<b>Joint Unitary Development Plan (JUDP)</b>	The currently adopted development plan for Pembrokeshire County Council. This contains policies used to determine planning applications.
<b>Main Towns</b>	Haverfordwest/Merlins Bridge, Milford Haven, Neyland, Pembroke, Pembroke Dock, Fishguard/Goodwick and Narberth.
<b>New Development</b>	A new dwelling built on Greenfield land.
<b>Redevelopment</b>	The replacement of an existing structure with a new development. In terms of housing this can often allow the development of housing accommodation which is better adapted to meeting present and future housing needs, as long as the quality of the environment is maintained.
<b>Rural Areas</b>	All other villages/hamlets within the Pembrokeshire County Council area.
<b>Section 106 Agreement</b>	A legal agreement under section 106 of the 1990 Town & Country Planning Act. Section 106 agreements are legal agreements between a planning authority and a developer, or undertakings offered unilaterally by a developer, that ensure that certain extra works related to a development are undertaken.
<b>Sporadic</b>	Any housing development outside a settlement boundary.
<b>Windfall</b>	Housing development which was not specifically allocated in the development plan.