

Brownfield Land Solution?

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Brownfield development is often proclaimed to be the solution to England's housing crisis. The rallying cry from many campaigners is that there is no need to build on greenfield sites when there is a plethora of vacant/derelict previously developed sites in our towns and cities just waiting to be regenerated for housing.

Clearly, it's important that brownfield land is used where it is suitable for housing, and can be viably developed, but analysis using the National Land Use Database (NLUD) and household projections produced by CLG reveals two fundamental problems in trying to avoid releasing green field land for housing:

a. There's simply not enough brownfield land available to meet needs. NLUD sites have capacity of c.1m when needs over the next fifteen years are for 3.3m new homes. Even if there are further sources of untapped potential, the national gap is likely to be very significant.

b. Brownfield capacity is not concentrated in locations with the highest levels of housing need.

Figure 1 presents a regional comparison of brownfield sites suitable for housing and CLG household projections.

Only in London and the North West is there any significant capacity for brownfield land to meet housing requirements. In London almost half of the projected new homes that the city requires up to 2030 could be met by brownfield sites (at present, the remaining half largely goes unmet). Around 1m new homes are required around London (in the South East and East of England), but there is brownfield capacity equivalent to just a fifth of this. In the South West and East Midlands there is also only enough brownfield capacity to meet around a fifth of projected household growth. Even within regions, not all of the brownfield capacity is in locations where people want to live or where job growth is greatest.

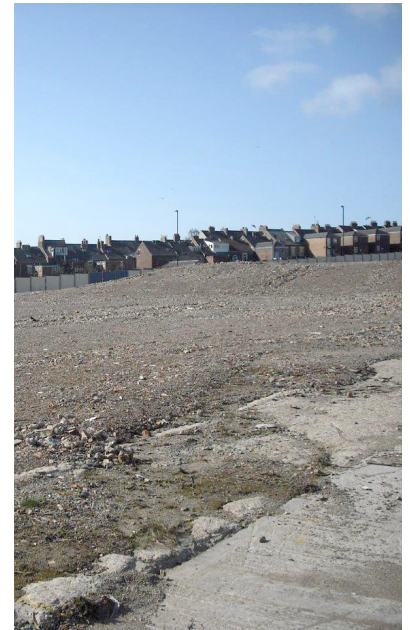
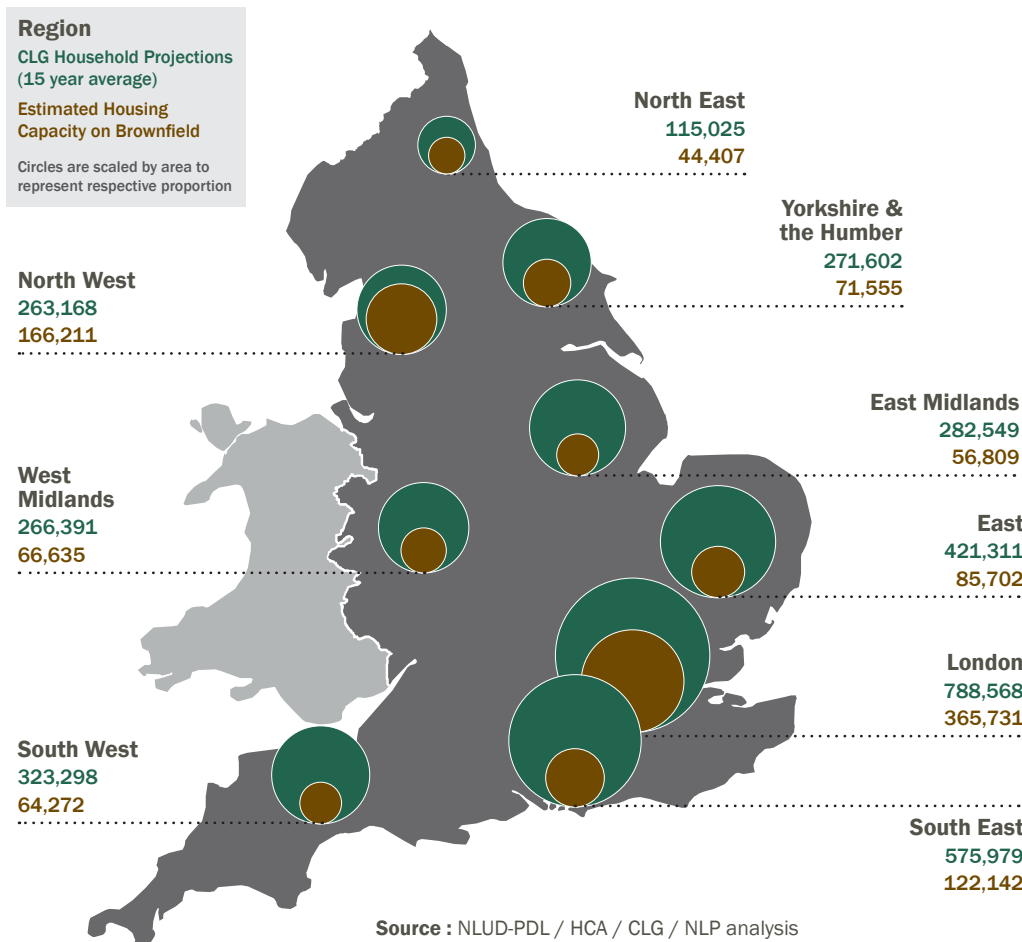


Figure 1 : Regional comparison of CLG Household projections and estimated housing capacity on brownfield sites



Key Figures

- 1m** Total housing capacity of brownfield sites
- 2.3m** Shortfall of homes required over the next 15 years that cannot be met on identified brownfield sites
- 46%** Proportion of the new homes that London requires up to 2030 that could be met on known brownfield sites
- 1/5** of brownfield capacity (excluding London) lies outside built up areas
- 520** brownfield sites are on areas designated as Green Belt
- 21%** The capacity of brownfield land as a % of housing needs in the regions surrounding London

Brownfield doesn't mean urban

Most brownfield sites are within urban areas. But the National Land Use Database also reveals how much previously developed land lies outside existing towns and cities.

Figure 2 plots the location of every brownfield site on the database and categorises it as either 'urban' (within a village, town or city), 'fringe' (contiguous with an urban area) or 'rural' (in the open countryside).

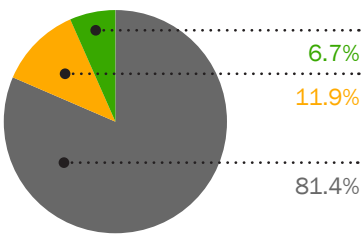
The analysis shows that, excluding London, almost a fifth (18.6%) of brownfield capacity

lies outside built up areas, typically on sites such as old airfields and former industrial areas, some of which may not be well located in terms of transport accessibility or in proximity to jobs and services. Such sites may perform less well against typical sustainability criteria than alternative, greenfield sites.

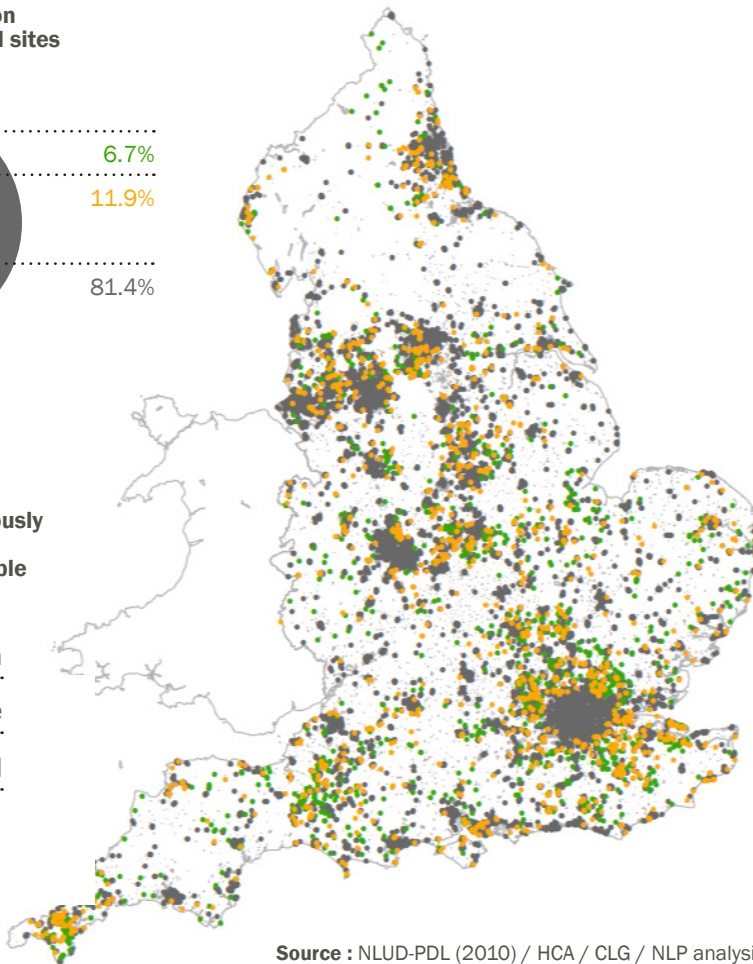
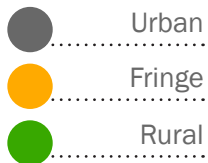
There are 520 brownfield sites with capacity for c. 23,000 houses on areas designated as Green Belt.

Figure 2: Location of brownfield sites suitable for housing

Housing capacity on suitable brownfield sites outside London



National Land Use Database of Previously Developed Land (NLUD-PDL) - suitable for housing



Source : NLUD-PDL (2010) / HCA / CLG / NLP analysis

About NLUD

The National Land Use Database of Previously Developed Land (NLUD-PDL) is the basis for this analysis. NLUD is assembled using local authority data and represents the most comprehensive national register of brownfield land

The data comprises all Local Authorities in England and was last updated in 2010

NLUD does not provide any assessment of site viability or achievability

The NLUD-PDL database includes some sites that are in existing use

Housing yield on individual sites is based on estimates supplied by the relevant Local Authority

The data may not reflect some opportunities for urban intensification in existing towns/cities

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