

Insight focus

SEPTEMBER 2022

Start to Finish City of Edinburgh

This paper looks at how long it took recent housing site completions in Edinburgh to develop out based on when they first received planning permission.



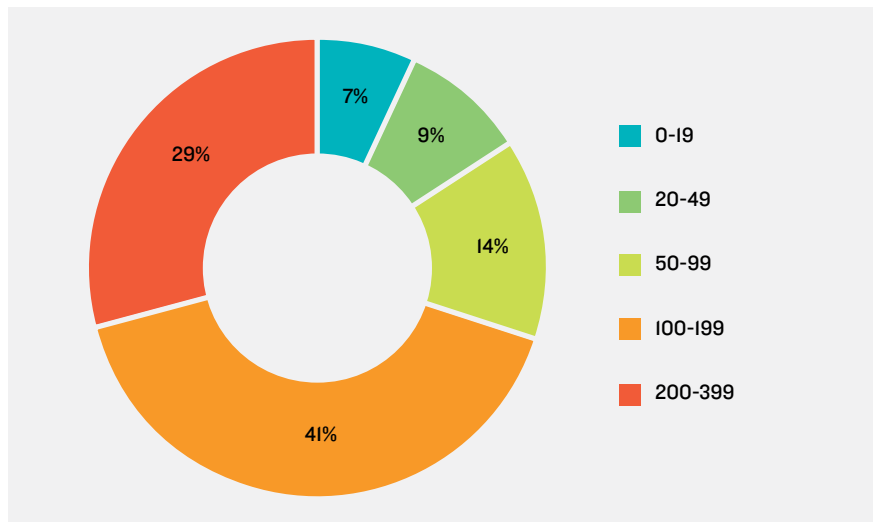
It is often not well recognised that there can be a significant time lag between the allocation of a housing site or its inclusion in a Housing Land Audit (HLA) and the delivery of homes from that site. There are many factors that play a role in this.

Start to Finish is award winning research undertaken by Lichfields in England and Wales. This Insight looks at housing development sites in the City of Edinburgh to ascertain what Edinburgh's Start to Finish profile looks like.

For the purpose of this research we have looked at development sites that were completed between April 2016 and March 2021 – ie over a 5 year period. In so doing we will draw conclusions about how long it takes for smaller sites to deliver ie less than 500 units. We have also looked at 2 much larger sites (one Brownfield and one Greenfield) and tracked their journey from first consent to delivery by 2021 and will similarly draw conclusions on those sites in terms of expectations for their Start to Finish.

We have examined the sites that were reported as complete in the 2017, 2018, 2019, 2020 and 2021 Housing Land Audits prepared by the City of Edinburgh Council.

Figure 1: Sites Complete 2017-2021 - Proportion Of New Homes Delivered By Different Capacity Sites



In so doing we were able to assess the Start to Finish profile of those sites grouped by site capacity. 159 sites were considered, see Figure 1 for the proportion of new homes delivered by different sizes of sites. In terms of absolute site numbers 681 new homes were built on sites that had a capacity of less than 20; 2,148 new homes were built on sites that had a capacity of 20-99; and, 6,524 new homes were built on sites that had a capacity of 100-399.

It should be noted that a number of these sites are parts of larger overall sites but that they each have individual entries in the HLA. Two such larger overall sites that have a number of phases are considered separately overleaf. This paper concludes by setting out Start to Finish expectations for the sites being brought forward by Edinburgh City Council for delivery of new homes over the coming years.

HEADLINE FIGURES

2-3yrs From first consent to first homes delivered

30+p.a. Average number of homes delivered in sites of < 100 units

50+p.a. Average number of homes delivered in sites of 100 - 399 units

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Our Analysis

0-399 home sites that completed 2017-2022

Our analysis looked at 159 sites that completed 2016/17 - 2020/21. It has found that on average it took 2-3 years for first homes to be completed after the first planning permission was gained. That said 9 sites took more than 10 years to complete their first home after first being granted planning permission. Sites of less than 50 units on average took 2-3 years to develop out and sites of 50 or more units took 5-6 years on average. Sites of between 20 and 99 units will on average build out at a rate of just over 30 units per annum. Larger sites, more than 100 new homes, will on average develop out at more than 50 new homes per annum.



1000+ home case study sites

New Greendykes is a greenfield site. It is an allocated site. It has had an outline planning permission for 1000 new homes since 2010. The first homes were delivered in 2014 and up to March 2021 a total of 699 new homes had been delivered on the site. There remains programming for a further 355 new homes.

- It is 12 years since the site was allocated and the first outline consent was granted.
- It was 4 years from the outline consent being granted to first delivery of new homes but on average 2 years elapsed between the granting of detailed consents for each phase and first completions of these.
- The site has delivered on average 49 units per annum.
- The site is not programmed to be complete until 2026/27.

Western Harbour is a brownfield site. It is part of housing led mixed use regeneration proposals identified in the current LDP. It has had a planning consent for 1881 new homes since 2002. The first homes were delivered in 2006 and up to March 2021 a total of 1041 new homes had been delivered on the site. There remains programming for a further 978 new homes.

- It is 20 years since the site gained its first planning permission.
- Consents for subsequent phases have been granted approximately every 2 years.
- It was 4 years from the outline consent being granted to first delivery of new homes but on average 2 years elapsed between the granting of detailed consents for each phase and first completions of these.
- The site has delivered on average 88 units per annum.
- The site is not programmed to be complete until more than 30 years after its first permission was granted.

The Start to Finish Profile for Edinburgh

In general terms we can see that in Edinburgh it takes on average 2-3 years from the granting of the first planning application to the delivery of the first home regardless of site capacity.

Delivery rates are on average just over 30 units per annum for sites with capacity for 20-99 units. This steps up to just over 50 per annum for sites with capacity for 100-399 units and larger sites of over 1000 units deliver in the order of 70 units per annum.

The time taken from first homes being delivered to completion of the site steps up as you would expect in line with the size of the site taking 1-5 years to complete. If taken as a whole our Brownfield case study will complete in 27 years and our Greenfield case study in 11 years.

The time from first consent to completion, so the overall start to finish of a housing site in Edinburgh, is 3-4 years for sites of less than 50 units and for the individual phases of the very large sites. It is 5-6 years for sites of 50-399 units. Our Brownfield case study site will have a Start to Finish profile of 31 years if it develops out as expected and our Greenfield case study site will have a Start to Finish profile of 16 years if it completes as programmed.



Figure 2: Years from first consent to first homes delivered by site capacity

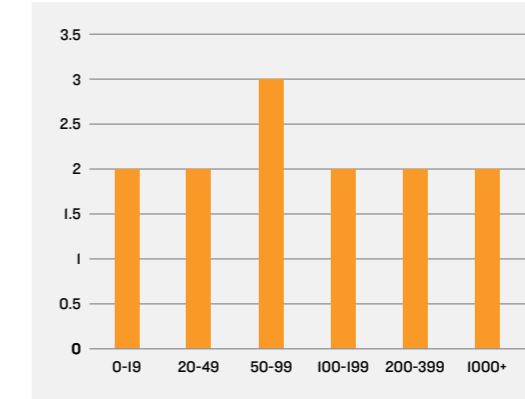


Figure 3: Average Delivery rates pa by site capacity

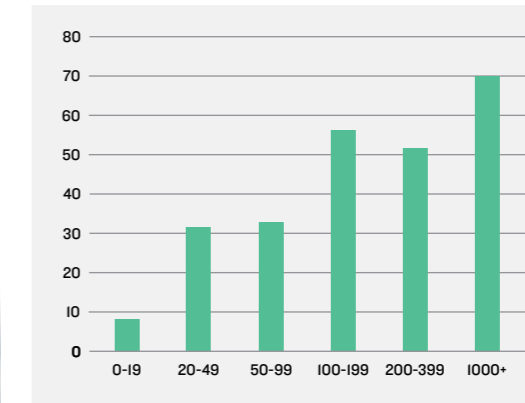
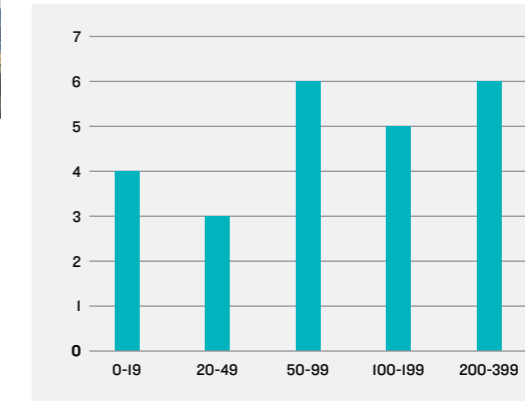


Figure 4: Years from first consent to site completion by site capacity



Edinburgh City Council has identified 117 sites to deliver new housing across the city in the emerging Cityplan 2030; 97 of these are new allocations.

Table 1 shows that it is anticipated that the majority of new housing will be delivered by 12 sites with capacity for more than 1000 new homes. Only 4 of these new sites are new allocations and more than half of the new homes on these large sites are expected to come from legacy sites.

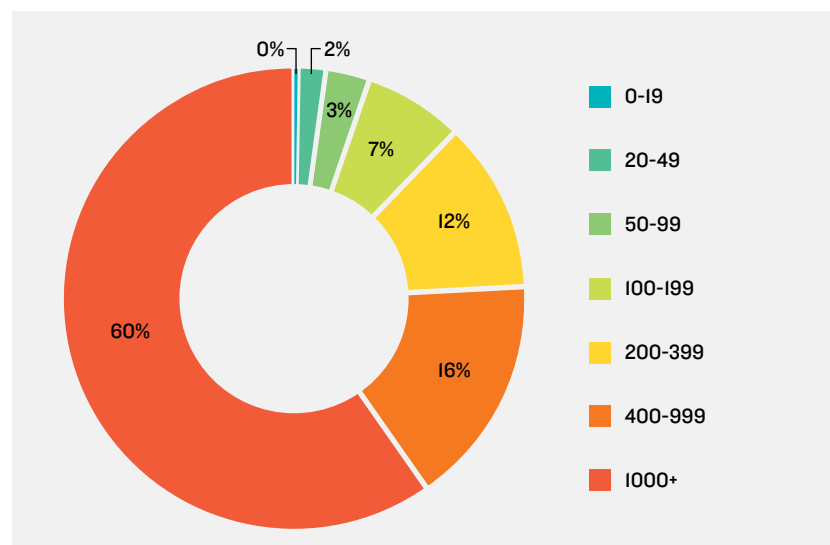
In September 2022 the City of Edinburgh Council published their updated Development Plan Scheme for City Plan 2030. This suggests submission of the plan for examination by the end of 2022 and its examination from Jan-Sept 2023. If this timetable is followed the new LDP could be adopted in early 2024. Given the findings of this Insight, new allocations of more than 50 units will need to gain planning permission in the first year of the plan (2024) if they are to be complete by 2030.

Table 1: Majority of new housing

	No. of Sites	% of Sites	Capacity	% of Capacity
0-19	12	10%	145	0.33%
20-49	24	21%	786	2%
50-99	18	15%	1352	3%
100-199	23	20%	3248	7%
200-399	18	15%	5203	12%
400-999	10	9%	6754	16%
1000+	12	10%	26299	60%

Sites of less than 50 units will need to secure their first consent by 2026 at the latest if they are to complete by 2030. Similarly, the very large sites will need to gain outline consent in the first year of the plan and detailed permission for each phase very quickly afterwards if they are to begin to deliver in the plan period.

Figure 5: City Plan 230 - proportion of new homes to be delivered by different capacity sites



At an average delivery rate of 88 units per annum for our brownfield case study we should perhaps only expect each of the 4 new very large allocated sites to deliver in the order of 700 new homes within the plan period, taking into consideration the time it will likely take to gain planning permission post allocation and the time for new homes to be delivered thereafter.

Overall we can perhaps expect the other large greenfield sites to deliver 931 new homes and other large brownfield sites to deliver 2,112 new homes by 2030 given the current planning status of each site. This will lead to a significant shortfall against the Housing Land Requirement identified.

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Contact Us

Birmingham

Jon Kirby
jon.kirby@lichfields.uk
0121 713 1530

Bristol

Andrew Cockett
andrew.cockett@lichfields.uk
0117 403 1980

Cardiff

John Cottrell
john.cottrell@lichfields.uk
029 2043 5880

Edinburgh

Nicola Woodward
nicola.woodward@lichfields.uk
0131 285 0670

Leeds

Christopher Darley
christopher.darley@lichfields.uk
0113 397 1397

London

Matthew Spry
matthew.spry@lichfields.uk
020 7837 4477

Manchester

Simon Pemberton
simon.pemberton@lichfields.uk
0161 837 6130

Newcastle

Harvey Emms
harvey.emms@lichfields.uk
0191 261 5685

Thames Valley

Daniel Lampard
daniel.lampard@lichfields.uk
0118 334 1920