HBF CONFERENCE · 9 July 2026

Delivering on Housing in Wales

A view from the Planning Bar

Sioned Davies
No5 Chambers

THE CONTEXT

So, where have we got to?

TAN 1 gone

The presumption favouring development where five-year supply fell short was withdrawn.

Plans stalled

Extended plan periods left little incentive to restart plan-preparation.

2024–25 · PUBLISHED AUGUST 2025

The figures...

COMPLETIONS

4,631

Down 3% on the year — the **second-lowest on record** .

73% private, 23% RSLs, 5% local authorities.

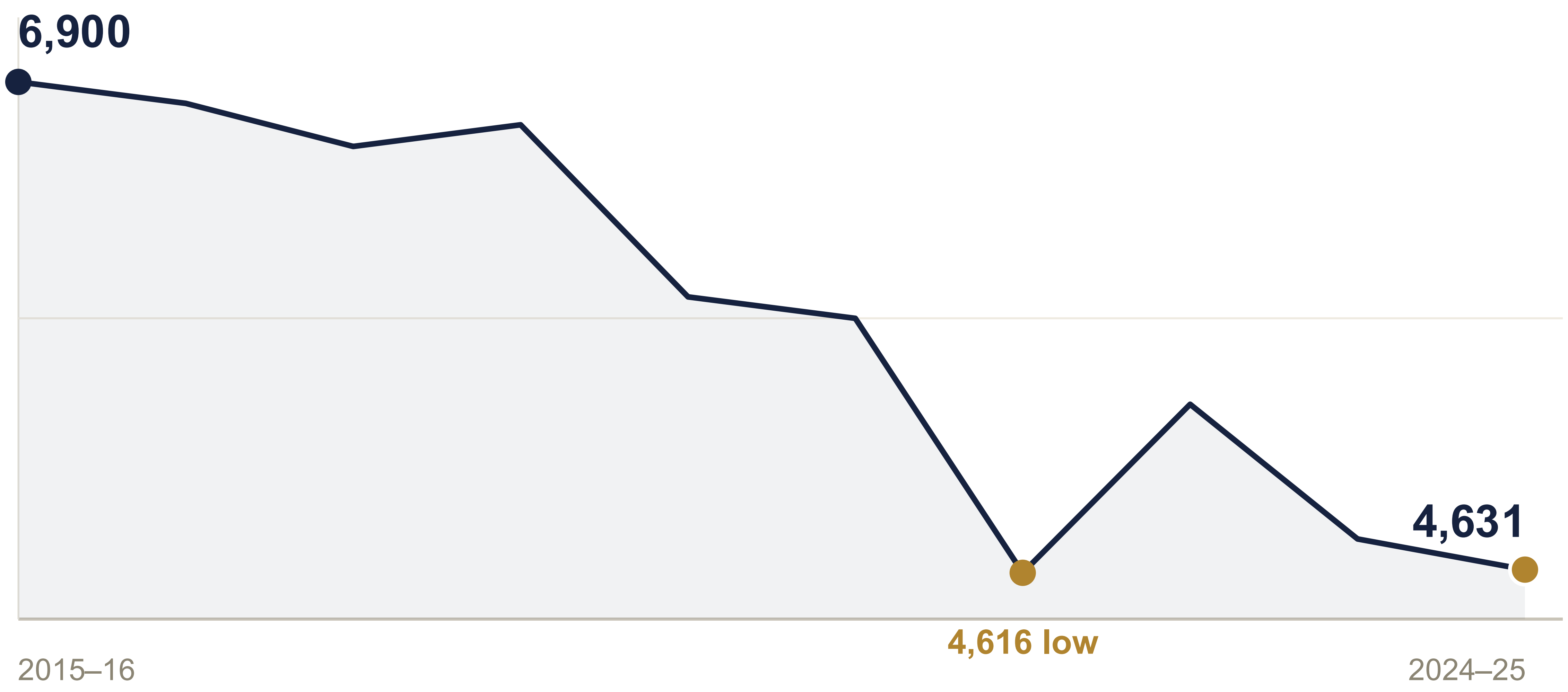
STARTS

3,798

Down 26% — the **fewest starts ever recorded**

THE TREND IS WALES-SPECIFIC

Roughly a third down in a decade.



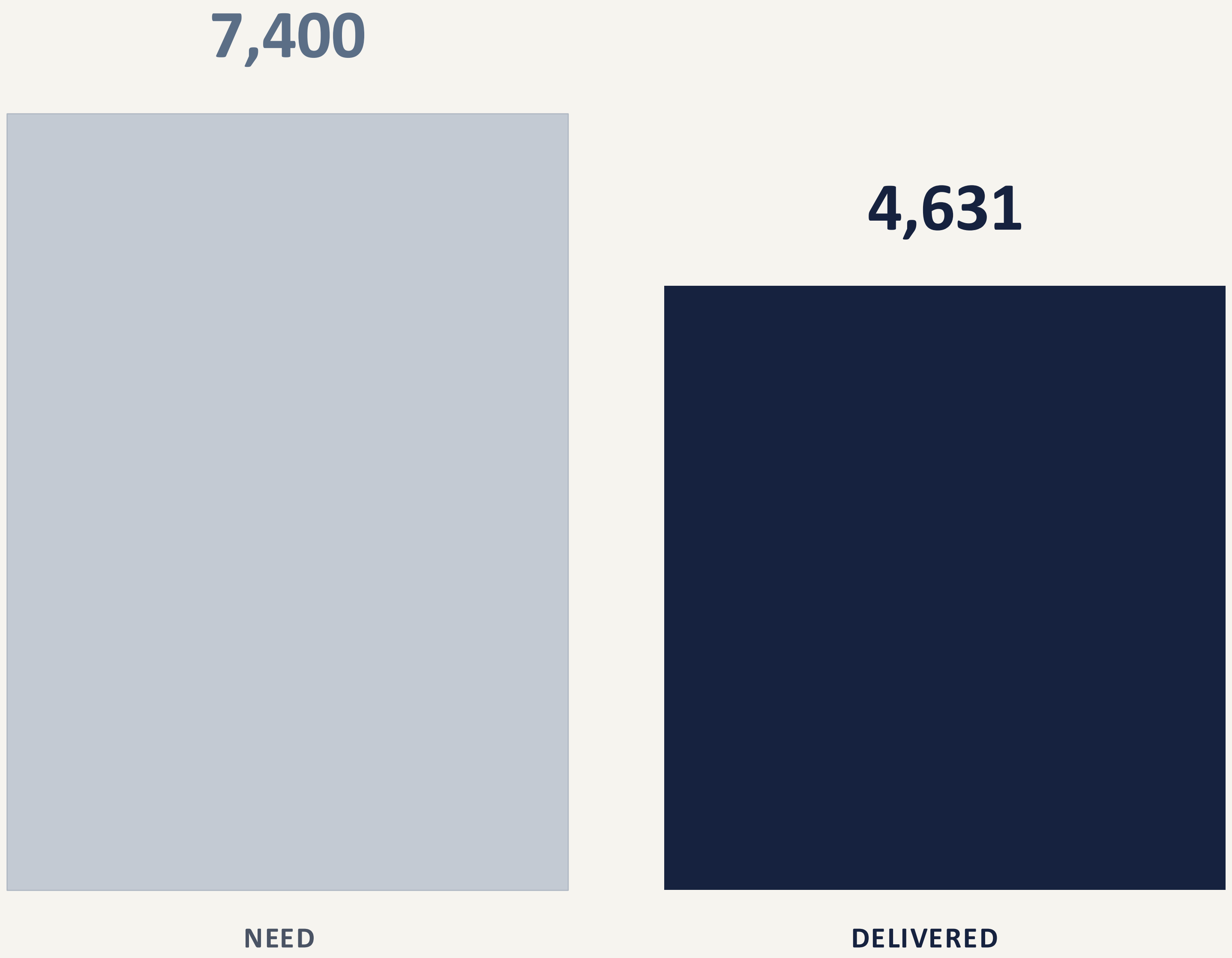
England, Scotland & Northern Northern Ireland all saw completions *rise* over the decade. Only Wales declined.

+42%

One encouraging signal: 1,811 completions in Oct–Dec 2025 — but largely one big Cardiff flats scheme.

Running at 60% - and a south-east story.

ANNUAL HOMES · NEED VS DELIVERY



Welsh Government's own central estimate was **~7,400 a year** — delivery sits at **~60%**, well under half the higher-need scenarios.

COMPLETIONS BY AUTHORITY, 2024–25

Several counties sat at just 1 per 1,000. Delivery is increasingly a **south-east Wales story.**

Leckwith Quays Decision

Planning Balance and Overall Conclusions

The proposed development would provide up to 228 new homes with a suitable element of affordable housing. There is a considerable and pressing need to increase the supply of housing in the Country, and in these circumstances, I consider that the scheme's important contribution to addressing the present need for housing, including lower cost affordable housing, is a consideration that attracts considerable and significant weight in favour of the development.

Plan Making...

25

LPAS IN WALES

~½

ON TIME-EXPIRED PLANS

First-generation LDPs were adopted 2011–2019, with periods ending 2021–2026 — so a whole cohort hits the cliff **at once**, while almost none have replacements through examination.

DECISION-TAKING · S.38(6)

Deciding schemes when the plan has expired.

SWANSEA

The plan expired mid-application.

The Swansea LDP **ceased to be a plan in January, three months** after refusal. The development plan became Future Wales alone. The first decision to apply the apply the time-expiry provision, and the template for what for what follows....

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WREXHAM

Decided against a 2005 plan.

After litigation demoted the examined 2023 LDP, a scheme in a **National Growth Area** was determined against a UDP from 2005 — evidence base 20+ years old.

Being in a Growth Area was the saving grace — under-delivery ran at half the required rate, weighing in favour.

LEGISLATIVE IMPACTS

Two important acts (and lots of secondary legislation) this year…

PLANNING (WALES) ACT 2026

Consolidation does not change the substance of the law—but the structure. On commencement, statutory references need to be revisited.

Potential for changes, more quickly….

INFRASTRUCTURE (WALES) ACT 2024

Live 15 December 2025 — the biggest change to consenting consenting since devolution. The Infrastructure Consent Order carries permission, compulsory purchase, the purchase, the lot. Energy to the 350MW ceiling; as well as well as impacts upon transport, water, etc..

Twenty thousand social homes by 2030.

The name from the *tŷ unnos* tradition — build a house on land between sunset and sunrise, smoke rising by morning, and it was yours. As a statement of intent on speed, one could hardly do better.

4,000

social homes a year needed — little over **4,600** total completions across *all* tenures last year.

1. Social housing at that scale **is not delivered separately from the market** — often it comes through s.106, shared supply chains and land promotion.

2. Unnos will not stand outside the planning system — likely still going to need to confront the planning system, needing adopted plans and consenting capacity like everyone else.

In a failing river catchment, two ways through...

Projects held up with nutrient neutrality impacts needs mitigation secured beyond all reasonable scientific doubt today — but it is narrow and expensive, and the transaction costs bite hardest at the SME end.

ROUTE 1

Headroom

Connect to a treatment works with with permitted nutrient headroom— dependent on permit reviews converting into development capacity.

ROUTE 2

The mitigation market

Buy or build secured, evidenced, perpetual mitigation — funded for the life of the development. Available, but costly.

ROUTE 3

Legislation

England has legislated a third route. **Wales has not.** For 20,000 homes in affected catchments, perhaps an opportunity?

Inspector time…

LECKWITH

4½ yrs

Application to decision — on the *winning* scheme. Oct 2020 to Jun 2025.

WREXHAM

4+ mths

“dead time” between the Inspector’s report and the ministerial decision.

KINMEL BAY

1 year

For **three dwellings.** Called in Feb 2025, decided Jan 2026.

Lot of pressure on PEDW already – and likely to get worse with infrastructure pressures and local plans coming to examination

THE LEVERS THAT NEED PULLING

If Wales is to build more homes.

I Fix plan-making

II Recognition of the link between market & affordable

III A corrective mechanism when plan-making fails

IV Resource

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sda@no5.com