



Property market trends & planning changes in Wales 2020





Our people

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Covering

- General update on the planning sector in Wales
- Affordable homes
- Trends & changes in the property market
- Planning changes experienced in 2020
- What did we learn?



Update on the planning sector

2020 an extremely challenging & unprecedented year

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Applications submitted in 2020



Source: Planning Portal

Applications submitted in 2020



National Development Framework

Proposed changes

- Regional footprint
- Energy
- Rural issues
- Transport
- Flood risk
- The role and function of the NDF
- NDF opportunities & challenges
- NDP outcomes and monitoring
- NDF policies
- Strategic Diagrams – National & Regional



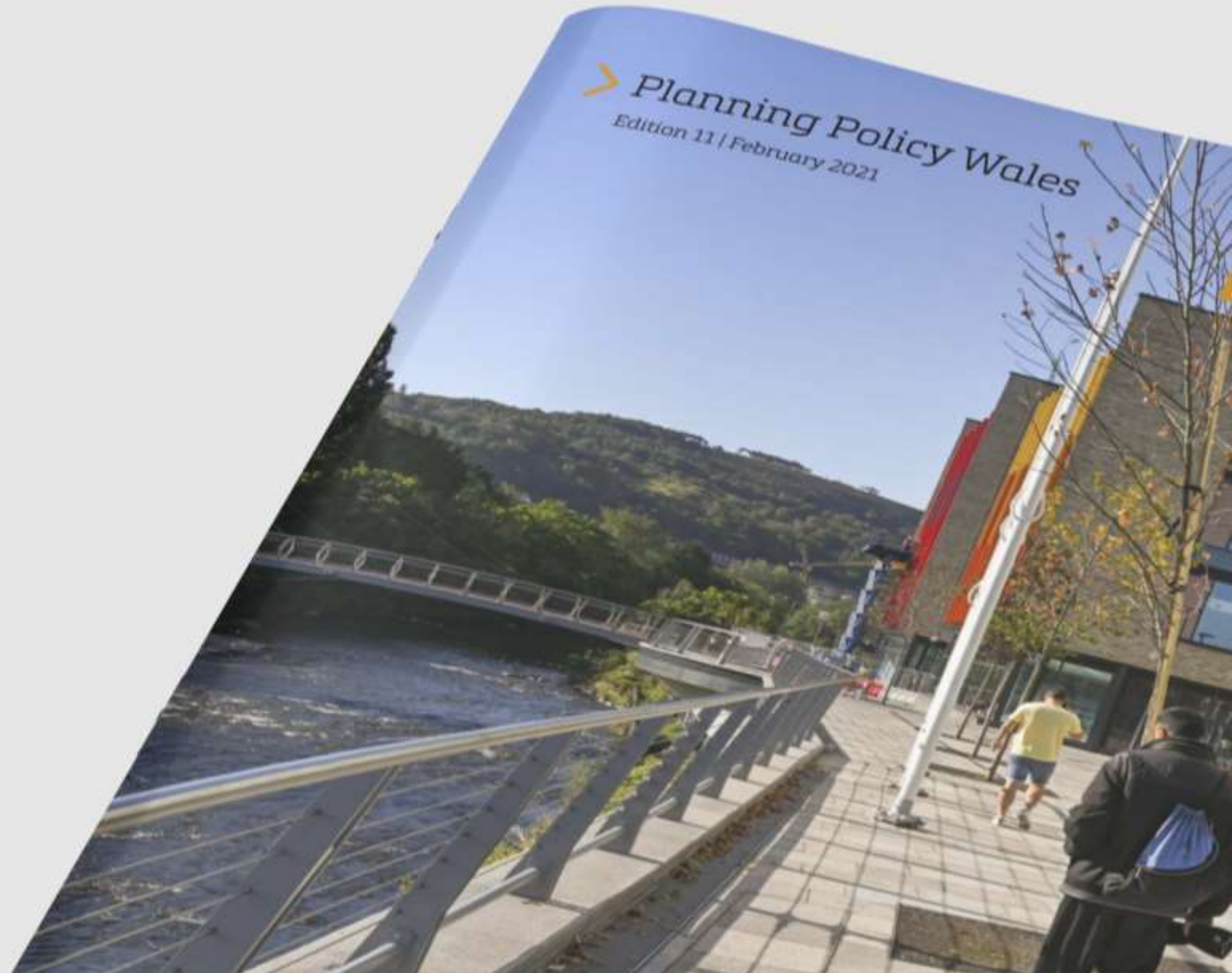
Published February 2021

Planning Policy Wales

National policy outlining guidance for making planning decisions

Circular 001/2020 – Town and Country Planning (Major Residential Development) (Notification) (Wales) Direction 2020

Requires Local Planning Authorities (LPAs) to “refer applications to the Welsh Ministers where they are minded to grant planning permission for residential development of 10 or more residential units or residential development on 0.5 hectares or more of land, which is not in accordance with one or more provisions of the development plan in force”.



Strategic Development Plans

Consultation ended 4th of January 2021

Work will start on SDP regulations
in Spring 2021

SDP regulations hoping to
come into force



Cardiff Capital Region (CCR)

Cardiff
Newport
The Vale of Glamorgan
Bridgend
Rhondda Cynon Taf
Merthyr Tydfil
Caerphilly
Baenau Gwent
Torfaen
Monmouthshire



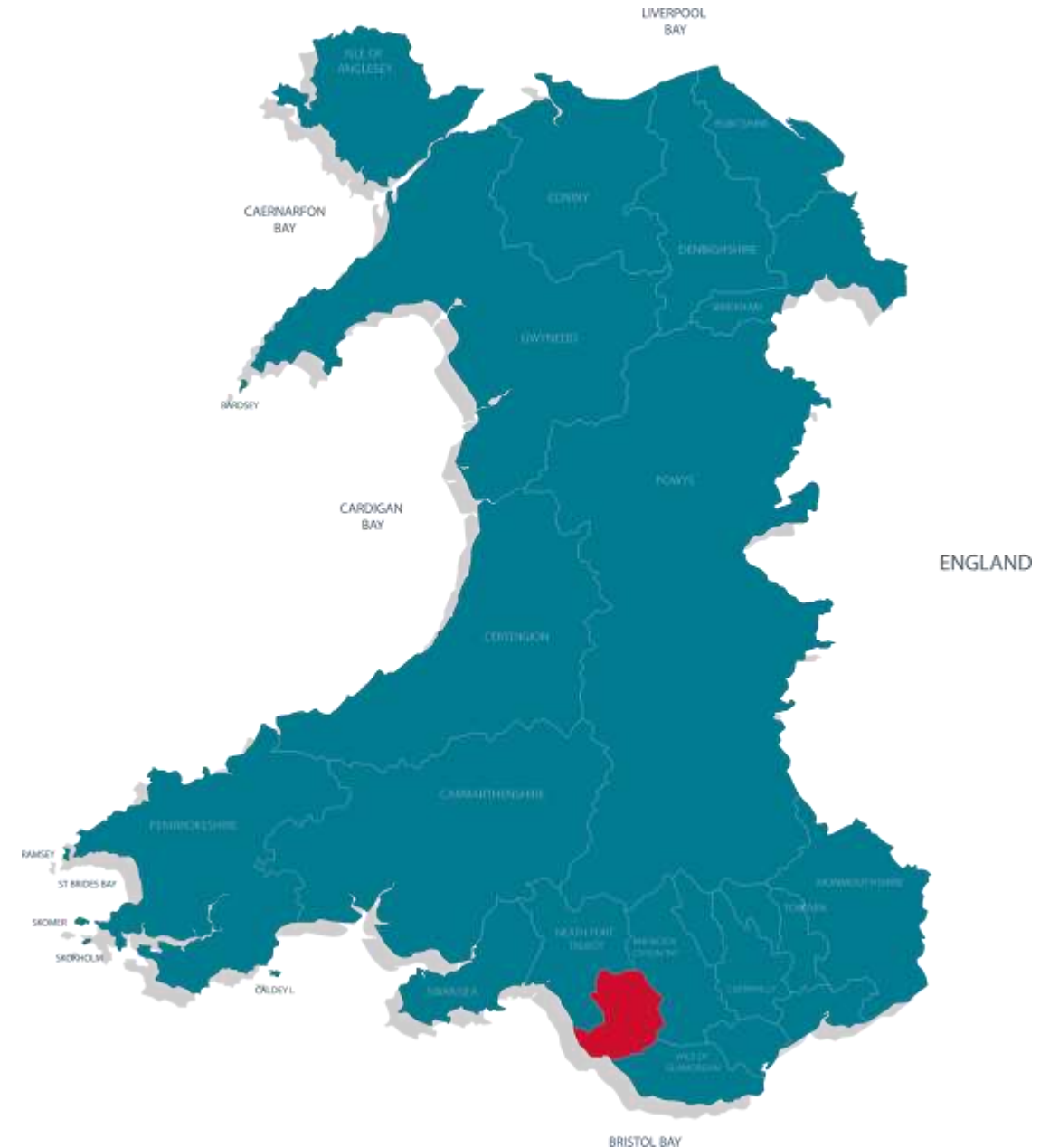


Local Development Plans (LDPs): At what stage is each local authority?

KEW Planning: Delivering Success

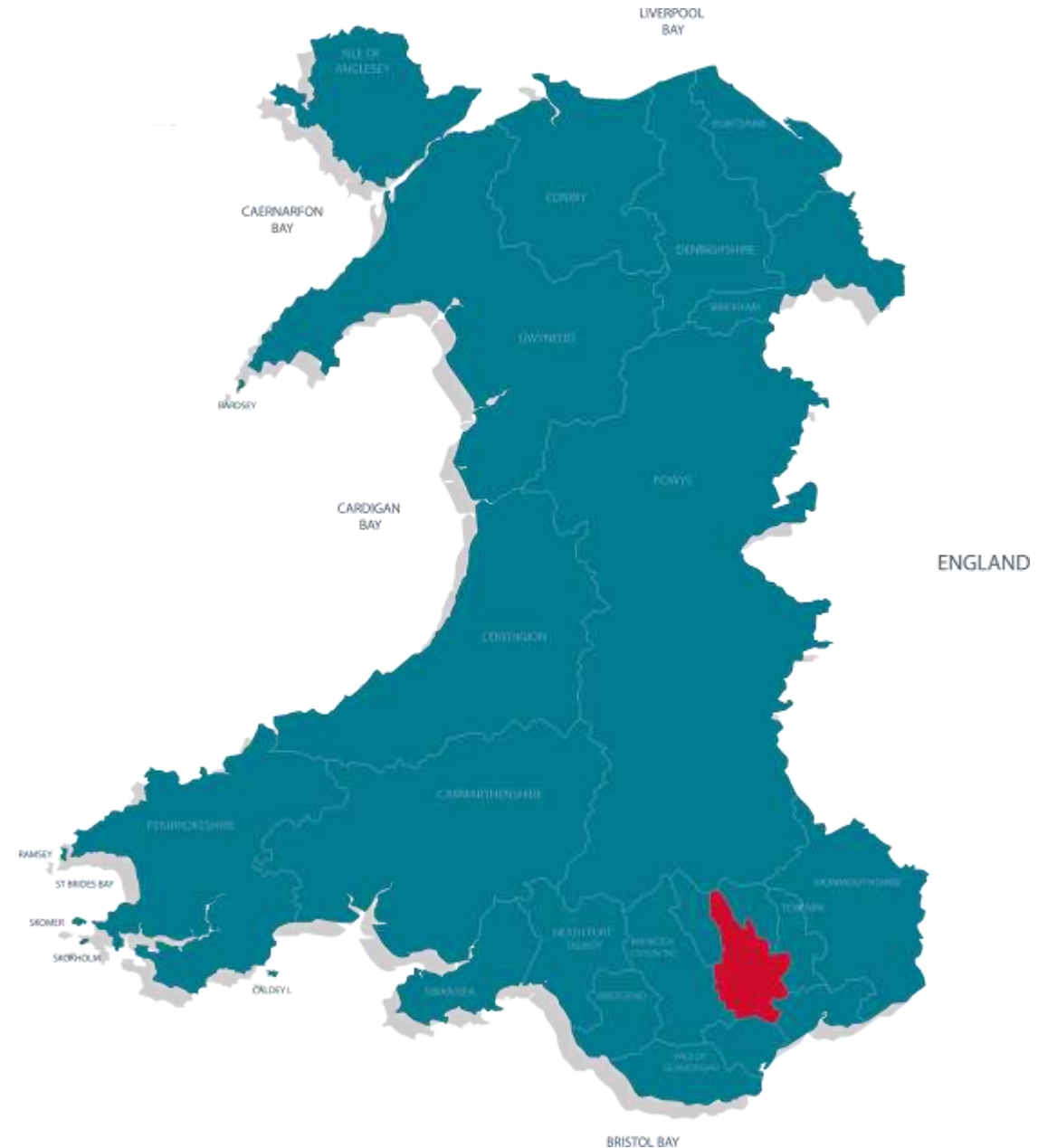
Local Development Plans (LDPs):

Bridgend County Borough Council



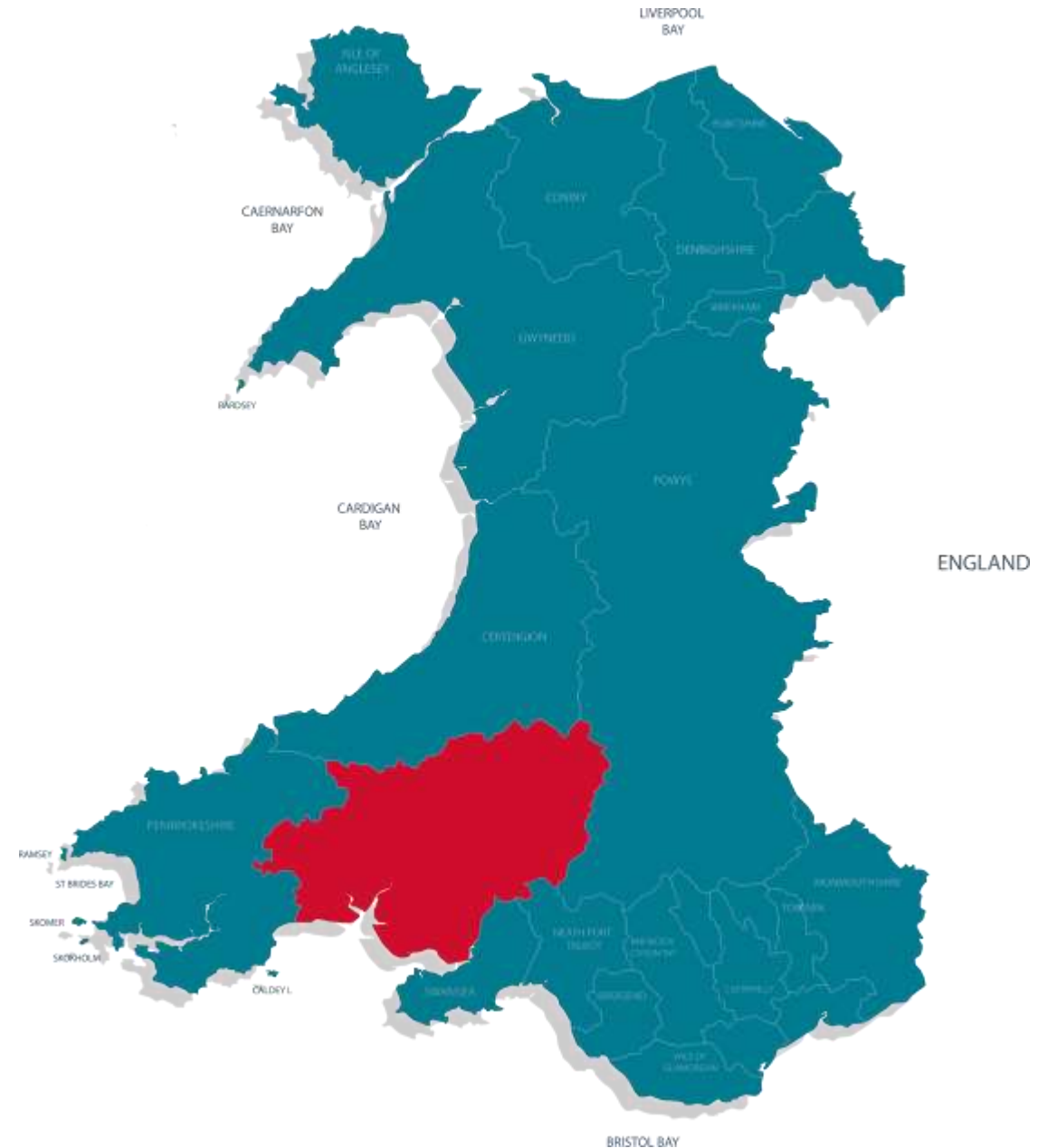
Local Development Plans (LDPs):

Caerphilly County Borough Council



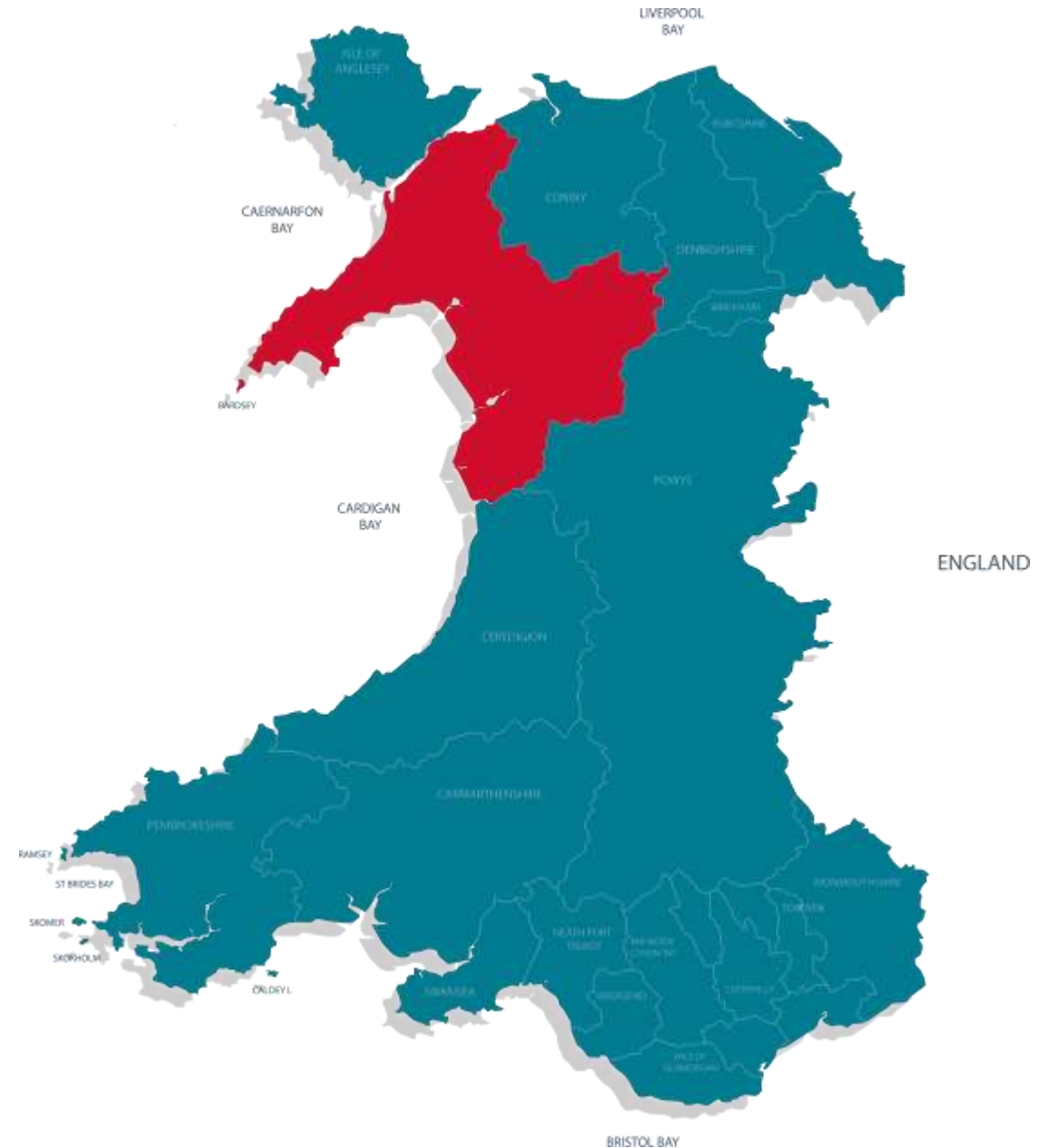
Local Development Plans (LDPs):

Carmarthenshire County Council



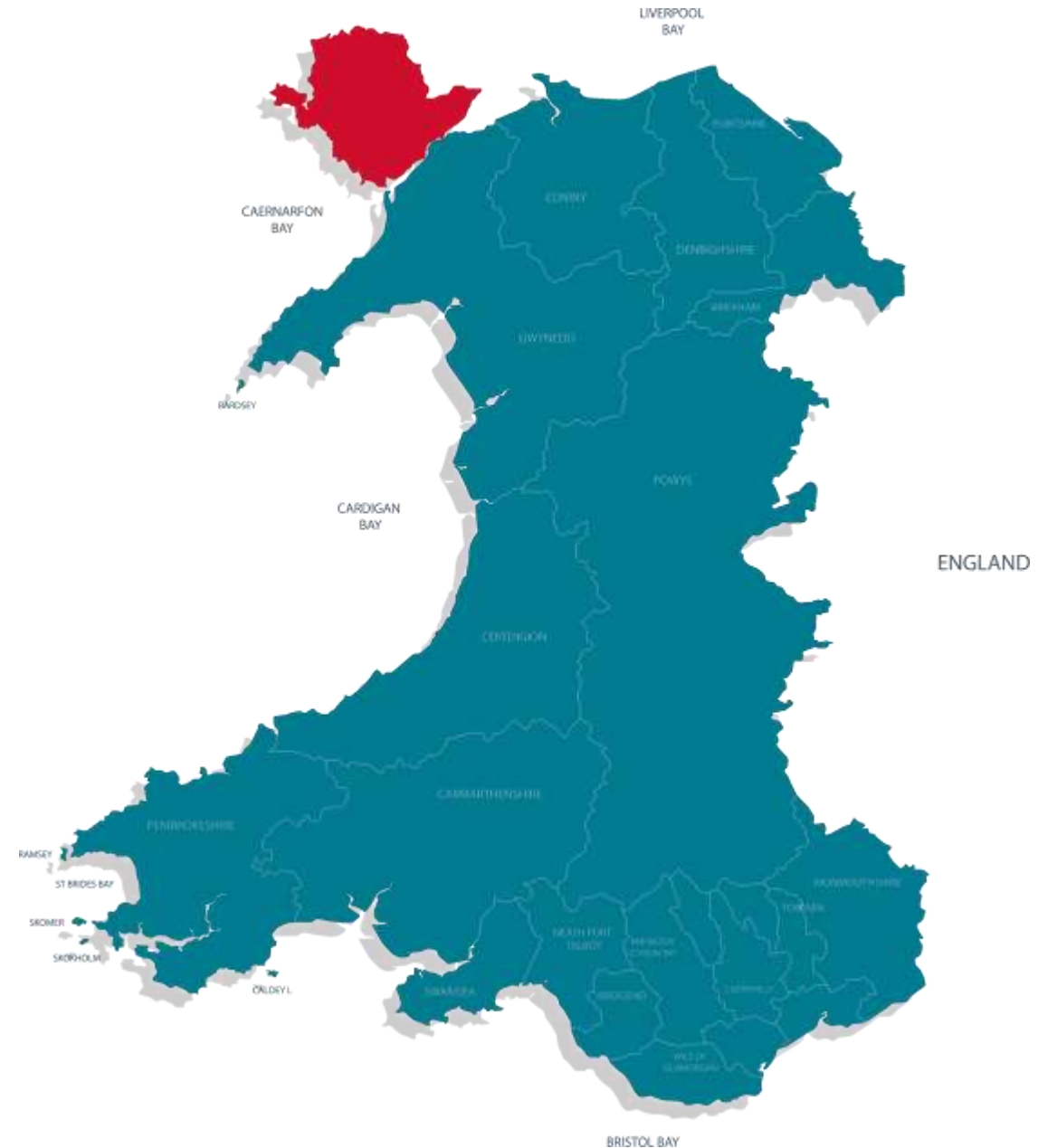
Local Development Plans (LDPs):

Gwynedd County Council



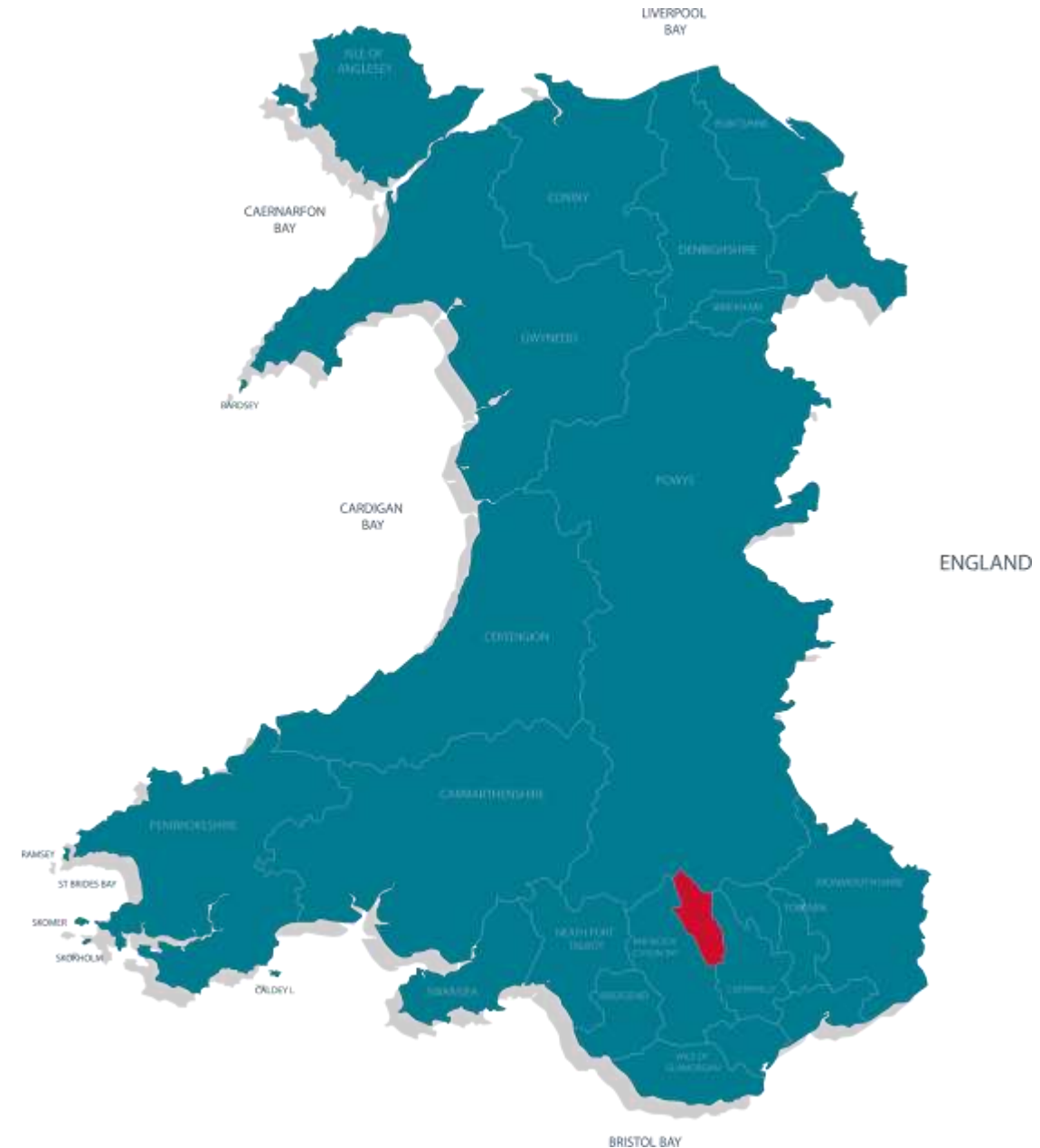
Local Development Plans (LDPs):

Isle of Anglesey County Council



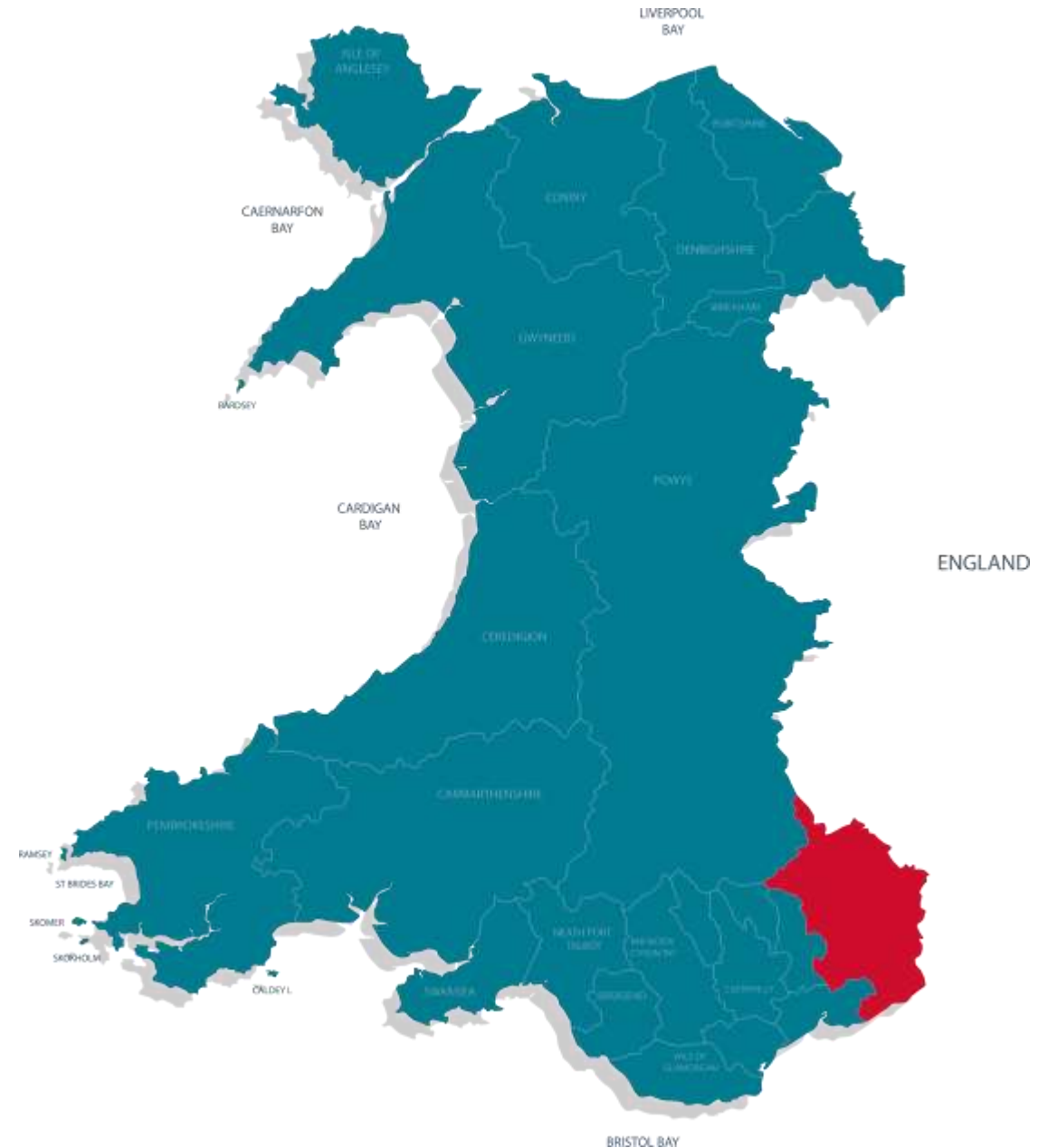
Local Development Plans (LDPs):

Merthyr Tydfil County Borough Council



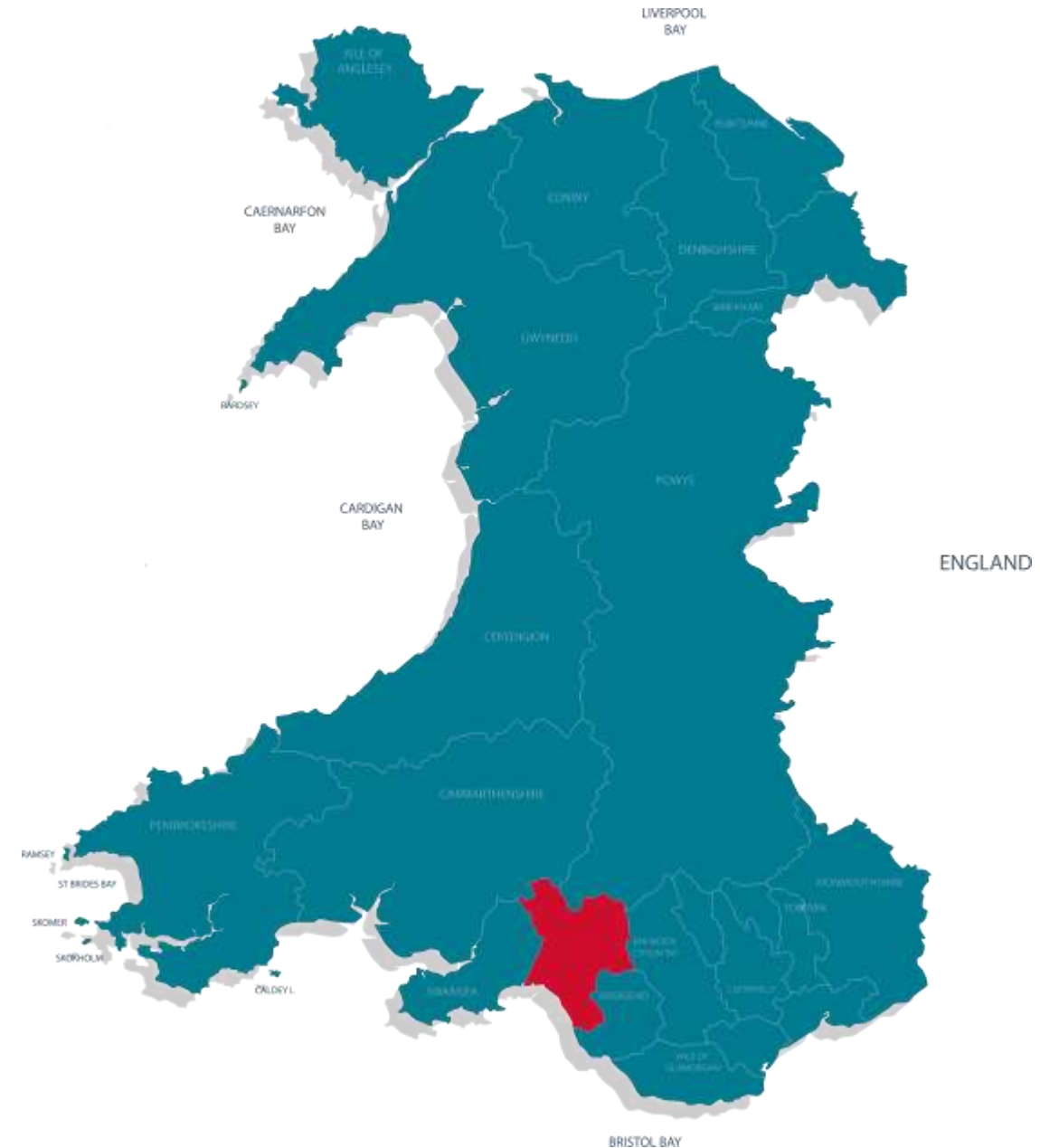
Local Development Plans (LDPs):

Monmouthshire County Council



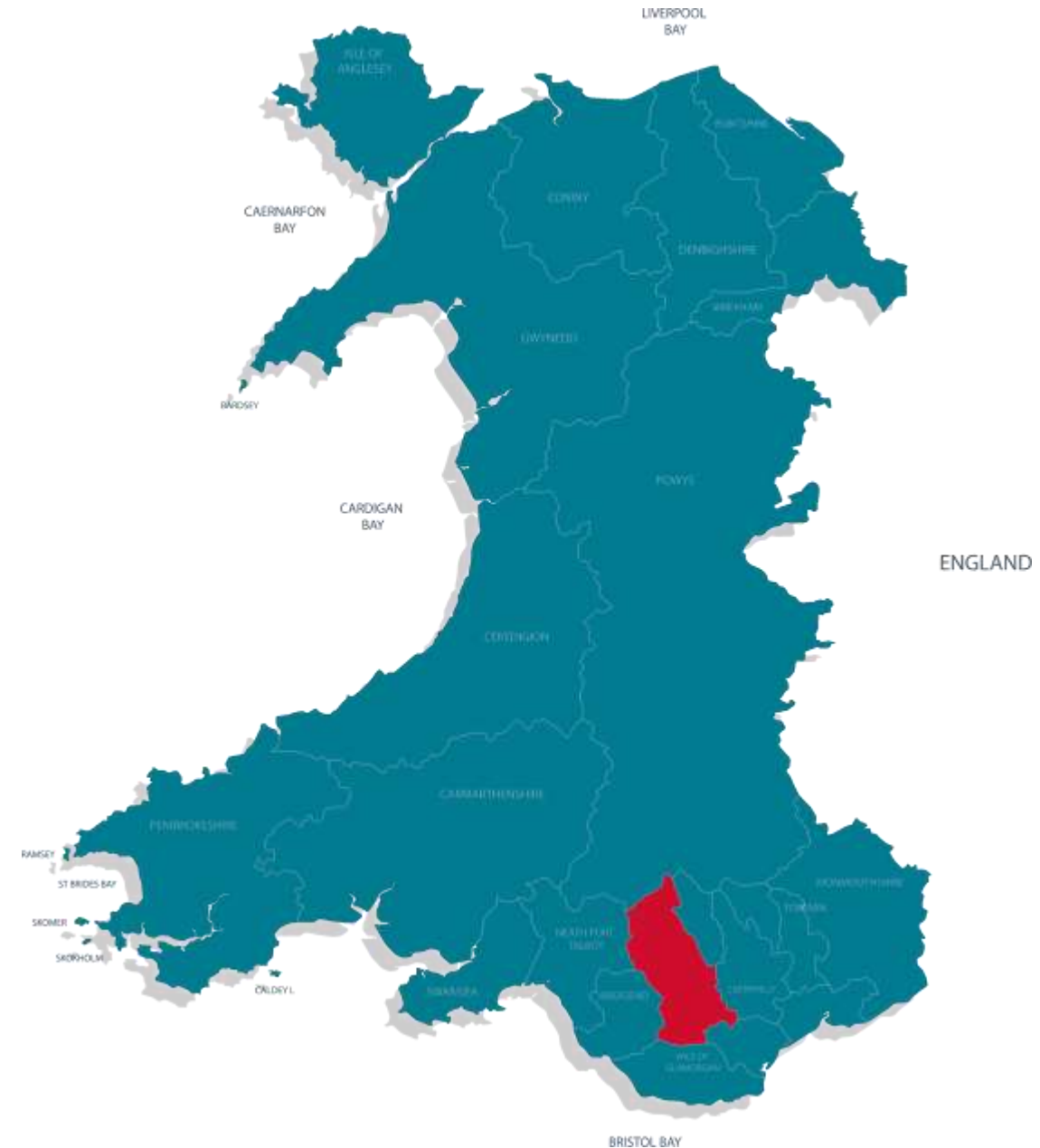
Local Development Plans (LDPs):

Neath Port Talbot County Borough Council



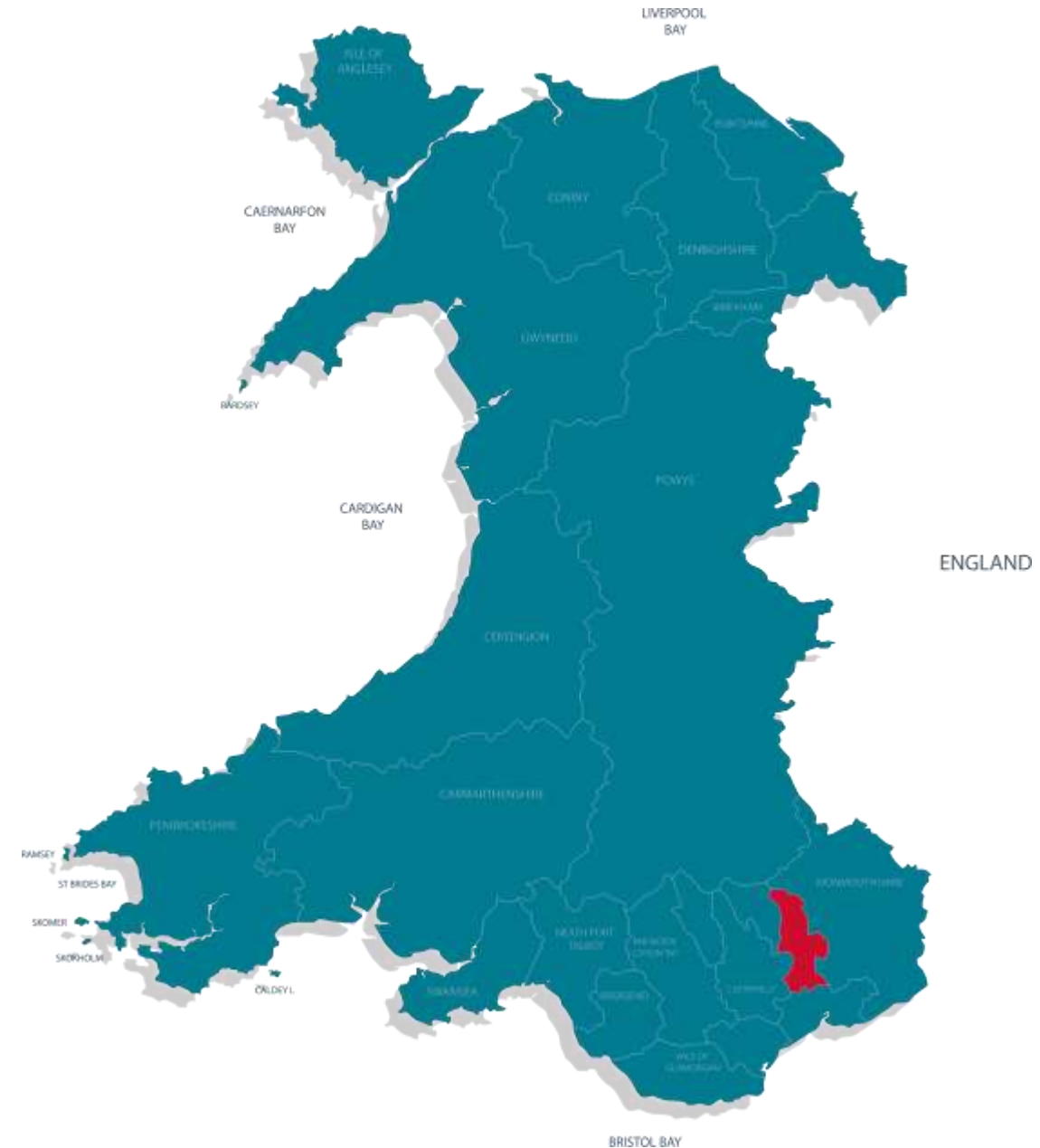
Local Development Plans (LDPs):

Rhondda Cynon Taf County Borough Council



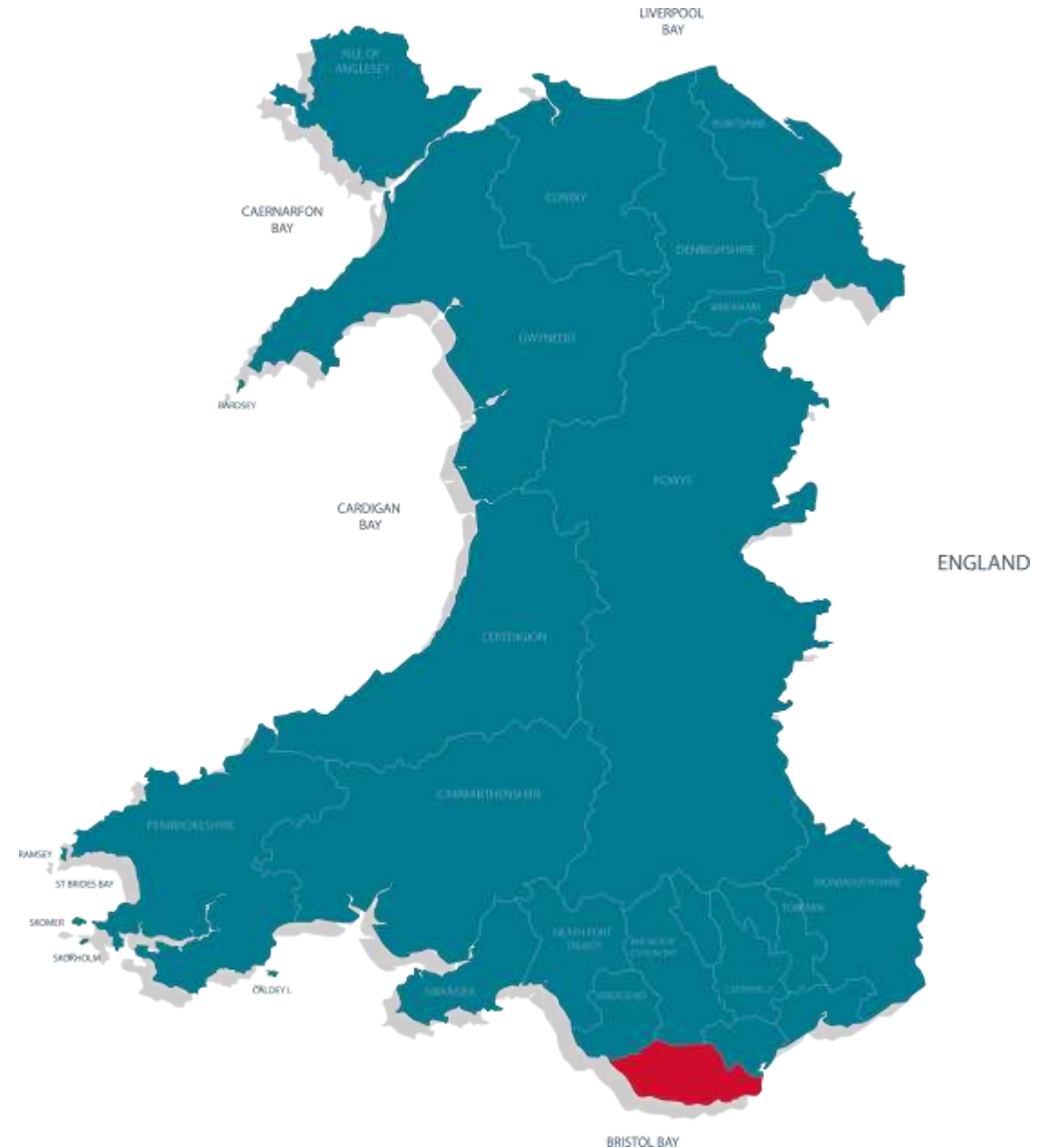
Local Development Plans (LDPs):

Torfaen County Borough Council



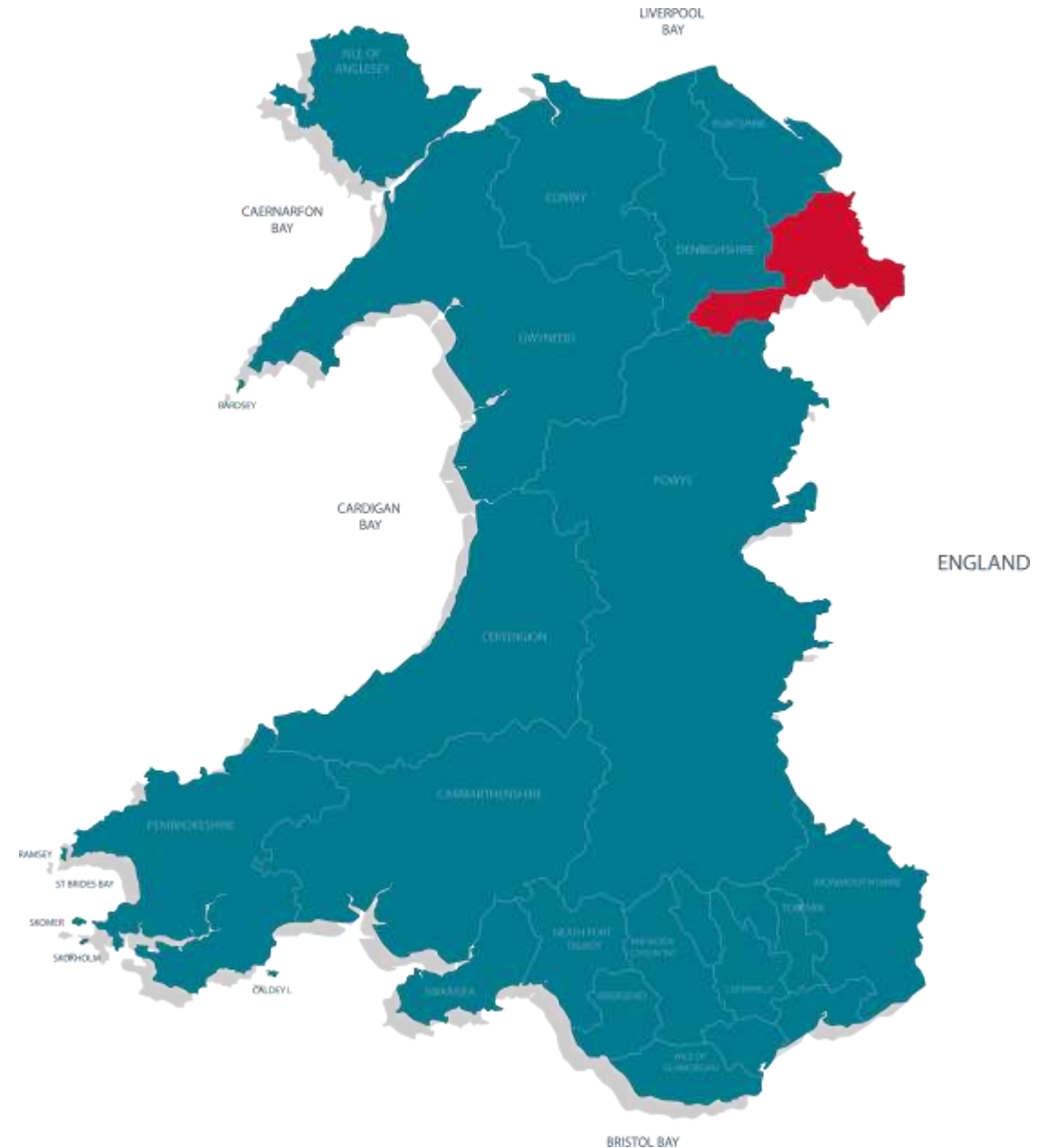
Local Development Plans (LDPs):

Vale of Glamorgan Council



Local Development Plans (LDPs):

Wrexham County Borough Council





Affordable homes: Is the Welsh government delivering?

KEW Planning: Delivering Success

The Welsh Government's commitment to end homelessness



The Welsh Government's commitment to end homelessness



Julie James

Minister for Housing & Local Government

“

The Coronavirus has shone a light on housing in a way that few of us have seen before and reminded us of all of the fundamental importance of good-quality affordable housing, a safe and secure home and strong and cohesive communities where people want to live and work.

”

The Welsh Government's commitment to end homelessness



Julie James

Minister for Housing & Local Government

“

I have been clear that I do not wish to see anyone forced to return to the streets. We have a unique opportunity to change the services and change lives for the better – and make homelessness rare, brief and unrepeated

”

Welsh Government's 5-year rent policy



Social rents
uplifted by max
CPI + 1%



Landlords to set their rents
within boundaries



Landlords to work
to identify
affordability.

Social landlords agree to:

- Minimise all evictions
- Undertake tenant satisfaction surveys
- Build on commitment to deliver quality
- Aspire to ensure all new build are EPC A.

Independent Review
Affordable Housing Sup

Final Report
April 2019



Beautiful homes and spaces

Quality Requirements for affordable Housing



High quality,
innovative and sustainable



Flexible over
the life of the
building



Homes should
be Safe
and secure.

Consultation ended on the 1st of November 2020



Recommendations for planning law in Wales

“

We are recommending that a new
Planning Code is created for Wales,
which is comprehensive but simpler

”

The Law Commission



Sustainable Drainage Systems (SuDS)

The Sustainable Drainage (Approval and Adoption)
(Wales) (Amendment) Order 2020 ("the Order").





New trends in the property market



KEW Planning: Delivering Success

The residential sector



Annual growth
of 10.3% up to
November 2020
in Wales



Biggest monthly
increase in UK house prices in 16
years
during 2020.

Coronavirus drives
shop closures
to new records



The commercial sector



Distribution warehouses



Increase demand
for distribution warehousing



Online food retailing sector



Hello Fresh
230,000 sq ft new
logistics space

Ocado
40%
more capacity

Gousto
3X
more capacity

Online sales up 14% from 2010-2020

Traditional food retailing

UK food & grocery market is set to grow **10%** by 2022



A tilted black document titled "COVID-19 Food and Drink Wales" is shown. At the top left is the Welsh Government logo with the text "Llywodraeth Cymru Welsh Government". The main title "COVID-19 Food and Drink Wales" is in large white font, with the subtitle "Supporting recovery of businesses and supply chains from Covid-19" below it. The document features a grid of six images: a plate of food, a bowl of berries, a tray of bread, a burger, a kitchen sink with a faucet, and a plate of food. At the bottom, it says "Together we'll Keep Wales Safe" and "July 2020". The logo for "Bwyd a Diod Cymru Food & Drink Wales" is at the bottom right.

Associated British Ports (ABP) & Freeports



ABP has in total
21 ports
in and around
The UK

ABP ports handle
£150bn
of trade
every year

ABP ports
contribute
£7.5bn
to the UK economy
every year

The hospitality sector



The hotel and tourism sector



Daily revenues in
London slumped to
£29
per bedroom
in 2020



The healthcare sector



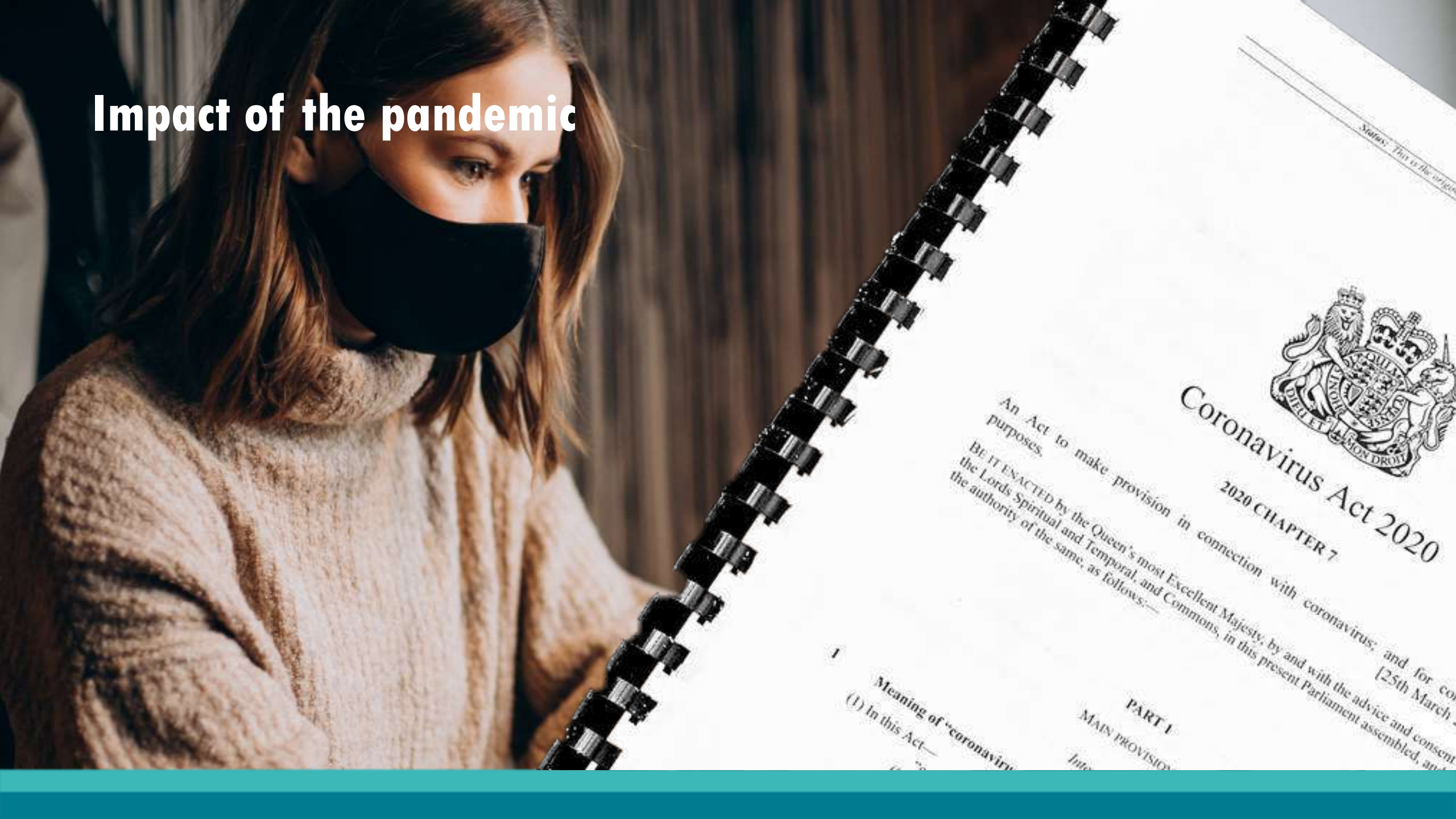
GIG
CYMRU
NHS
WALES



Planning changes experienced in 2020

KEW Planning: Delivering Success

Impact of the pandemic



Coronavirus Act 2020

2020 CHAPTER 7

An Act to make provision in connection with coronavirus; and for other purposes.

BE IT ENACTED by the Queen's most Excellent Majesty, by and with the advice and consent of the Lords Spiritual and Temporal, and Commons, in this present Parliament assembled, and by the authority of the same, as follows:—

[25th March 2020]

PART 1
MAIN PROVISIONS

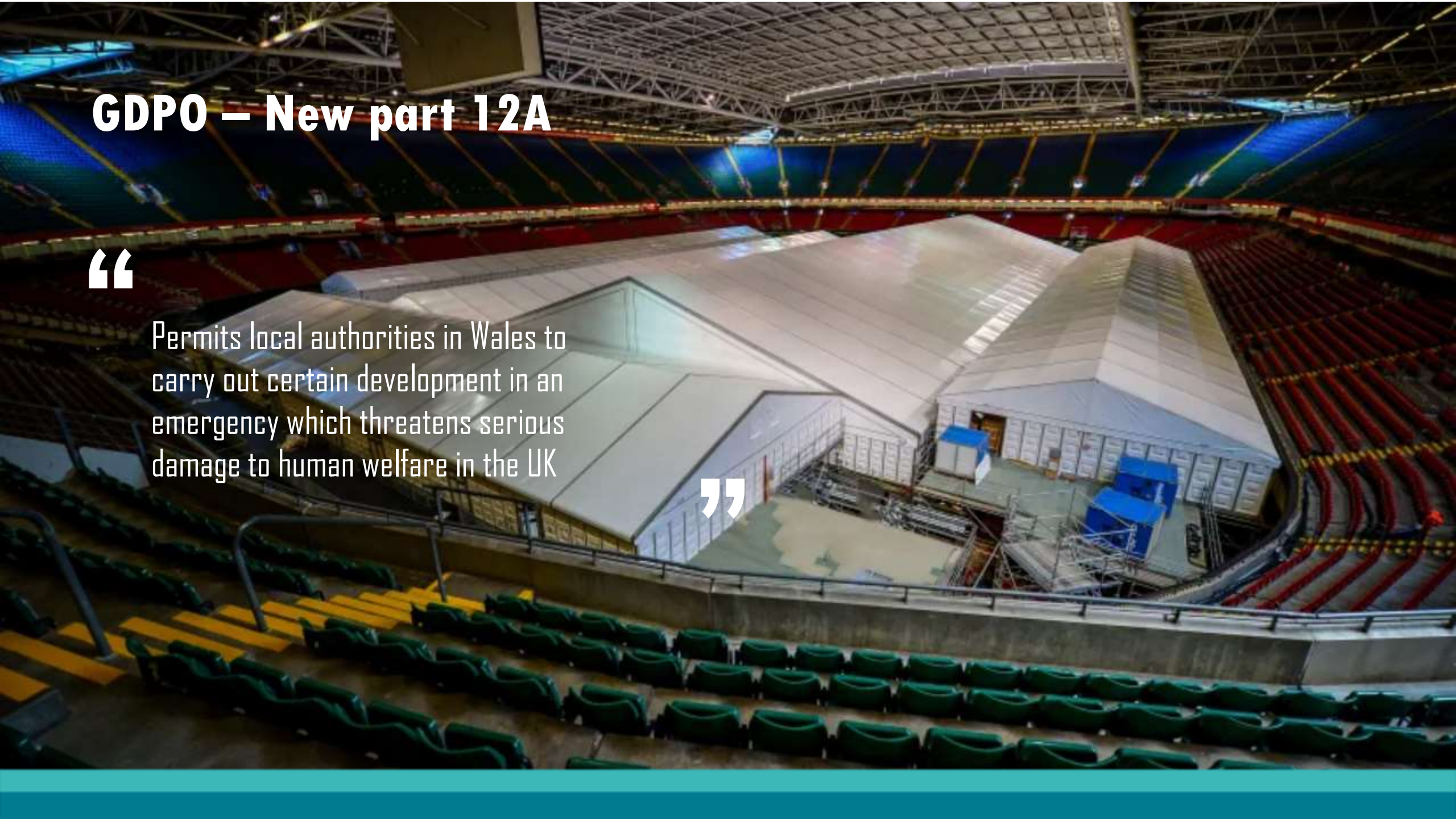
1 **Meaning of "coronavirus"**
(1) In this Act—

GDPO – New part 12A

“

Permits local authorities in Wales to carry out certain development in an emergency which threatens serious damage to human welfare in the UK

”



PAC Frustration

Unable to commence

Vast costs

Onerous requirements

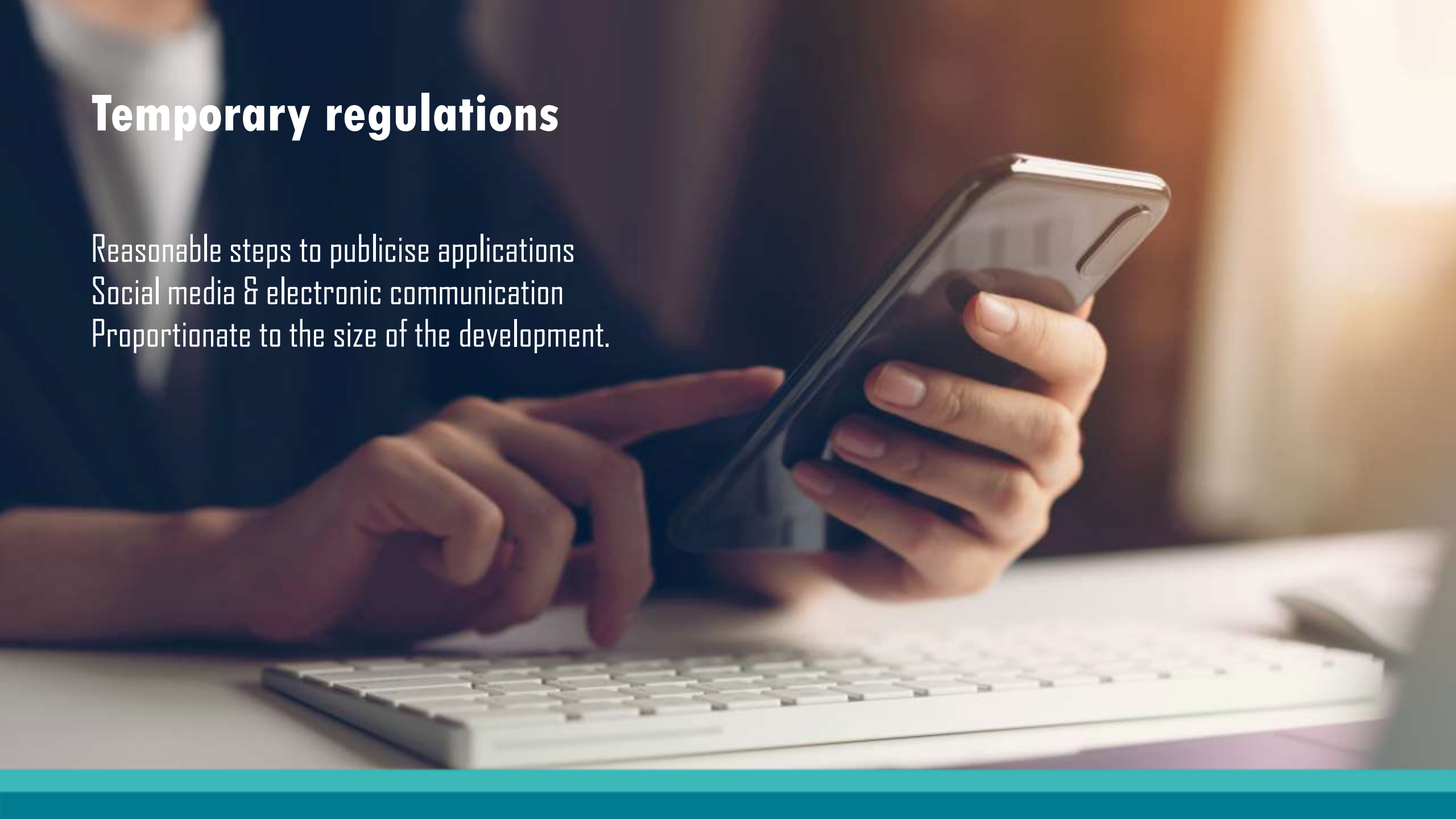
No engagement with developers

Still witnessing delays



Temporary regulations

Reasonable steps to publicise applications
Social media & electronic communication
Proportionate to the size of the development.



Planning application fees

The background of the slide is a detailed architectural drawing, likely a site plan or floor plan, rendered in white lines on a dark background. Various drafting tools are overlaid on the drawing: a pair of silver compasses is positioned in the center, a large circular protractor is to its right, and a pair of glasses with a green frame is in the upper right. A portion of a computer keyboard is visible in the top left corner. The overall aesthetic is professional and technical.

increased by approximately

20%

Residential schemes



300 homes
rejected



Llanmoor
Homes

What did we learn?

A man with dark hair, wearing a white surgical mask and a mustard-colored jacket, is shown in profile, looking down. The background is dark with several large, detailed, reddish-brown virus particles, some with prominent spikes, floating in the air. The overall mood is somber and focused on health and safety.

Importance of responding quickly to emerging problems

Working from home is possible and surprisingly efficient!

Social interaction is essential for people's mental health

The NHS is hugely underfunded

Importance of tackling homelessness

Thank you



Kathryn Williams
Managing Director



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Associate



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Graduate Planner



Nathan Goldup-John
Graduate Planner



KEW

PLANNING

Delivering commercially viable expert results

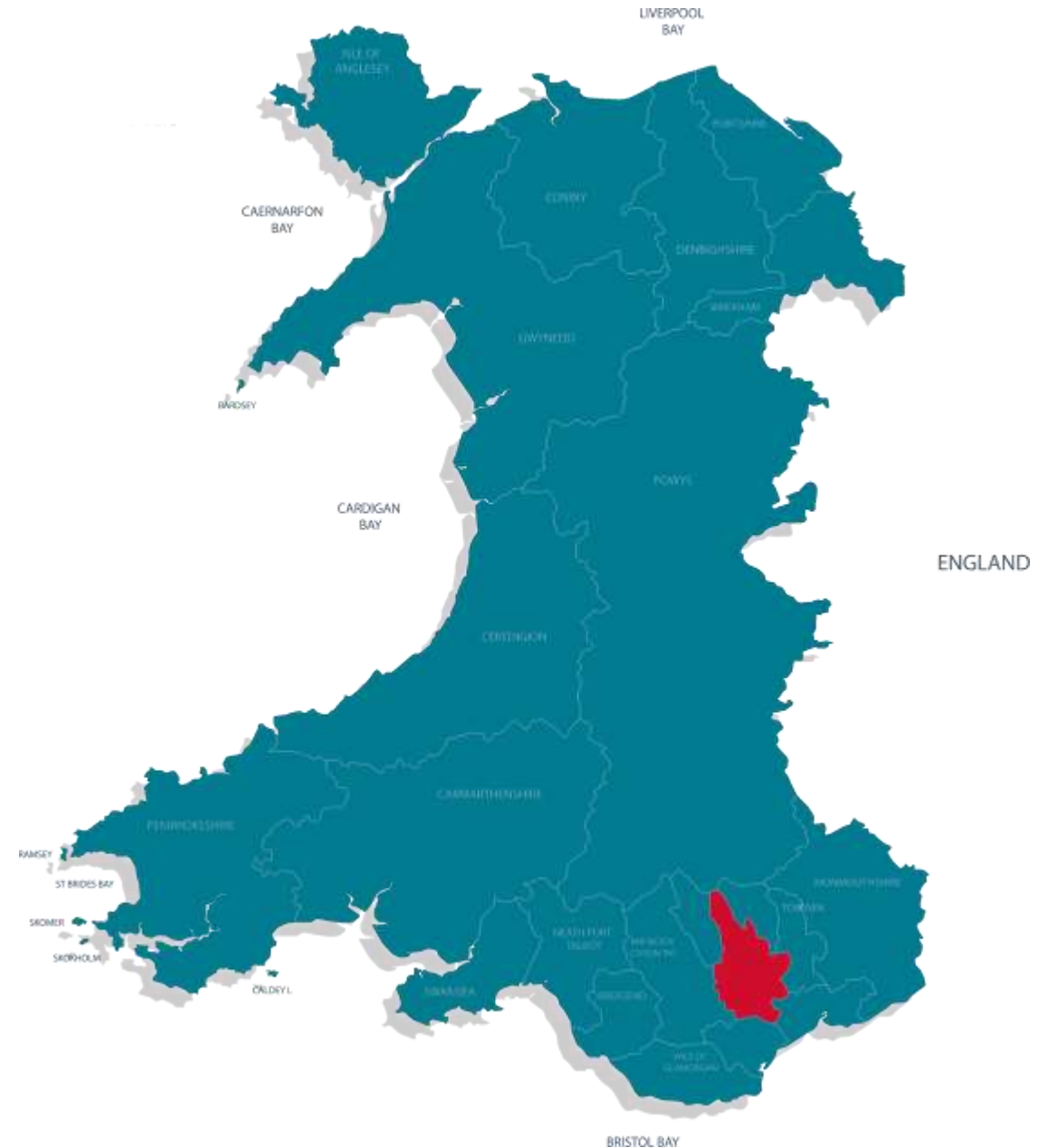
Local Development Plans (LDPs): Blaenau Gwent County Borough Council

Adopted LDP 2006-2021.

Replacement LDP (RLDP) 2018-2033 not yet adopted.

Consulting on the RLDP Second Call for Candidate Sites
(currently suspended due to Tier 4).

All comments on the findings to the Second Call
for Candidate Sites to be submitted by 2nd of February
2021 (likely to be extended due to Tier 4 restrictions).

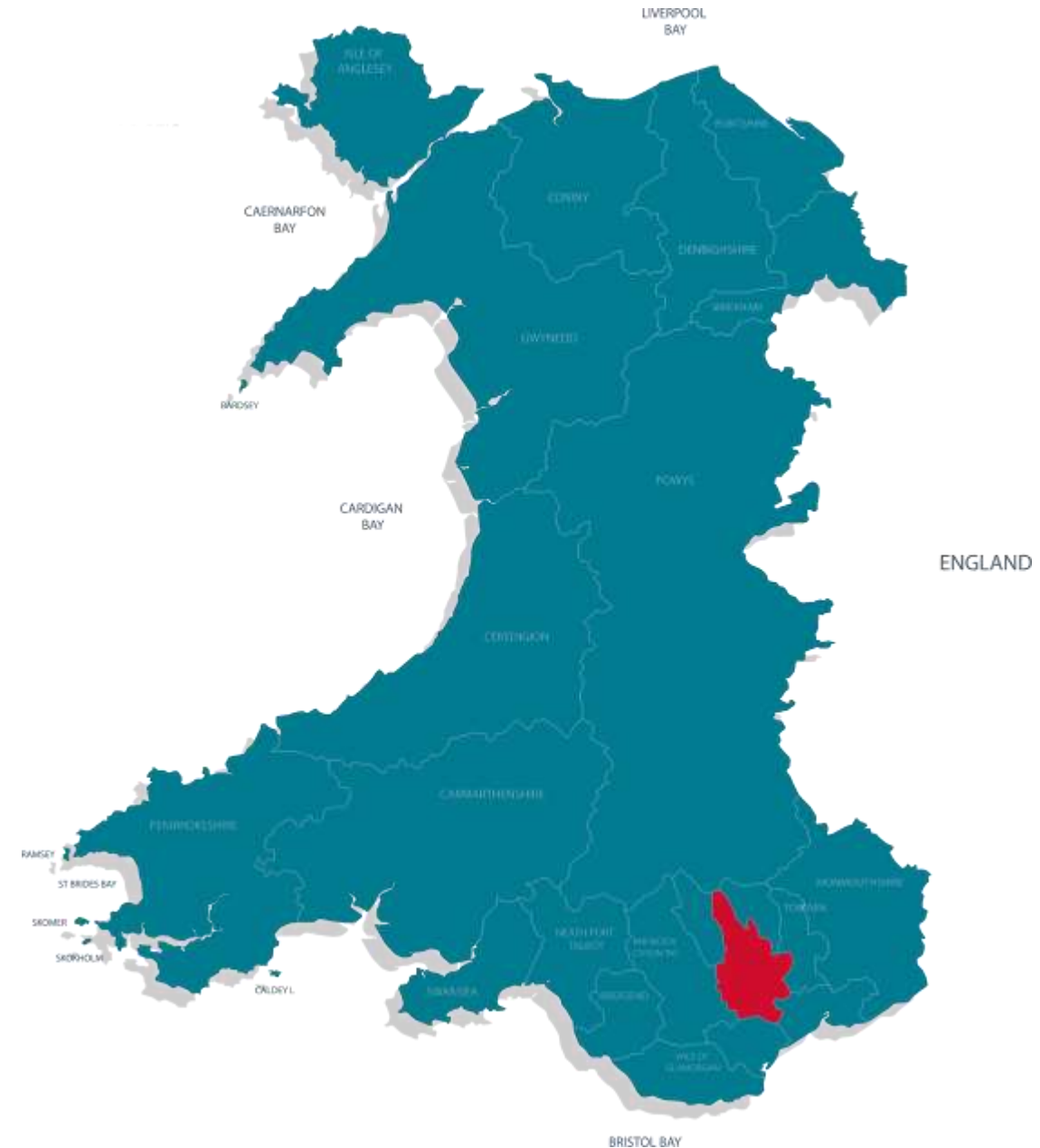


Local Development Plans (LDPs):

Caerphilly County Borough Council

Adopted LDP 2006-2021. RLDP up to 2035 not yet adopted.

Canceled the 2nd RLDP Draft Delivery Agreement consultation due to Covid-19. Not progressing any further until the Covid-19 crisis has ended



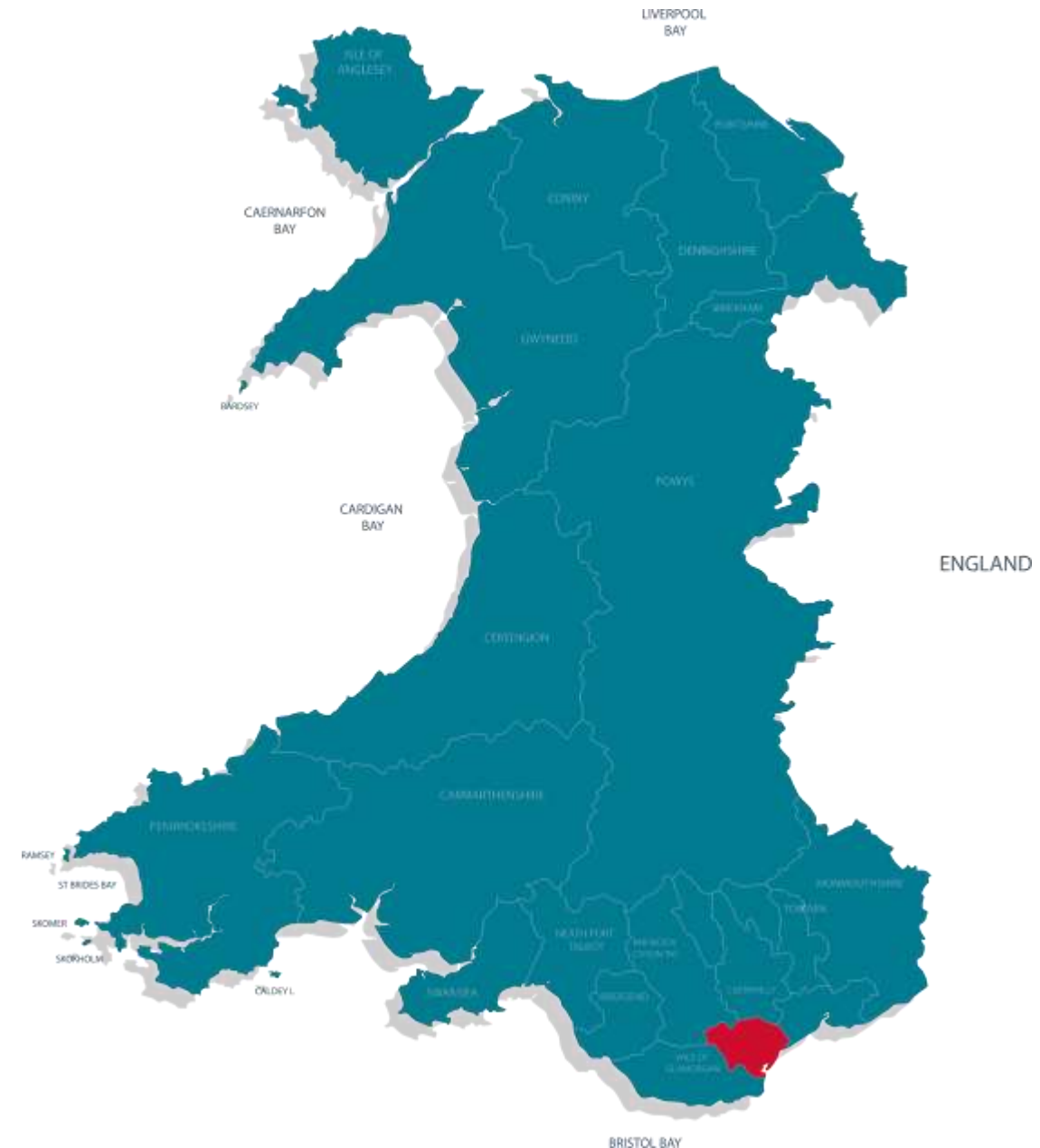
Local Development Plans (LDPs):

Cardiff Council

Adopted LDP 2006-2021. RLDP 2021-2036 not yet adopted.

The Full Review process of the LDP (which initially took place in December 2019) is being restarted.

Draft Review Report and Draft Delivery agreement is subject to a 4-week consultation period (7th January – 4th of February 2021).



Local Development Plans (LDPs):

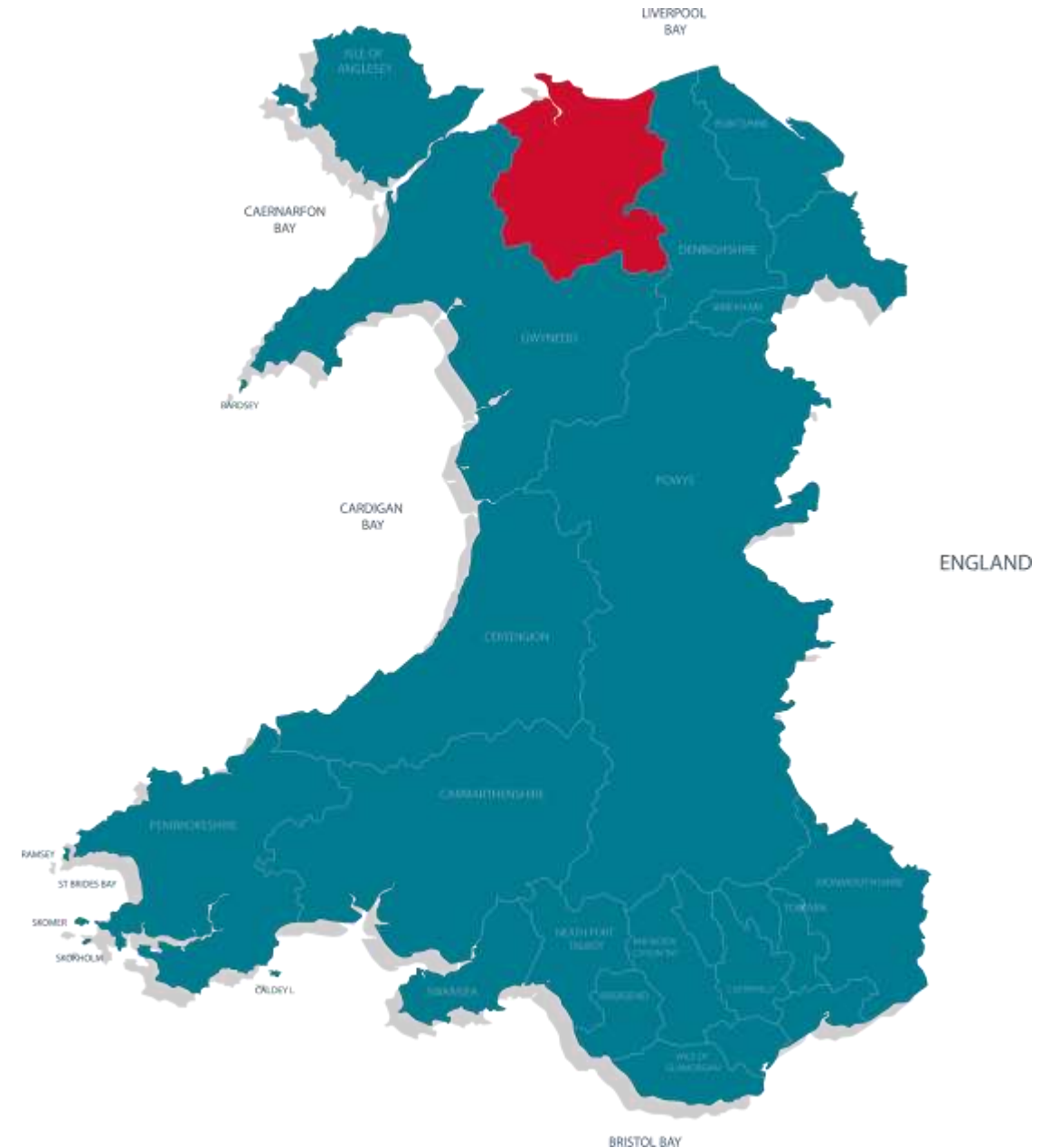
Conwy County Borough Council

Adopted LDP 2007-2022.

RLDP 2018-2033 not yet adopted.

Consulted on the Preferred Strategy
between July-September 2019.

Next stage is to prepare the Deposit Plan.



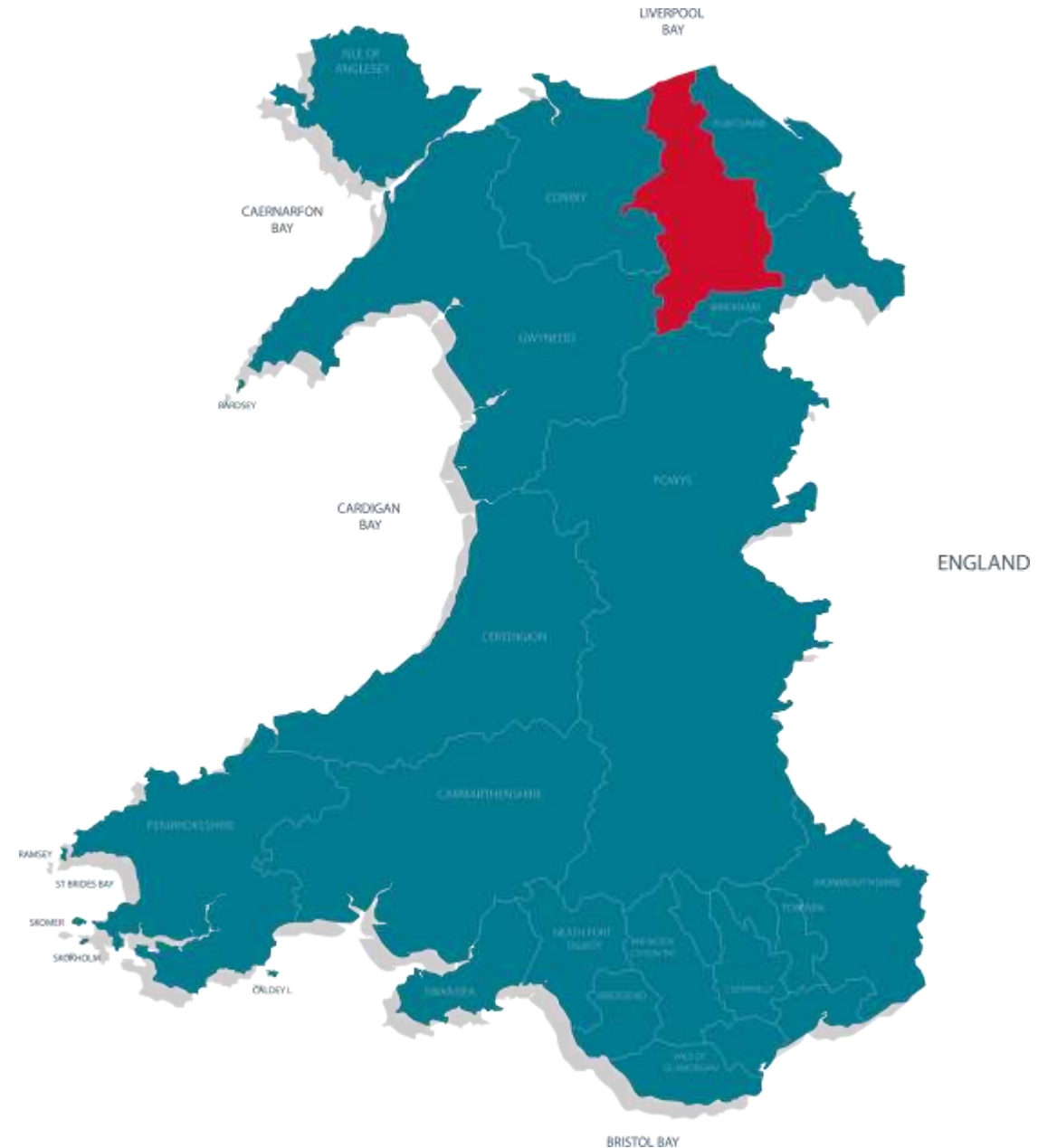
Local Development Plans (LDPs):

Denbighshire County Council

Adopted LDP 2006-2021. RLDP 2018-2033 not yet adopted.

Consulted on the Draft Preferred Strategy, Sustainability Appraisal (SA) and HRA between July-August 2019.

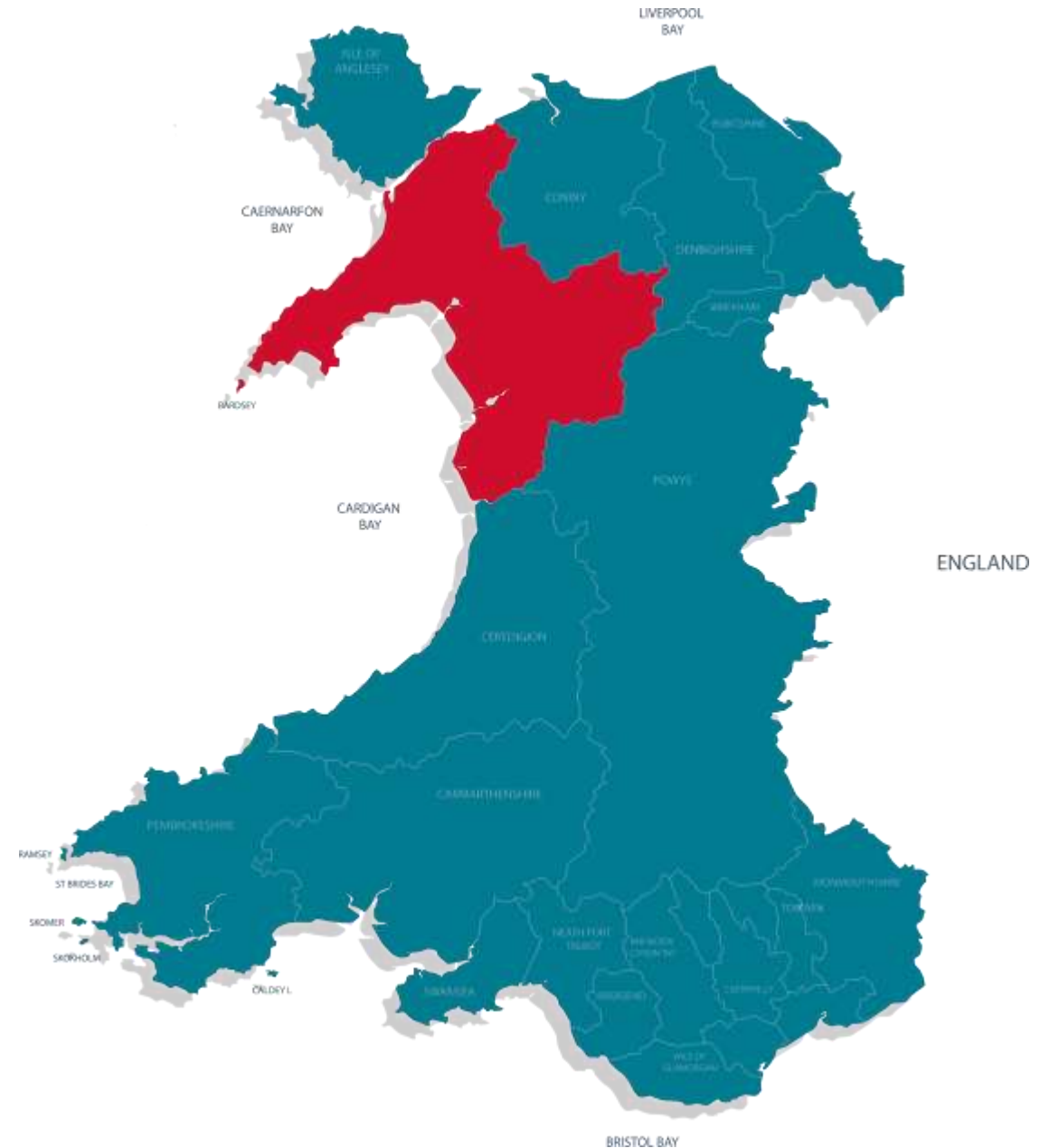
Draft Deposit LDP initially anticipated to be available for public consultation in Spring 2020. Covid-19 means the Council will revise the timetable set out in the Delivery Agreement. Timetable yet to be revised



Local Development Plans (LDPs):

Gwynedd County Council

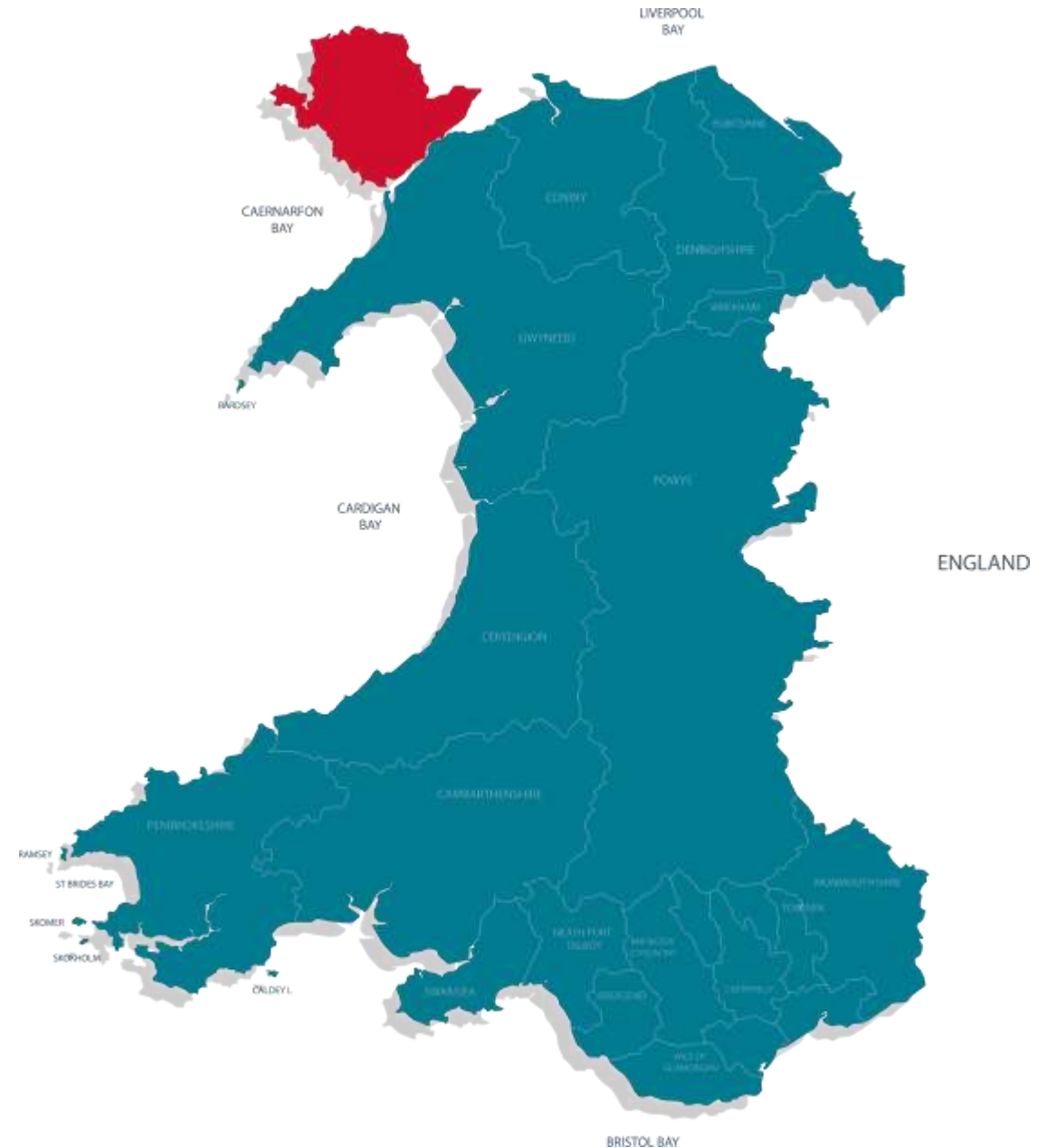
Adopted Joint LDP with Anglesey County Council 2011-2026.



Local Development Plans (LDPs):

Isle of Anglesey County Council

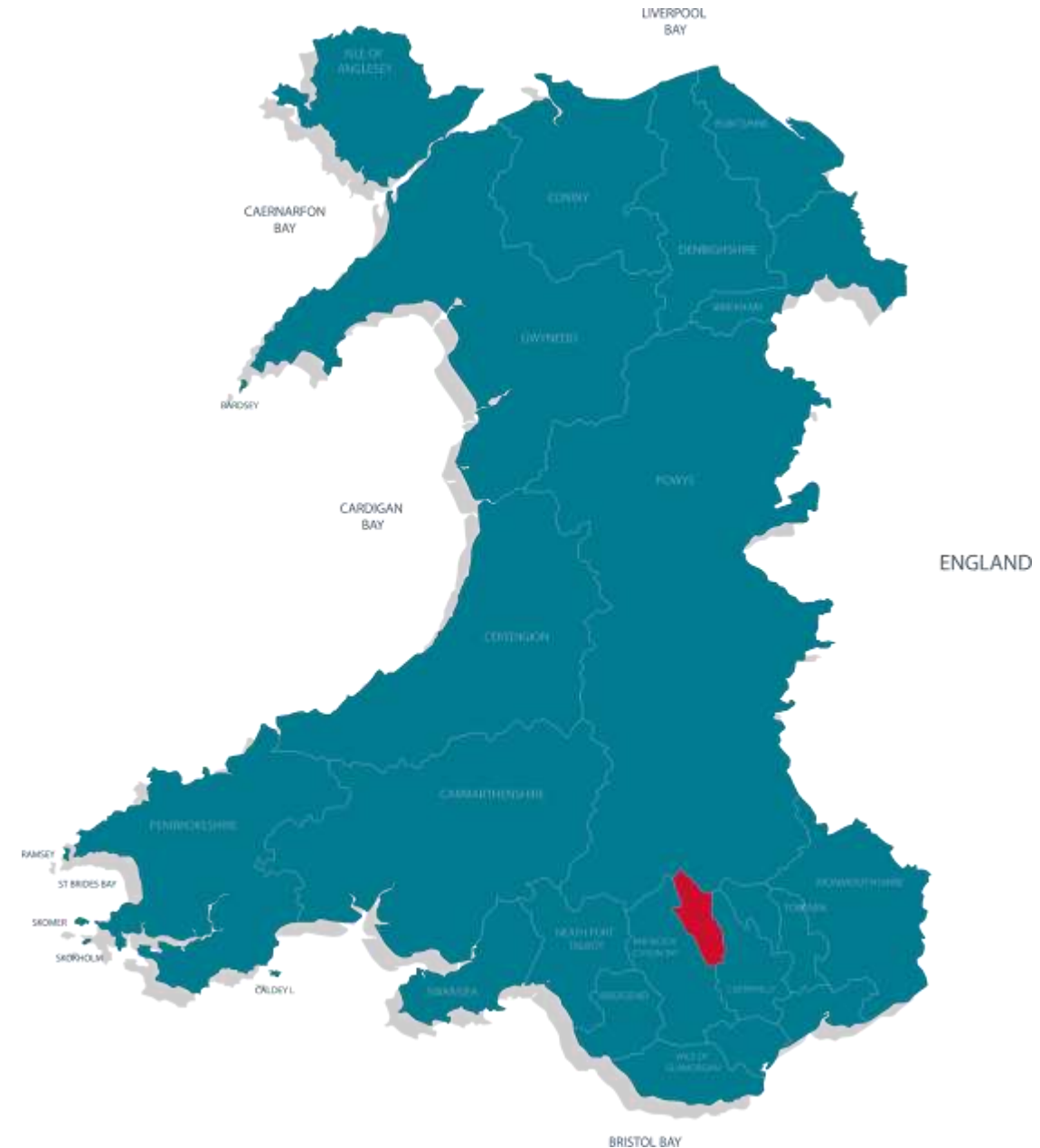
Adopted Joint LDP with Gwynedd Council 2011-2026.



Local Development Plans (LDPs):

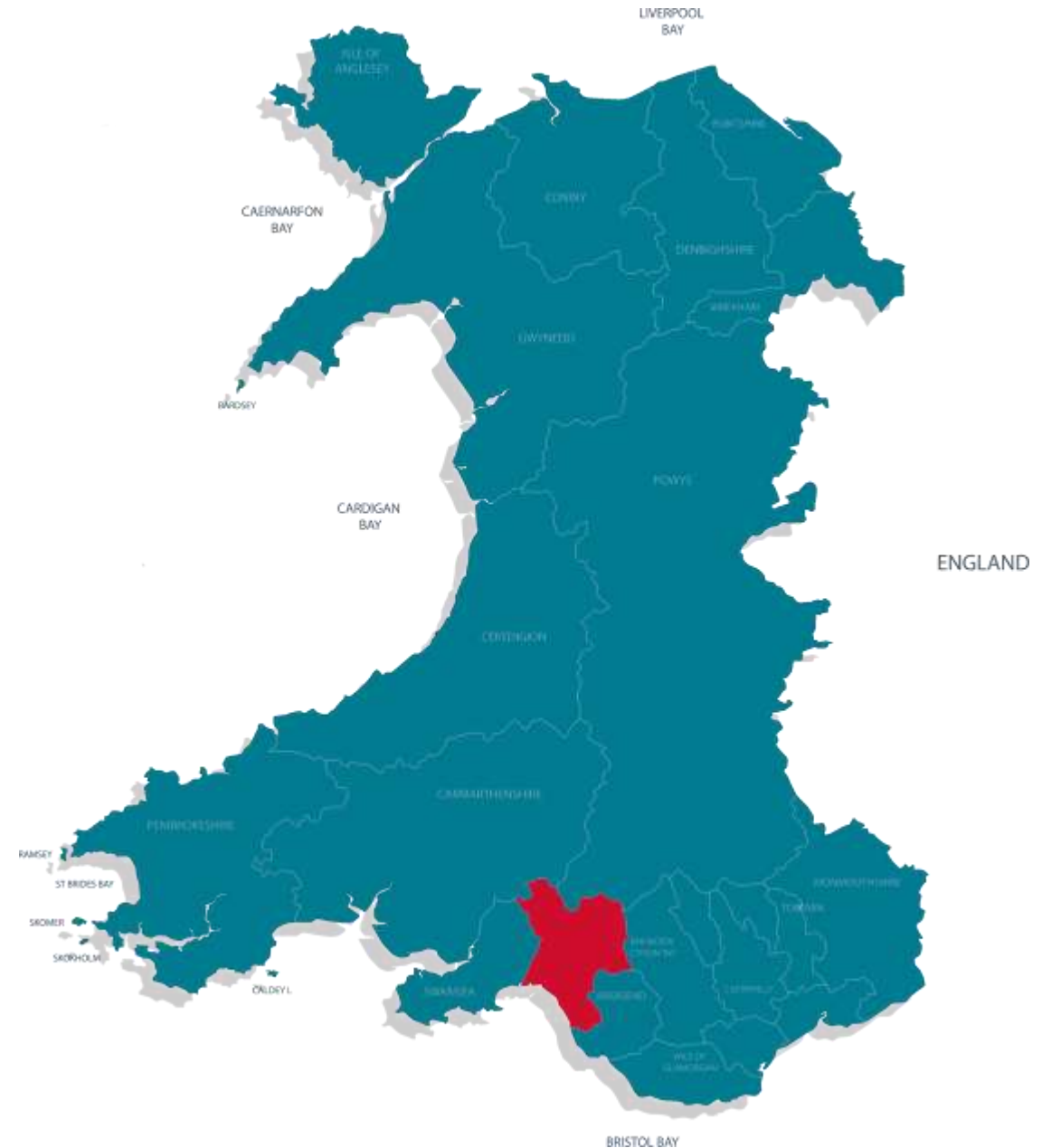
Merthyr Tydfil County Borough Council

Adopted the RLDP 2016-2031 on the 29th of January 2020.



Local Development Plans (LDPs): Neath Port Talbot County Borough Council

Adopted LDP 2011-2026.



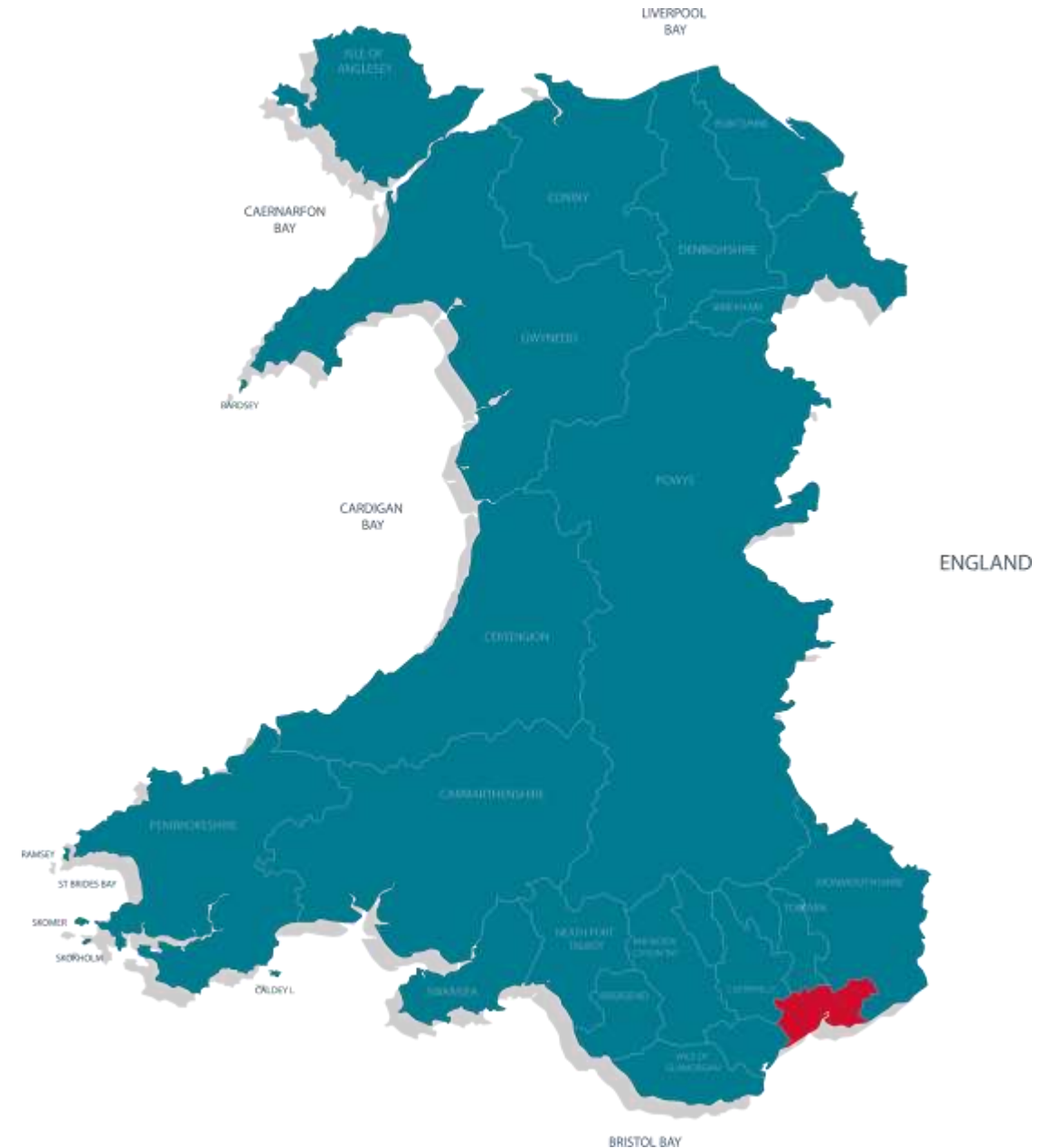
Local Development Plans (LDPs):

Newport City Council

Adopted LDP 2011-2026. RLDP 2021-2036 not yet adopted.

Currently seeking views on the Draft Review Report and Draft Delivery Agreement until the 5th of March 2021.

Informal Call for Large Development Sites closed November 2020. Candidate Site Stage in June-Sept 2021.



Local Development Plans (LDPs):

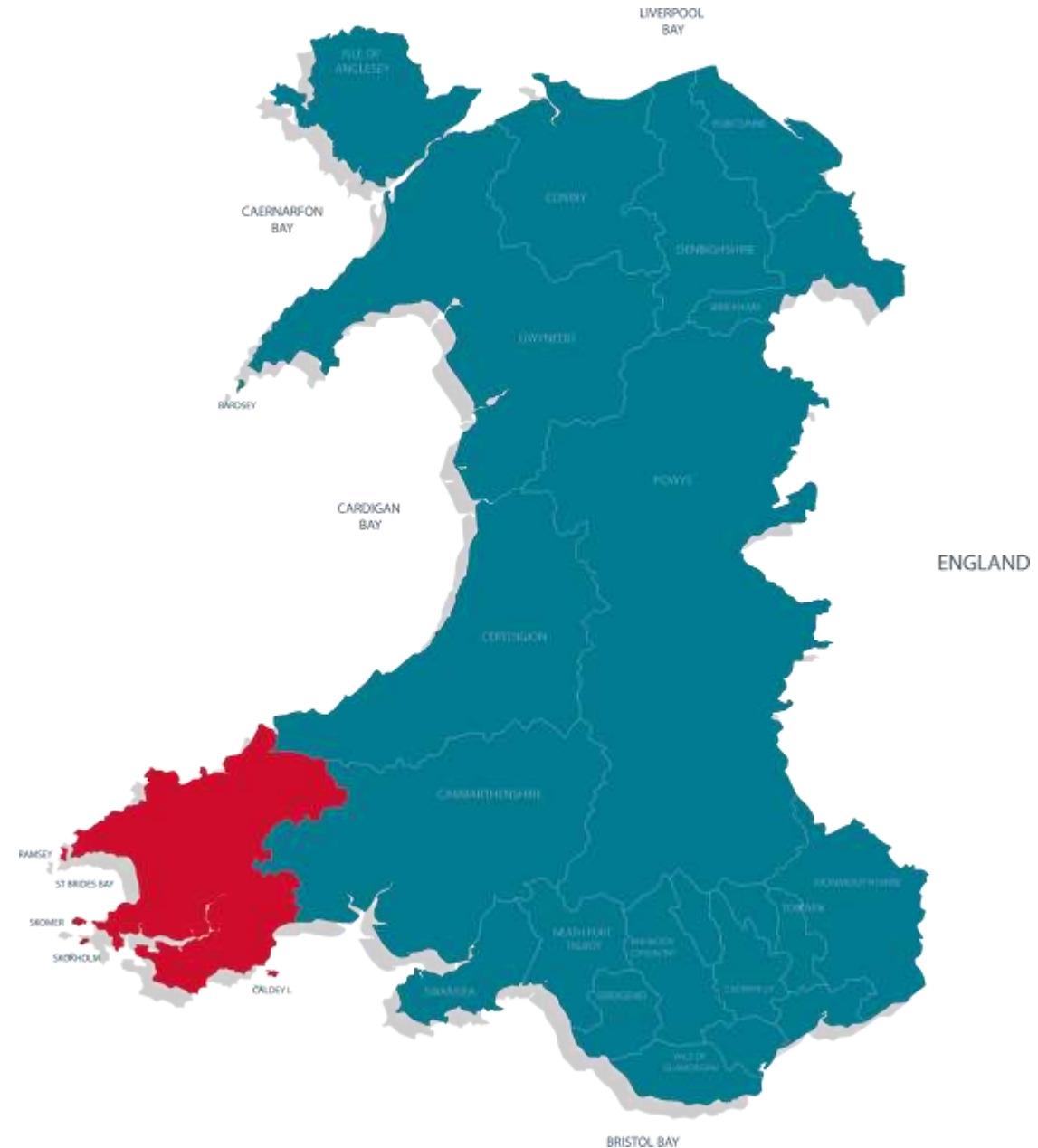
Pembrokeshire County Council

Adopted LDP 2011-2021. RLDP 2021-2033 not yet adopted.

In Spring 2021, a report listing the comments made on the Deposit Plan and officer response will be presented to Full Council.

Once agreed, any changes will be published as part of a Focused Change consultation in Spring 2021.

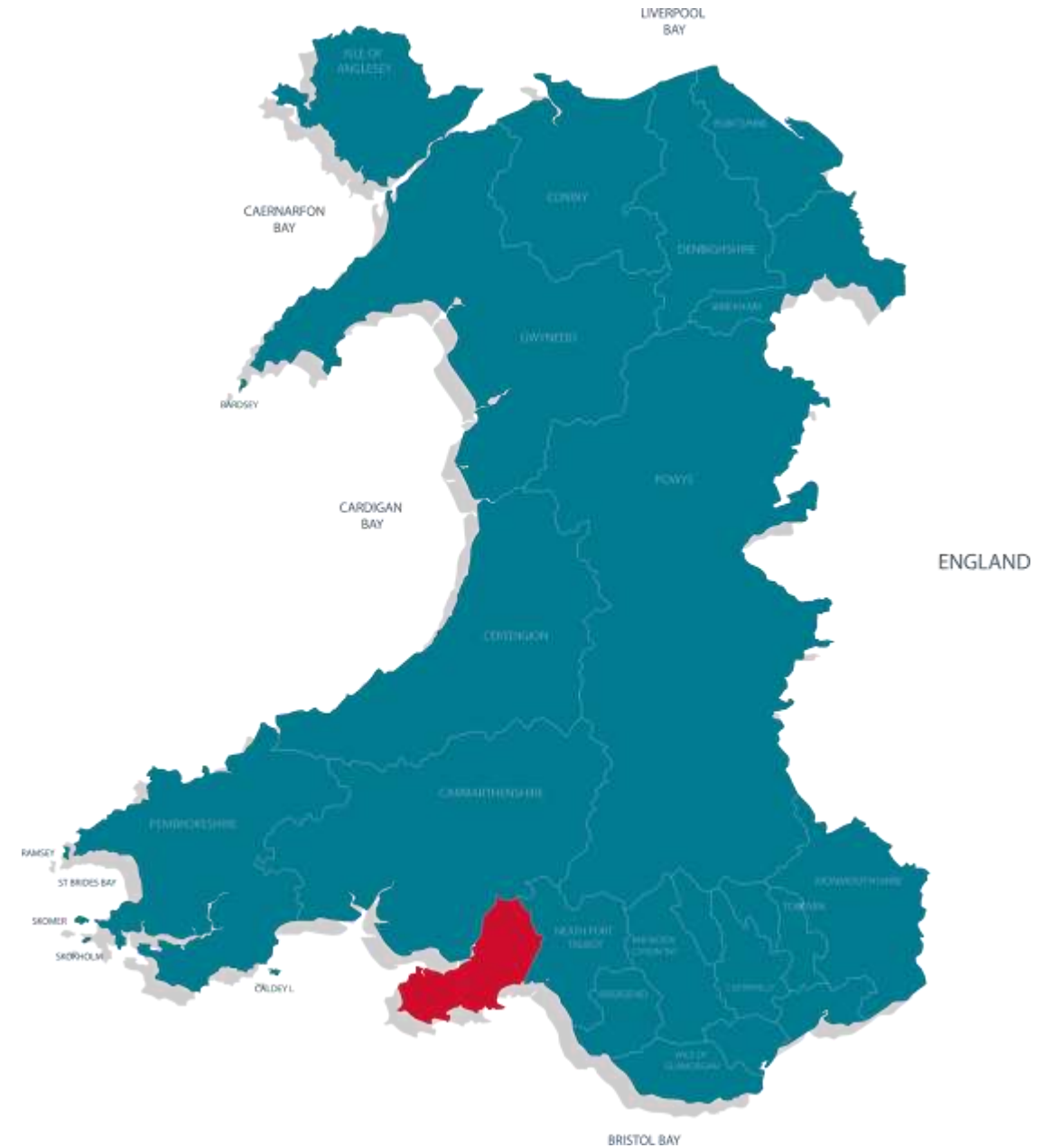
Anticipated adoption of revised LDP = Summer 2022.



Local Development Plans (LDPs):

Swansea Council

Adopted Swansea LDP 2010-2025.



Local Development Plans (LDPs):

Vale of Glamorgan Council

Adopted LDP 2011-2026.

