Ceredigion County Council

Urban Capacity & Urban Extension Study

Technical Appendices – Volume 2

22 October 2008

Entec UK Limited

Appendix A
Glossary of Terms

4 Pages

Part A – Ceredigion County Council – Urban Capacity and Urban Extension Study: A Glossary of Frequently Used Terms

Term / Acronym	Definition
Brownfield	An area that has previously been developed
Building Research Establishment Environmental Assessment Methodology (BREEAM)	Environmental assessment method for buildings.
Chamber of Trade	A chamber of commerce is a form of business network. Business owners in towns and cities form these local societies to advocate on behalf of the business community. Local businesses are members, and they elect a board of directors or executive council to set policy for the chamber.
Code for Sustainable Homes	An environmental impact rating system for housing in England, setting new standards for energy efficiency (above those in current building regulations) and sustainability which are not mandatory under current building regulations but represent important developments towards limiting the environmental impact of housing.
Commercial Development	Development for employment purposes that does not include industry. For example, offices.
Community Strategy	For promoting or improving the economic, social and environmental well-being of an area, and contributing to the achievement of sustainable development in the UK'. Each local authority should work with the voluntary sector and private sector, as well as local people, to agree the content.
Conservation Area	A tract of land that has been awarded protected status in order to ensure that natural features, cultural heritage or biota are safeguarded. A conservation area may be a nature reserve, a park, a land reclamation project, or other area.
Density per hectare (dph)	Number of houses on a hectare of land.
Department for Communities and Local Government (DCLG) (formerly the Office of the Deputy Prime Minister (ODPM))	The government department responsible for local and regional government, housing, planning, regeneration, social exclusion and neighbourhood renewal. It works with other government departments, local councils, businesses, the voluntary sector, and communities themselves to help create sustainable communities.
Development Control	The element of the United Kingdom's system of Town and Country Planning through which local government regulates land use and new building.
Development Plan	The statutory development plan setting out our policies and proposals for the development and use of land and buildings in the district. In Wakefield the current development plan is the Unitary Development Plan First Alteration.
Development Plan Document (DPD)	A 'Local Development Document' which forms part of the statutory development plan and includes the core strategy, site specific documents, proposals map and area action plans.
DTZ	A global real estate adviser.
English Partnerships	The national regeneration agency for England, performing a similar role on a national level to that fulfilled by Regional Development Agencies on a regional level. It is responsible for land acquisition and assembly and major development projects, alone or in joint partnership with private sector developers

Term / Acronym	Definition
Environment Agency	Public body charged with protecting and improving the environment in England and Wales. Aims to make sure that air, land and water are looked after to help achieve sustainable development and ensure that future generations inherit a cleaner, healthier environment.
Friends of the Earth	Is an international network of environmental organizations.
Geographic Information System (GIS)	Is an information system for capturing, storing, analyzing, managing and presenting data which is spatially referenced (linked to location).
Greenfield	A piece of previously undeveloped land, in a city or rural area, either currently used for agriculture, landscape design, or just left to nature.
Greenspace	An open urban space with plant life, or the natural environment.
Housing Association	Independent not-for-profit body that provides low-cost "social housing" for people in housing need. Any trading surplus is used to maintain existing homes and to help finance new ones. They are now the United Kingdom's major providers of new homes for rent, while many also run shared ownership schemes to help people who cannot afford to buy their own homes outright.
Housing capacity	Maximum amount of houses to be placed on a given area of land.
Housing Corporation	The non-departmental public body that funds new affordable housing and regulates housing associations.
Inert waste	Waste which does not react chemically or biologically and will not break down naturally. Examples of inert waste include building rubble and concrete.
Landfill	A site where local authorities and industry can take waste to be buried and compacted with other wastes. Sites are licensed and regulated by the Environment Agency to ensure that their impact on the environment is minimised.
Listed Building	A building or other structure officially designated as being of special architectural, historical or cultural significance.
Local Development Plan/ Unitary Development Plan	Following the Planning and Compulsory Purchase Act 2004, each unitary authority in Wales is required to prepare a local development plan (LDP) for its area. These will replace the previous unitary development plans (UDPs), and will become the sole development plans for each council and National Park.
National Park	A reserve of land, usually declared and owned by a national government, protected from most human development and pollution.
National Playing Fields Association (NPFA)	Also known from 2007 as Fields in Trust (FIT), it aims to protect and promote sports and recreation open space in British cities and towns.
Planning Policy Guidance (PPG)	Guidance produced by central government setting out its policies on specific planning topics. These are being updated and replaced by planning policy statements.
Planning Policy Statement (PPS)	Statement produced by central government setting out its policies on specific planning topics. Regional spatial strategies and local development frameworks must take account of and conform to national planning policy.
Planning Policy Wales (PPW)	Provides guidance on the preparation and content of development plans and advice on development control decisions and appeals.
Regional Assembly	Bodies established as regional chambers under the Regional Development Agencies Act 1998
Scheduled Ancient Monument	A protected archaeological site or historic building of national importance.

Term / Acronym	Definition
Section 106 agreement	A legal agreement between local authorities and developers linked to a planning permission which requires the developer to carry out certain works to offset the effects of development or provide benefits for the local community to allow the development or proceed such as road infrastructure. These are also known as planning gain, planning benefits, community benefits or planning obligations, and usually could not normally be achieved by the use of planning conditions or other statutory controls.
Settlement boundary	The extent of a settlement.
Sites of Special Scientific Interest (SSSI)	A conservation designation denoting a protected area in the United Kingdom. They represent the country's best wildlife and geological sites.
Special Landscape Area	A non-statutory conservation designation used by local government in some parts of the United Kingdom to categorise sensitive landscapes which are, either legally or as a matter of policy, protected from development or other man-made influences.
Strategic Environmental Assessment (SEA)	All major strategies and plans, including local development documents, must be subject to the requirements of the European Union Directive on Strategic Environmental Assessment. Environmental impacts have to be assessed and monitored and necessary mitigation measures identified. (See also 'Sustainability Appraisal').
Strategic Housing Land Availability Assessment (SHLAA)	A study into the availability and suitability of land for housing.
Sustainability Appraisal (SA)	The process of assessing and weighing the economic, social and environmental costs and benefits of development proposals, both individually and collectively. (See also Strategic Environmental Assessment).
Sustainable Development	Activity which achieves mutually reinforcing economic, social and environmental benefits without compromising the needs of future generations.
Sustainable Urban Drainage Systems (SUDS)	Designed to reduce the potential impact of new and existing developments with respect to surface water drainage discharges.
Technical Advice Notes (TAN)	Topic based supplements to development plans in Wales.
Urban Extension	The outward growth of a settlement reshaping the settlement boundary.
Welsh Assembly	A devolved assembly with power to make legislation in Wales.

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Appendix B
Study Scoping Report

21 Pages

Ceredigion County Council

Urban Land Capacity & Urban Extension Study

Scope of Project

April 2008

Entec UK Limited

Report for

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Ceredigion County Council

Urban Land Capacity & Urban Extension Study

Scope of Project

April 2008

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Document Revisions

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Contents

1. Purpose of this Report

Entec UK Ltd, in conjunction with Dr Andrew Golland, has been commissioned by Ceredigion County Council to undertake an Urban Land Capacity Study and Urban Extension Study for the County of Ceredigion.

The purpose of the study is to gain an accurate understanding of the potential urban capacity of the County. This will be achieved through a quantitative assessment of vacant and underused land and buildings within the boundaries of the six largest towns. The study will also investigate the type and quantity of development that could realistically be accommodated on identified sites, given extant and emerging planning policy, environmental constraints, regeneration opportunities, density and parking provision, and, development costs, etc.

The Ceredigion Urban Capacity Study will concentrate on the six largest towns of Ceredigion, as defined within the Ceredigion Unitary Development Plan Proposed Modifications 2006 (UDP), namely, Aberystwyth, Cardigan, Lampeter, Aberaeron, Tregaron and Llandysul. The towns of Aberystwyth, Cardigan and Lampeter will also be the subject of an additional Urban Extension Study, the findings of which will supplement the main report.

The findings of the study will form a key evidence source for the Council's new Local Development Plan (LDP), which in turn will set out the planning policy framework and development requirements of the County over the next fifteen years.

In the meantime, all applications for development will continue to be determined in accordance with policies contained within the UDP. The appearance of a site within the study does not imply Council support for development or that permission will be granted for identified uses. Sites may also be suitable for other uses (such as open space) under policies to be formulated within the new LDP.

The Council are consulting on this methodology with a range of stakeholders including, house-builders, commercial developers, registered social landlords, environmental groups and other interested groups and individuals. Comments on the proposed approach and methodology are invited from all parties and you are asked to suggest sites that should be considered by this study where these fall within the settlement boundaries of the six main towns in the UDP.

The Ceredigion Urban Land Capacity and Urban Extension Study is one of a series of consultation exercises currently being undertaken by Ceredigion County Council. It is important to recognise therefore that the information collated as part of this consultation exercise is separate, and in addition to that of the statutory Call for Candidate Sites Consultation which is currently being progressed as part of the preparation of their Ceredigion Local Development Plan (LDP). Similarly, the County's Employment Land Review, currently being undertaken by consultants DTZ, is set apart and disassociated with this scoping report.

Those bodies in receipt of this Report are detailed in the following table. You are invited to suggest other consultees should you feel that their input would be beneficial at this time:

Table 1.1 Recipient of Scoping Report

Recipients of Scoping Report		
• The Welsh Assembly Government	• Neighbouring Local Authorities (Powys, Carmarthenshire, Gwynedd, Pembrokeshire and the Pembrokeshire Coast National Parks)	• Other interested parties (e.g. Friends of the Earth, Campaign of the Protection of Rural Wales)
• Countryside Commission for Wales		
• Registered Social Landlords (Tai Cantref / Mid Wales Housing Association)	• Developers / house-builders/ HBF	• Estate and Land Agents
	• Ceredigion Community Strategy C2020	• Antur Teifi
• Environmental Agency	• Chamber of Trade	Greener Aberystwyth
•	•	•

This report will be revised and re-issued in line with responses received during the consultation period where these are appropriate. This revised report will not be consulted on again and will be for information purposes only.

KEY QUESTIONS:

1. ARE THE CONSULTEES SET OUT IN TABLE 1.1 THE RIGHT ONES?

2. ARE THERE ANY OTHERS THAT SHOULD BE INCLUDED AT THIS TIME? (BEAR IN MIND THAT THE STUDY WILL FORM EVIDENCE IN SUPPORT TO THE NEW DEVELOPMENT PLAN AND WILL BE THOROUGHLY TESTED IN PUBLIC BY AN INDEPENDENT INSPECTOR)

2. Planning Policy Background

There is no explicit policy requirement to undertake an Urban Land Capacity Study in Wales. In undertaking this study, the Council are responding to the recommendations of the Inspector to the UDP that it be undertaken for a range of land uses to enable the relative needs of the urban and rural areas to feed into the policy of the LDP.

In doing this, Planning Policy Wales (PPW) directs that development should be provided in accordance with the principles of sustainability in locations well served by and supporting local populations, jobs and services and with a priority placed upon the development of brownfield land. The following development concerns apply:

- Employment to be provided where it meets the needs of the local economy including those of small and medium sized businesses. Sites should be assessed against clear criteria and should take into account the views of local business. This aspect of the study will be informed by the findings of an employment land demand study being undertaken in parallel by the consultancy DTZ;
- The importance of town centres as locations for retail development;
- The provision of housing in the most sustainable locations with a strong priority placed upon the development of brownfield land whilst maintaining a 5-year supply of genuinely available land for housing. The study findings will augment this knowledge and allow the Council to consider how sites can best support the development needs of its communities

As the Council cannot rely upon approved Welsh guidance, the proposed methodology is set out to consult with, and gain the input of, local stakeholders. Although drawn up with reference to the most up-to-date guidance and examples of good practice elsewhere[1] the Council wishes to ensure that it reflects, and respects, local conditions and concerns; the methodology will be amended where it is considered that it would be strengthened by suggested changes.

KEY QUESTIONS:

3. THE COUNCIL BELIEVES THAT THE STUDY (IN PARALLEL TO THE EMPLOYMENT LAND DEMAND STUDY) IS THE BEST WAY TO PROVIDE A SOUND BASIS FOR LAND ALLOCATION AND POLICIES WITHIN THE LDP. DO YOU AGREE? IF NOT, WHY NOT?

[1] DCLG *"Strategic Housing Land Availability Assessments – Practice Guidance" 2007;* North West Regional Assembly *"Exploring Urban Potential for Housing – the Guide"2003*

3. Methodology – Which Sites and Where?

3.1 Where should the Study Look?

The study proposes to provide a statement of the position in the County as at 1st April 2008 and will be updated periodically to ensure that it is consistent with the LDP at the time of it's submission to the Welsh Assembly. Sites will be assessed according to the potential development contribution over the next fifteen years

The Urban Land Capacity study will focus upon the six largest urban areas (Aberystwyth, Cardigan, Lampeter, Aberaeron, Llandysul and Tregaron) and will address these towns in a 'comprehensive' way within the settlement boundaries defined within the UDP.

The towns of Aberystwyth, Cardigan and Lampeter will also be the subject of an additional Urban Extension Study, the findings of which will supplement the main report. As the towns identified as relatively small in scale, it is assumed that the extension sites are likely to be relatively small. For the purpose of the study, it is proposed that appropriate areas of land within 250 meters of a settlement boundary will be assessed. This distance has been selected due to:

Sustainability reasons – small extensions are unlikely (on their own) to warrant the need for new community facilities and infrastructure, hence it is important that new residents are located within a reasonable distance of existing services within the towns; and

Sites previously proposed – none of the previously promoted sites extend beyond this distance from the settlement concerned.

The additional assessment criteria that will be used to assess urban extension sites can be found at **Appendix B Table B11**.

3.2 What Sorts of Site should the Study Consider?

The study proposes to address both brownfield and greenfield sites. Areas of greenfield land may possess development potential although it will ultimately be a local decision as to whether the sustainability of the sites location outweighs its greenspace benefit. These will include potentially surplus allotments as well as recreational open spaces and playing fields where there is provision would still be adequate upon development.

It initially seeks to identify all sites with development potential comprising 0.02 hectares and above.

It will also include the potential re-use of existing buildings. Such buildings will only be included in the study if there is some indication that the use will cease over the study period.

The table below sets out our proposed assessment method for each of the identified sources of supply.

Table 3.1 Proposed Assessment Method for the Type of Site / Land Supply

Type of Site / Land Supply > 0.02 ha	Proposal to Address
Subdivision of Existing Buildings / Houses	Establish with CCC through past trend data
Conversions / Flats over Shops	Establish with CCC through past trend data
Empty Housing Stock	Establish by discussions with CCC Housing Dept
Previously developed vacant and derelict land and buildings (non housing)	Site specific review and site visits correct as at 1 April 2008
Intensification of land use within residential areas (use of incidental open spaces, garage courts etc)	Review CCC strategies / plans in respect of regeneration proposals / managed stock
Redevelopment of existing housing (if redeveloped for housing, this can have both a gross and net impact)	Review CCC strategies / plans in respect of regeneration proposals / clearances
Redevelopment of car parks	Site specific review and site visits correct as at 1 April 2008
Conversion of existing commercial buildings	Site specific review and site visits correct as at 1 April 2008
Review of proposed UDP allocations / unimplemented consents	Site specific review and site visits correct as at 1 April 2008
Vacant land - not previously developed	Site specific review and site visits correct as at 1 April 2008
Land and Buildings Currently in Use (Employment / Leisure / Retail)	Site specific review and site visits correct as at 1 April 2008
Under used and potentially surplus allotments	Site specific review and site visits correct as at 1 April 2008
Under used and potentially surplus open spaces	Site specific review and site visits correct as at 1 April 2008
Under used and potentially surplus sports pitches	Site specific review and site visits correct as at 1 April 2008
Under used and potentially surplus school playing fields	Site specific review and site visits correct as at 1 April 2008

The study will establish recent trends in the development of small sites under the site size threshold of 0.02 ha and seek to predict the likely yield from such small sites in future. Sources and Recording of Site Information

To identify all potential development sites, the study will draw upon the following sources:

- Previous land use analyses undertaken by the Council on an annual basis;
- Desk work and site visits to be undertaken by CCC officers and Entec in Spring 2008;
- Additional sites identified by consultation with officers of the Council;
- Sites suggested by consultees to this report.

From the combination of these sources, this study will seek to establish as comprehensive and complete a list of candidate sites as possible. The boundaries of each identified site will be digitised using a GIS system and site details will be entered on a Microsoft Access database. This approach will ensure that there is a clear separation between sites that fall within the site-specific approach and those that are assessed through trend analysis – this will address any danger of double counting.

The following data is suggested for collection at this stage:

Table 3.2 Site Specific Data Suggested for Collection

Field Categorisation	NWRA Guide Proposes Fields to Include:
1. Unique Identifier Fields	• Unique site reference number, site address etc;
2. Record Versioning Fields	• 1 April 2008;1 April 2009, etc;
3. Geographical & Address Referencing Fields	• Grid ref; Postcode; Ward, and ED; Regeneration area, other policy area etc;
4. Land Use, Planning Status & Related Fields	• Gross area (ha); Land type; Contamination; Planning status; Anticipated density; Unconstrained potential; Anticipated yield; Initial assessment of timescale (1-5 years, 5-10 years, 10-15 years) etc;
5. Source and Market Status Fields	• Reason for site to be known (e.g. previously promoted); Ownership(if known); Agent name; Welsh Assembly involvement;
6. Other Miscellaneous Fields	• General information; Comments; Other (as known).

For field categories 4, 5 and 6, it is proposed to modify this approach in line with the process set out in the new DCLG guidance that aims to put each site within a framework of constraints and opportunities. The attributes and factors are all related to informing the assessment of site developability (availability, suitability and viability) in Section 5 below.

KEY QUESTIONS:

4. DOES TABLE 3.1 REPRESENT A COMPREHENSIVE STATEMENT OF THE LIKELY DEVELOPMENT OPPORTUNITIES TO BE FOUND IN THE URBAN AREAS? DO YOU FEEL THAT ANY ARE INAPPROPRIATELY INCLUDED OR EXCLUDED? IF THERE ARE ANY OTHER TYPES OF SITE THAT THE STUDY SHOULD CONSIDER HOW CAN THE STUDY GAIN INFORMATION ON THESE?

5. IS THERE ANY OTHER SITE INFORMATION THAT THE STUDY SHOULD COLLECT? IF SO, WHAT IS THIS? HOW WOULD IT BENEFIT THE STUDY? WHERE CAN IT BE OBTAINED? (BEAR IN MIND THAT INFORMATION ON CONSTRAINTS (E.G. FLOODPLAINS) AND OPPORTUNITIES (E.G. REGENERATION PROPOSALS) IS ALSO TO BE COLLECTED – SEE SECTION 4 BELOW)

4. Methodology – Attributes & Constraints

To help decide whether a site is suitable for development or, if so, whether this development will need to take constraints into account, the study will seek to obtain as much data as practically possible in order to place the sites in context. This will be derived through a series of contextual studies:

- An analysis of the prevailing property markets and the nature of sites that can be developed under current market conditions;
- A characterisation of the towns against sustainability criteria formed around access to services and facilities. This will identify those areas poorly provided by services or close to other supportive land uses;
- The identification of area and site specific development constraints e.g. floodplains, conservation areas, 'cordon sanitaire' areas;
- The identification of the extent, timing and scope of current and expected regeneration initiatives; and
- A statement of emerging policy requirements for the development of sites and their capacity e.g. the need to incorporate sustainable drainage measures (SUDS) etc. This is known as 'future proofing'.

4.1 Property Market Context

Data will be collected in order to inform assessment of site potential in response to property market factors. As the main driver for land-use change in the towns is likely to be for housing, this will consider the current financial benefits of housing development on sites against the development values yielded by a sites existing or alternative uses. As land values will vary from place to place, this analysis will need to be sensitive to local sub-market situations and how these may change through known changes that will boost a site's appeal for a particular land-use.

We propose to construct this element of the study around the following three elements:

1. An assessment of sub-markets in the towns, analysing its structure in terms of stock, demand and supply housing potential for all post-code areas within them;
2. A round of structured interviews with developers, agents, land-owners and registered social landlords that will obtain views on the strengths and weaknesses of each of the sources of land supply identified in Table 3.1 above and the likely impact of interventions in individual neighbourhoods or regeneration areas. It will be important to establish the types of interventions that could raise dwelling prices to a point where it becomes the most favourable land use, whether individual developments may be of a size to generate its own 'market' or whether house prices will still be benchmarked against the surrounding second hand homes;

3. A representative sample of 16 sites will be subjected to detailed examination to draw out those factors that influence viability and promote changes of use. The approach to this aspect of the study is set out in Appendix A.

4.2 Environmental Constraints

Environmental and physical constraints can influence the suitability of sites for housing and the costs of development. To establish suitability for development, sites will be assessed against information available for:

- Sites of interest for natural heritage;
- Sites of interest for cultural heritage (Scheduled Ancient Monuments / Listed Buildings / Conservation Areas / Parks);
- Other areas of sensitivity or policy constraint (floodplains/ groundwater protection zones/ air quality management areas/ ground instability and contamination/ health and safety 'cordon sanitaire' etc).

4.3 Policy Initiatives

Policy initiatives such as regeneration programmes can generate new opportunities for development. In seeking to improve the quality of environments and raise the image of areas, they can influence market conditions across all employment sectors and housing demand. Sites will be assessed in the context of ongoing proposals or regeneration measures that could, in time, influence the health of the local housing market already assessed. The spatial extent, nature, timing and scope will impinge upon any appraisal of availability, suitability and viability in Section 6 below.

4.4 Future Requirements in the Development of Sites

Planning policy seeks to respond to an increasingly important sustainability agenda. It is important to assess whether sites are likely to remain suitable for development or whether their capacity is likely to alter as a result of new requirements. Examples include:

- The need to provide flood or run-off attenuation measures in areas of current flood risk or where infrastructure has limited capacity. The provision of sustainable urban drainage systems (SUDS) can have significant land take requirements and site capacity will need to take any requirement for such measures into account;
- Any requirement to facilitate sustainable waste management including improved access for HGVs or domestic bring sites;
- Enhanced standards of sustainable design and construction; and
- Enhanced standards for the provision of community facilities or open space.
- Any requirement for district heating systems etc.

KEY QUESTIONS:

6. **DO YOU AGREE THAT THE CONSTRAINTS AND INITIATIVES ARE THE CORRECT FACTORS TO CONSIDER? ARE THERE ARE OTHER FACTORS THAT SHOULD BE INCLUDED? IF SO, FROM WHERE CAN THIS INFORMATION BE OBTAINED?**

7. **DO YOU ENVISAGE ANY REQUIREMENTS/LEGISLATION THAT WILL EXCLUDE SITES BEING CONSIDERED FURTHER?**

8. **DO YOU ENVISAGE ANY REQUIREMENTS/LEGISLATION THAT WILL INFLUENCE THE WAY IN WHICH SITES ARE DEVELOPED? IF SO, HOW SHOULD THE STUDY RESPOND TO THESE?**

5. Methodology – Site Potential

This part of the methodology attempts to establish the following:

- To what purpose can each site be put?
- What is the relative value of these uses? What would the site be best used for?
- What is the most appropriate form and density of development in terms of e.g. employment floorspace / numbers of houses?

5.1 Land Use Suitability

To help decide whether a site is suitable for development of a certain type, each will be assessed against a range of criteria to determine its suitability for the following range of uses:

- Employment including:
  - Industrial and Manufacturing;
  - Business Parks;
  - Commercial, retail and offices;
- Leisure; and
- Housing.

The study will not at this stage identify a preferred end use. It will identify those uses to which a site could be put and also assign a judgement to its value for each of these. For instance, whilst very suitable for both employment and housing uses a site may represent one of the best employment sites in the county; the site's relative value is different.

This process will also help to identify where mixed-use development (residential over retail/commercial) could be delivered in town centres.

The criteria to be used to assess individual sites are at Appendix B. It should be noted that whilst many of the criteria and requirements are similar, weightings are applied to distinguish those factors to which a particular land-use is particularly sensitive.

KEY QUESTIONS:

9. DO YOU AGREE THAT THE APPROACH TO ASSESSING POTENTIAL END USES IS APPROPRIATE IN PRINCIPAL? IF NOT, CAN YOU IDENTIFY HOW THIS SHOULD BE APPROACHED?

10. ARE THE CRITERIA USED TO ASSESS THE POTENTIAL LAND USES CORRECT AND COMPREHENSIVE? ARE ANY MISSING? IF SO, WHICH ONES?

11. THE WEIGHTINGS ATTACHED TO THE CRITERIA IN APPENDIX B ARE CLEARLY IMPORTANT. ARE THESE WEIGHTINGS APPROPRIATE OR SHOULD CERTAIN CRITERIA BE UPGRADED OR DOWNGRADED AGAINST OTHER CONCERNS? IF SO, PLEASE EXPLAIN WHY THIS SHOULD BE.

5.2 Assessing Realistic Capacity

In some cases, the baseline studies (especially the environmental constraint baseline) may identify particular sites or areas as being unsuitable for housing – such sites can be discounted at this stage.

Those sites identified as having realistic potential for development will then be assessed to determine how much floorspace / how many houses could be accommodated on them. This **constrained potential** is a realistic appraisal of the development that can be built in the time period. This will also include sites where only part of the area is considered suitable for development.

In respect of employment and other non-housing development, the study will apply broad assumptions in respect of plot ratios / storeys / job yield per sq.ft) for the area considered developable.

In respect of housing, design templates are applied to demonstrate how it's yield can best be maximised, whilst respecting particular site context, the character of the local area and the potential to accommodate other land uses/ mixed uses. In particular, consideration will be given to how density will be affected by imaginative design solutions. From a palette of over 100 templates, the study will identify the most relevant in respect of local circumstances / recent consents / regeneration objectives for the locality. Examples of development templates are included at Appendix C.

Consultation with the Council will allow a range of other policy considerations to be taken into account. This will include development density, external private space standards, minimum distance between houses, off street parking standards for each potential use.

This stage will have addressed, in the case of each site, the following questions:

- Is the site suitable for development now or, if not, in the future?
- If so, what form of development would be appropriate? This judgement would tease out issues of local sensitivity that will determine density of development, local need and the tenure and mix of residential proposals;
- Are there any issues that would promote or hamper the contribution of the site or affect its timing? Examples may be the timing of regeneration initiatives or the need for remediation;
- An expression of the extent to which areas of the site maybe required for, constrained by the needs of envisaged guidance and legislation – 'future proofing'.

KEY QUESTIONS:

12. DO YOU AGREE THAT THE APPROACH TO ASSESSING EMPLOYMENT AND COMMERCIAL (NON RESIDENTIAL) CAPACITY IS APPROPRIATE? ARE THERE ANY LOCAL CONSIDERATIONS THAT SHOULD BE BUILT INTO THE METHODOLOGY? IF SO, PLEASE SPECIFY.

13. DO YOU AGREE THAT THE APPROACH TO ASSESSING RESIDENTIAL CAPACITY IS APPROPRIATE? ARE THERE ANY AREAS THAT ARE SUITABLE FOR HIGHER DENSITY, OR APARTMENT DEVELOPMENT? ARE THERE ANY LOCAL CONSIDERATIONS THAT SHOULD BE BUILT INTO THE METHODOLOGY?

6. Towards a Framework for Developability

Having identified the sites that could be developed and the range and nature of the development that could be provided upon them, the next step is to place this capacity in the context of their developability and hence their likely contribution to the objectives of the LDP. To do this, the following considerations are used:

- Availability for development;
- Suitability for development (taken from Section 5.1 above);
- Economic viability of development.

6.1 Availability

A number of issues need to be appraised to determine the advantages and disadvantages of the considered sites. The extent to which these can be overcome will determine whether a site is identified as having potential within five years or in the medium to longer term. The impact of regeneration and renewal initiatives will clearly have a bearing upon this assessment.

6.2 Suitability

The assessment of suitability will rest in each case upon common criteria that will apply to all land uses and upon use-specific criteria that indicate particular suitability for certain land uses.

The study proposes the use of the maximum distance standards contained in the University of the West of England's publication *Sustainable Settlements - A Guide to Planners, Designers and Developers.* In this publication, the following maximum distances will be used to assess the relative sustainability of the sites – although the importance of these facilities will vary according to the land-use being considered. Sites will not be excluded simply because they do not meet one or more criteria - instead a realistic view of a site's sustainability will be based on these general standards.

- Primary School 600 m;
- Health Centre/ Doctor's surgery 1000 m;
- Local shopping centre 800 m;
- Post Office 1000 m;
- Banking facility 1000m;
- Bus Stop or railway station 400 m.

The developability of the site will also be taken into account. This will include consideration of factors such as highway access; contamination; ecology; flood risk; air quality; and bad neighbour uses.

Concerns and criteria specific to each land use under consideration are incorporated through consideration of the factors highlighted in Appendix B.

6.3 Economic Viability

Economic viability is defined as "whether the revenue from the development scheme covers the costs of development so as to provide the landowner with an adequate reward for selling land to a developer"[2]. This will vary according to the type of development concerned and a comparative assessment of other uses (e.g. retail) will inform the viability of a site for housing.

An economic viability assessment will be undertaken of a sample of 16 sites across the County. This approach is set out in the spreadsheet template in Appendix A drawn from best practice guidance. From this a residual land value can be derived.

The spreadsheet requires input of prices (housing prices and floorspace rental) and building cost. House prices will be obtained from the Land Registry and building costs will be obtained from the RICS database.

Table 6.1 Assessment of Site Deliverability / Developability

Suitability	Availability	Viability / Achievability
- Policy Restrictions *Designations / Protected Areas / Existing Planning Policy / Community Strategy Policy* **- Physical Problems or Limitations** *Access / Infrastructure / Ground Conditions / Flood Risk / Hazardous Risks / Pollution / Contamination* **- Potential Impacts** *Effect upon landscape features and conservation* **- Environmental Conditions** *Which would be experienced by prospective occupiers / residents*	**- Planning Consents / Applications** *Does not necessarily indicates availability* **- Legal or Ownership Factors** *Multiple ownership / Random Strips / Tenancies / Operational requirements of landowners* **- Interest to Develop** *Land controlled by developer expressing an intention to develop*	**- Market Factors** *Adjacent uses / Economic viability of existing, proposed and alternative uses in terms of land values / Attractiveness of Locality / Level of potential market demand / Projected rate of sales* **- Cost Factors** *Site Preparation relating to physical constraints / any exceptional works necessary / Relevant planning standards or Obligations / Prospect of Funding or Investment to address identified constraints or assist development* **- Delivery Factors** *Developers Phasing / Realistic Build-out Rate on larger sites / Likely start and completion dates / Single or Multiple Developers / Size & Capacity of Developer*
↓	**Individual Site Assessment** ↓	↓
Deliverable	**Developable**	**Not Currently Developable**
(Years 1-5)	(Years 6-10)	(Years 11-15)

[2] NWRA Guidance

The sample of sites will be constructed to incorporate as many of these factors as possible and be undertaken on sites assessed as being suitable for more than one use. This will meet the need to establish a robust database for the County's site capacity.

This process seeks to provide the Council with a robust assessment of potential development sites over the next fifteen years together with an appreciation of the strengths, weaknesses and opportunities that each presents. The degree to which these sites are developable or desirable given their surroundings or constraints will indicate the extent to which the Council may need to identify sites that extend settlements in order to meet their development aspirations.

KEY QUESTIONS:

14. DO YOU AGREE THAT THE PROPOSED SITE ATTRIBUTES ARE COMPREHENSIVE, APPROPRIATE AND ADEQUATE? ARE THERE OTHER FACTORS THAT SHOULD BE INCLUDED? IF SO, PLEASE SPECIFY THESE AND STATE FROM WHERE THIS INFORMATION CAN BE OBTAINED?

15. DO YOU ENVISAGE ANY REQUIREMENTS/LEGISLATION THAT WILL EXCLUDE SITES BEING CONSIDERED FURTHER?

16. DO YOU ENVISAGE ANY REQUIREMENTS/LEGISLATION THAT WILL INFLUENCE THE WAY IN WHICH SITES ARE DEVELOPED? IF SO, HOW SHOULD THE STUDY RESPOND TO THESE?

7. Study Timescale

The timescale for the study is expected to be as follows:

- April 2008 - Consultation on Methodology;
  Identification of Sites;
  Contextual Studies;
  Site Surveys;
  Stakeholder Interviews.
- May 2008 - Re-issue of methodology;
  Discounting / Assessment of Yield;
  Market Viability;
  Draft Report.
- May/June 2008 - Final Report.

KEY QUESTION:

17. THE STUDY IS INTENDED TO BE COMPLETE BY LATE SPRING / EARLY SUMMER 2008. DO YOU WISH TO BE CONSULTED FURTHER ON IT'S FINDINGS?

Appendix A
Site Residual Valuation Spreadsheet Approach to Assessment of Economic Viability

7 Pages To ensure that the results of the urban housing potential study are robust, the discounting process takes account of a number of practical constraints which also inform judgements on the theoretical estimate of homes that can be accommodated in the County.

Economic viability is defined in the NWRA Guide as "whether the revenue from the housing development scheme covers the costs of development so as to provide the landowner with an adequate reward for selling land to a developer". This varies according to the type of development concerned and a comparative assessment of other uses (e.g. employment) will inform the viability of a site for housing.

This process is undertaken in two parts:

- An important consideration is the housing market itself. A quantitative and qualitative assessment of prevailing housing market conditions obtained through analysis of published data and validated through interviews with development stakeholders does, in large measure, identify the impacts of the market on the eventual capacity estimated; and
- Informed by the above, an economic viability analysis of a sample of 46 sites that assesses build costs against current prices commanded in the local market. These analyses are conducted using the spreadsheet template in the best practice guidance provided by the NWRA guide.

Spreadsheet Analysis

Aims of the Analysis

The spreadsheet analysis has several functions. It aims to inform:

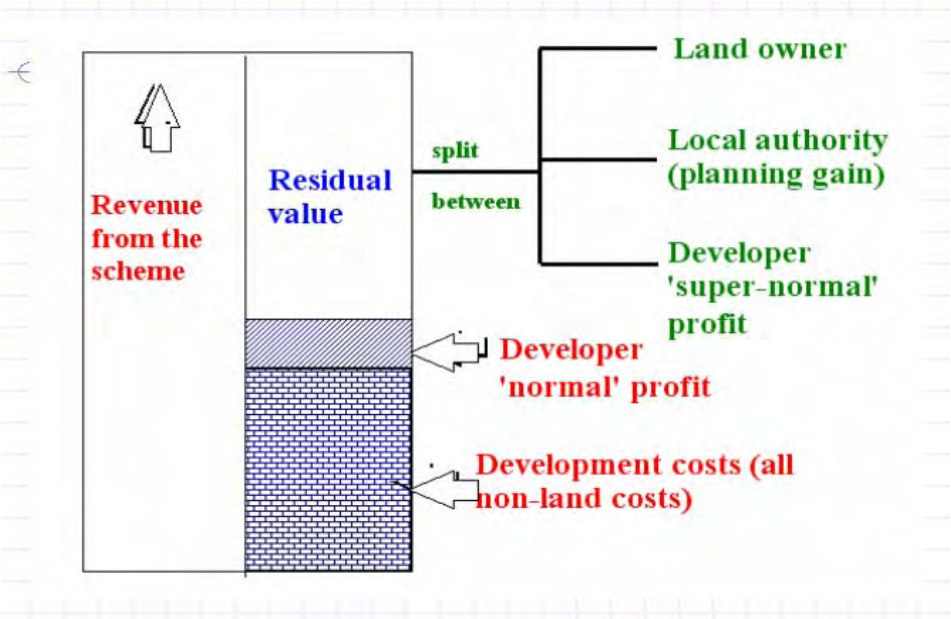
- Which sites are commercially viable for housing development, and which are not;
- An indication, via the sampling process, to which there should be a discount from assessed capacity to achieve a deliverable number of homes based on market impacts;
- How location, and sub markets, affect the viability of housing development;
- How location, combined with housing mix, impact on the likelihood of sites coming forward; and
- How, and where relevant (according to policy parameters), affordable housing looks achievable in viability terms.

There is a possibility that the appraisals, carried out at arms length may not uncover all the factors impacting on site value and therefore the propensity of the site to come forward, it has

been attempted to 'factor in' potential affordable housing impacts where policy indicates that a site may qualify for an affordable housing contribution. This is not however a fully appraisal of each of the identified sites and very often this process simply seeks to flag up difficult market areas where it would be inadvisable to push hard for affordable housing or other planning obligations without much more detailed, site specific information.

Theoretical Underpinning

The spreadsheets are based on a residual development appraisal. The plate below shows the basic relationship between its elements:



This makes the fundamental assumption that site value is based on the difference between the revenue generated by the scheme and its non-land related costs as follows:

$\mathbf{R^S = R^V - NLC}$

Where:

> $\mathbf{R^V}$ = Scheme revenue. This is the value of the sales that are generated from a site (for instance, 10 dwellings each sold at £100,000 will generate a scheme revenue of £1m). For the purposes of this exercise, this value is assumed to be fixed although in practice it may increase over time as a result of general (a rise in house prices) or specific (regeneration activity) processes;
>
> **NLC** = The non land (development) costs associated with the construction of scheme such as materials and labour (base development costs) and fees (architects, engineers etc). For the purposes of this exercise, this value is assumed to be broadly fixed although in practice this will vary according to development constraints (slope, contamination, access difficulties). Also included is an element of operating profit (the standard margin of 15% is the figure usually adopted in leading economic appraisal models). <u>The cost of the land is excluded from this element of the equation;</u>

$\mathbf{R^S}$ = Site Residual Value. This is the amount that is available to 'share around' as a benefit of the development taking place. These elements all vary according to circumstance but include:

- Benefit to the developer in the form of 'super-normal' profit in excess of 15%. Some developers may seek such margins for commercial reasons or they may accrue as a result of negotiated decreased benefits to the planning authority and the landowner;
- Benefit to the planning authority in the form of planning gain which could take the form of the provision of affordable housing, play-space or a financial contribution to, say, education provision; and
- Crucially, the amount that is paid to the landowner to buy the land. Unless this value meets the expectations of the owner then the site is unlikely to be available for development. These expectations may be based upon knowledge of the values secured by other landowners or simply upon a comparison with the value of the land for, say, agriculture. In some cases, longstanding option (or legal) agreements may exist that have set the parameters of any payment to the landowner.

These three elements of the Site Residual Value are all variable and subject to separate negotiation. However, for a site to be viable, the sum of all three cannot exceed the difference between the scheme revenue and the development costs. This may only vary where a developer is willing to accept less than a 15% operating profit.

Spreadsheet Mechanics

An example of the spreadsheet is explained below. It has five sections split across three input areas which are:

1. Input Variables;
2. Development Appraisal; and
3, 4, 5. Commercial Viability.

These are addressed in turn:

Section 1: Input Variables

The Plate below shows the input variable section. This identifies the probable value of the scheme value ($\mathbf{R^V}$) and well as the base development cost element of the non-land related costs (**NLC**). These are both based upon the development density and dwelling 'mix' prescribed by the application of development templates applied in Section 5.3.2 above.

To derive the anticipated $\mathbf{R^V}$, selling prices based on postcode sectors are drawn from HM Land Registry. These provide an understanding for the sub markets within Ceredigion, and hence a basis for making broader judgements about site capacity and potential. However, further verification is required to check whether the site specifics reflect the broader sub market in so far as site negotiations with developers are concerned (see below).

Further key inputs are build costs and unit sizes. Build costs, on the basis of per square metre (Gross Internal) costs, are taken as standards from the RICS Building Cost Information Service.

For houses, the unit sizes are taken as developer benchmarks although for flats, there is an additional adjustment from net to gross measurements to take account of common areas which, in theory, add cost but do not accrue value.

Input Variable Screenshot

SITE Ref: UCSBRY13		DESCRIPTION: Large Greenfield site in Brymbo								
1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS										
(a)	(b)	(c)	(d)	(e)	(f)		(g)	(h)	(i)	
Dwelling & Bedroom(s)	Construction	Build Type	Selling price	Units	Dev values		Build Cost (m^2)	Size (m2)	Build Costs	
1 Bed Flats	2/3 Storey	Below 5 Storey			£	-			£	-
2 Bed Flats	2/3 Storey	Below 5 Storey	£ 108,000	14	£	1,512,000	£ 918	75	£	963,900
2 Bed Town houses	2/3 Storey	Estate	£ 110,000	20	£	2,200,000	£ 776	70	£	1,086,400
3 Bed Town houses	2/3 Storey	Estate	£ 127,000	14	£	1,778,000	£ 776	80	£	869,120
3 Bed Semis	2 Storey	Estate	£ 131,000	24	£	3,144,000	£ 772	85	£	1,574,880
4 Bed Semis	2 Storey	Estate	£ 144,000	10	£	1,440,000	£ 772	95	£	733,400
3 Bed Detached	2 Storey	Estate	£ 186,000	8	£	1,488,000	£ 772	105	£	648,480
4 Bed Detached	2 Storey	Estate	£ 238,000	6	£	1,428,000	£ 772	125	£	579,000
				96				Base Build		
				GDV =	£ 12,990,000			Costs	£	6,455,180

Section 2: Development Appraisal

This section (summarised below) takes forward the base build costs and applies a number of additional costs that a builder would normally expect to incur within a housing development (professional fees, finance costs, marketing or disposal fees and a basic 15% profit margin) to derive a total development cost (**NLC**) to be compared against the scheme value ($\mathbf{R^V}$). This difference between the two allows a residual value ($\mathbf{R^S}$) for the site to be calculated. The information in this section is based on industry norms or standards. In addition, an allowance is made for the cost of financing land over the period of the development.

Development Appraisal Screenshot

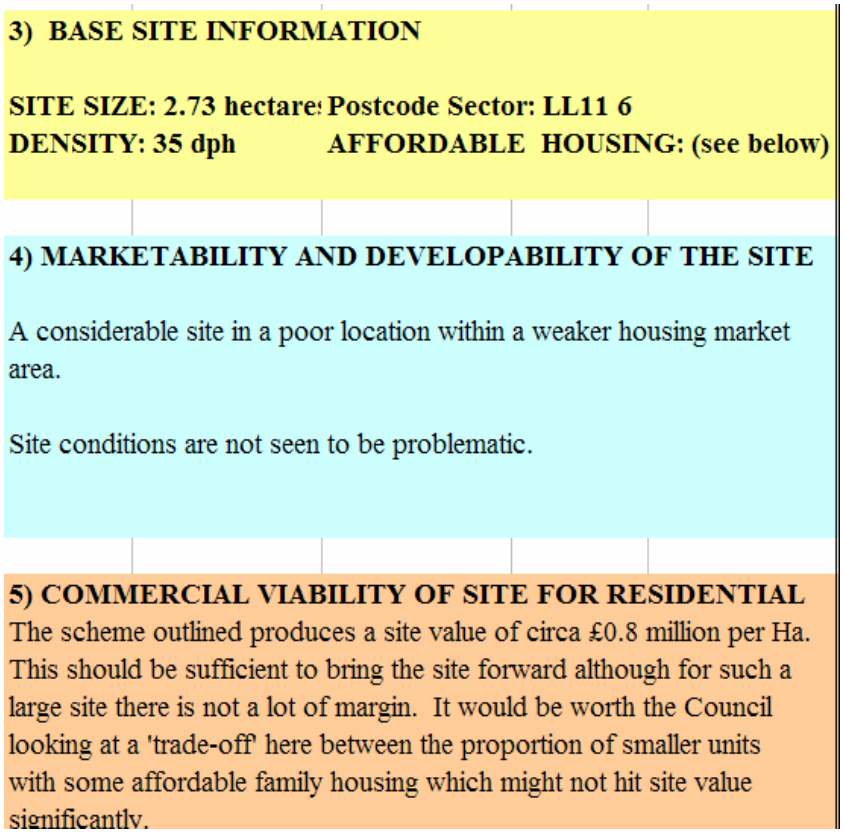
2) DEVELOPMENT APPRAISAL			
Build costs (carried down)			£ 6,455,180
Professional fees	£	774,622	
Disposal fees (4% GDV)	£	519,600	
Finance (6% Build costs)	£	387,311	
Dev Return (15% GDV)	£	1,948,500	
Internal overheads (10%)	£	645,518	
Abnormal costs	£	-	
Total Development costs			**£ 10,730,730**
GDV (carried forward)	**£**	**12,990,000**	
Residual land value for site			**£ 2,259,270**
Land finance @6%	£	135,556	
Final residual			**£ 2,123,713**
Site Area (Hectares)	2.73		
Residual value for 1 Hectare			**£ 777,917**

If relevant, any known abnormal costs can also be applied at this stage; this would need to be based upon broad assumptions as more precise details are not usually to hand. In general however, a brownfield site is likely to have remedial costs and (all other factors being equal) is more likely to be discounted than a green field site.

Sections 3, 4, 5: Commercial Viability

This provides a conclusion upon the viability of the site for residential development based upon the application of base information (3) and marketability and developability factors (4) under the assumptions made within the spreadsheet.

Assessment of Marketability



3) BASE SITE INFORMATION

SITE SIZE: 2.73 hectare: Postcode Sector: LL11 6
DENSITY: 35 dph AFFORDABLE HOUSING: (see below)

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

A considerable site in a poor location within a weaker housing market area.

Site conditions are not seen to be problematic.

5) COMMERCIAL VIABILITY OF SITE FOR RESIDENTIAL

The scheme outlined produces a site value of circa £0.8 million per Ha. This should be sufficient to bring the site forward although for such a large site there is not a lot of margin. It would be worth the Council looking at a 'trade-off' here between the proportion of smaller units with some affordable family housing which might not hit site value significantly.

Base site information (3) comprises the site area as well as the development density assumptions agreed as part of the discounting consultation process. Assessments of the marketability and developability of the site (4) are drawn from site survey work along with an impression formed of the local neighbourhood in the context of the relevant post code sector.

Finally a conclusion is drawn on the viability and likelihood of the site to come forward (5). These conclusions are informed by views expressed during consultations with developers and agents and particularly by the broad benchmark land values established during these consultations.

The Interpretation of Results

These analyses provide an indication of likely site values under the range of assumptions made. As noted above, it is not only location that determines site viability, but also the development mix and the planning gain requirements of the planning authority. The application of development templates to each site has reflected current development conditions in the settlement concerned and the composition and mix of these templates has informed the assessed sample of sites.

It should be appreciated however that some locations offer the opportunity to maximise site value according to the specific mix adopted; the market for apartments is the best example of this. Where there is not a mature market in flats, unless these developments are located in prime or key locations, it is often preferable for developers to build lower density, more suburban type housing.

Against identified benchmark values, an assessment is made of the potential of sites across the study area to realise these. In the weaker housing market areas, it may not mean that sites will not come forward, rather that completed dwellings are likely to sell at adjusted prices.

It is important to appreciate that the absolute revenue that can be realised from a scheme ($\mathbf{R}^{V}$) is very significant. Although a pro-rata (per hectare) site value may look robust, a developer may be unwilling to take on a low value site on the basis that marginal cost overruns (or failure to achieve expected selling prices) could cause the development to become unviable. This is particularly important for smaller sites where the absolute value is low.

Appendix B
Land Use Suitability Assessment Criteria

13 Pages

This Appendix sets out the qualitative data to be collected for all sites considered by the study. This data will form the basis of use-specific site assessments and each attribute will be captured within the study's site database. The derivation of site assessment criteria is necessary to assess the potential value of identified sites for a range of land uses that may be required to meet the development needs of the county over the next fifteen years.

1. Assessment Criteria

The study needs to categorise the nature of sites under consideration and the broad type of area in which they are located. This categorisation is at Table B1.

Table B1: Site Categorisation based upon Current Use

Status	Categorisation	
Previously Developed / Allocated	A.	Subdivision of Existing Buildings / Houses
	B.	Conversions / Flats over Shops
	C.	Empty Housing Stock
	D.	Previously developed vacant and derelict land and buildings (non housing)
	E.	Intensification of land use within residential areas (use of incidental open spaces, garage courts)
	F.	Redevelopment of existing housing (if redeveloped for housing, this can have both a gross and net impact)
	G.	Redevelopment of car parks
	H.	Conversion of existing commercial buildings
	I.	Land and buildings currently in employment use
	J.	Review of unimplemented previously developed allocations in UDP
Greenfield	A.	Review of unimplemented greenfield allocations in UDP
	B.	Vacant land - not previously developed
	C.	Under used and potentially surplus allotments
	D.	Under used and potentially surplus open spaces
	E.	Under used and potentially surplus sports pitches
	F.	Under used and potentially surplus school playing fields
	G.	Agricultural pasture land
	H.	Agricultural arable land
Location (Distance / Character)	A.	Town Centre
	B.	Edge of Town Centre
	C.	Urban
	D.	Sub-Urban
	E.	Urban Fringe
	*Include indication of appropriate potential future land use(s):-	
	1 = Residential	2 = Employment 3 = Community

2. Framework for Site Appraisal

A Multi-Criteria Appraisal (MCA) is undertaken for all identified sites to classify each into categories (such as 'best', 'good', 'fair' and 'poor'), to reflect their suitability for the various land uses. MCA enables a range of potentially immeasurable qualitative attributes to be reviewed in a quantitative analytical framework.

The qualitative site characteristics are individually assessed relative to ideal qualities and then organised into categories. Against each of the criteria, sites are assigned a 'qualitative assessment level' on a five point scale according to its performance against the descriptions indicated in Table B2 below:

Table B2 Qualitative Assessment Levels

Qualitative Level	Assessment description (suitability for use type at the site)
1	Strongly negative
2	Negative
3	Neutral
4	Positive
5	Strongly positive

The criteria may then be ranked (in order of importance or significance) and weighted (in relation to overall significance). For example proximity to town centre and availability of parking will be important to retail uses, whereas access to highways and distance from sensitive use may be more important to industrial developments.

The Multi-Criteria Analysis provides information which indicates the relative importance of different types of use at each site under the assessment criteria. These values will allow for site comparisons and provides a way to illustrate transparency in the decision making process.

3. Assessment Criteria

The assessment criteria are categorised.

Firstly, there are common criteria that are applied to all sites comprising:

- Indicators of availability and cessation of current use (Table B3);
- Common physical criteria (Table B4);
- Amenity criteria applied to indicate suitability for housing (Table B5);
- Current use and vacancy criteria (Table B6);
- Market activity criteria (Table B7);
- Sustainability criteria framed around access to services (Table B8);
- On-site environmental criteria to identify those on-site issues identified that cannot be identified through desk assessment (Table B9);
- Policy and social criteria (Table B10).

There are then additional criteria to assess sites considered for urban extensions to the three main towns of Aberystwyth, Cardigan and Lampeter (Table B11).

Table B3 Site Availability and Cessation of Current Use

Criteria	Qualitative Weighting and Description
Availability for Development / Cessation Likely?	1. Appears to be a very important employer maximising value of the land (10+ years) 2. Site appears well used and with no indication of long-term cessation (5 – 10 years) 3. Site appears under-used but premises well maintained and capable of re-use (1 - 5 years) 4. Site appears under-used (e.g. few cars) and premises in very poor state of repair or where current uses known to be searching for other premises (1 - 3 years) 5. Site vacant/being vacated and ready for re-use / re-development or Agricultural land (not including buildings) (< 1 year)

Table B4 Common Physical Criteria

Criteria	Qualitative Weighting and Description	
Access	1.	Site inaccessible / landlocked by secure adjacent land uses
	2.	Site is accessible subject to available third party land
	3.	Site is accessible subject to major measures but land is within owners / Highway Auth. control
	4.	Site is accessible subject to minor measures
	5.	Site is readily accessible
Instability	1.	Site appears highly unstable or threatened by off-site instability and likely to be un-developable
	2.	Site appears unstable or threatened by off-site instability and likely to require major measures
	3.	Site appears unstable or threatened by off-site instability and likely to require minor measures
	4.	Instability possible but unknown
	5.	Site appears stable and un-threatened by off-site instability
Contamination	1.	Site is known or highly likely to be contaminated given it's previous or surrounding use
	2.	Site may have land quality issues or is adjacent to unresolved contaminative uses
	3.	Contamination possible but unknown
	4.	Sites previous use is unlikely to have been contaminative
	5.	Site is previously undeveloped with no adjacent contaminative uses
Topography (as a majority)	1.	Site is extremely steep and unlikely to be developable
	2.	Site is steep and likely to require the creation of development terraces and retaining walls
	3.	Site is undulating/sloping and likely to require re-modelling and creation of development platforms
	4.	Site is undulating but unlikely to require the creation of development platforms
	5.	Site is flat or gently undulating

Table B5 Additional Housing Criteria

Criteria	Qualitative Weighting and Description
Quality of neighbouring area/uses SOURCE: DESK / SITE	1. Site adjacent to bad neighbouring uses (non-residential) 2. Site situated adjacent to some sensitive uses. Probable requirement for mitigation 3. Site within poor quality area or surrounding area being developed and quality unknown 4. Site located in area of good quality 5. Site located in area of high quality
Quality of public realm SOURCE: SITE	1. Very Poor – Run down area 2. Poor – Poor quality public realm 3. Average – Public realm requires improvement 4. Good – Good quality public realm 5. Very Good – Very high quality public realm – will attract high quality uses

Table B6 Current Use and Vacancy Criteria

Criteria	Qualitative Weighting and Description
Quality of existing buildings SOURCE: SITE	1. Very Poor. In poor state of repair and unlikely to meet needs 2. Poor. In good repair but unlikely to meet needs 3. Average. In poor repair but likely to meet needs 4. Good. In good repair and likely to meet needs 5. Very Good. New building designed to meet needs
Overall site area and floorspace (in use) SOURCE: SITE	1. Fully used - 0% 2. Substantially in use - 25% 3. Half used - 50% 4. Substantially un-used - 75% 5. Fully un-used or agricultural land (not including buildings) - 100%
Proportion of floorspace for sale/vacant SOURCE: SITE	1. Vacant 0% 2. Substantially vacant and on market - 25% 3. Good level of vacancy and on market - 50% 4. Some vacancy and on market - 75% 5. Few or no vacancies - 100%
Potential development areas (on sites) SOURCE: SITE	1. Fully used - 0% 2. Substantially vacant - 25% 3. Good level of vacancy - 50% 4. Some vacancy - 75% 5. Few or no vacancies - 100%

Table B7 Market Criteria

Criteria	Qualitative Weighting and Description
Strength of local demand SOURCE: COUNCIL / AGENT	1. Very Poor - Assessed against past conditions / trends 2. Poor - Assessed against past conditions / trends 3. Average - Assessed against past conditions / trends 4. Good - Assessed against past conditions / trends 5. Very Good - Assessed against past conditions / trends
Recent market activity SOURCE: COUNCIL / AGENT	1. Very Poor – Little or no evidence of recent activity. Many vacant plots 2. Poor – Little evidence of recent activity. Some vacant plots 3. Average – Some evidence of recent activity. Vacant plots remaining 4. Good -– Evidence of significant recent or on-going development activity 5. Very Good – Evidence of significant recent and on-going development activity

Table B8 Sustainability Criteria

Criteria	Qualitative Weighting and Description
General transport accessibility SOURCE: DESK (GIS) / SITE	1. Site very remote – only accessible by car 2. Site remote – significant effort required to access by public transport 3. Average – public transport accessible within 800m 4. Good – public transport accessible within 400m 5. Very good – site directly served by public transport
Distance to local railway station / other public transport / cycle paths / safe routes to school / PROW SOURCE: DESK (GIS) / SITE	1. Very Poor – Absent or Infrequent service in excess of 1,500m. Poor cycle and footpath connectivity 2. Poor – Infrequent service accessible over 1,500m or site with poor cycle and footpath connectivity 3. Average – Frequent service accessible over 1,500m away but with good cycle and footpath connectivity 4. Good – Frequent service accessible between 500m and 1500m away and with good cycle and footpath connectivity 5. Very Good – Frequent service accessible within 500m with good cycle and footpath connectivity

Table B8 Sustainability Criteria continued.

Criteria	Qualitative Weighting and Description
Access to Major Road Infrastructure SOURCE: DESK (GIS) / SITE	1. Remote from highway 2. Located within 100m of road 3. Accessible subject to improvements 4. Adjacent to lower order road 5. Directly adjacent to major road infrastructure
Distance to local shops and services (Schools, GPs, Banks etc) SOURCE: DESK (GIS) / SITE	1. Very Poor – Absent or in excess of 3,000m 2. Poor – Between 2,000 and 3,000m 3. Average – Between 1,000 and 2,000m 4. Good – Between 500 and 1,000m 5. Very Good – Within 500m
Distance to town centre SOURCE: DESK (GIS)	1. Very Poor – In excess of 3,000m of town centre or with accessibility issues 2. Poor – Between 2,000 and 3,000m of town centre with clear access to it 3. Average – Between 1,000 and 2,000m of town centre or with accessibility issues 4. Good – Between 500 and 1,000m of town centre with clear access to it 5. Very Good – Within, adjacent or within 500m of town centre

Table B9 On-Site Environmental Criteria

Criteria	Qualitative Weighting and Description
Distance to natural receptors SOURCE: DESK (GIS) / SITE	1. Very Poor – Significant receptors or suitable habitat on site 2. Poor – Potential for some receptors or suitable habitat on or immediately adjacent to site 3. Average – On site or adjacent issues easily mitigated. 4. Good – Receptors located between 50m to 200m of site 5. Very Good – No receptors within 200m of site
Distance to surface water receptors and groundwater source protection zones (SPZs) SOURCE: DESK (GIS) / SITE	1. Very Poor – Watercourse on site and within an SPZ 2. Poor – Watercourse on site 3. Average – Site adjacent to watercourse or within SPZ. Easily mitigated 4. Good – Watercourse or SPZ away from site but potential pathway 5. Very Good – Watercourse or SPZ away from site with no apparent pathway
Interaction/conflicts between sites and surrounding uses SOURCE: DESK (GIS) / SITE	1. Very Poor – Site substantially within and surrounded by sensitive uses 2. Poor – Site adjacent sensitive uses 3. Average – Site within 50m of sensitive uses 4. Good – Site within 250m of sensitive uses 5. Very Good – Site at least 250m of sensitive uses

Table B10 Policy and Social Criteria

Criteria	Qualitative Weighting and Description
Strategic impact of reallocation of use SOURCE: DESK / SITE	1. For 2. Against
Linkages with existing regeneration policies, projects and programmes SOURCE: COUNCIL / DESK (GIS)	1. Very Poor – No regeneration area. None in prospect 2. Poor – No regeneration area. Some prospect in longer term 3. Average – Regeneration area. Activity likely beyond 5 years 4. Good – Regeneration area. Activity likely within 5 years 5. Very Good – Active Regeneration area
Current Local employment issues and deprivation levels SOURCE: COUNCIL / DESK	1. Very Poor – High levels of ward deprivation < bottom 10% nationally 2. Poor – High levels of ward deprivation < bottom 20% nationally 3. Average – Outside of poorest areas but with poor employment / skill levels 4. Good – Within top 50% of wards and with good employment / skill levels 5. Very Good – Within top 20% of wards
Potential to assist achievement of economic development targets SOURCE: COUNCIL / DESK	1. Very Poor – Remote area with poor employment/skills. Unlikely to contribute 2. Poor – Remote area but with some employment/skills. Contribution marginal 3. Average – Peripheral location with some employment/skills. Some contribution probable 4. Good – Close to growth locations with good employment/skills. Contribution likely 5. Very Good – Within growth location with good employment/skills. Contribution very likely

Table B11 Additional Urban Extension Criteria

Criteria	Qualitative Weighting and Description
Agricultural Land Classification	1. Grade 1 (most versatile) 2. Grade 2 3. Grade 3 (A & B) 4. Grade 4 5. Grade 5 (least versatile)
Visual Impact (in Town)	1. Highly visible from major (A & B) roads and from majority of town (or over 100 properties) 2. Highly visible from major (A & B) roads or from majority of town (or over 100 properties) 3. Visible from major (A & B) roads or from within town (50 to 100 properties) 4. Only glimpsed from major (A & B) roads or comparatively well screened (up to 10 properties 5. Well screened, little or no visual impact
Visual Impact (outside town)	1. Highly visible from major (A & B) roads and from over 50 properties 2. Highly visible from major (A & B) roads or from over 50 properties 3. Visible from major (A & B) roads or from 15 to 50 properties 4. Only glimpsed from major (A & B) roads or from 5 to 15 properties 5. Well screened, little or no visual impact
Landscape Containment	1. Very sensitive - will clearly break skyline when viewed from town 2. Sensitive - potential to break skyline when view from town 3. A level of sensitivity – could be mitigated by layout / retention of vegetation 4. Significantly enclosed by surrounding topography, low impact 5. Well contained, little or no impact

Table B12 Main Proposed / Other Uses

Main proposed use	USE:
	QUANTITY:
	OTHER SUITABLE USES:
	NOTES / COMMENTS:

Appendix C
Sample Development Templates

14 Pages

Appendix D
Consultation Form: Key Questions

6 Pages

SECTION 1 – PURPOSE OF THIS REPORT

1.	**ARE THE CONSULTEES SET OUT IN TABLE 1.1 THE RIGHT ONES?**
2.	**ARE THERE ANY OTHERS THAT SHOULD BE INCLUDED AT THIS TIME? (BEAR IN MIND THAT THE STUDY WILL FORM EVIDENCE IN SUPPORT TO THE NEW DEVELOPMENT PLAN AND WILL BE THOROUGHLY TESTED IN PUBLIC BY AN INDEPENDENT INSPECTOR)**

SECTION 2 – PLANNING POLICY BACKGROUND

3.	**THE COUNCIL BELIEVES THAT THE STUDY (IN PARALLEL TO THE EMPLOYMENT LAND DEMAND STUDY) IS THE BEST WAY TO PROVIDE A SOUND BASIS FOR LAND ALLOCATION AND POLICIES WITHIN THE LDP. DO YOU AGREE? IF NOT, WHY NOT?**

SECTION 3 – METHODOLOGY : WHICH SITES AND WHERE?

4. DOES TABLE 3.1 REPRESENT A COMPREHENSIVE STATEMENT OF THE LIKELY DEVELOPMENT OPPORTUNITIES TO BE FOUND IN THE URBAN AREAS? DO YOU FEEL THAT ANY ARE INAPPROPRIATELY INCLUDED OR EXCLUDED? IF THERE ANY OTHER TYPES OF SITE THAT THE STUDY SHOULD CONSIDER HOW CAN THE STUDY GAIN INFORMATION ON THESE?

5. IS THERE ANY OTHER SITE INFORMATION THAT THE STUDY SHOULD COLLECT? IF SO, WHAT IS THIS? HOW WOULD IT BENEFIT THE STUDY? WHERE CAN IT BE OBTAINED? (BEAR IN MIND THAT INFORMATION ON CONSTRAINTS (E.G. FLOODPLAINS) AND OPPORTUNITIES (E.G. REGENERATION PROPOSALS) IS ALSO TO BE COLLECTED – SEE SECTION 4 BELOW)

SECTION 4 – METHODOLOGY : ATTRIBUTES AND CONSTRAINTS

KEY QUESTIONS:

6. DO YOU AGREE THAT THE CONSTRAINTS AND INITIATIVES ARE THE CORRECT FACTORS TO CONSIDER? ARE THERE ARE OTHER FACTORS THAT SHOULD BE INCLUDED? IF SO, FROM WHERE CAN THIS INFORMATION BE OBTAINED?

7. DO YOU ENVISAGE ANY REQUIREMENTS/LEGISLATION THAT WILL EXCLUDE SITES BEING CONSIDERED FURTHER?

8. DO YOU ENVISAGE ANY REQUIREMENTS/LEGISLATION THAT WILL INFLUENCE THE WAY IN WHICH SITES ARE DEVELOPED? IF SO, HOW SHOULD THE STUDY RESPOND TO THESE?

SECTION 5 – METHODOLOGY : SITE POTENTIAL

KEY QUESTIONS:

9. DO YOU AGREE THAT THE APPROACH TO ASSESSING POTENTIAL END USES IS APPROPRIATE IN PRINCIPAL? IF NOT, CAN YOU IDENTIFY HOW THIS SHOULD BE APPROACHED?

10. ARE THE CRITERIA USED TO ASSESS THE POTENTIAL LAND USES CORRECT AND COMPREHENSIVE? ARE ANY MISSING? IF SO, WHICH ONES?

11. THE WEIGHTINGS ATTACHED TO THE CRITERIA IN APPENDIX B ARE CLEARLY IMPORTANT. ARE THESE WEIGHTINGS APPROPRIATE OR SHOULD CERTAIN CRITERIA BE UPGRADED OR DOWNGRADED AGAINST OTHER CONCERNS? IF SO, PLEASE EXPLAIN WHY THIS SHOULD BE.

12. DO YOU AGREE THAT THE APPROACH TO ASSESSING EMPLOYMENT AND COMMERCIAL (NON RESIDENTIAL) CAPACITY IS APPROPRIATE? ARE THERE ANY LOCAL CONSIDERATIONS THAT SHOULD BE BUILT INTO THE METHODOLOGY? IF SO, PLEASE SPECIFY.

13. DO YOU AGREE THAT THE APPROACH TO ASSESSING RESIDENTIAL CAPACITY IS APPROPRIATE? ARE THERE ANY AREAS THAT ARE SUITABLE FOR HIGHER DENSITY, OR APARTMENT DEVELOPMENT? ARE THERE ANY LOCAL CONSIDERATIONS THAT SHOULD BE BUILT INTO THE METHODOLOGY?

SECTION 6 – TOWARDS A FRAMEWORK OF DEVELOPABILITY

KEY QUESTIONS:

14. DO YOU AGREE THAT THE PROPOSED SITE ATTRIBUTES ARE COMPREHENSIVE, APPROPRIATE AND ADEQUATE? ARE THERE OTHER FACTORS THAT SHOULD BE INCLUDED? IF SO, PLEASE SPECIFY THESE AND STATE FROM WHERE THIS INFORMATION CAN BE OBTAINED?

15. DO YOU ENVISAGE ANY REQUIREMENTS/LEGISLATION THAT WILL EXCLUDE SITES BEING CONSIDERED FURTHER?

16. DO YOU ENVISAGE ANY REQUIREMENTS/LEGISLATION THAT WILL INFLUENCE THE WAY IN WHICH SITES ARE DEVELOPED? IF SO, HOW SHOULD THE STUDY RESPOND TO THESE?

SECTION 7 – STUDY TIMESCALE

KEY QUESTION:

17. THE STUDY IS INTENDED TO BE COMPLETE BY LATE SPRING / EARLY SUMMER 2008. DO YOU WISH TO BE CONSULTED FURTHER ON IT'S FINDINGS?

Appendix C
Development Trends on Small Sites

15 Pages

Part C – Ceredigion County Council – Urban Capacity and Urban Extension Study: Development Trends on Small Sites

1. Purpose of this Technical Note

The purpose of this note is twofold:

- To provide evidence of recent development trends on small sites to justify the site size threshold to the study;
- To inform a realistic view on the amount of development that could come forward on the very smallest sites and hence in addition to the findings of the study.

2. Deriving a Realistic Small Site 'Windfall' Allowance

Any assessment of the likely contribution of small windfall sites is problematic. They are intrinsically 'unplanned' are subject to variation and are therefore for an unreliable source of supply. The latest 2007 English guidance explicitly excludes any such allowance from such studies encouraging planning authorities to actively plan the provision of identified and allocated sites. In principle, the County Council must actively plan to meet the needs of its communities and reliance upon the 'unplanned' contribution of small 'windfall' sites within the development plan is discouraged.

Despite this, it is still informative to define these small sites and assess their potential. Although increasingly likely to be constrained by development control issues (e.g. prescribed distances) it is nevertheless clear that such sites will contribute an element of supply over the period of the study to 2022.

3. Addressing the Danger of Overlap/ Double Counting

In addressing the potential of small sites, it is important to ensure that there is no overlap or double counting in the methodology that will inflate identified capacity. This danger arises from:

- Overlap with sites above the site size threshold of the study;
- Overlap with sites with existing consents likely to be implemented;
- In respect of housing, the relationship between this work and any assessment of small site capacity made within any return under Technical Advice Note 1, Joint Housing Land Availability Studies, (TAN1).

This study draws data on sites from defined databases and each has digitised boundaries within a GIS layer; consequently, there is no overlap between identified sites and existing consents. Similarly, the digitised boundaries enable a clear separation either side of the site size threshold.

The Council is undertaking work to support the production of a TAN1 return. As there is no current return there is no risk of double counting the small site allowance that would be included as part of this submission.

4. Approach

To minimise the degree of uncertainty presented by this allowance, a very low site size threshold is implied. Although recent development trends suggest that the provision of retail units, offices, residential subdivisions, conversion of HMOs and flats over shops has taken place in some numbers over the past decade, they are, due to their size, hard to identify and the prediction of their timing even harder.

In establishing the study site threshold it is important that this is:

- Small enough to capture the greater majority of development activity in the towns, based on previous trends, to reduce the small site windfall allowance and provide an evidence base grounded upon real and identified site opportunities;
- Large enough to avoid assessment of a plethora of extremely small sites that would be difficult to survey, be likely to provide minimal yield and form an unreliable and unpredictable supply.

The ability to strike this balance is addressed through an analysis of development trends over the past decade in respect of retail, commercial and housing completions. These in turn deal with the following:

- The quantum and trend of development activity for each town. As in some cases, completions have been sporadic, smoothed data is graphed to identify recent trends.
- The range of sites coming forward in terms of site size;

5. Retail and Commercial Trends

5.1 Retail

Although there have been a good many retail scheme completions over the past decade (79), most of these are of a small size. Not surprisingly, the largest town of Aberystwyth has seen the greatest number and frequency of development - on average 0.026 hectares has been developed over the past decade.

Elsewhere, demand is far more variable responding to small, but in context, significant developments at particular times. For instance Cardigan has seen a major completion in 2007 and a recent retail demand study indicates an ongoing requirement within the three largest towns. Aside from these periodic developments, there is a steady supply of very small completions largely within defined retail policy areas.

As some schemes are extremely small (<0.01 hectares), the study needs to apply a threshold appropriate to capture the greater quantum of retail floorspace rather than the numbers of schemes themselves. Under a threshold of 0.02 hectares – if applied over the past decade, this

would be sensitive enough to cover 44% of all schemes (Table C2) but 91% of development area (Table C3).

5.2 Commercial

Some 59 commercial schemes have been completed over the past decade. Again, and reflecting the nature of the County's towns, most are small the largest of which comprised just 0.45 hectares. Trends display a steady and reasonably predictable supply of floor-space with an annual average 0.016 hectares developed over the past decade.

Elsewhere, supply is more variable responding to small, but in context, significant developments at particular times - for instance a major completion of 0.44 hectares in Lampeter in 2003 (Table C4). Aside from these periodic developments, there is a steady supply of very small completions presumably to meet the needs of new or expanding SMEs.

Again, the study needs to apply a threshold appropriate to capture the greater quantum of commercial floorspace rather than the numbers of schemes themselves. Under a threshold of 0.02 hectares – if applied over the past decade, this would be sensitive enough to cover 54% of all schemes (Table C5) but 92% of development area (Table C6).

6. Housing Trends

These warrant detailed consideration given their importance in past and predicted urban growth. Of approximately 1,659 urban completions between 1994 and 2005, some 583 were provided on small sites comprising less that 0.05 hectares. Of this, Table C7 and Figure C3 show that the vast majority, some 457 (or 78%) took place in Aberystwyth. Focus is thus concentrated upon this town as:

- It's relative size and economic activity means that it is the town most likely to require urban extensions in the longer term. It makes sense therefore to evaluate ongoing urban yield in most detail to support any greenfield justification; and
- It provides a strikingly different form of supply that in the other towns. Figures C4 and C5 demonstrate that:
  - small sites made up a high proportion of the towns completions; and
  - these sites are, in many cases, very small indeed with the consequence that developments of one or two homes produce very high densities. Most graphically, the smoothed trend line Figure C8 veers sharply indicating a very different nature in supply above and below 0.05 hectares.

There is an apparent recent downturn in the deliver of these sites which may imply either less favourable market conditions or indicate that the physical capacity of the town has been reached. Alternatively, should any move to campus living on the part of the University have gathered pace then this may have removed some demand for flatted development. Whilst there is still a level of current supply of unimplemented consents, the recent level of completions may call the deliverability of these into question.

7. Recommended Threshold

A site size threshold of 0.02 hectares is adopted on the basis that it:

- Represents the smallest feasible area to be reliably surveyed; but
- Provides a good level of sensitivity which is much smaller than those thresholds adopted in similar studies elsewhere; and
- Will reduce the LDP's reliance on a theoretical allowance in line with best practice.

Table C1 Implemented Retail Consents by Town 1998 - 2007

Hectares	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Total	Average
Aberaeron				0.00			0.02	0.01			0.03	0
Aberystwyth	0.21	0.73	0.17	0.01	0.23	0.02	0.12	0.45	0.66	0.02	2.62	0.26
Cardigan	0.01	0.01			0.01	0.00	0.02	0.02	0.05	0.74	0.85	0.09
Lampeter	0.35	0.41	0.09	0.01			0.00	0.01	0.01	0.05	0.94	0.09
Llandysul			0.03			0.05	0.00	0.02		0.01	0.11	0.01
Tregaron		0.06		0.01	0.06						0.12	0.01
TOTAL	**0.57**	**1.21**	**0.30**	**0.04**	**0.30**	**0.07**	**0.16**	**0.50**	**0.72**	**0.81**	**4.68**	**0.47**

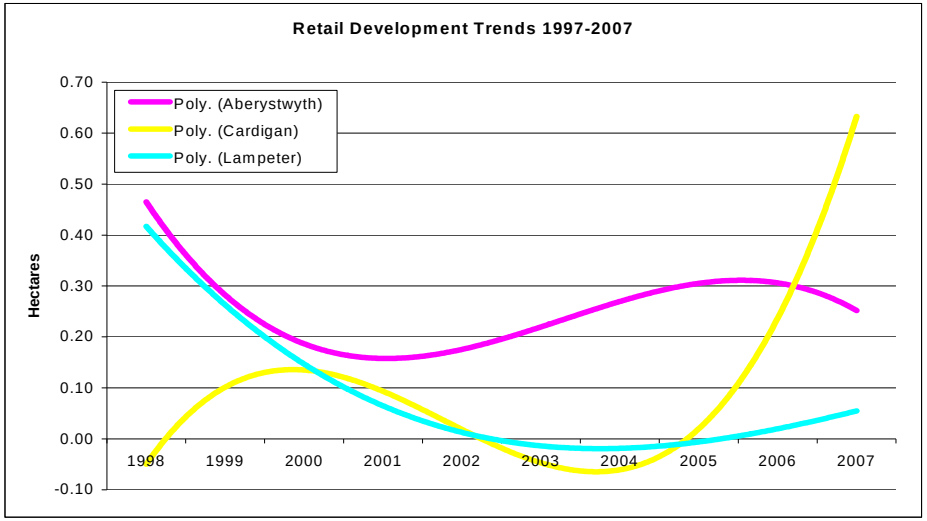
Table C2 Implemented Retail Consents (Schemes) by Town by Site Size

Hectares	Aberaeron	Aberystwyth	Cardigan	Lampeter	Llandysul	Tregaron	Grand Total	Cum Total	Cum as %
> 0.50		1	1				2	2	3%
> 0.10 – 0.50		5		2			7	9	11%
> 0.05 – 0.10		6		2		2	10	19	24%
> 0.02 - 0.05		**8**	**3**	**2**	**3**		**16**	**35**	**44%**
> 0.01 - 0.02	2	7	4	2	1		16	51	65%
0.01or below	1	13	5	6	2	1	28	79	100%
TOTAL	**3**	**40**	**13**	**14**	**6**	**3**	**79**		

Table C3 Implemented Retail Consents (Hectares) by Town by Site Size

Hectares	Aberaeron	Aberystwyth	Cardigan	Lampeter	Llandysul	Tregaron	Grand Total	Cum Total	Cum as %
> 0.50		0.69	0.70				1.39	1.39	30%
> 0.10 – 0.50		1.08		0.67			1.74	3.14	67%
> 0.05 – 0.10		0.43		0.16		0.12	0.71	3.85	82%
> 0.02 - 0.05		**0.21**	**0.08**	**0.05**	**0.09**		**0.43**	**4.28**	**91%**
> 0.01 - 0.02	0.03	0.10	0.05	0.02	0.01		0.21	4.49	96%
0.01or below	0.00	0.11	0.03	0.04	0.01	0.01	0.19	4.68	100%
TOTAL	**0.03**	**2.62**	**0.85**	**0.94**	**0.11**	**0.12**	**4.68**		

Figure C.1



Some 79 retail schemes have been completed over the past decade. Most are small with nothing over 0.70 hectares. Trends display a reasonably predictable supply for retail floor- space in Aberystwyth. On average 0.026 hectares has been developed over the past decade.

Elsewhere, demand is far more variable responding to small, but in context, significant developments at particular times. For instance Cardigan has seen a major completion in 2007 and a recent retail demand study indicates an ongoing requirement within the three largest towns. Aside from these periodic developments, there is a steady supply of very small completions largely within defined retail policy areas.

A threshold of 0.02 hectares – if applied over the past decade, this would be sensitive enough to cover 44% of all schemes (Table C2) but 91% of development area (Table C3).

Table C4 Implemented Commercial (B1) Consents (Units) on Sites less than 0.05 Hectares by Town

Hectares	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Total	Average
Aberaeron			0.01			0.45	0.06		0.16	0.07	0.75	0.08
Aberystwyth	0.04	0.11	0.30	0.05	0.03	0.01	0.46	0.13	0.06	0.41	1.59	0.16
Cardigan	0.19	0.02	0.01	0.17			0.17	0.04	0.07		0.67	0.07
Lampeter	0.00		0.04	0.04	0.01	0.44		0.02			0.54	0.05
Llandysul												
Tregaron										0.01	0.01	0
TOTAL	**0.23**	**0.13**	**0.36**	**0.26**	**0.04**	**0.90**	**0.69**	**0.18**	**0.29**	**0.49**	**3.56**	**0.36**

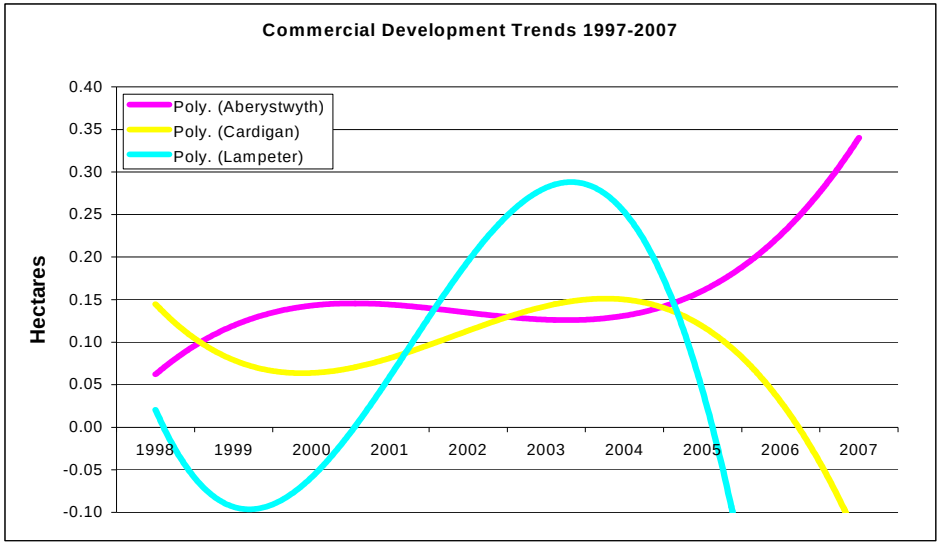
Table C5 Implemented Commercial (B1) Consents (Schemes) by Town by Site Size

Hectares	Aberaeron	Aberystwyth	Cardigan	Lampeter	Llandysul	Tregaron	Grand Total	Cum Total	Cum as %
> 0.50									0%
> 0.10 – 0.50	2	3	3	1			9	9	15%
> 0.05 – 0.10	3	5					8	17	29%
> 0.02 - 0.05		**7**	**5**	**3**			**15**	**32**	**54%**
> 0.01 - 0.02	1	8	6				15	47	80%
0.01or below	1	4	3	3		1	12	59	100%
TOTAL	**7**	**27**	**17**	**7**	**0**	**1**	**59**		

Table C6 Implemented Commercial Consents (Hectares) by Town by Site Size

Hectares	Aberaeron	Aberystwyth	Cardigan	Lampeter	Llandysul	Tregaron	Grand Total	Cum Total	Cum as %
> 0.50									0%
> 0.10 – 0.50	0.56	0.85	0.40	0.44			2.26	2.26	63%
> 0.05 – 0.10	0.17	0.40					0.57	2.83	80%
> 0.02 - 0.05		**0.19**	**0.16**	**0.09**			**0.44**	**3.27**	**92%**
> 0.01 - 0.02	0.02	0.12	0.09				0.22	3.49	98%
0.01or below	0.01	0.02	0.02	0.01		0.01	0.07	3.56	100%
TOTAL	**0.75**	**1.59**	**0.67**	**0.54**	**0.00**	**0.01**	**3.56**		

Figure C.2



Some 59 commercial schemes have been completed over the past decade. Most are small with nothing over 0.45 hectares. Trends display a reasonably predictable supply for commercial floor-space in Aberystwyth although the trend is skewed by a significant recent completion. On annual average 0.016 hectares has been developed over the past decade.

Elsewhere, demand is extremely variable responding to small, but in context, significant developments at particular times. For instance a major completion of 0.44 hectares in Lampeter in 2003 (Table C4) is exceptional and unpredicted into the future. Aside from these periodic developments, there is a steady supply of very small completions presumably to meet the needs of new or expanding SMEs.

A threshold of 0.02 hectares – if applied over the past decade, this would be sensitive enough to cover 54% of all schemes (Table C5) but 92% of development area (Table C6).

Table C7 Implemented Housing Consents (Units) on Sites less than 0.05 Hectares by Town

Hectares	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Total	Avg 94 - 05
Aberaeron	1					2	4		5		1			4	17	1
Aberystwyth	43	61	30	46	37	27	40	48	58	28	16	7		16	457	38
Cardigan	7	10		7		6	3	8	5	6	4	3		6	65	5
Lampeter	6	2		2	3	6	1		9	9	1	5	No data	2	46	4
Llandysul		2		2	1	1		3	5		3				17	1
Tregaron				1	1	1	2	1		2					8	1
TOTAL	**57**	**75**	**30**	**58**	**42**	**43**	**50**	**60**	**82**	**45**	**25**	**15**		**28**	**583**	**49**

Figure C.3

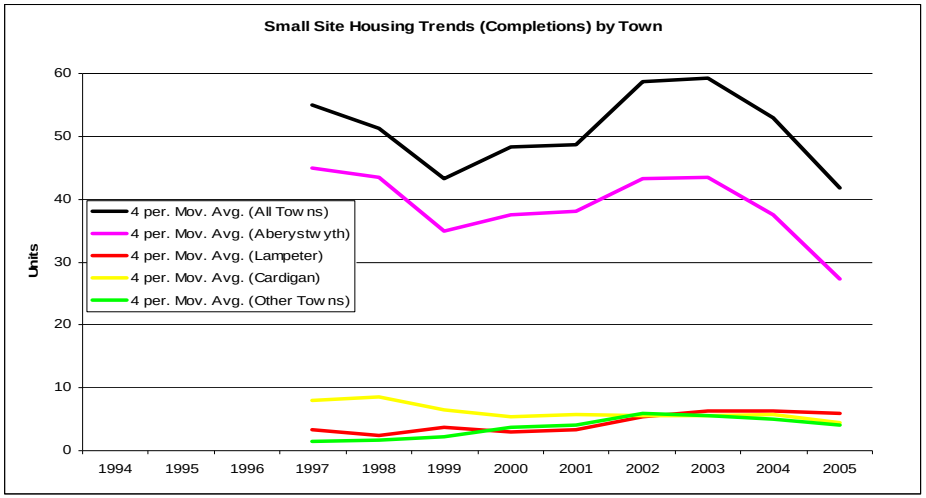


Table C8 Implemented Housing Consents (Units) on Small Sites in Aberystwyth by Site Size

Hectares	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Total	Cum Total	Cum as %
> 0.04 - 0.05	2	2		2			13	5	18	1					43	43	9%
> 0.03 - 0.04	13	1	7	7		2		1	8	1		1		9	50	93	20%
> 0.025-0.03	6	1	1			5	1	4	8	1	5				32	125	27%
>0.02-0.025	**5**	**12**	**2**	**1**	**1**	**3**	**2**	**3**	**6**	**2**		**1**	No data	**4**	**42**	**167**	**37%**
>0.015-0.02	2	11	1	5	8	2	2	7	3	3	4			3	51	218	48%
>0.01-0.015	7	14	4	22	14	6	17	17	8	13	3				125	343	75%
0.01& below	8	20	15	9	14	9	5	11	7	7	4	5			114	457	100%
TOTAL	**43**	**61**	**30**	**46**	**37**	**27**	**40**	**48**	**58**	**28**	**16**	**7**		**16**	**457**	**-**	**-**

Table C9 Implemented Housing Consents (Hectares) on Small Sites in Aberystwyth by Site Size

Hectares	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Total	Cum Total	Cum as %
> 0.04 - 0.05	0.10	0.09		0.09			0.09	0.09	0.17	0.05				0.037	0.71	0.71	18%
> 0.03 - 0.04	0.07	0.03	0.06	0.10		0.07		0.03	0.04	0.04		0.04			0.48	1.19	31%
> 0.025-0.03	0.08	0.03	0.03			0.03	0.03	0.10	0.05	0.03	0.06				0.42	1.60	41%
>0.02-0.025	**0.02**	**0.06**	**0.05**	**0.02**	**0.02**	**0.04**	**0.02**	**0.06**	**0.04**	**0.02**		**0.02**	No data	**0.02**	**0.40**	**2.00**	**52%**
>0.015-0.02	0.04	0.09	0.02	0.03	0.07	0.04	0.03	0.05	0.05	0.04	0.04				0.49	2.49	64%
>0.01-0.015	0.06	0.09	0.02	0.08	0.08	0.07	0.11	0.11	0.06	0.07	0.01			0.02	0.81	3.30	85%
0.01& below	0.05	0.09	0.05	0.05	0.08	0.05	0.03	0.06	0.03	0.03	0.03	0.03			0.58	3.88	100%
TOTAL	0.41	0.49	0.22	0.37	0.24	0.29	0.31	0.52	0.45	0.27	0.13	0.09		0.077	3.88		

Figure C.4

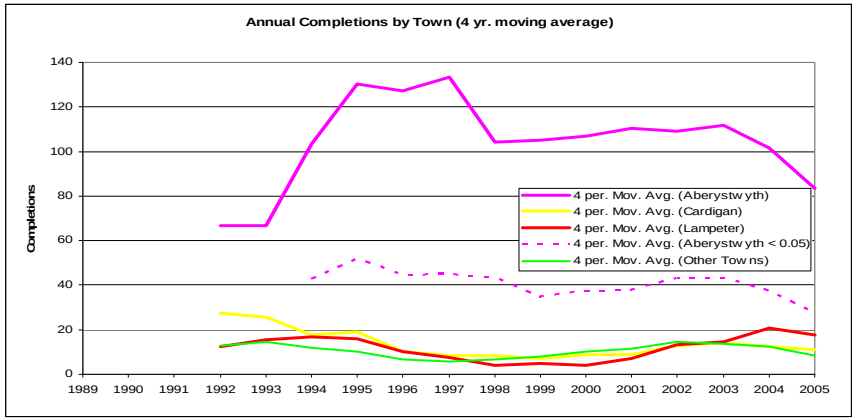


Figure C.5

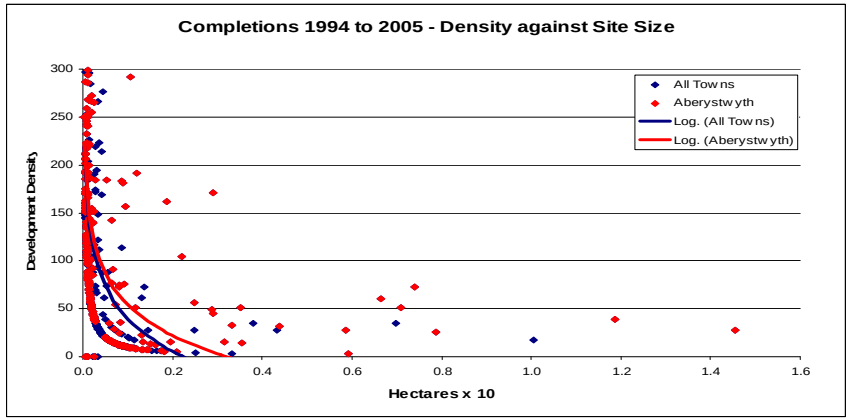


Figure C.6

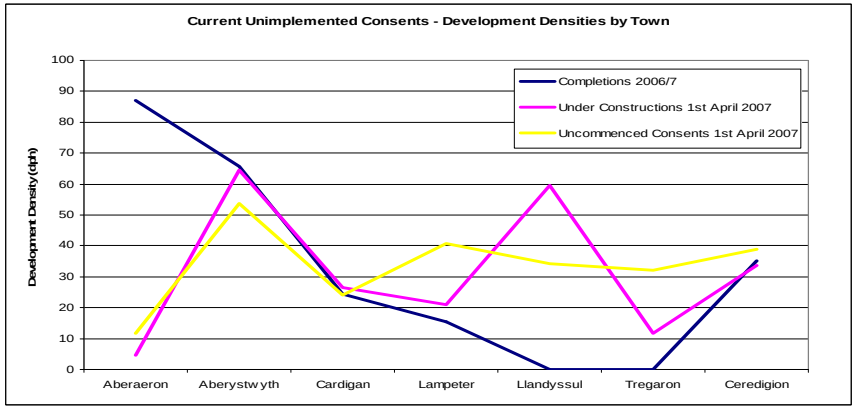


Figure C.7

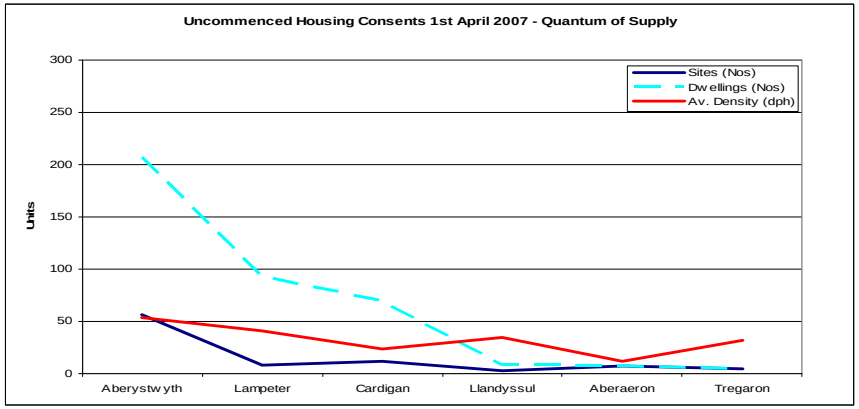


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Figure C.8

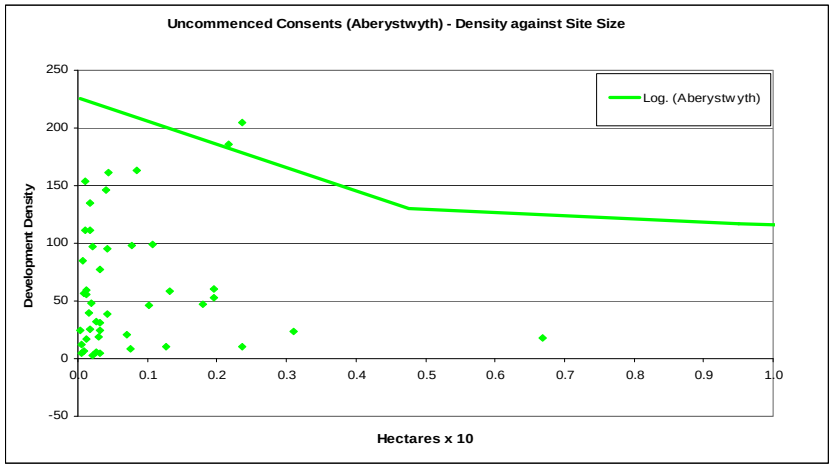
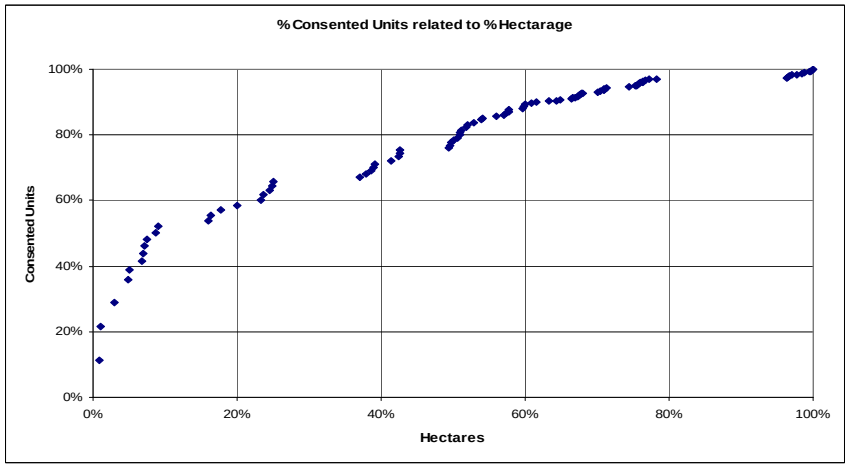


Figure C.9



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8. The Significance of the 'Windfall' Allowance

Despite the steady downward trend in completions and consents, small site contribution is inherently unpredictable. Indeed current English guidance explicitly seeks to direct planning authorities to exclude (or at least reduce) reliance upon such 'unplanned' supply from development plans.

Summary Table C10 demonstrates that the following proportions of commercial and retail development would have been captured within the site-based element of the methodology:

Table C10 Proportion of Development Delivered on Sites below 0.02 Hectares 1998 - 2007

Land Use	No of Schemes	Proportion of Schemes (No)	Developed Area (Ha)	Proportion of Schemes (Ha)	Av. Annual Developed Area (Ha)
Retail	44 of 79	56%	0.40 of 4.68	9%	0.04
Commercial	37 of 59	46%	0.29 of 3.56	8%	0.03

The vast majority of site areas (and therefore usable floorspace) falls within the methodology. As the UDP is unlikely to allocate such small sites (control exercised through development control policy) it is considered a robust approach.

Table C11 depicts the trend in housing completions over the eleven years from 1994 to 2005.

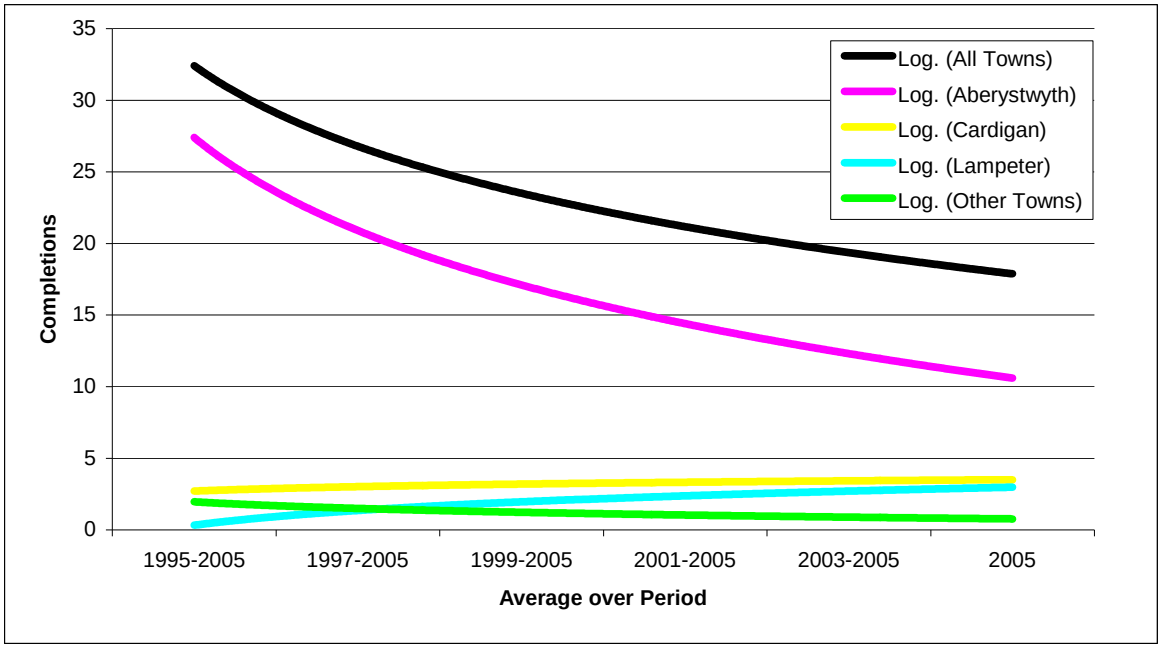
Table C11 Housing Completions on Sites of Less Than 0.02 Hectares by Town 1994 - 2005

Settlement	94	95	96	97	98	99	00	01	02	03	04	05	Total
Aberystwyth	17	45	20	36	36	17	24	35	18	23	11	5	287
Cardigan	7	8		2		6		2	1	6	4	3	39
Lampeter	2	2		2		1			1	1		5	14
Other Towns	1	1	0	1	0	3	3	1	5	1	1	0	17
All Towns	27	56	20	41	36	27	27	38	25	31	16	13	357

In overall terms, these figures display a declining trend. The smoothed trend lines in Figure C.10 depicts a marked and steady reduction in average completions of dwellings on small sites over a range of shortening timescales since 1995. Of particular note is that the declining yield of Aberystwyth almost entirely accounts for that County-wide.

Whilst extrapolation of the figures in Table C11 up to 2022 suggest a supply of between 480 dwellings (based upon historical trends of about 30 per year) down to 240 dwellings (based upon current yields of about 15 per year), it is felt that this downward trend may mean that even this latter figure could be significantly too high.

Figure C.10 Trends in Housing Completions on Small Sites by Town (< 0.02ha)



As broadly half of retail and commercial development has taken place on small sites, the average annual land take is very low. Such development clearly meets distinct market needs, it tends to take place within specific locations (for instance within town centres) and in the context of the towns considered has an importance that would not be the case in larger settlements. Consequently a small site allowance should be considered although the quantum of this should be based upon ongoing monitoring given the current general downturn in economic conditions.

There appears to be little value in including a small site windfall allowance for housing. In principle, these figures are unpredictable and do not form a reliable basis for the guaranteed supply that a development plan should provide. In addition, and under current trends, yield is unlikely to be sufficient to offer any scope to reduce the amount of allocated land. Consequently, a small site allowance is not recommended.

In summary, a site size threshold of 0.02 hectares is considered to provide a very comprehensive and inclusive assessment of development capacity and will provide a more than adequate evidence base to the new development plan. Subject to ongoing monitoring, current trends do not imply a particularly significant or useful contribution to the County's development needs.

Author: Carl Mort

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Reviewer: John D Hall

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Appendix D
A Classification of Sources of Supply

5 Pages

Part D – Ceredigion County Council – Urban Capacity and Urban Extension Study: A Classification of Sources of Supply

1. Purpose of this Baseline Study

This technical note sets out the classification of previously developed and greenfield sites considered for development potential within the settlement boundaries of the six towns. It reflects and expands upon Table 3.3 of the Main Report.

2. The Sources of Supply

2.1 Previously Developed Sources

A - Subdivision of Existing Housing

The contribution of this source most commonly occurs in areas with many large mature (e.g. Victorian) houses.

Assessment is difficult and it is considered unfeasible for the study to consider all potential for sub-divisions on a site by site basis. Consequently this source is addressed by:

- Quantifying its contribution over the past ten years;
- Establishing the trend of these completions; and
- Agreement of this trend with Council officers and therefore the likely numerical contribution from this source over the next fifteen years.

The significance of this source varies across the six towns and is particularly important in Aberystwyth. Whilst recent local trends are informative, the supply of such sites is not infinite and historic rates may not be able to continue.

B – Conversions / Flats Over Shops

Again the contribution of this source is difficult to predict. The take up of such opportunities could be very significant although in practice this is very much subject to the initiative of private individuals. Again it is not feasible for the study to consider all potential for sub-divisions on a site by site basis. Consequently this source is addressed by:

- Quantifying its contribution over the past ten years;
- Establishing the trend of these completions; and
- Agreement of this trend with Council officers and therefore the likely numerical contribution from this source over the next fifteen years.

Again the significance of this source varies across the six towns varies and again it is important in Aberystwyth. The methodology will need to be sensitive to local trends and address them at an appropriate level of detail.

C - Empty Houses

Where high levels of vacancies exist within the current housing stock, a concerted attempt to address this can yield significant housing capacity without the need to develop further.

The England and Wales average is currently below 3% and it could be considered that an authority achieving better than this rate is managing its vacant properties effectively. As at February 2008, County-wide, Ceredigion had a vacancy rate were just 2% which suggests there is little scope to offset the need for development; this source is not considered further. There is no data available to assess the performance of the individual six towns.

D - Previously Developed Vacant and Derelict Land and Buildings (Non Housing)

This can be a significant source of potential and sites may present excellent short term potential to boost urban populations and contribute to the support of existing services.

Such sites will be identified through Council's annual land use analyses, officer consultation and through primary site survey work informed by map sources.

E - Intensification of Existing Housing Areas

The intensification of existing housing areas can be relatively significant in areas where supply from other sources is limited. It is in these places where this source warrants special attention.

Such potential sites will be identified through reference to map bases and validated through site visits. Such land will only be included where it is palpably underused and potentially available - for instance well used garage courts have not been considered. Sources can be:

- Garage courts. These sites were taken forward only where they are substantially (75%) vacant, derelict or very poorly maintained;
- Areas of retail uses not specifically identified or proposed for protection within the UDP. Again, these sites will be taken forward only where they are substantially (75%) vacant, derelict or very poorly maintained;
- Community uses such as churches, public houses and public buildings and their associated car parks. These sites will be taken forward only where they are vacant, derelict or very poorly maintained.

F - Redevelopment of Existing Housing

In areas of market failure or where there is a high proportion of local authority ownership, there may be opportunities, or it may be desirable, to redevelop areas to secure housing market renewal.

Such areas will be identified through local knowledge or through visual inspection of areas of poor quality. Such sites are therefore largely identified and defined through site survey work. Existing non-standard forms of housing such as flats, residential homes and institutional uses, where occupied or well maintained, will be discarded.

Any assessment of the capacity of this source will be handled carefully to ensure that the net impact of redevelopment opportunities is incorporated within the study findings.

G - Re-Development of Car Parks

This is a potentially significant source especially where they fall within, or on the fringe of town and neighbourhood centres. These will be identified through site survey work and will be included within the study only where it is judged that they are substantially vacant or underused.

H - Conversion of Commercial Buildings

Office developments of varying ages are a feature, although not a particularly prevalent one, of the County's larger town centres. Where premises are vacant or under-used, the potential of buildings for conversion will be considered where they are of high architectural quality. It should be acknowledged however that such conversions can be challenging especially where they formerly housed an industrial use and may not be viable where the local housing market is sluggish.

These sites will be identified through site survey work. Their suitability for change of use will be validated through reference to the Council's separately commissioned employment land study.

I - Land and Buildings Currently in Use (Employment / Leisure / Retail)

Whilst distinct from that of previously developed, vacant and derelict land and the conversion of commercial buildings, this source commonly occurs in the same areas. Underused or partially vacant employment premises may offer some scope for residential use although much will depend upon need to retain the overall supply of employment land and its environmental condition. These sites will be considered further only where they appear to be poorly used or where there is evidence that the current use may cease.

The study will also consider opportunities where vacant, or potentially vacant, sites fall on the fringes of secure land uses or within defined policy areas and where adjacent to compatible uses.

The suitability of identified sites will be validated through reference to the Council's separately commissioned employment land study.

J - Review of unimplemented previously developed allocations in UDP

Where allocations for varying uses were proposed in the 2006 Proposed Modifications UDP but have not yet been developed there is an opportunity to review the capacity of the site against assumptions made within the UDP or against any unimplemented consent.

Such sites are identified through the analysis of assumptions previously made by the Council cross checked through site visits. Capacity assumptions are reviewed and validated through discussions with officers of the County Council's Planning Department's Development Control Section. This will identify where proposals are at an interim/fluid stage and where additional or denser development might be secured. Conversely, it will also assist in evaluating the impact of known or forthcoming influences that may serve to constrain site capacity such as SUDS.

2.2 Greenfield Sources

K - Review of unimplemented greenfield allocations in UDP

Where allocations for varying uses were proposed in the 2006 Proposed Modifications UDP but have not yet been developed there is an opportunity to review the capacity of the site against assumptions made within the UDP or against any unimplemented consent.

Such sites are identified through the analysis of assumptions previously made by the Council cross checked through site visits. Capacity assumptions are reviewed and validated through discussions with officers of the County Council's Planning Department's Development Control Section. This will identify where proposals are at an interim/fluid stage and where additional or denser development might be secured. Conversely, it will also assist in evaluating the impact of known or forthcoming influences that may serve to constrain site capacity such as SUDS.

L - Vacant Land - Not Previously Developed

Vacant land with no history of development can be a significant source of supply although clearly within the context of PPW its development should be justified by a lack of previously developed land elsewhere. Establishing the development history of a site can be difficult. This is especially the case where significant redevelopment may have occurred beyond living memory.

Without evidence of previous development or, say, a contaminative use, this study can only evaluate sites as they appear on the ground. Such sites will be identified through a combination of site visits and officer consultations.

M / N / O / P - Under Used and Potentially Surplus Allotments/Open Spaces/Sports Pitches/School Playing Fields

The potential of these sources is, in PPW, subordinated to the preferred development of previously developed land. Potential depends upon an assessment of the quantity and quality of the range of existing facilities against the needs of the population it is seeking to serve. This study will adopt a precautionary principle and address the provision of urban green space 'in the round'. Even where settlements are in surplus, permanent loss through development could, in time, result in a deficit where development in general increases the settlements population.

In general, this study assumes that such land, where identified as a site for recreation within the 2006 Proposed Modifications UDP will be retained for its current use. However, where greenspaces are presently demonstrably underused / un-maintained or of very poor quality, these will be identified as having some potential for redevelopment beyond ten years subject to confirmation that they are surplus. It is a matter for CCC to consider their potential against a concern to meet the NPFA standard of 6 acres per 1,000 population. Each site will then be individually assessed in terms of the nature and quality of its current use; only where the site is clearly poorly used and does not provide a local environmental asset will its potential be considered further.

Allotments also fall within the definition of open space. Consequently, they will be subject to the same considerations as for open space and sports pitches.

R/S - Agricultural Land (Arable / Pasture)

Although not routinely included within such studies, it is clear that there a number of urban sites under agriculture and these are identified through a combination of aerial photographs and site

visits. Clearly within the context of PPW its development should be justified by a lack of previously developed land elsewhere.

Author: Nick Williams

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Appendix E
Site Assessment Criteria

14 Pages

Part E – Ceredigion County Council – Urban Capacity and Urban Extension Study: Development Trends on Small Sites Site Assessment Criteria

The study categorises the nature of sites under consideration and the broad type of area in which they are located. This categorisation is at Table F1.

Table F1: Site Categorisation based upon Current Use

Status	Categorisation	
Previously Developed / Allocated	A.	Subdivision of Existing Buildings / Houses
	B.	Conversions / Flats over Shops
	C.	Empty Housing Stock
	D.	Previously developed vacant and derelict land and buildings (non housing)
	E.	Intensification of land use within residential areas (use of incidental open spaces, garage courts)
	F.	Redevelopment of existing housing (if redeveloped for housing, this can have both a gross and net impact)
	G.	Redevelopment of car parks
	H.	Conversion of existing commercial buildings
	I.	Land and buildings currently in employment use
	J.	Review of unimplemented previously developed allocations in UDP
Greenfield	A.	Review of unimplemented greenfield allocations in UDP
	B.	Vacant land - not previously developed
	C.	Under used and potentially surplus allotments
	D.	Under used and potentially surplus open spaces
	E.	Under used and potentially surplus sports pitches
	F.	Under used and potentially surplus school playing fields
	G.	Agricultural pasture land
	H.	Agricultural arable land

Location (Distance / Character)	A.	Town Centre
	B.	Edge of Town Centre
	C.	Urban
	D.	Sub-Urban
	E.	Urban Fringe

*Include indication of appropriate potential future land use(s):-

1 = Residential 2 = Employment 3 = Commercial 4 = Retail 5 = Community 6 = Other

2. Framework for Site Appraisal

A series of criteria have been applied to all identified sites to classify each into categories (from 'very good' down to 'very poor') to inform the assessment of their availability and suitability for the various land uses under consideration. Whilst site performance is summarised against each criteria, the purpose is not to aggregate these into an overall 'score' as a high score may mask a failure to meet a 'show stopper' that effectively removes a site from consideration for development completely.

Against each criteria, sites are assigned a 'qualitative assessment level' on a five point scale according to its performance against the descriptions indicated in Table F2 below:

Table F2 Qualitative Assessment Levels

Qualitative Level	Assessment description (suitability for use type at the site)
1	Strongly negative
2	Negative
3	Neutral
4	Positive
5	Strongly positive

3. Assessment Criteria

The assessment criteria are categorised.

Firstly, there are common criteria that are applied to all sites comprising:

- Indicators of availability and cessation of current use (Table F3);
- Common physical criteria (Table F4);
- Amenity criteria applied to indicate suitability for housing (Table F5);
- Current use and vacancy criteria (Table F6);
- Market activity criteria (Table F7);
- Sustainability criteria framed around access to services (Table F8);
- On-site environmental criteria to identify those on-site issues identified that cannot be identified through desk assessment (Table F9);
- Policy and social criteria (Table F10).

There are then additional criteria to assess sites considered for urban extensions to the three main towns of Aberystwyth, Cardigan and Lampeter (Table F11).

Table F3 Site Availability and Cessation of Current Use

Criteria	Qualitative Weighting and Description
Availability for Development / Cessation Likely?	1. Appears to be a very important employer maximising value of the land (10+ years) 2. Site appears well used and with no indication of long-term cessation (5 – 10 years) 3. Site appears under-used but premises well maintained and capable of re-use (1 - 5 years) 4. Site appears under-used (e.g. few cars) and premises in very poor state of repair or where current uses known to be searching for other premises (1 - 3 years) 5. Site vacant/being vacated and ready for re-use / re-development or Agricultural land (not including buildings) (< 1 year)

Table F4 Common Physical Criteria

Criteria	Qualitative Weighting and Description
Access	1. Site inaccessible / landlocked by secure adjacent land uses
	2. Site is accessible subject to available third party land
	3. Site is accessible subject to major measures but land is within owners / Highway Auth. control
	4. Site is accessible subject to minor measures
	5. Site is readily accessible
Instability	1. Site appears highly unstable or threatened by off-site instability and likely to be un-developable
	2. Site appears unstable or threatened by off-site instability and likely to require major measures
	3. Site appears unstable or threatened by off-site instability and likely to require minor measures
	4. Instability possible but unknown
	5. Site appears stable and un-threatened by off-site instability
Contamination	1. Site is known or highly likely to be contaminated given it's previous or surrounding use
	2. Site may have land quality issues or is adjacent to unresolved contaminative uses
	3. Contamination possible but unknown
	4. Sites previous use is unlikely to have been contaminative
	5. Site is previously undeveloped with no adjacent contaminative uses
Topography (as a majority)	1. Site is extremely steep and unlikely to be developable
	2. Site is steep and likely to require the creation of development terraces and retaining walls
	3. Site is undulating/sloping and likely to require re-modelling and creation of development platforms
	4. Site is undulating but unlikely to require the creation of development platforms
	5. Site is flat or gently undulating

Table F5 Additional Housing Criteria

Criteria	Qualitative Weighting and Description
Quality of neighbouring area/uses SOURCE: DESK / SITE	1. Site adjacent to bad neighbouring uses (non-residential) 2. Site situated adjacent to some sensitive uses. Probable requirement for mitigation 3. Site within poor quality area or surrounding area being developed and quality unknown 4. Site located in area of good quality 5. Site located in area of high quality
Quality of public realm SOURCE: SITE	1. Very Poor – Run down area 2. Poor – Poor quality public realm 3. Average – Public realm requires improvement 4. Good – Good quality public realm 5. Very Good – Very high quality public realm – will attract high quality uses

Table F6 Current Use and Vacancy Criteria

Criteria	Qualitative Weighting and Description
Quality of existing buildings SOURCE: SITE	1. Very Poor. In poor state of repair and unlikely to meet needs 2. Poor. In good repair but unlikely to meet needs 3. Average. In poor repair but likely to meet needs 4. Good. In good repair and likely to meet needs 5. Very Good. New building designed to meet needs
Overall site area and floorspace (in use) SOURCE: SITE	1. Fully used - 100% 2. Substantially in use - 75% 3. Half used - 50% 4. Substantially un-used - 25% 5. Fully un-used or agricultural land (not including buildings) - 0%

Table F7 Market Criteria

Criteria	Qualitative Weighting and Description
Strength of local demand SOURCE: COUNCIL / AGENT	1. Very Poor - Assessed against past conditions / trends 2. Poor - Assessed against past conditions / trends 3. Average - Assessed against past conditions / trends 4. Good - Assessed against past conditions / trends 5. Very Good - Assessed against past conditions / trends
Recent market activity SOURCE: COUNCIL / AGENT	1. Very Poor – Little or no evidence of recent activity. Many vacant plots 2. Poor – Little evidence of recent activity. Some vacant plots 3. Average – Some evidence of recent activity. Vacant plots remaining 4. Good -– Evidence of significant recent or on-going development activity 5. Very Good – Evidence of significant recent and on-going development activity

Table F8 Sustainability Criteria

Criteria	Qualitative Weighting and Description
General transport accessibility SOURCE: DESK (GIS) / SITE	1. Site very remote – only accessible by car 2. Site remote – significant effort required to access by public transport 3. Average – public transport accessible within 800m 4. Good – public transport accessible within 400m 5. Very good – site directly served by public transport
Distance to local railway station / other public transport / cycle paths / safe routes to school / PROW SOURCE: DESK (GIS) / SITE	1. Very Poor – Absent or Infrequent service in excess of 1,500m. Poor cycle and footpath connectivity 2. Poor – Infrequent service accessible over 1,500m or site with poor cycle and footpath connectivity 3. Average – Frequent service accessible over 1,500m away but with good cycle and footpath connectivity 4. Good – Frequent service accessible between 500m and 1500m away and with good cycle and footpath connectivity 5. Very Good – Frequent service accessible within 500m with good cycle and footpath connectivity

Table F8 Sustainability Criteria continued.

Criteria	Qualitative Weighting and Description
Access to Major Road Infrastructure SOURCE: DESK (GIS) / SITE	1. Remote from highway 2. Located within 100m of road 3. Accessible subject to improvements 4. Adjacent to lower order road 5. Directly adjacent to major road infrastructure
Distance to local shops and services (Schools, GPs, Banks etc) SOURCE: DESK (GIS) / SITE	1. Very Poor – Absent or in excess of 3,000m 2. Poor – Between 2,000 and 3,000m 3. Average – Between 1,000 and 2,000m 4. Good – Between 500 and 1,000m 5. Very Good – Within 500m
Distance to town centre SOURCE: DESK (GIS)	1. Very Poor – In excess of 3,000m of town centre or with accessibility issues 2. Poor – Between 2,000 and 3,000m of town centre with clear access to it 3. Average – Between 1,000 and 2,000m of town centre or with accessibility issues 4. Good – Between 500 and 1,000m of town centre with clear access to it 5. Very Good – Within, adjacent or within 500m of town centre

Table F9 On-Site Environmental Criteria

Criteria	Qualitative Weighting and Description
Distance to natural receptors SOURCE: DESK (GIS) / SITE	1. Very Poor – Significant receptors or suitable habitat on site 2. Poor – Potential for some receptors or suitable habitat on or immediately adjacent to site 3. Average – On site or adjacent issues easily mitigated. 4. Good – Receptors located between 50m to 200m of site 5. Very Good – No receptors within 200m of site
Distance to surface water receptors and groundwater source protection zones (SPZs) SOURCE: DESK (GIS) / SITE	1. Very Poor – Watercourse on site and within an SPZ 2. Poor – Watercourse on site 3. Average – Site adjacent to watercourse or within SPZ. Easily mitigated 4. Good – Watercourse or SPZ away from site but potential pathway 5. Very Good – Watercourse or SPZ away from site with no apparent pathway
Interaction/conflicts between sites and surrounding uses SOURCE: DESK (GIS) / SITE	1. Very Poor – Site substantially within and surrounded by sensitive uses 2. Poor – Site adjacent sensitive uses 3. Average – Site within 50m of sensitive uses 4. Good – Site within 250m of sensitive uses 5. Very Good – Site at least 250m of sensitive uses
Contribution to green infrastructure / linkages SOURCE: DESK (GIS) / SITE	1. Very Poor – Site without current value remote from and unlinked to green infrastructure. 2. Poor – Site without current value but located within 50m of green infrastructure 3. Average – Site of some value and located within 50m of green infrastructure 4. Good – Site of value and connects to green infrastructure links of limited extent (<100m) 5. Very Good – Site of value connecting to wider green infrastructure network (>100m)

Table F10 Policy and Social Criteria

Criteria	Qualitative Weighting and Description
Strategic impact of reallocation of use SOURCE: DESK / SITE	1. Against – proposed use(s) inconsistent/in conflict with existing regeneration strategy / UDP 3. Site not situated within Regeneration Strategy area / not allocated in UDP 5. For – proposed use(s) consistent with existing regeneration strategy / allocated in UDP
Linkages with existing regeneration policies, projects and programmes SOURCE: COUNCIL / DESK (GIS)	1. Site distant from existing regeneration areas (>100 m) / No regeneration strategy within settlement 2. Small site adjacent to proposed regeneration area (within 100 m) 3. Large site adjacent proposed regeneration area (within 100 m) 4. Site within/on peripheral of proposed regeneration 5. Large strategic site within proposed regeneration zone
Potential to assist achievement of economic development targets SOURCE: COUNCIL / DESK	1. Site distant to regeneration zones/in conflict with, with no direct economic/regeneration impact 2. Site adjacent to regeneration areas, unlikely to influence overall regeneration targets 3. Site within regeneration areas, implementation likely to have positive influence 4. Important site, implementation likely to have positive impact 5. Strategically important site, implementation likely to have significant impact

Table F11 Additional Urban Extension Criteria

Criteria	Qualitative Weighting and Description
Agricultural Land Classification	1. Grade 1 (most versatile) 2. Grade 2 3. Grade 3 (A & B) 4. Grade 4 5. Grade 5 (least versatile)
Visual Impact (in Town)	1. Highly visible from major (A & B) roads and from majority of town (or over 100 properties) 2. Highly visible from major (A & B) roads or from majority of town (or over 100 properties) 3. Visible from major (A & B) roads or from within town (50 to 100 properties) 4. Only glimpsed from major (A & B) roads or comparatively well screened (up to 10 properties 5. Well screened, little or no visual impact
Visual Impact (outside town)	1. Highly visible from major (A & B) roads and from over 50 properties 2. Highly visible from major (A & B) roads or from over 50 properties 3. Visible from major (A & B) roads or from 15 to 50 properties 4. Only glimpsed from major (A & B) roads or from 5 to 15 properties 5. Well screened, little or no visual impact
Landscape Containment	1. Very sensitive - will clearly break skyline when viewed from town 2. Sensitive - potential to break skyline when view from town 3. A level of sensitivity – could be mitigated by layout / retention of vegetation 4. Significantly enclosed by surrounding topography, low impact 5. Well contained, little or no impact

Table F12 Main Proposed / Other Uses

Main proposed use	USE:
	QUANTITY:
	OTHER SUITABLE USES:
	NOTES / COMMENTS:

Appendix F
Schedule of Assessed and Discounted Sites

6 Pages

Ceredigion County Council: Urban Capacity & Urban Extension Study

Table F1 - Schedule of Sites Considered to Have Potential for Development

Site Ref:	Town	Site Name	Site Status	Site Area (ha)	% Assumed Developable	Net Dev Area (ha)	Summary of Potential
Ab11	Aberaeron	Aberaeron Hospital	Brownfield	0.10	100	0.10	Currently in use as Aberaeron Hospital. Potential for conversion of existing property for flat development. Redevelopment also viable, design would need to be sympathetic to existing and surround setting. No flood risk.
Ab12	Aberaeron	JHLA Field, Lampeter Road	Greenfield	1.74	85	1.48	Greenfield site abutting settlement boundary. Site offers natural infill potential for Resi development. Access off Lampeter Road. No flood risk.
Ab4	Aberaeron	D & L Davies Garage, South Road	Brownfield	0.14	100	0.14	A predominantly derelict yard with one small tool shop (J Gerlait Davies and Son). Located within floodplain with an awkward access. Potential for re-use as employment only.
Ab5	Aberaeron	Volvo Garage, South Road	Brownfield	0.64	95	0.61	Currently in use as a car dealership. Site offers potential for Resi development uses in established residential area.. Car dealership would require potential relocation. All land in the same ownership. Good access off South Road.
Ab6	Aberaeron	Field rear of Volvo Garage	Greenfield	1.21	85	1.03	Site to rear of car dealership, although same ownership. Site consists of undulating field and existing residential dwelling. Potential for Resi redevelopment in established residential area. Good access of South Road.
Ab7	Aberaeron	NFU Office and small units, South Road	Brownfield	0.15	100	0.15	Offices currently occupied by NFU. Redevelopment potential for Resi or Emp uses. Access off South Road. No flood risk.
Ab8	Aberaeron	Derelict House, South Road	Brownfield	0.19	100	0.19	Large detached derelict dwelling with substantial garden area. Potential for Resi redevelopment. Existing access from South Road. No flood risk.
A1	Aberystwyth	Former Pub, Queen's Road	Brownfield	0.10	95	0.10	Brownfield site in a prominent location, potential for Resi or Comi development. Good access off Morfa Mawr. Suitable for flat development.
A10	Aberystwyth	Tabernael, Powell St.	Brownfield	0.09	95	0.08	Redundant Chapel. Good potential for Resi redevelopment.
A11	Aberystwyth	The Cambria, New Promenade	Brownfield	0.07	95	0.07	Currently in use as offices. Potential for mixed use development Resi and Comi. Prominent sea front location. Site is identified in regeneration strategy.
A12	Aberystwyth	Old University, New Promenade	Brownfield	0.41	95	0.39	University Building. Potential for Mixed Use scheme comprising Leisure, Resi and Comun. Prominent sea front location. Site is identified in regeneration strategy.
A13	Aberystwyth	Library	Brownfield	0.04	100	0.04	Currently in use as library. Potential for mixed use redevelopment Community and Resi.
A14	Aberystwyth	China shop, Junctin Terrace Road/New Parade	Brownfield	0.02	100	0.02	Currently in use as retail shop. Potential for redevelopment of retail site. Opportunity for Resi element above ground floor shop frontage. Site is identified in regeneration strategy. Listed building.
A15	Aberystwyth	Coral, Junction Dark Gate/Bridge Street	Brownfield	0.05	100	0.05	Former Hotel. Site is within town centre boundary providing good opportunity for Resi/Community element above ground floor shop frontage.
A16	Aberystwyth	Garage, Eastgate Street	Brownfield	0.06	95	0.06	Currently in use as garage. Site within town centre boundary. Offers potential redevelopment opportunity for Resi in the longer term.
A17	Aberystwyth	Charlies Stores, Cambria Street	Brownfield	0.04	100	0.04	Currently in use as retail shop. Potential for redevelopment of retail site. Opportunity for Resi/Community element above ground floor shop frontage.
A18	Aberystwyth	Anthony Motors, Pen-yr-Anger	Brownfield	0.08	95	0.07	Currently in use as a garage. Site in a predominantly residential area. Good redevelopment potential for Resi. Good access off Pen yr Angor.
A19	Aberystwyth	Fire Station, Penparcau Road	Brownfield	0.23	95	0.22	Fire Station site. Site allocated as Mixed Use allocation in UDP and identified in regeneration strategy. Resi, community and Retail potential. Access off Pen yr Angor.
A2	Aberystwyth	Vacant Council Offices	Brownfield	0.13	95	0.13	Redundant council offices and adjoining car park. Potential for Resi or Community development. Listed building so sympathic design essential. Good access off Morfa Mawr. Moderate flood risk.
A20	Aberystwyth	Welsh Martyrs Catholic Church	Brownfield	0.25	95	0.24	Redundant Welsh Martyrs Catholic Church. Site offers good Resi redevelopment potential. Conversion potential limited.
A21	Aberystwyth	Land between A4120 and A487	Brownfield	0.28	100	0.28	Currently in use as Public Open Space. Site in established residential area. Potential for small scale residential development. Landscape buffer likely to be required. Site is identified in regeneration strategy.
A22	Aberystwyth	Land at corner of Penparcau Road	Brownfield	0.07	95	0.06	Vacant plot on junction of Penparcau Road and Heol Ystrad. Potential Resi infill site.
A23	Aberystwyth	Moduron Delfryn Owens	Brownfield	0.08	95	0.07	Currently in use as car dealership. Potential for small scale Resi development. Site is within an established residential area. Good access off Llwn-Yr-Eos.
A24	Aberystwyth	Midfield Caravan Park	Brownfield	2.69	85	2.29	Currently in use as Midfield Caravan Park. Site offers potential for large scale Resi development. Loss of holiday amenity could be constraint to development.
A25	Aberystwyth	Corner Brynrheidol	Brownfield	0.12	100	0.12	Vacant plot. Site currently use as incidential open space. Potential for small scale Resi development. Undulating site.
A29	Aberystwyth	Rear of Plas Lluest	Greenfield	0.17	100	0.17	Vacant gardens surrounded by mature trees. Site on edge of settlement boundary. Potential for small scale Resi development.
A3	Aberystwyth	Small business units in carriage block	Brownfield	0.14	95	0.13	Brownfield site on junction of Morfa Mawr and Coedian - Y - Frenhines. Potential for substantial mixed use development with Resi element. Site adjacent to A4.
A30	Aberystwyth	Land to East of Cambrian Printers	Greenfield	0.13	100	0.13	Vacant plot. Small linear site suitable for infill Resi development. Good access off A44.

A31	Aberystwyth	Car Park Adjacent to Station	Brownfield	0.98	95	0.94	Currently in use as Car Park. Site is within town centre boundary and offers significant potential for Mixed Use development (inc. Retail, Resi and Community). Site allocated as Mixed Use allocation in UDP and identified in regeneration strategy. Site is within C1 flood zone.
A32	Aberystwyth	Riverside Terrace Working Mans Club	Brownfield	0.10	95	0.10	Currently in use as Riverside Terrace Workingmans Club. Site is situated on prominent riverside frontage and offers good potential for Resi redevelopment. Site is within C1 Flood zone. Site adjacent to regeneration strategy site A31.
A33	Aberystwyth	Arriva Depot and Vacant Units	Brownfield	1.56	85	1.32	Currently in use as Arriva Bus Depot. Site offers significant potential for Mixed Use redevelopment, inc Resi, Community, Empl and Community uses. Good access off Coedlan-Y-Parc. Site allocated as Mixed Use allocation in UDP and identified in regeneration strategy. Site is within C1 flood zone.
A34	Aberystwyth	Park Avenue Car Park	Brownfield	1.62	85	1.37	Currently in use as Car Park. Site offers significant potential for Mixed Use redevelopment, inc Community, Leisure, Empl and Community uses. Good access off Coedlan-Y-Parc. Site allocated as Mixed Use allocation in UDP and identified in regeneration strategy.
A36	Aberystwyth	Vicarage Land	Greenfield	0.59	90	0.53	Currently in use as Vicarage garden. Substantial site with potential for Resi development. Good access off Quebec Road. Established residential area.
A37	Aberystwyth	Land off Ffordsulien	Greenfield	0.45	100	0.45	Vacant plot. Linear site with potential for Resi development. Good access off Quebec Road. Established residential area.
A38	Aberystwyth	Field on B4572	Greenfield	0.97	90	0.87	Agricultural land. Site at edge of settlement boundary. Potential for Resi or Community uses. Access off B4572. Undulating site.
A39	Aberystwyth	Field adj Kerry Farm	Greenfield	2.64	85	2.25	Pasture land situated at edge of settlement boundary. Potential for Resi and/or Community uses. Site allocated for Resi use in UDP.
A4	Aberystwyth	Scout hut	Brownfield	0.04	100	0.04	Small scout hut site with potential for small mixed use (Community and Emp) development with Resi element. Potential to link with adjoining site A3. NB the site excludes the garage site. Good access off Morfa Mawr.
A41	Aberystwyth	JHLA Quarry	Greenfield	0.85	90	0.77	Pasture land situated at edge of settlement boundary. Potential for Resi development. Site allocated for Resi use in UDP.
A42	Aberystwyth	Erw Goch Field Adj	Greenfield	1.62	85	1.38	Vacant scrub land. Substantial opportunity for Resi and/or Community uses. Site allocated for Community use in UDP.
A43	Aberystwyth	Land Adj GVC	Greenfield	3.88	85	3.29	Currently in use as horse paddock. Substantial opportunity for Resi and/or Community uses. Potential for relocation / relationalisation of UWA. Site allocated for Community use in UDP.
A44	Aberystwyth	Field Adj Livery	Greenfield	1.48	85	1.26	Pasture land. Good access off Primrose Hill. Potential for Resi and/or Community development. Site allocated for Community use in UDP and identified in regeneration strategy.
A46	Aberystwyth	Plashendre Field	Brownfield	0.79	90	0.71	Pasture land located just within the settlement boundary with good highway access. Preferred for housing use or as a buffer to a potential urban extension for employment uses (Site AE8)
A47	Aberystwyth	Tyn-Y-Fron Lane JHLA	Greenfield	1.34	85	1.14	Vacant scrub land. Substantial opportunity for Resi use. Site allocated for Resi in UDP and identified in JHLA study. Access off Tyn-Y-Fron Lane.
A48	Aberystwyth	Brewery, Penparcau Rd, (opp fire station A19)	Brownfield	0.46	95	0.44	Brownfield site currently in use by various employment premises. Excellent potential as gateway redevelopment project. Potential for Mixed Use site including Emp, Comi and Retail uses. Good access off A487. Site identified in regeneration strategy.
A5	Aberystwyth	Bay hotel and adjacent properties	Brownfield	0.20	95	0.19	Currently in use as a hotel. Prominent sea front location. Potential for flat conversion. Parking at rear. Moderate flood risk. Site adjacent to A49.
A50	Aberystwyth	Llanbadarn Campus	Brownfield	12.22	80	9.78	A very long term prospect. No physical of practical barriers to redevelopment but not currently available
A51	Aberystwyth	Land at Piercefield Lane (south of A20)	Greenfield	3.15	80	2.52	A large area of agricultural land within the site boundary with good access from Penparcau Road. Suitable for housing
A52	Aberystwyth	Land south of Maesycrugiau	Greenfield	1.21	85	1.03	Currently within agricultural use. Would relate well to the the Maes Crugiau housing area to the north although mitigation to Antaron Avenue to the east may be required
A53	Aberystwyth	Cinema Site, Bath Street	Brownfield	0.25	100	0.25	A regeneration site with potential for reuse for retail, employment, housing or mixed uses subject to vacancy or relocation of Cinema
A54	Aberystwyth	Park Avenue South (Football Ground)	Brownfield	2.19	80	1.75	A regeneration site with potential for reuse for retail, employment, housing or mixed uses subject to vacancy or relocation of Football Ground
A6	Aberystwyth	Cambria tyres	Brownfield	0.25	95	0.24	Long thin linear site. Currently used as Tyre Centre. Potential for Mixed Use development. Good access from Stryd-y-Faenor.
A7	Aberystwyth	Recently cleared on A44	Brownfield	0.08	95	0.08	Small vacant plot in established residential area. Potential for small apartment development. Good access off Epworth Terrace.
A8	Aberystwyth	Shell garage, Mill St.	Brownfield	0.07	95	0.07	Currently in use as petrol station. Good potential site within town centre boundary. Comi development with Resi element. Site is identified in regeneration strategy.
A9	Aberystwyth	Royal mail depot, Queen St.	Brownfield	0.20	95	0.19	Currently in use as Royal Mail depot. Good potential retail site within town centre boundary. Opportunity for Resi element above ground floor shop frontage. Site is identified in regeneration strategy.
AE1	Aberystwyth	South A4120	Greenfield	5.42	80	4.34	Pasture land. Large site south east of settlement boundary. Offers the potential for Resi development. Good access from A4120 or B4340.
AE2	Aberystwyth	Gwar-y-felin Field	Greenfield	1.93	80	1.54	Pasture land. Site offers natural infill opportunity. Access from Cysgod y Bryn.
AE3	Aberystwyth	West Penparcau	Greenfield	4.52	80	3.61	Greenfield land. Site covers three separate fields. Undulating site.
AE4	Aberystwyth	North Depot, East Aberystwyth	Greenfield	2.05	80	1.64	Greenfield land. Site offers potential for Resi development. Access off Primrose Hill.

AE5	Aberystwyth	Disused Quarry	Greenfield	8.13	80	6.51	Greenfield site. Site offers potential for natural infill Resi development. Large undulating site. Access off Lon Llywelyn.
AE6	Aberystwyth	East Penglais Farm	Greenfield	1.64	80	1.32	Greenfield site. Site adjacent to existing UWA hall of residence. Access off B4572.
AE7	Aberystwyth	Llanbadarn Farm	Greenfield	7.95	80	6.36	Greenfield site. Large strategic site offering potential for substainial Resi development with associated landscaping. Access off A44. Undulating site.
AE8	Aberystwyth	Plas Hendre fields to Ty Gwyn	Greenfield	14.17	80	11.34	A very large area of agricultural land close to the University Campus with potential to provide complementary employment uses. Also suitable for housing subject to need to extend urban area.
C1	Cardigan	Tenby Road South	Greenfield	0.24	100	0.24	JHLA site under planning permission for 3 detached houses by Mr and Mrs Mosabbir
C10	Cardigan	St Marys Old School Hall, Pont-Y-Cleifion	Brownfield	0.10	100	0.10	St Marys Old School Hall. Appears to be un-used, or under used. Development taking place at rear
C11	Cardigan	Cardigan Hospital, Pont-Y-Cleifion	Brownfield	1.21	85	1.03	Cardigan Hospital. Housing would be a good option after cessation of the Hospital.
C12	Cardigan	A487 / A484 Field (N)	Greenfield	1.13	80	0.91	Community allocation, poorly maintained field, with horses, quite steep. Topography may rule out community use, with parts of the site more suitable for housing.
C14	Cardigan	JHLA Field, Napier Gardens	Greenfield	0.76	90	0.69	Field, Napier Gardens, JHLA UDP allocation
C15	Cardigan	Unused Buildings, Napier Gardens	Brownfield	0.10	100	0.10	Run down buildings and poorly maintained space - unsure of use. Could be used in conjunction with site 14 as a community use such as a sports area or residential.
C16	Cardigan	JHLA West Cardigan	Greenfield	23.24	80	18.59	Huge JHLA site, mostly agricultural land with fire station and council depot - development begun in areas
C17	Cardigan	Llwynpiod, next to new build	Greenfield	0.14	100	0.14	Small rubble plot from new build, but possibly the garden for the new build
C18	Cardigan	JHLA Erw Wen	Greenfield	0.52	90	0.47	Partially built JHLA, land remaining to the North
C19	Cardigan	JHLA NE Heol Bedw	Greenfield	1.84	80	1.47	JHLA/UDP allocated - good housing land
C2	Cardigan	Tenby Road North	Greenfield	0.10	100	0.10	Poorly maintained small green/open space. Sloping
C21	Cardigan	Sheep Field A487	Greenfield	0.58	90	0.52	Sheep Field paralel to main road, ideal for housing
C22	Cardigan	Teifi Parc Business Park	Greenfield	22.25	80	17.80	New business park already under employment allocation, but potential for anything on the remainder
C23	Cardigan	Disused Scout Hut and vacant land	Brownfield	0.15	100	0.15	Old Scout hut and scrub, but very narrow and poor access. Housing Potential
C24	Cardigan	Old Garage, Strand	Brownfield	0.04	100	0.04	Garage on river front with very narrow and poor access. Potential for housing
C25	Cardigan	Royal Mail Sorting Office, Pont-Y-Cleifion	Brownfield	0.09	100	0.09	Sorting Office
C26	Cardigan	Afon Teifi - River edge around old mart si	Brownfield	2.44	80	1.95	A mixed use allocation. Reasonably buoyant employment area that could be subject to improvement or redevelopment subject to vacancy. Floodplain location means that the site is not suitable for residential uses.
C27	Cardigan	Aberteifi Quays	Brownfield	0.76	90	0.68	A mixed use allocation. Mixed and some poor quality uses that could be subject to improvement or redevelopment. Floodplain location means that the site is not suitable for residential uses.
C3	Cardigan	Market Street Yard	Brownfield	0.08	100	0.08	Poorly maintained yard with bits of scrap
C4	Cardigan	Dol-Werdd Field	Greenfield	3.37	80	2.69	Mowed field (Agriculture), sloping with no apparent current use. Sloping nature prefers housing to sports pitches, but housing and community use could be combined.
C5	Cardigan	Garage, Greenfield Square	Brownfield	0.06	100	0.06	Well used small garage.
C6	Cardigan	Furniture Shop, Greenfield Square	Brownfield	0.03	100	0.03	Unused old poor quality furniture shop.
C7	Cardigan	Power tools shop and derelict yard, St Marys St	Brownfield	0.33	100	0.33	A predominantly derelict yard with one small tool shop (J Gerlait Davies and Son)
C8	Cardigan	TM Daniels, Morgan Street Garage	Brownfield	0.03	100	0.03	Garage. Location good for housing. Opens itself also to the possibility of flats over shops.
CE1	Cardigan	Neuaddwen Plot 1	Greenfield	3.16	80	2.53	Greenfield site. Potential for Emp/Comi development associated with adjacent uses (C22). Access off Parc Teifi.
CE2	Cardigan	Neuaddwen Plot 2	Greenfield	0.65	80	0.52	Greenfield site. Potential for Emp/Comi development associated with adjacent uses (C22). Access off Parc Teifi.
CE3	Cardigan	Neuaddwen Plot 3	Greenfield	0.92	80	0.74	Greenfield site. Potential for Emp/Comi development associated with adjacent uses (C22). Access off Parc Teifi.
CE5	Cardigan	East Felinban	Greenfield	2.73	80	2.18	Greenfield site adjacent to C19. Site offers potential for natural Resi growth of town boundary. Access off Heil Felin Newyd.
CE8	Cardigan	Land bounded by New Mill Road	Greenfield	2.73	80	2.18	Add site - boundary requested
L11	Lampeter	Maes-Y-Deri Open Space	Greenfield	0.77	90	0.69	Public Open Space. Site appears underused as POS and offers potential for Resi development. Access off Maes-y-Deri.
L12	Lampeter	Poorly used backyards by Somerfield	Brownfield	0.12	100	0.12	Brownfield site offering potential for mews type Resi development. Site ownership potentially problematic.
L13	Lampeter	Brynyr Eglwys Pasture	Greenfield	1.23	80	0.98	Large greenfield site with War Memorial to south East. Site offers potential for mixed use development of Resi and Community uses. Design would need to consider existing setting. Undulating site. Allocated in UDP for Community uses.
L14	Lampeter	Jewsons, Station Terrace	Brownfield	0.16	100	0.16	Currently in use as Jewsons Yard. Site in C2 floodplain. Potential for Emp uses. Site identified in regeneration study. Access of Station Terrace.
L15	Lampeter	Royal Mail Sorting Office, Station Terrace	Brownfield	0.29	100	0.29	Currently in use as Royal Mail Sortiing Office. Access of Station Terrace.
L16	Lampeter	Danny Williams Haulage Yard, Station Terrace	Brownfield	0.28	100	0.28	Currently in use as Haulage Yard. Site sutiable for Emp uses. Access off Station Terrace. Site identified in regeneration study.

L17	Lampeter	Gwil Jones a'I Febian, New Holland Yard	Brownfield	0.57	100	0.57	Brownfield site identified in regeneration study. Site offers potential for Emp use development. Access off
L18	Lampeter	Vacant Land (adj. New Holland)	Brownfield	1.33	85	1.13	Site identified in regeneration study.
L19	Lampeter	Forest Road Field	Greenfield	0.57	90	0.51	Greenfield site currently used as pasture land. Potential for Resi development. Access off A485.
L1a	Lampeter	JHLA Falcondale Drive	Greenfield	1.14	80	0.91	Greenfield site identified in Lampeter JHLA study. Site offers potential for significatn Resi development. Access would require demolition of unit along mian frontage highway (Pontfaen Road).
L1b	Lampeter	JHLA Falcondale Drive	Greenfield	1.04	80	0.83	Greenfield site identified in Lampeter JHLA study. Site offers potential for significatn Resi development. Access would require demolition of unit along mian frontage highway (Pontfaen Road).
L20	Lampeter	ATS Buildings, North Road	Brownfield	0.27	100	0.27	Currently in use as ATS garage. Site offers potential for Resi development in a prominently residential area. Likely owner would require relocation. Access off A482.
L21	Lampeter	Old School and Derelict Buildings, Bryn Road	Brownfield	0.66	95	0.63	Army Cadets Hut. Brownfield site identified in regeneration study. Potential for Resi and/or Mixed Use development. Access off Bryn Road.
L23	Lampeter	DSA Centre, Pontfaen Road	Brownfield	0.43	100	0.43	Existing office development. Site identified in regeneration study and offers significant potential for redevelopment of higher density office development. Site currently only one storey.
L24	Lampeter		Greenfield	0.93	90	0.84	Add site - resi capacity reduced to account for flooding over part of the site.
L5	Lampeter	Bus Depot	Brownfield	0.13	100	0.13	Currently in use as Bus Depot. Brownfield site offering potential for Resi redevelopment.
L6	Lampeter	Various Units	Brownfield	0.27	100	0.27	Brownfield site currently occupied by a number of Emp uses.
L7	Lampeter	J&E Woodworks and Environment Agency	Brownfield	0.39	100	0.39	A somewhat remote location with good access. Sequentially difficult for anything other than housing
L9	Lampeter	JHLA Brongest	Greenfield	0.95	90	0.85	Pasture land idenitifed in Lampeter JHLA Study. Potential for Resi development.
LE1	Lampeter	A482 SE Lodge Wood	Greenfield	2.82	80	2.26	Large strategic site with Resi development potential. Design would need to consider existing woodland setting. Access off A482. No flood risk.
LE2	Lampeter	Maesycoed Infill	Greenfield	6.14	80	4.91	Large undulating site with potential for sympathically designed Resi development. Site presents natural infill site in residential area. Access potential from Maes-y-Deri. No flood risk.
LE3	Lampeter	A485 North Lampeter	Greenfield	1.80	80	1.44	Large infill site with potential for Emp uses. Good access of A486. No flood risk. Site would present a natural infill extension of the urban settlement boundary.
LE4	Lampeter	North Ffynon Bedr	Greenfield	3.27	80	2.62	Large greenfield site adjacent to site L1. Linkage potential evident. Site presents opportunity for Resi development within an existing residential area. No flood risk. Potential access off Ffynon Bedr.
LE5	Lampeter	Llanwnen Road west of Poontfaen & play	Greenfield	4.39	80	3.51	Large extension across playing field and sequentially remote from urban area. Developable but would result in poor urban form
Ll1	Llandysul	Church Street Slope	Greenfield	0.54	90	0.48	Pasture land. Very steep site, potential for Resi development, likely to require platform modelling. Potential access of Church Street.
Ll10	Llandysul	JL Jones Cash & Carry, New Road	Brownfield	0.09	100	0.09	Old Gwasg Gomer site. Allocated in UDP for Mixed Use scheme.. Site also idenitified in regeneration strategy for POS, community space. Site has potential for retail led development and/or community environmental project.
Ll11	Llandysul	Small Garages, High Street	Brownfield	0.02	100	0.02	Small brownfield site occupied by garages. Potential for Resi infill development.
Ll3	Llandysul	Field, Heol-Y-Gilfach	Greenfield	2.76	80	2.20	Greenfield site. Existing UDP Community allocation occupies northern section of site. Identified in regeneration study for Educational uses. Site offers potential for mixed use development comprises community use with potential for residential element. Access off Heol-y-Gilfach.
Ll5	Llandysul	Field 2, Heol-Y-Gilfach	Greenfield	0.17	100	0.17	Incidental green open space. Potential for Resi infill development. Undulating site. Access off Heol-y-Gilfach. Site could be incorporated into development of Ll3.
Ll6	Llandysul	JHLA off Heol-Y-Gilfach	Greenfield	2.35	80	1.88	Greenfield site consisting of mature wooded area and hedgerows. Site allocated in the UDP and identified by Llandysul JHLA study. Potential for Resi development with appropriate landscaping. Access potential from Bridge Street..
Ll7	Llandysul	Llyn Y Fran Infill	Greenfield	0.09	100	0.09	Empty plot. Site presents natural infill site for single Resi development.
Ll8	Llandysul	JHLA Llyn Y Fran East	Greenfield	3.97	80	3.18	Greenfield site. Site allocated in the UDP and identified by Llandysul JHLA study. Potential for Resi development with appropriate landscaping. Access off Llyn Y Fran.
Ll9	Llandysul	JHLA Llyn Y Fran West	Greenfield	4.01	80	3.21	Large greenfield site. Site allocated for housing in UDP and identified by Llandysul JHLA study. Potential for Resi development with appropriate landscaping. Access off Llyn Y Fran.
T1	Tregaron	Tregaron Hospital	Brownfield	0.97	95	0.92	Tregaron Hospital. Site allocated in UDP for Community uses. Potential for redevelopment related to exisiting hospital site.
T10	Tregaron	Shed North, Station Road	Brownfield	0.61	95	0.58	Greenfield site identified within Tregaron regeneration strategy as potential location for relocation of existing garage sites within centre. Offers potential for Emp uses. Access off Station Road.
T11	Tregaron	Industrial & Commercial Units, Station Road	Brownfield	4.60	85	3.91	Industrial and Commerical Units. Large site suitable for Mixed Use redevelopment. Potential future uses include Resi and Emp. Landscape buffering would need to considered. Access off Station Road.
T12	Tregaron	Tregaron Fields West	Greenfield	5.53	80	4.42	Greenfield site identified within UDP for Mixed Use allocation. Site also identified by Tregaron JHLA. Presents potential for community uses.
T13	Tregaron	J.Jenkins & Sons Yard, Station Road	Brownfield	0.04	100	0.04	Empty plot currently used for car storage. Site presents potential Resi infill site. Identified within Tregaron regeneration strategy.
T14	Tregaron	Station Road Plot	Greenfield	0.09	100	0.09	Greenfield plot with chicken hut. Site presents potential Resi infill site.

T15	Tregaron	Sheep Field Opposite School	Greenfield	0.69	90	0.62	Pasture land adjacent to Church yard and Cemetery. Site presents opportunity for small scale Resi development.
T16	Tregaron	Garage site	Brownfield	0.10	100	0.10	Currently in use as garage. Site is identified within Tregaron regeneration strategy. Site offers potential for small Resi or Emp infill development.
T17	Tregaron	Building and yard adjacent to Talbot Hotel	Brownfield	0.04	100	0.04	Site identified within Tregaron regeneration strategy. Potential for small scale Mixed Use infill development with Resi element.
T18	Tregaron	Car storage area adjacent museum and c	Greenfield	0.05	100	0.05	A small site. housing would result in marked environmental improvement over current uses / condition
T4	Tregaron	JHLA School	Greenfield	0.63	90	0.56	Greendfield site allocated in UDP for Resi and identified in Tregaron JHLA study. Potential for Community and/or Resi uses. Undulating site.
T5	Tregaron	Afon Brennig Fields	Greenfield	1.98	80	1.58	Scrub land. Site allocated in UDP for Community uses. C2 flood zone. Site has potential for Community uses subject to EA regulation.
T6	Tregaron	Tregaron Fire Station	Brownfield	0.22	100	0.22	Currently in use as Fire Station. Site offers potential for Resi development. Prominent location on Dewi Road. Access would need to consider appropriate visibility splays.
T7	Tregaron	J.Jenkins & Sons Garage, Dewi Road	Brownfield	0.20	100	0.20	Currently in use as car maintainance garage. Site is situated in C2 flood zone. Part of the site within town centre boundary. Potential for housing limited, Community uses more suitable.
T8	Tregaron	Recycling Centre	Brownfield	1.08	85	0.92	Recycling centre. Site offers potential for Mixed Use redevelopment of Resi, Comi and Emp uses. Strategic position within Tregaron. Consideration would need to be given to the relocation of recycling facility.
T9	Tregaron	Playing Field Opposite Recycling Centre	Greenfield	0.50	90	0.45	Playing Fields. Site appears underused. Presents possible site for Resi and/or Community development.

Ceredigion County Council: Urban Capacity & Urban Extension Study

Table F2 - Schedule of Sites Discounted from Consideration for Development

Site Ref:	Town	Site Name	Area (Ha)	Reason Discounted
A26	Aberystwyth	Llwynffynnon 1908	0.29	Unsuitable - large houses serviced off substandard road
A27	Aberystwyth	Land South of Pendre	2.68	Unsuitable. C2 floodplain
A28	Aberystwyth	Former Hotel and Car Park	0.35	Unavailable. Planning permission granted for residential.
A35	Aberystwyth	Car Park, Boulevard Street	0.53	Unavailable. No plans to re-locate Park and Ride
A40	Aberystwyth	Rhos Hender Green	0.34	Unsuitable. Important Green Space
A45	Aberystwyth	Hospital	2.80	Unavailable. Aberystwyth Hospital
C9	Cardigan	Royal Mail Sorting Office, Pont-Y-Cleifion	0.35	Unavailable. Post sorting centre in ideal location.
C13	Cardigan	Members Club, Napier Street	0.21	Unavailable. Required for current use
C20	Cardigan	Feidr Henffordd Field (adj. Tesco)	0.57	Unsuitable. Loss of allotments resisted.
L1	Lampeter	JHLA Falcondale Drive	3.27	Pasture partly lying in C2 Floodplain. No Apparent Access
L2	Lampeter	Sewage Works Field	2.90	Unsuitable. In floodplain
L3	Lampeter	Sub Station Field	0.42	Unsuitable. Poor access
L4	Lampeter	Small Sewage Works Field	0.33	Unsuitable. In floodplain
L8	Lampeter	Pont Brongest Yard	0.43	Unavailable. Subject to recent investment
L10	Lampeter	WD Lewis, Bridge Street	0.23	Unavailable. Subject to recent investment
L22	Lampeter	Unused building, Bryn Road	0.05	Unsuitable - retain for community use
Ab1	Aberaeron	Beach Parade Field	1.78	Unsuitable. Loss of important green space
Ab2	Aberaeron	Heol Yr Odyn Triangle	0.07	Unsuitable. Loss of important green space
Ab3	Aberaeron	Jewsons Yard, Bro Allt-y-Graig	1.01	Unavailable. Currently well used. Houses are currently being built on area unaffected by C2 Floodplain
Ab9	Aberaeron	Memorial Hall, South Road	0.18	Unavailable. Well used Hall
Ab10	Aberaeron	Derelict Yard and Building, South Road	0.18	Unavailable. Telephone Exchange
T2	Tregaron	Dewi Road Field, Opposite Hospital	0.92	Unsuitable. Sequentially poor
T3	Tregaron	Tregaron Field North, B4343	2.70	Unavailable. Retain for current use
Ll2	Llandysul	Musical Building	0.40	Unsuitable and unavailable. Harp manufacturers.
Ll4	Llandysul	Central Pastures	9.60	Unsuitable. Important setting to conservation area
CE4	Cardigan	NE Bron-Y-Dre	1.50	Unsuitable. Prominent site overlooking estuary
CE6	Cardigan	West Llwynpiod	1.34	Unsuitable. Inspector viewed existing built form here as sporadic dev in open countryside
CE7	Cardigan	South Gotrel Farm	2.61	Unsuitable. Inspector viewed existing built form here as sporadic dev in open countryside

Appendix G
Housing Market Baseline

20 Pages

Part G – Ceredigion County Council – Urban Capacity and Urban Extension Study: Housing Market Baseline

1. Purpose of this Baseline Study

This baseline study considers the current housing market situation in Ceredigion. It has two main functions:

- To provide a statement of the current position of the housing market. The study considers both supply and demand providing a key basis for the discounting process;
- To provide underpinning for the site survey and site sampling process which is required as part of the discounting process. The baseline provides useful background information on development trends, selling prices, market change and sub market performance.

The study comprises two distinct parts:

- Part 1 - Quantitative Statement: This comprises a robust statement of the recent performance of, and trends within, the local housing market. This draws primarily upon data obtained from the HM Land Registry and informs the consultation process with developers, agents and other property market stakeholders undertaken under Part 2;
- Part 2 - Stakeholder Consultations: The degree to which sites come forward depends upon the willingness of developers and other stakeholders and is often based upon experiences, perceptions, aspirations and the reading of trends within the housing market. Part 2 reports upon the findings of a series of structured interviews with developers aimed at establishing assumptions to inform the economic viability of sites under consideration.

2. Part 1 - Quantitative Statement

2.1 Analysing Sub-markets

It is important to recognise that housing markets do not fit neatly around administrative local authority borders. A key objective of this housing market analysis is to ensure that it as relevant to the study area as possible, taking local and where possible, neighbourhood distinctions into account.

This analysis focuses upon house prices and transactions at the postcode sector level provided by a bespoke data set purchased from HM Land Registry. Ceredigion is covered by two postcode areas: SY (Shrewsbury) covering the north of the County including Aberystwyth and Tregaron and SA (Swansea) covering the south including Aberaeron, Cardigan, Lampeter and

Llandysul. Within these areas, postcode sectors equate to the first 5 digits within the postcode hierarchy for instance SY23 2 or SA44 4.

Postcode sectors are small enough to distinguish sub markets from each other, but large enough to ensure that a large enough sample of transactions provides a robust reflection of dwelling prices. The majority of sectors are 'self-contained' and relate to a specific town and its rural hinterland, thus the data reported for each post-code sector does not relate exclusively to the town included within it. Additionally, it should be noted that a few sectors (for instance SA44 4 containing Llandysul) also cover areas outside the County. Table 1 sets out the relevant sectors for the County with the six main towns denoted which **Plan 1** shows this relationship spatially.

Table 1 Settlements related to Postcode Sectors

Postcode Sector	BROAD LOCATIONS
SY20 8	Includes Furnace
SY24 5	Includes Borth & Tal-y-Bont
SY23 3	Includes Capel Bangor & Ponterwyd
SY23 1	Includes **Aberystwyth** North
SY23 2	Includes **Aberystwyth** South
SY23 4	Includes Llanfarian & Cnwch Coch
SY23 5	Includes Nebo & Llanrhystud
SY25 6	Includes **Tregaron** & Llangeitho
SA46 0	Includes **Aberaeron**
SA48 8	Includes Trefilan & Llanfair
SA48 7	Includes **Lampeter** & Cribyn
SA47 0	Includes Oakford & Llanarth
SA45 9	Includes New Quay
SA44 6	Includes Llangranog & Llwyndafydd
SA44 4	Includes Capel Dewi & Talgarreg (including **Llandysul**)
SA44 5	Includes Henllan & Rhyslewis
SA40 9	Includes Llanwenog & Gorsgoch
SA38 9	Includes Brongest & Cwm Cou
SA43 1	Includes **Cardigan**
SA43 2	Includes Llandygwydd & Blaenporth
SA43 3	Includes **Cardigan** South

NB: Unshaded areas equate to the study towns

2.2 Approach to Market Analysis

The market analysis looks at both the second hand market and the market for new housing. The second hand market highlights the structural differences in demand for specific locations whilst data on new build indicates where the market is picking up development opportunities.

This study considers the overall level of prices in the major (second hand) market before looking at market structure and recent changes in the pattern of house prices. For the new market, the price of new build flats (a key source of new supply) and overall levels of private sector delivery are analysed.

The analysis uses HM Land Registry data which has been aggregated for the calendar years 2006 and 2007 and where appropriate, this data has been indexed forward to 2008 using Land Registry data. HM Land Registry data is held as a very robust data source for this type of analysis.

2.3 The Existing or Second Hand Market

2.3.1 Role of the Second Hand Market

The existing or second hand market is important since to a large extent it is the springboard from which new development stems. If the price of existing housing is low, or close to development costs, then developers cannot viably develop sites and hence cannot offer land owners sufficient return for the latter to want to sell their sites. In some cases sites will come forward at low value, but it must be remembered that land will only come forward for housing if the residual value (the difference between site revenue and site cost) is greater than the existing use value. Whilst some sites (e.g. green field agricultural) have very low existing use, others (e.g. those with commercial use) have high existing use values and even a permission for a housing site with strong demand may not entice the land owner to sell.

We assume in this and related analysis that in most locations, the existing housing market will be the starting point by which developers set prices for new build. New build will normally carry a price premium for the additional 'attraction' of a new home to buyers. This will vary by house type but a ballpark range for the premium is 10% to 15%.

In some cases developers will be able to set prices more independently of the second hand market, although in current market conditions this looks increasingly unlikely. The best example of developers create a new independent market in recent years is perhaps the trend to apartments in city and town centres.

2.3.2 Average Prices Across the County

The second hand market is the most significant in determining prices since it has a much higher level of transactions; this market also largely determines housing affordability in a given area.

Figure 1 shows the average price of housing at the postcode sector level across Ceredigion. The average price is not necessarily indicative of the relative desirability of each of the areas since it is highly influenced by the mix of the housing stock. Clearly, where detached housing is the mainstay of the market, then average prices will, all other things being equal, be higher than in areas where terraces and flats predominate. However, the average price is an important marker in understanding the relative affordability of neighbourhoods and areas.

Figure 1 **Average House Prices by Postcode Sector**

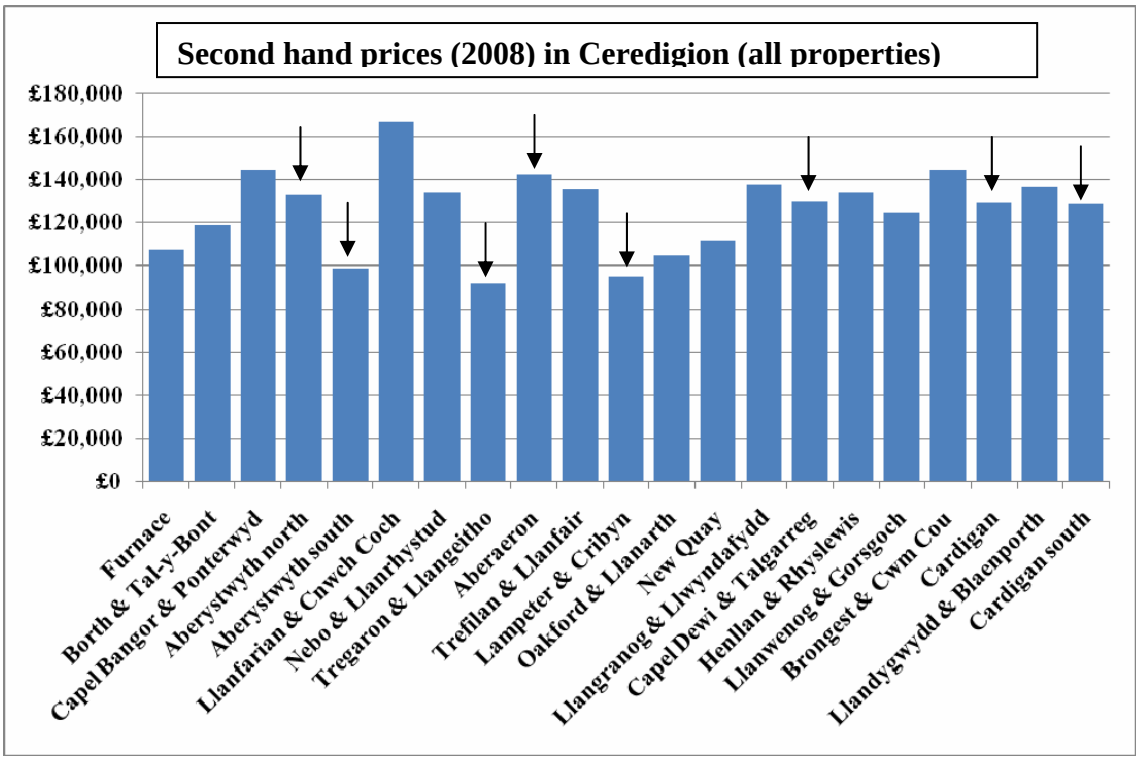


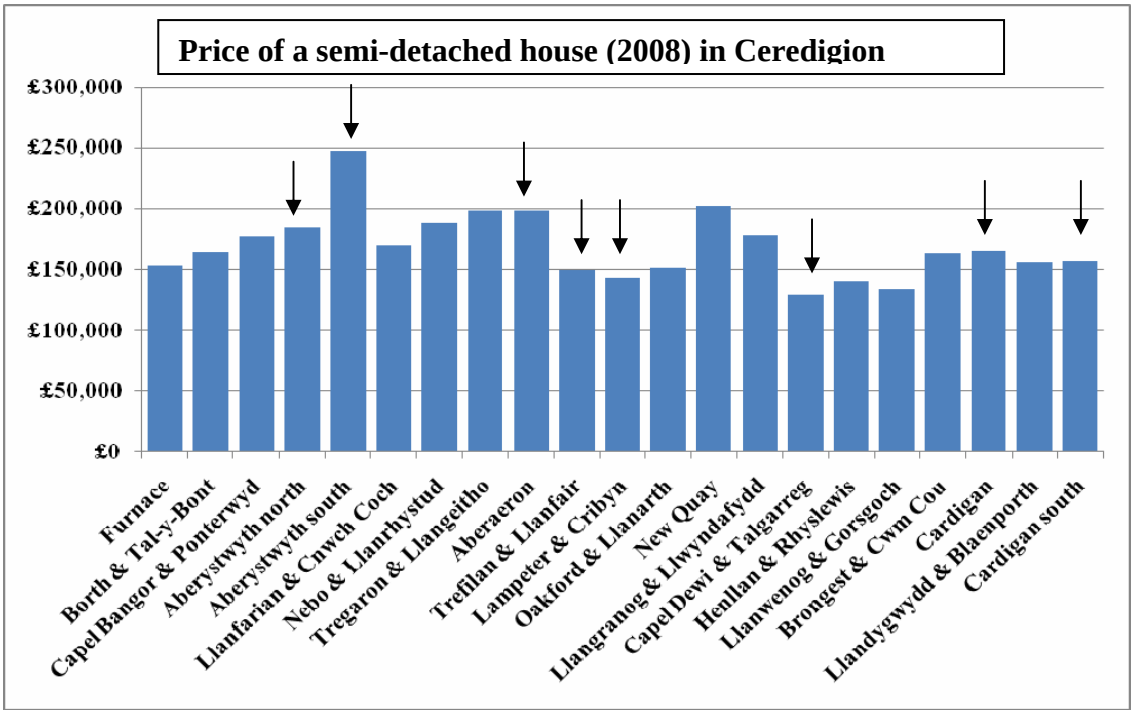
Figure 1 shows that high values are found in both rural and urban areas (urban areas identified by arrows in the chart). The mix of dwelling types offered in the housing stock clearly affects overall prices and therefore it is not easy to define the areas of highest and lowest demand. We comment on this in the following sections.

2.3.3 Locational Demand: Looking at Comparable House Types

The data in **Figure 2** and **Figure 3** provide even more significant indications of where housing demand is high and low. **Figure 2** compares the price of semi detached housing (as a standard unit) across the different postcodes with **Figure 3** providing the same for detached houses.

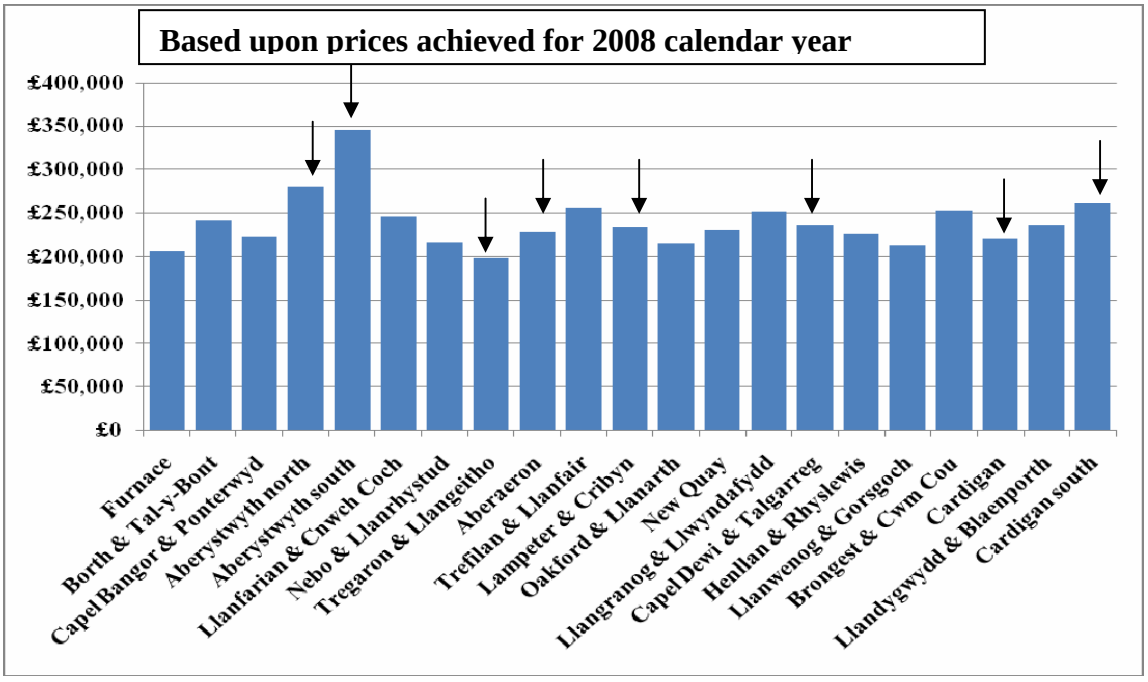
In both cases, South Aberystwyth stands out as the most expensive location in the County. Elsewhere the nature of demand varies according to the town considered. For instance, semi-detached homes appear highly prized in Tregaron and Aberaeron but achieve particularly low price levels in Lampeter and, particularly, Llandysul.

Figure 2 **Average Prices for Semi-Detached Houses**



Detached properties command high prices in South Cardigan as one of the main urban areas of the County.

Figure 3 **Average Prices for Detached Houses**



Looking at a different house type confirms a pattern of pricing with coastal areas generally having stronger prices than those in the rural hinterland.

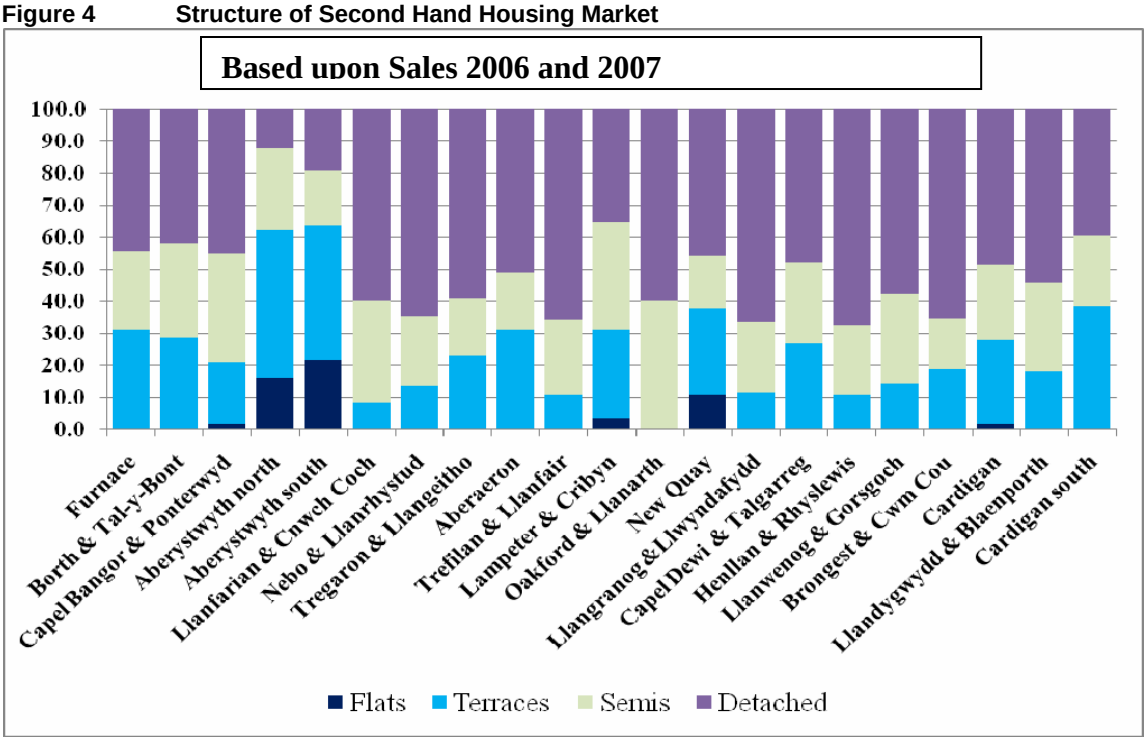
2.4 Structure of the Housing Market in Ceredigion

The structure of the existing market is important to a large extent in determining the nature of new development, particularly density and mix. Unless new development sites are to depart radically from the 'tone' of the existing neighbourhood, then what is already there will set the basis for the development of new housing sites.

Figure 4 highlights the significant extent to which the supply of housing through the market County-wide relies on larger detached housing. In over 40% of sub markets (postcode sectors) detached housing makes up in excess of 50% of the stock.

There is a very different mix of stock in the study towns where pressures on land are greater. In Aberystwyth there is a relatively low stock of detached homes (less than 20%), whilst the town has a substantial stock of flats (circa 20%). This is unique amongst the towns although the small rural settlement of New Quay also has a stock of flats which could be described as being 'significant'.

Figure 4 **Structure of Second Hand Housing Market**



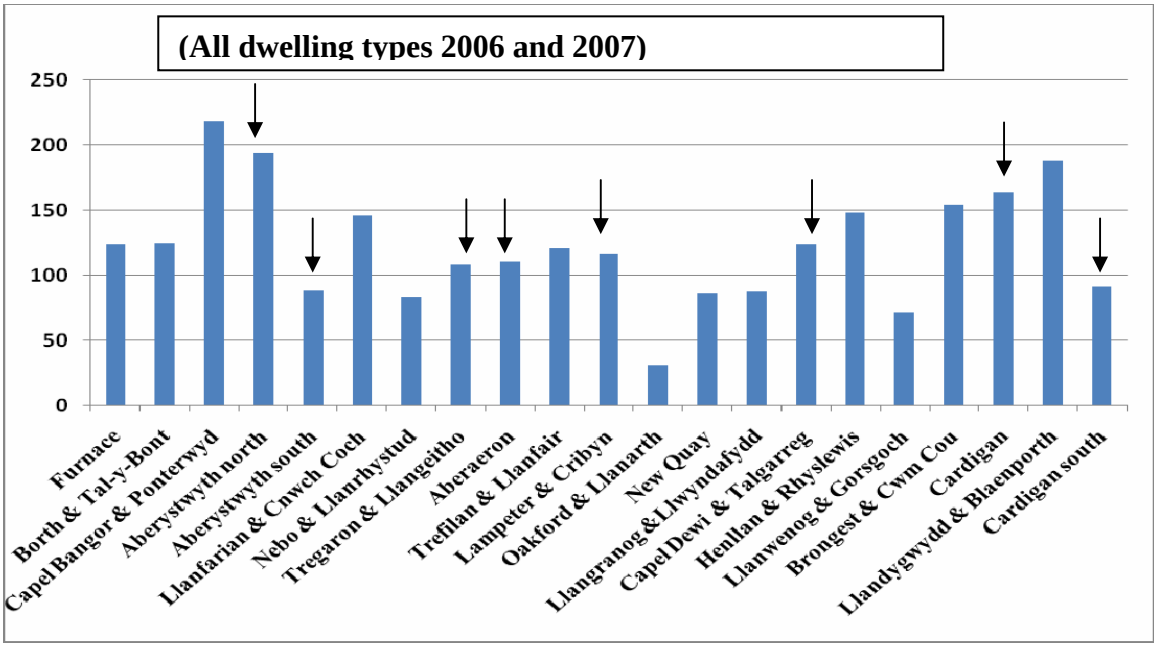
Terrace houses make up a significant proportion of the stock, as may be anticipated, in the study towns especially in Aberystwyth, Aberaeron and Cardigan.

2.5 Market Activity

To help balance housing markets (new supply against the existing stock) it is helpful to look at the areas where sales volumes are high and low. **Figure 5** shows a high variance between areas.

During 2006 and 2007, and using combined data for all dwelling types, the most striking feature is the number and extent of main growth locations outside the study towns. The level of sales in rural sectors Capel Bangor and Ponterwyd area (218) and Llandygwydd & Blaenporth (188) are broadly comparable to those in Aberystwyth (281) and Cardigan (254); these are remarkable where compared with the other towns of Lampeter, (116) and Aberaeron, Llandysul and Tregaron (just over 100 each). Although to an extent, these patterns are artificial being dependent upon where the postcode sectors 'fall' and the incidence and location of the housing stock, it is evident that the County is as reliant on its rural settlements as it is for its urban ones.

Figure 5 Sales volumes in Ceredigion



2.6 Trends in new build in Ceredigion

Figure 6 shows that new build sales in Ceredigion have in recent years been low; there were just 57 sales in 2006 and 2007 and it is probably fair to assume that sales in these years broadly mirror the pattern of starts in the previous years.

The patterns of sales were sporadic with the greater majority of locations seeing no new build activity at all. Development within the towns is exceptionally low; there were only 4 flats sold in the southern part of Aberystwyth and 5 detached houses in Cardigan.

The highest number of new build sales (25 units or 44% of all sales) occurred in the Capel Bangor and Ponterwyd area. Although these sales included a range of dwelling types, 17 were of semi detached homes.

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Figure 6 **New build housing in Ceredigion**

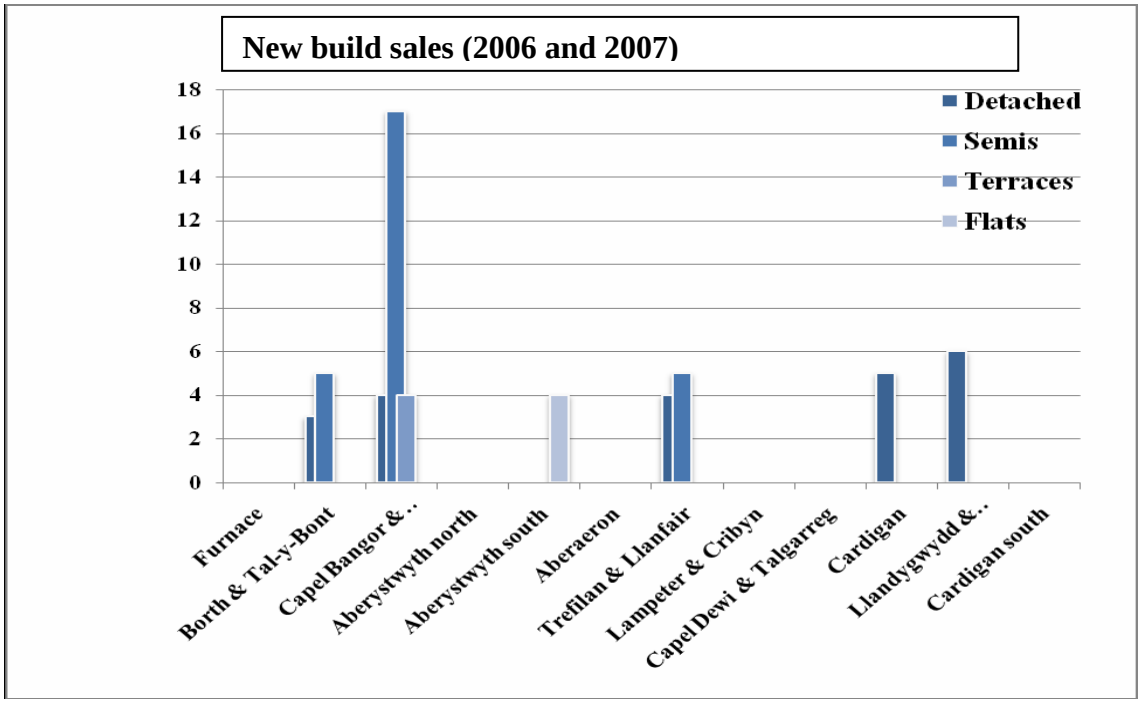
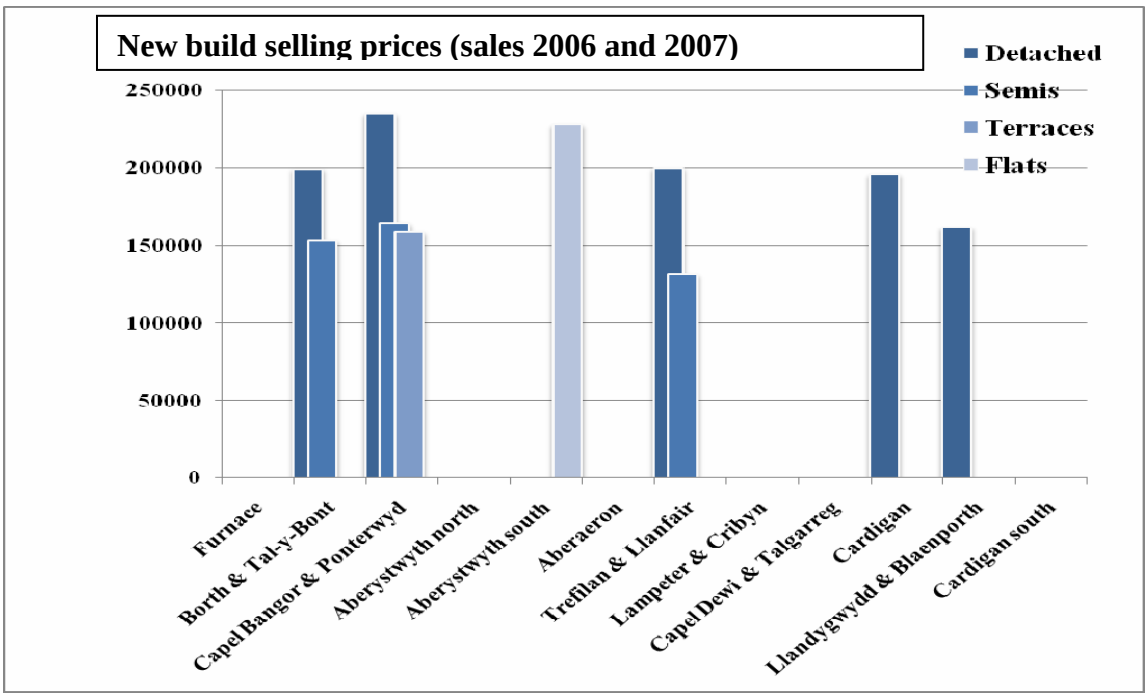


Figure 7 **New build selling prices in Ceredigion**

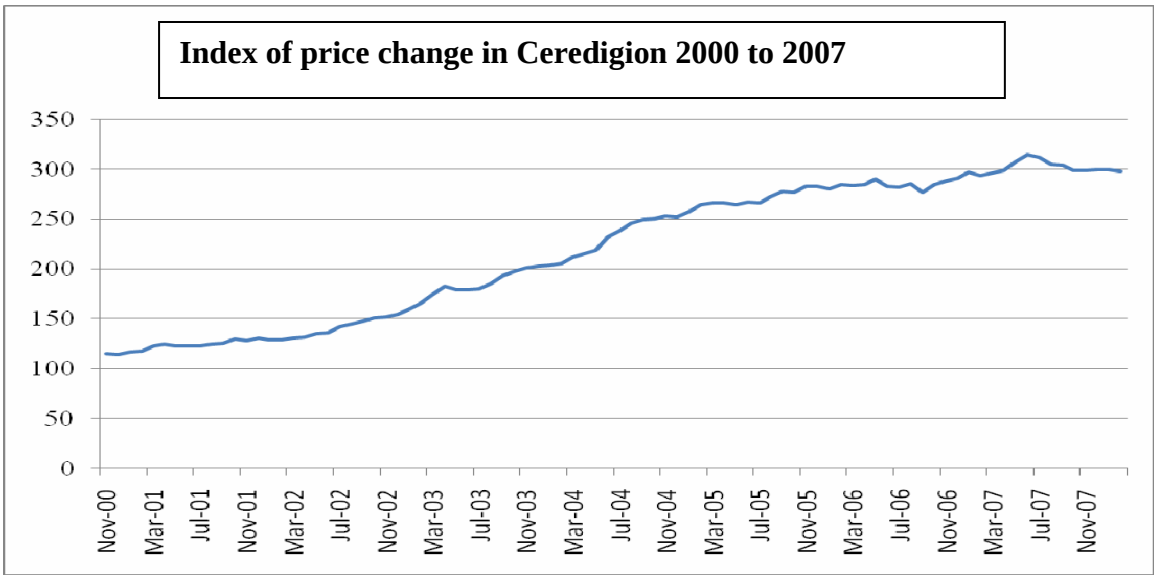


2.7 Conclusions to Part 1

This analysis suggests that the development economics within the housing market in Ceredigion are fairly bouyant. Critically, most areas would appear to be able to generate sales values for new build that 'clear' development costs, leaving a reasonable residual value to encourage land oners to bring sites forward.

Prices have grown strongly over the past 7 to 8 years. **Figure 8** (drawn from the HM Land Registry) shows that prices have more than doubled since 2000. This probably means that sites which were previously unviable in 2000 are now able to come forward. This is important in terms of predicting the deliverability of specific sites and sources of supply.

Figure 8 Index of Price Change in Ceredigion



There may be some relationship between the low levels of new build and the general increase in prices in Ceredigion. Restricted supply may impact on price levels generally although it is difficult to unhinge this expectation from general inflation in house prices caused by a generally improving macro economic climate which was the case until fairly recently.

Clearly Ceredigion has a varied housing market. The analysis by postcode sector shows that the coastal locations are generating the highest values generally within the more urban areas with a wider mix of housing stock.

Developing a range of units in new developments in these locations should, on the face of it, be easier than elsewhere. However, existing use values are also likely to be higher in the urban areas. Therefore the achievability of sites will need to be seen in wider context of local property markets.

Finally, it is also clear that, in common with other locations in England and Wales, the housing market is weakening. **Figure 8** suggests that this has been happening since the middle of 2007.

The implications of a weakening housing market may not be significant given the scale of house price inflation since 2000. However, the ability for the Council to deliver housing with significant levels of Section 106 planning obligations may well be compromised should

concerns over the housing market remain and given the need for developers to protect margins based upon the yield of consents some years hence.

3. Part 2 - Stakeholder Consultations

3.1 Purpose and Consultees

Part 2 seeks to validate understanding of development issues and gather the views and experiences of local developers and agents so that more accurate assessments of site yield and development mix can be included in the discounting process. More specifically it helps to identify the following:

- Areas where the housing market is weak and is less likely to support housing development;
- Areas where the market is not especially strong but where development is possible subject to site characteristics and public intervention to address these; and
- Areas where the housing market is strong and development is usually viable except where exceptional costs are involved.

The findings from consultation with stakeholders will help to inform the overall capacity assessment as they bring a 'reality check' to housing market and deliverability questions.

Stakeholders interviewed as part of this consultation exercise are as follows and the consultant team would like to than them for their time.

Table 2 Consultees

Interviewee	Company
Rhian Davis	John Francis, Cardigan
Tania Rose Dulnell	West Wales
Jeremy Ellis-Jones	Merlin Homes
Ian Jones	Rheiddol Homes
Iestyn Leyshon	Lloyd Herbert and Jones, Aberystwyth
Sarah Williams	Raw-Rees and Co, Aberystwyth

3.2 The housing market in Ceredigion

There is a broad split in the housing market in Ceredigion distinguishing between the generally higher value coastal strip and the inland rural areas. The attractive coastal towns of Aberystwyth, Aberaeron, and Cardigan provide centres of employment and have a sound tourist base. One respondent stated that prices begin to decline significantly three miles inland.

One agent mentioned a 'magic triangle' (for housing demand) which falls between Aberystwyth, Aberaeron and Lampeter. This is seen as a desirable and accessible location.

The rural areas vary significantly in terms of demand. Much of Ceredigion is very remote and this constrains prices. Some locations (specifically Tregaron and also Lampeter were mentioned) are very slow and new build homes can sometimes take more than a year to sell. The market inland is dominated by larger detached houses and by working farms.

Our focus is therefore very much on Aberystwyth and Cardigan as set out below.

3.3 Focus on Aberystwyth

The town has traditionally provided a good range of housing stock for First Time Buyers through to families. A strong investment market has grown up in the town based on the student market and the University. This market is seen as having good long term 'mileage' as students will still seek to study at Aberystwyth.

The mainstream rented market has weakened however during the past 12 months with landlords in some cases struggling to find tenants. The trend for landlords to convert HMOs (Houses in Multiple Occupation) is also slowing as a result of a perceived worsening in the development economics for converted buildings.

First-Time-Buyers are also finding it difficult to access the market. They need properties under £150,000 and they are 'lucky to find a flat under £170,000 with parking'.

There is a strong and consistent demand for family housing, particularly at the sub £250,000 level. This is an affordable product for this household type and agents reported that developers could quite comfortably target this market, even under current conditions.

There is an over supply of flats in the town. This is not a good time to be developing new flats; re-sales are taking a long while to sell. New build flats are simply too expensive. Agents reported that you can buy a 4 bed terrace house for £180,000, whilst new build 2 bed flats are being marketed for £220,000. This makes them uncompetitive.

3.4 Focus on Cardigan

Cardigan has a strong local market with a good spread of housing stock. Its market benefits from its coastal location. It has good links with Aberporth, which also has strong housing demand. There is expected to be considerable expansion in the employment market at Aberporth and this will impact positively on the market at Cardigan.

In contrast with Aberystwyth, there is virtually no market in flats although where they do come on the market they are 'snapped up'.

There is a division in the housing market defined broadly by the river, with properties to the south being less desirable.

Prices in Cardigan are seen to be competitive; typically £130,000 for a 2 bed terrace; £150,000 for a 3 bed semi and £200,000 for a 4 bed detached. In contrast with Aberystwyth, the town has never had a significant market in flats although where they do come on the market they are 'snapped up'.

Historically there has been a steady market in second homes and retirement homes. This has 'eased off' in the last year as result of the general housing market downturn.

There is a high demand for rented property in the town.

Agents reported that the town lacks quality retail shops although this is not seen to be a significant brake to the local market.

3.5 Current Market Position

Prices have risen dramatically over the last five years with the price of land generally rising faster than house prices. This is now becoming a constraint to new development and builders are presently reluctant to acquire new sites.

Whilst, and in common with the rest of the country, the market is currently weak, agents do not see a significant fall in prices to be needed in order to kick start the market. There is 'nothing catastrophic' happening in the market but more a matter of reduced confidence that is tied to wider national trends and increased activity and confidence elsewhere.

There is no real market for flats in inland locations. Parish councils anticipate low density development and this usually means detached homes.

Stamp duty is a constraint to the market, with vendors and buyers constantly trying to find ways around the thresholds.

3.6 Planning Policy and Land Supply

Developers reported a stagnating housing and land market due in part to the so-called current 'credit crunch' but also due to the increasing burden of planning legislation. Whilst builders who are coming into the market now are generally in a stronger position to take advantage of lower land prices, these are still considered to be, nevertheless, too high. This view should be seen in the context of land values having risen from around £100,000 per acre (around five years ago) to around £700,000 at the current time.

The affordable housing policy position also needs further clarity. High targets have not traditionally been delivered in Ceredigion and the land market has not yet had time to adjust to enhanced requirements. Smaller developers are particularly concerned about the impact of affordable housing on the marketability of new units upon schemes of relatively low gross value.

3.7 The New Build Market

The new build market is dominated by small builders with current volumes insufficient to attract large developers. Small builders tend to be opportunistic and focus not only on house building and to a lesser extent upon commercial and mixed used schemes. All types of development are taken on provided that the margins are sufficient.

The prevailing development economics mean that most locations in Ceredigion are seen as being viable. The main issue for developers relates to volume and the potential pace of sales – this lack of pace expressing itself as a cautious approach that produces small, fragmented schemes over long gestation. The main town of Lampeter was stated to be an 'area' where it is perceived that sales for new build will be slow; one interviewee held a particularly pessimistic view stating that "twenty plots could take up to ten years shift".

Conversely, new build executive housing sells comparatively well in Ceredigion. New developments with a top marker of £400,000 can still pre-sell even in today's market.

In the past the 'Buy-to-Let' market has helped to support some new build schemes although this form of demand is not supported under current market conditions.

3.8 Conclusions

The housing market in Ceredigion has grown strongly in recent years and reports from agents would seem to suggest that the County is perhaps not suffering as badly as the wider national housing markets. House prices are strong enough to support new development and in many instances new schemes should sustain a range of housing mixes and tenures including affordable products.

The main challenge in increasing housing development is the 'culture of supply'. As far as we can tell, there are very few or no major house builders operating in Ceredigion. The current position of low supply of new development is matched by a small number of builders. Smaller developers are not focused on volume and it seems, are prepared to operate opportunistically developing sites for both housing and commercial property. Any step change in land supply would either force these builders to expand or open the market up to a range of non local or larger developers.

New development is small scale, although new forms of development (such as the apartment market in Aberystwyth) have grown in the past five to ten years. This shows that local developers are responsive to market change which is an inherent strength in the supply side for the future.

The findings of the interviews suggest that if higher levels of land were to be released into the market, development would be taken up. There are some locations (eg. Tregaron and Lampeter) where sales rates could be slow, although it is unclear whether this would be because of the nature of developments (e.g. too many large houses to sell) or because of the nature of the location.

If more land were to be released, we would expect in most cases, that developer revenues would exceed costs, encouraging strong site values to be paid for land.

In terms of policy development, much would rest on rates of release as larger sites would put greater demand on physical and social infrastructure and be likely to trigger affordable housing requirements. However, from a fundamental perspective of market economics, we do not see a significant problem for developers; were more land to be released, this may well bring in additional development resources.

The views of consultees on the potential market impacts of additional housing supply suggest that the apartment market is probably the most 'exposed' to additional supply. Smaller, family units would sell well under most conditions.

In our experience however, it is easy to overplay the potential impacts of new build on the second hand market. Nationally house builders have long argued that problems of affordability in the general housing stock result from a lack of supply yet the current (national) housing market situation reveals falling prices at a time when house building rates are also falling. This suggests other factors (most obviously the 'credit crunch' override the builders' hypothesis that lack of affordability is the 'fault' of the planning system for not releasing enough land.

Thus it may be a mistake should policy makers in Ceredigion should resist be 'manoeuvred' into site release to combat affordability issues. Rather, from a housing market perspective, sites

should be released to meet the needs of the local market (developing for 'gaps' in the market) and where possible, to use site releases to maximise Section 106 contributions.

4. Implications for the Study

The findings of this technical note confirm that the housing market in Ceredigion is buoyant enough to support development of sites in most locations. Viability is assured although current market confidence clearly has implications for phasing with short-term supply uncertain. This will serve to exacerbate recent low levels of development activity.

In terms of built form there are buoyant markets for first time buyer and family housing of medium to low density. The market for flats is largely confined to Aberystwyth and is currently very vulnerable to market conditions. Sites suitable to meet this market may be problematic in the short to medium term and, where suitable, alternative uses may be more deliverable. There is some suggestion that there may be an unmet demand for flats in Cardigan although this suggestion is probably insufficient to justify increased densities around the town centre.

In the more remote towns of Lampeter and Tregaron, the development of larger low density family houses would appear to be viable although subject to low demand. Sites suitable for development should realistically reflect this 'tradition'.

5. Key Data Tables

Table 3 Second Hand House Prices (average 2005 and 2006)

Postcode Sector Area	Detached	Semis
Furnace	£207,074	£152,884
Borth & Tal-y-Bont	£241,754	£163,976
Capel Bangor & Ponterwyd	£223,088	£177,490
Aberystwyth north	£280,620	£184,547
Aberystwyth south	£345,595	£247,587
Llanfarian & Cnwch Coch	£246,162	£169,713
Nebo & Llanrhystud	£216,116	£187,631
Tregaron & Llangeitho	£197,843	£197,843
Aberaeron	£227,831	£197,718
Trefilan & Llanfair	£255,197	£149,195
Lampeter & Cribyn	£233,492	£143,269
Oakford & Llanarth	£215,407	£151,195
New Quay	£230,202	£202,535
Llangranog & Llwyndafydd	£252,094	£177,897
Capel Dewi & Talgarreg	£236,079	£128,982
Henllan & Rhyslewis	£225,929	£140,496
Llanwenog & Gorsgoch	£212,941	£133,616
Brongest & Cwm Cou	£253,549	£163,115
Cardigan	£221,456	£164,662
Llandygwydd & Blaenporth	£236,431	£155,400

Source: H M Land Registry

Table 4 Market Structure (2005 and 2006 transactions) (%)

Main Settlement/Area	Detached	Semis	Terraces	Flats
Furnace	0.0	30.9	24.4	44.7
Borth & Tal-y-Bont	0.0	28.2	29.8	41.9
Capel Bangor & Ponterwyd	1.8	18.8	33.9	45.4
Aberystwyth north	16.1	46.1	25.4	12.4
Aberystwyth south	21.6	42.0	17.0	19.3
Llanfarian & Cnwch Coch	0.0	8.3	31.7	60.0
Nebo & Llanrhystud	0.0	13.3	21.7	65.1
Tregaron & Llangeitho	0.0	23.1	17.6	59.3
Aberaeron	0.0	30.9	18.2	50.9
Trefilan & Llanfair	0.0	10.8	23.3	65.8
Lampeter & Cribyn	3.4	27.6	33.6	35.3
Oakford & Llanarth	0.0	0.0	40.0	60.0
New Quay	10.6	27.1	16.5	45.9
Llangranog &Llwyndafydd	0.0	11.5	21.8	66.7
Capel Dewi & Talgarreg	0.0	26.8	25.2	48.0
Henllan & Rhyslewis	0.0	10.8	21.6	67.6
Llanwenog & Gorsgoch	0.0	14.1	28.2	57.7
Brongest & Cwm Cou	0.0	18.8	15.6	65.6
Cardigan	1.8	25.8	23.9	48.5
Llandygwydd & Blaenporth	0.0	18.1	27.7	54.3
South West Ceredigion	54.2	23.6	22.2	0.0

Source: H M Land Registry.

Table 5 New Build Prices (2005 and 2006)

Main Settlement/Area	Detached	Semis	Terraces	Flats
Furnace				
Borth & Tal-y-Bont	£199,000	£152,999		
Capel Bangor & Ponterwyd	£234,854	£164,414	£158,375	
Aberystwyth north				
Aberystwyth south				£227,437
Llanfarian & Cnwch Coch				
Nebo & Llanrhystud				
Tregaron & Llangeitho				
Aberaeron				
Trefilan & Llanfair	£199,487	£131,200		
Lampeter & Cribyn				
Oakford & Llanarth				
New Quay				
Llangranog &Llwyndafydd				
Capel Dewi & Talgarreg				
Henllan & Rhyslewis				
Llanwenog & Gorsgoch				
Brongest & Cwm Cou				
Cardigan	£195,700			
Llandygwydd & Blaenporth	£161,581			
South West Ceredigion	£174,945			

Source: H M Land Registry.

Table 6 Sales (2005 and 2006)

Main Settlement/Area	All Sales	New sales			
		Detached	Semis	Terraces	Flats
Furnace	123				
Borth & Tal-y-Bont	124	3	5		
Capel Bangor & Ponterwyd	218	4	17	4	
Aberystwyth north	193				
Aberystwyth south	88				4
Llanfarian & Cnwch Coch	145				
Nebo & Llanrhystud	83				
Tregaron & Llangeitho	108				
Aberaeron	110				
Trefilan & Llanfair	120	4	5		
Lampeter & Cribyn	116				
Oakford & Llanarth	30				
New Quay	85				
Llangranog &Llwyndafydd	87				
Capel Dewi & Talgarreg	123				
Henllan & Rhyslewis	148				
Llanwenog & Gorsgoch	71				
Brongest & Cwm Cou	154				
Cardigan	163	5			
Llandygwydd & Blaenporth	188	6			

Source: H M Land Registry

Author: Dr Andrew Golland

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Reviewer: John D Hall

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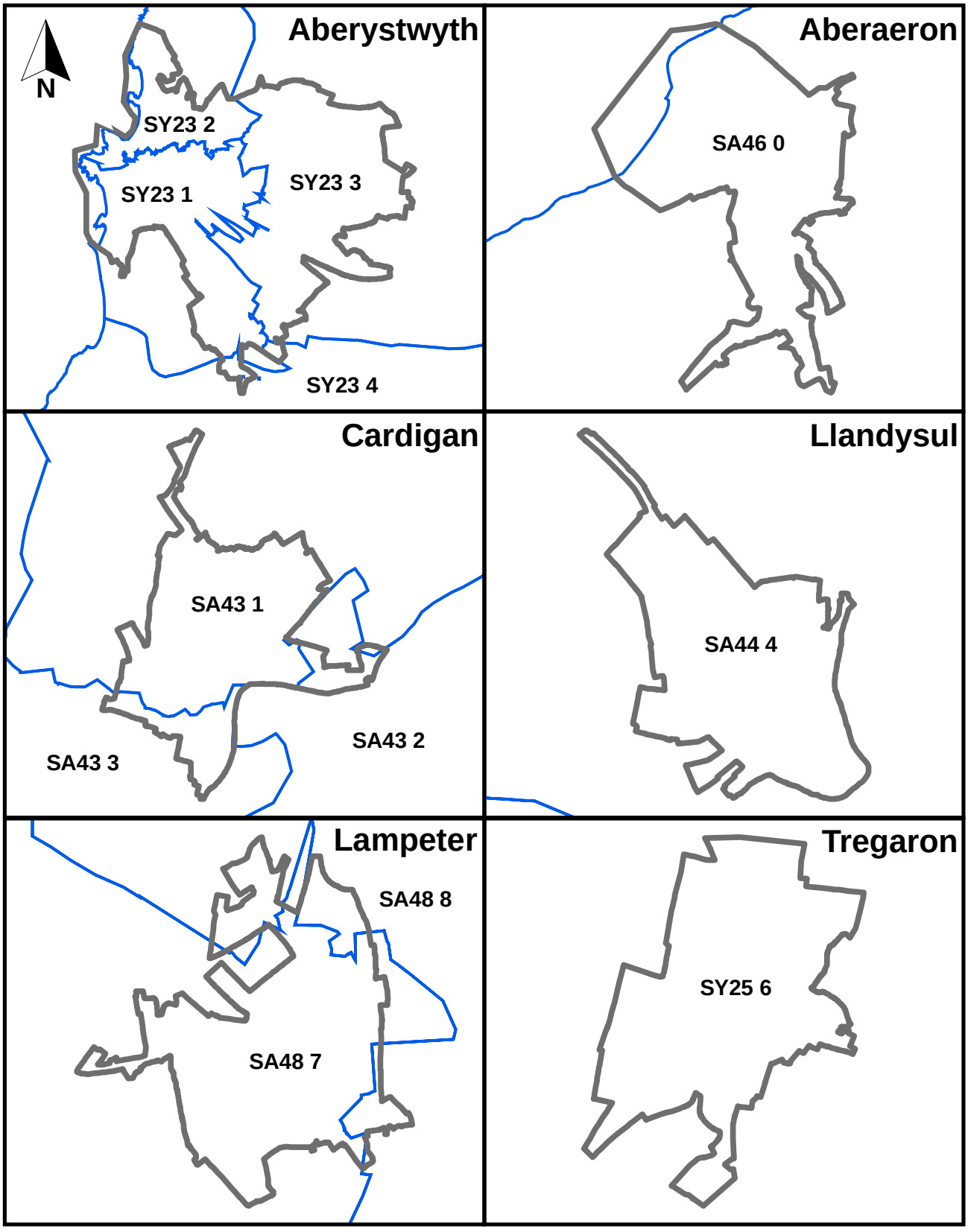

Key:

Settlement boundary

Postcode sector

Ceredigion County Council:
Urban Capacity & Urban Extension Study

Plan 1
Postcode Sectors for Study Towns

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Appendix H
Evidence for Development Density

18 Pages

Part H – Ceredigion County Council – Urban Capacity and Urban Extension Study: Evidence for Development Density

1. Purpose of this Technical Note

The capacity of any site depends upon the physical level to which it is developed in terms of both extent and density. This note provides evidence of recent trends in residential development densities to ensure that capacity assumptions applied to of each site are realistic against recent trends and in terms of the context of which the site sits.

This investigation is also prompted by the recommendations of the Inspector's Report to the Ceredigion Local Plan that broadly states that a minimum residential density of 35 dph should be achieved in all the six towns.

2. Employment, Retail and Commercial

Plot ratios (the relationship between site area and floorspace) vary markedly according to the nature of the employment use. As consents can cover a range of B1, B2 and B8 uses, evidence from recent trends can be both contradictory and confusing.

Nevertheless, drawing upon the guidance outlined in the ODPM report and other best practice, Table H1 sets out the assumptions have been applied to estimate the realistic potential of each hectare of development land.

Table H1 Ratios Used to Derive Floor-space Yield per Hectare

Land Use (Use Class)	Plot Ratio[1]	Av. No. of Storeys	Gross to Net Building Ratio[2]	Floor-space (m^2)
Employment (B2, B8) [3]	40%	1		4,000
Office, Commercial (B1) [3]	40%	2		8,000
Retail (Town Centre) [4]	85%	2	90%	15,300
Retail (Edge of / Out of Town Centre) [4]	50%	1.4	90%	6,300

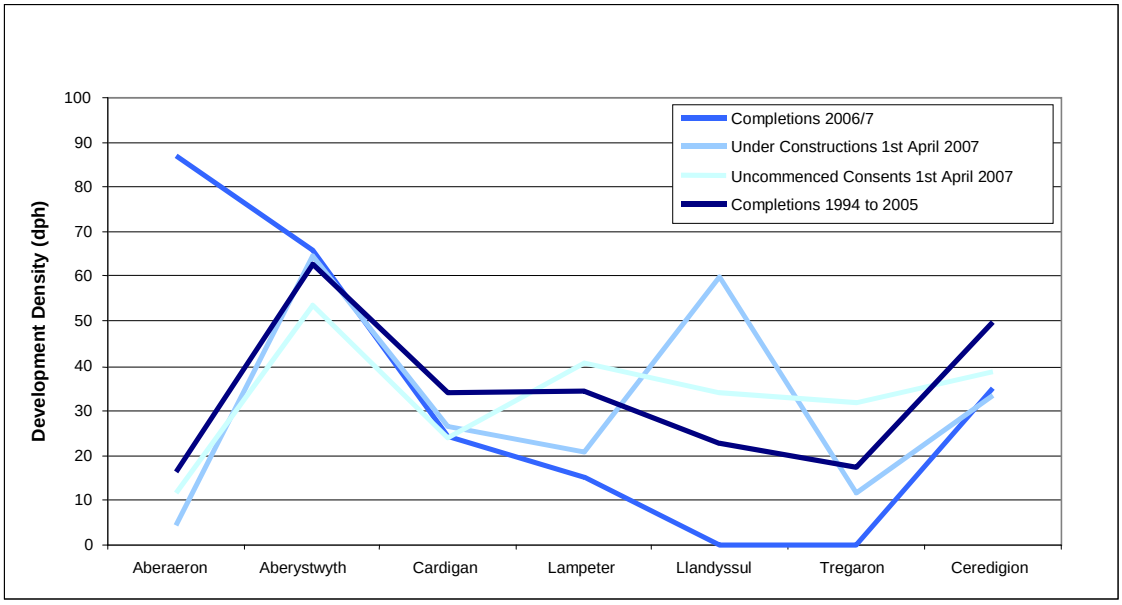
[1] Equates to development net of car parks, landscaping etc. Assumed to include allowance to meet future proofing requirements
[2] Equates to retail floorspace net of ancillary staff areas
[3] Source: Employment Land Reviews – Guidance Note, ODPM, 2004
[4] Kettering Retail Sites Study, Roger Tym and Partners, February 2007

3. Housing

3.1 Recent Trends

An analysis of the variations in the historical and recent trends across the six towns is evident from completions and current consents. The following Figure H.1 depicts the relative performance and characteristics of development in each town over the past decade, as well as within the current housing supply 'pipeline'.

Figure H.1 Historical and Current Housing Development Densities by Town



These characteristics of each town can be summarised are as follows:

3.1.1 Aberaeron

Aside from a high-density (88 dph) but small completion in 2006/7, the town has consistently delivered development of less than 20 dph. This looks set to continue under the development pipeline at 1st April 2007. The study adopts a starting assumption of 35 dph in line with the Inspector's recommendations although it is acknowledged that the relative shortage of land and the influence of topography of particular sites may not allow this to be achieved;

3.1.2 Cardigan

Most recent completions and current supply are consistent at about 25 dph. This is rather less than the average 35 dph achieved over the previous decade reflecting a trend towards larger family housing and a conspicuous lack of flatted development. Despite this apparent fall, the town is a significant growth location with a number of undeveloped allocations; consequently, the study adopts a density assumption of 35 dph in line with the Inspector's recommendations to prompt more efficient use of land than in recent years;

3.1.3 Lampeter

Density has fluctuated. Current consents averaging 40 dph are high against historical completions and may indicate a diversification of the towns housing stock. If true, it appears

reasonable to adopt a comparable starting assumption of 40 dph that exceeds the Inspector's recommendations and reflects its importance as a population, employment and service centre;

3.1.4 Llandysul

Density varies widely and development activity is too low to depict reliable trends. Nevertheless, current activity suggests a trend towards increasing density of at least 35 dph which may reflect growing accessibility for residents to jobs in Carmarthenshire. This will be supported by the new bypass; consequently the study adopts a starting assumption of 35 dph in line with the Inspector's recommendations;

3.1.5 Tregaron

Whilst development activity is again too low to depict reliable trends, the density of current consents belies a history of delivering very low (sub 20 dph) densities. Given the evident low level of development activity it is considered that the Inspector's recommendations could (without evidence of market acceptance) be difficult to deliver. Consequently, the study adopts a density assumption of 25 dph. This assumption can be reviewed in subsequent reviews of this study if appropriate.

3.1.6 Aberystwyth

The characteristics of development in Aberystwyth are more complex. Whilst on average, density has remained at a constant 55 to 65 dph for over a decade, this varies markedly depending upon the location of sites. Reflecting its significant size, form and economy, densities of at least 100 dph have been, and are, routinely achieved in the town centre. Those in suburban locations are rarely below 40 dph. The study adopts staged density assumptions ranging from 80 dph in, and adjacent to, the town centre, to 40dph in recent/new suburbs. Sites falling within more mature established residential areas are assessed against a density of 60dph.

3.2 The Density Assumptions

Based upon the above analysis, the density assumptions used to calculate the yield of individual site locations are be based on the matrix prescribed in Table H2 below.

Table H2 Town Specific Density Assumptions

	Town Centre	Urban	Suburban
Aberystwyth	80	60	40
Cardigan*	35	35	35
Lampeter*	40	40	40
Aberaeron*	35	35	35
Tregaron*	25	25	25
Llandysul*	35	35	35

* No distinction between densities sought in Town Centre, Urban and Sub-urban locations.

3.3 Application of Development Templates

As development densities can be a nebulous concept, to assist in the understanding and transparency of these assumptions a series of development templates have been applied to a selection of sites to be subject to economic viability evaluation in Section 6. The templates utilised in this study are reproduced below.

Author:

Carl Mort

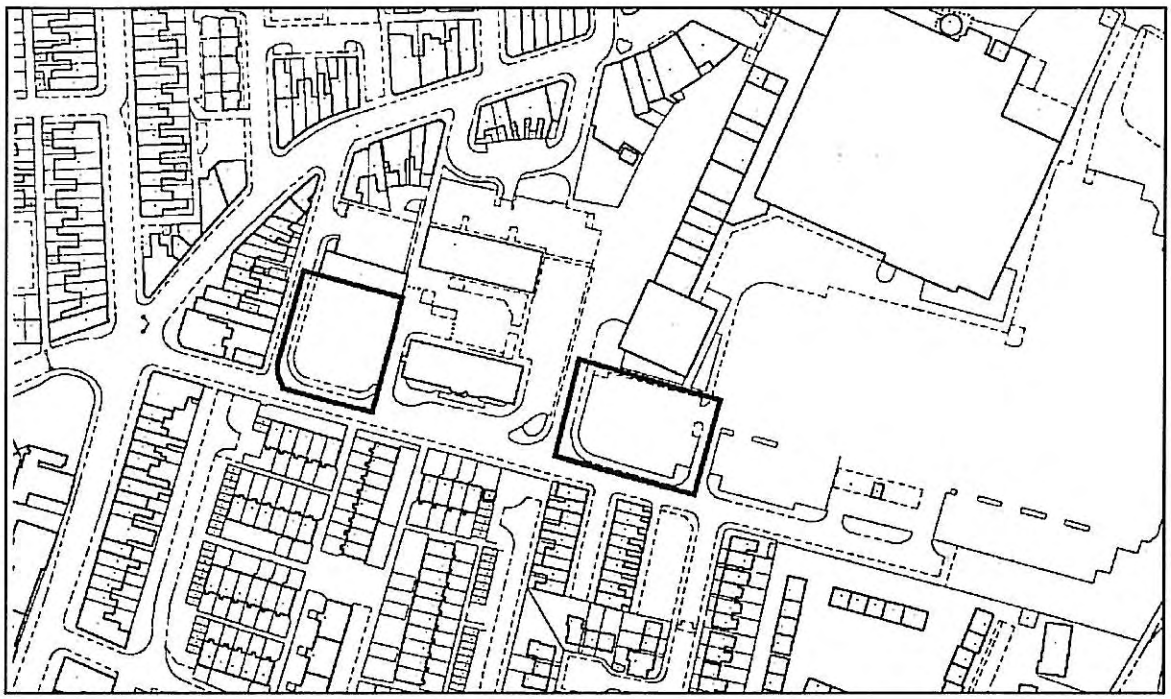
.....

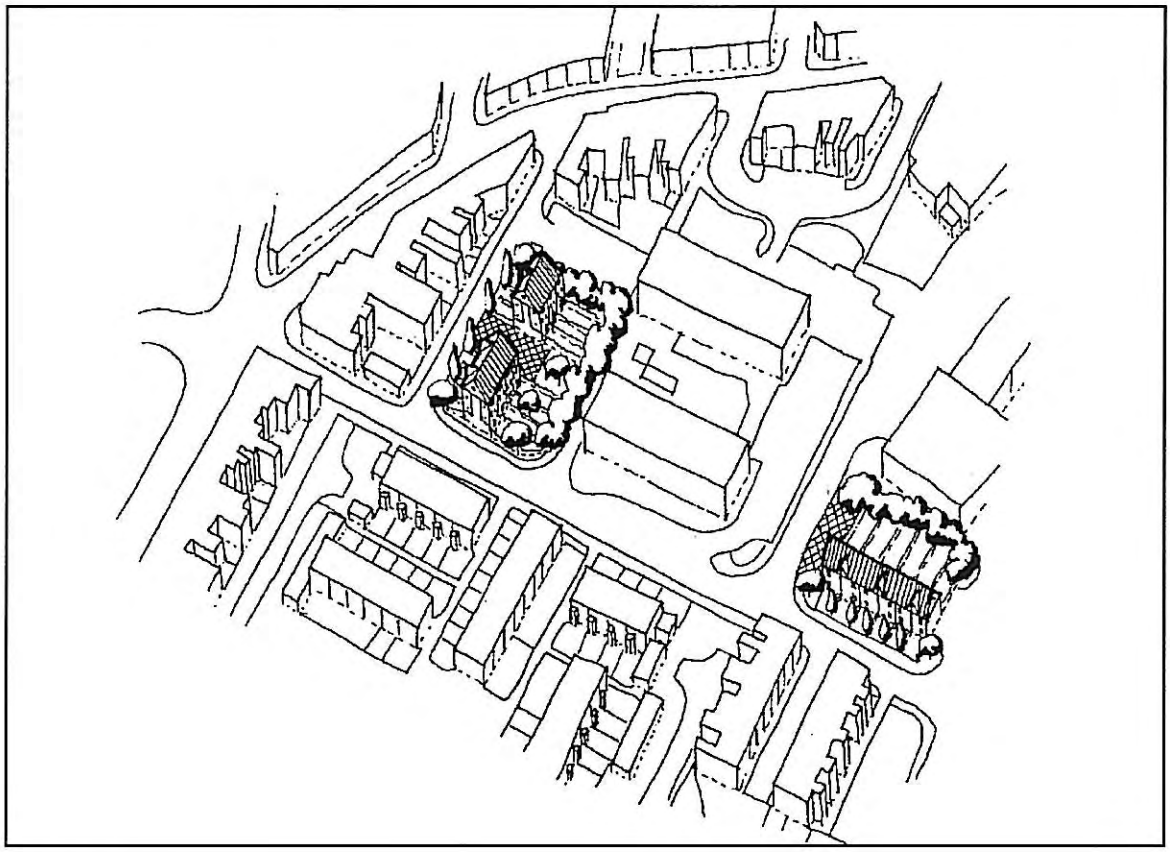
Reviewer:

John Hall

.....

Design Exercise 2

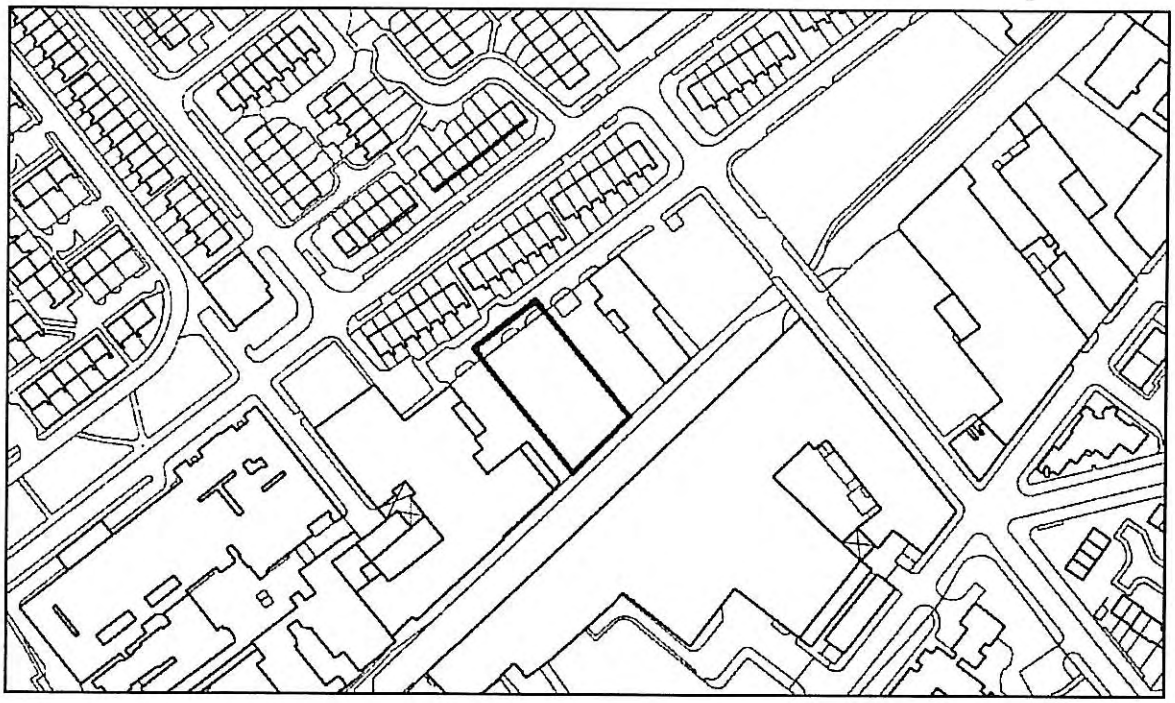


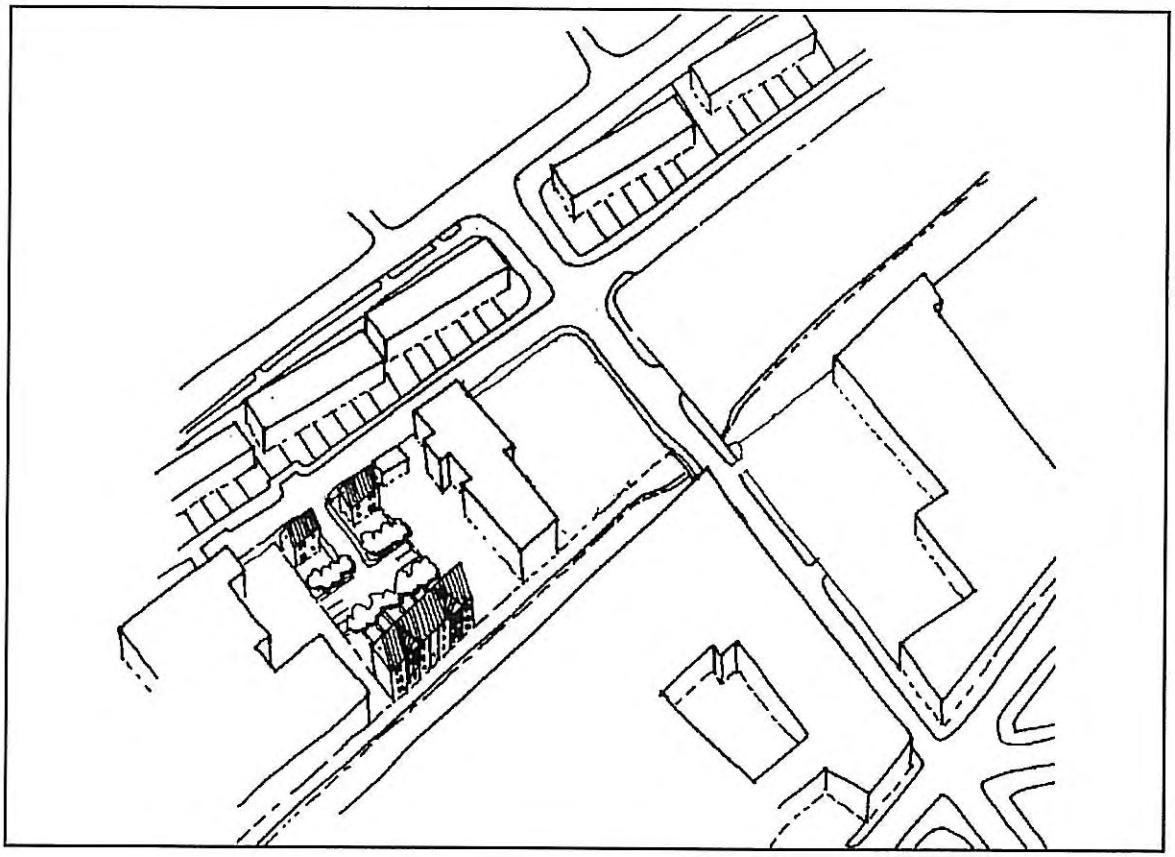


Schedule
Site Area (ha): 0.36
Density (dph): 36
No. of Dwellings: 13
Dwelling Type: 7 no. 2 Bed Houses, 6 no. 3 Bed Houses

No. of Car Parking Spaces: 15 @ 1.15 per dwelling

Design Exercise 4

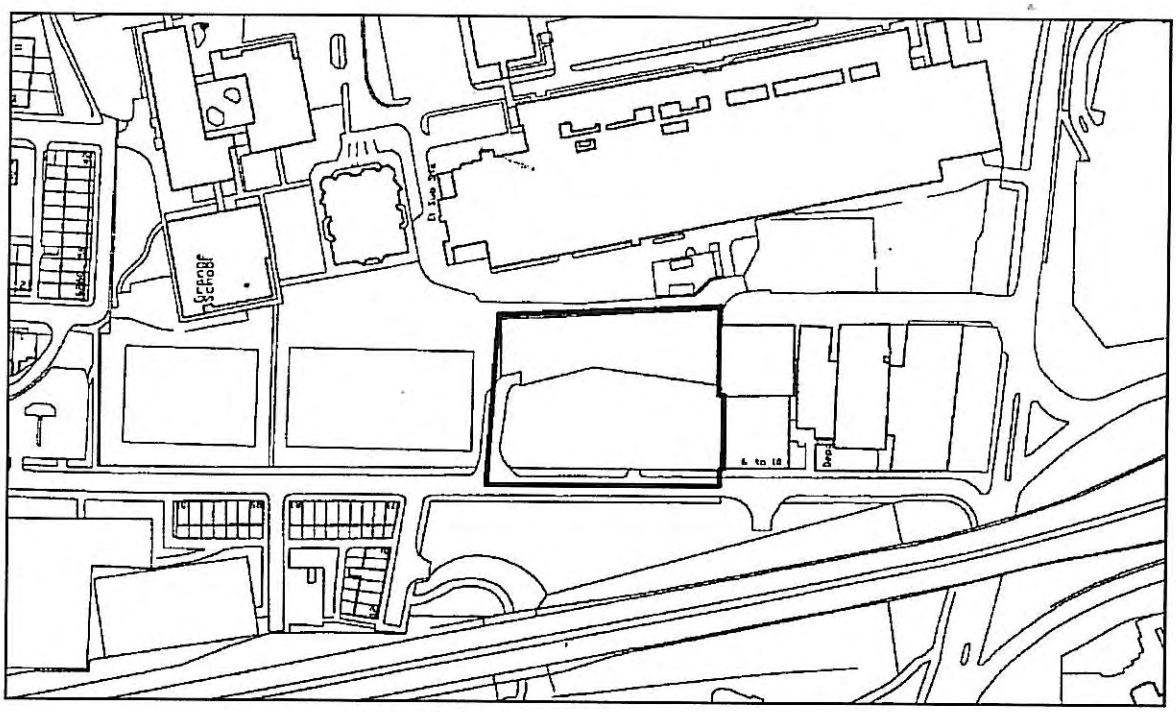


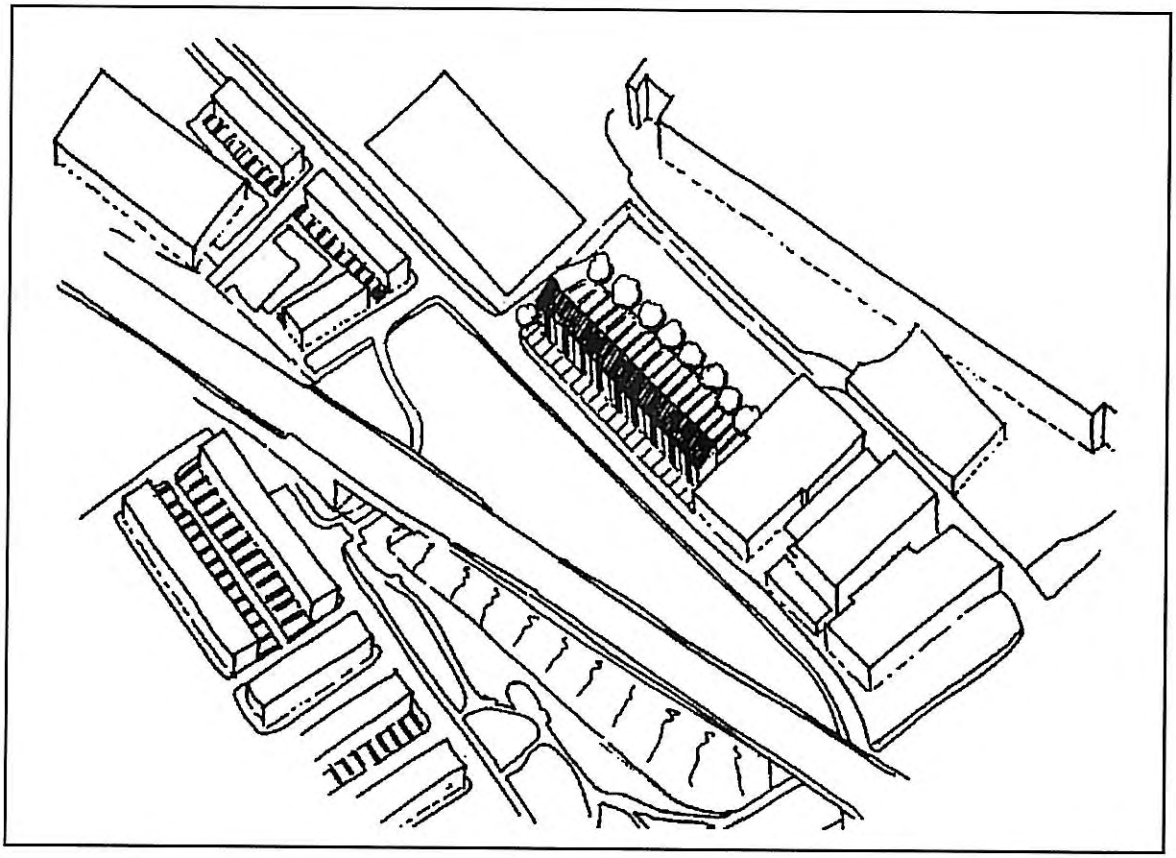


Schedule
Site Area (ha): 0.16
Density (dph): 50
No. of Dwellings: 8
Dwelling Type: 6 no. 4 Bed Houses, 2 no. 3 Bed Houses

No. of Car Parking Spaces: 8 @ 1 per dwelling

Design Exercise 6

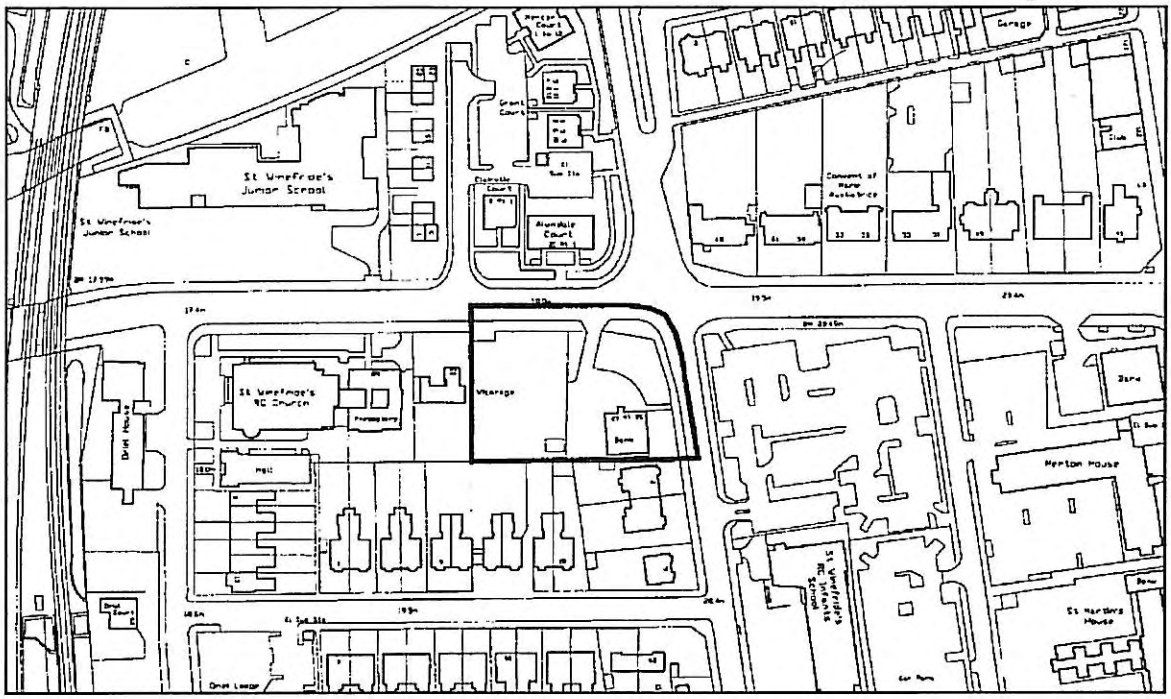


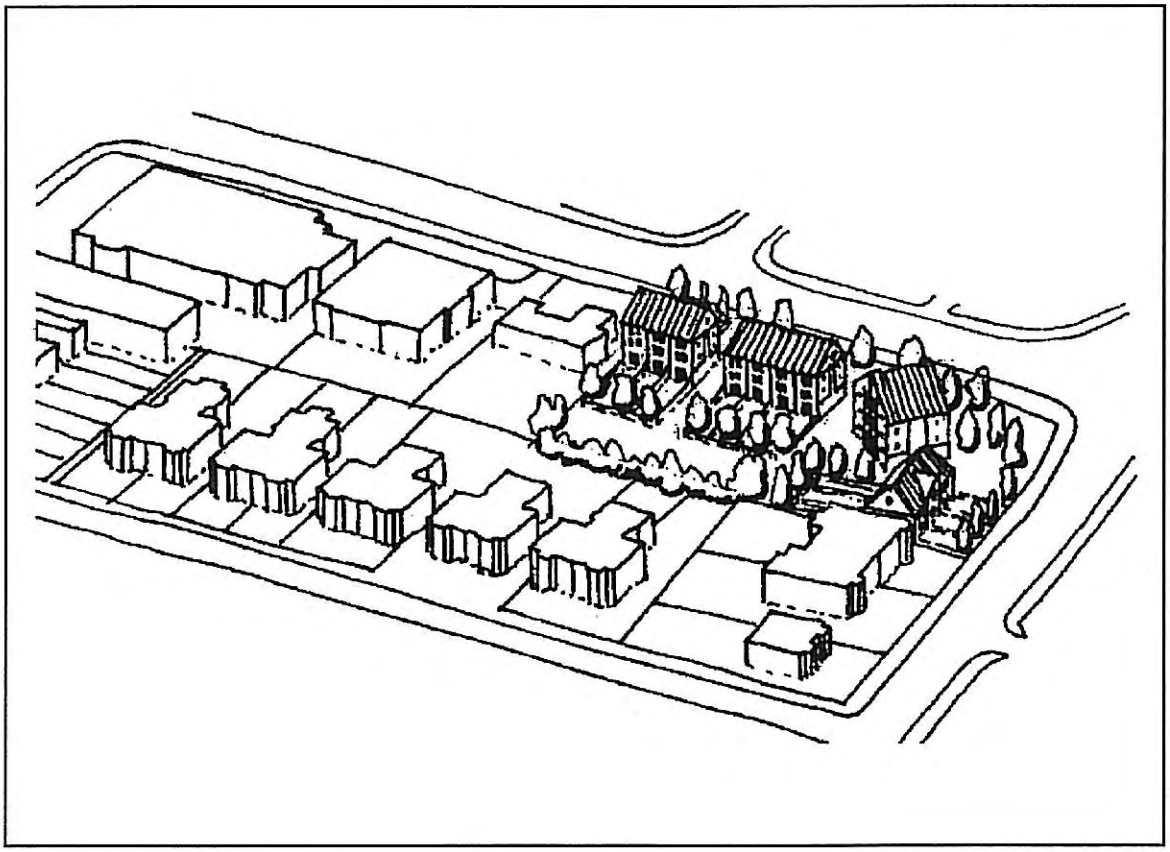


Schedule
Site Area (ha): 0.28
Density (dph): 96
No. of Dwellings: 27
Dwelling Type: 18 no. 2 Bed Houses, 9 no. 4 Bed Houses

No. of Car Parking Spaces: 0

Design Exercise 8

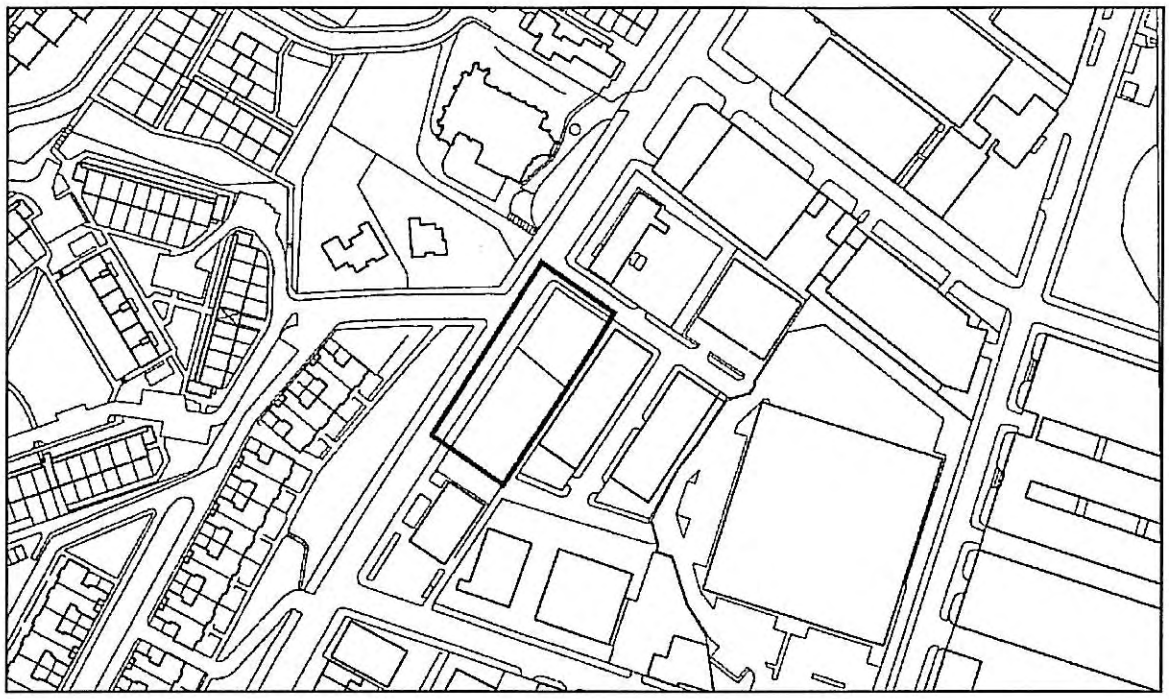


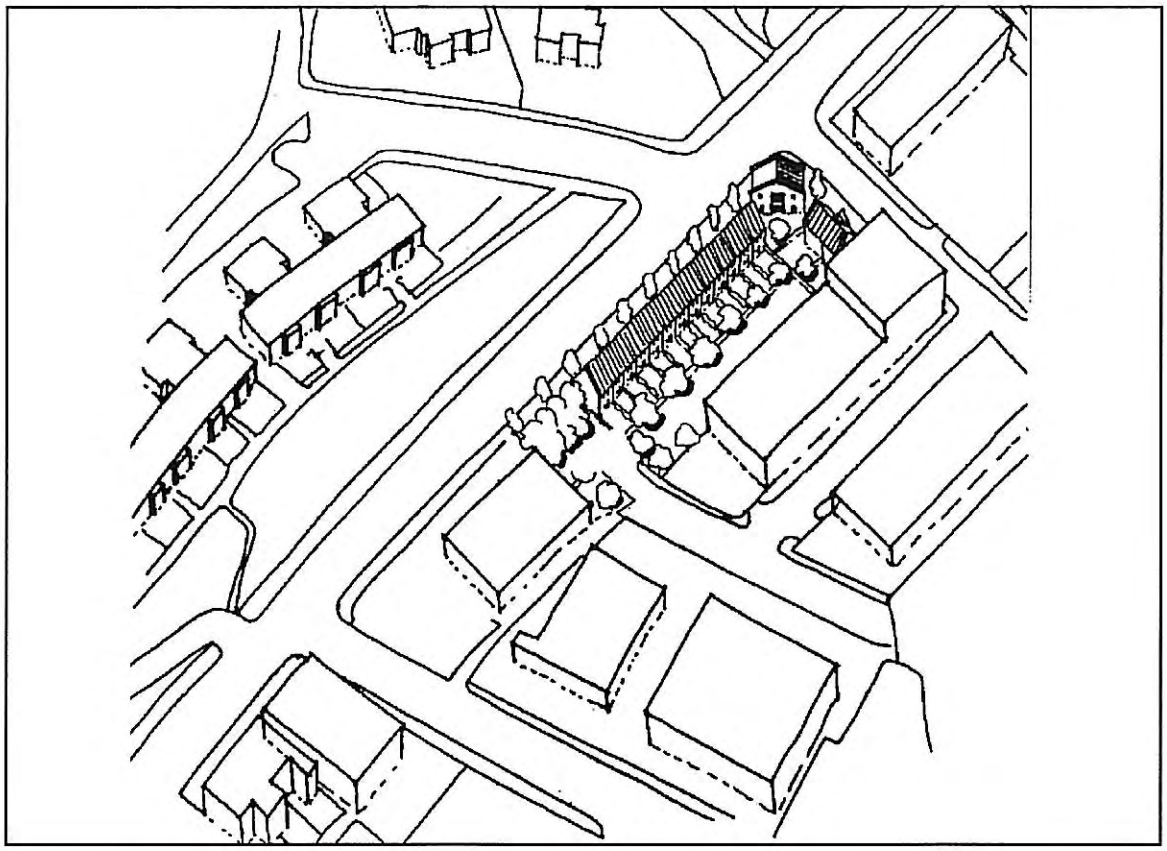


Schedule
Site Area (ha): 0.40
Density (dph): 40
No. of Dwellings: 16
Dwelling Type: 6 no. 2 Bed Flats, 3 no. 3 Bed Houses, 7 no. 4 Bed Houses

No. of Car Parking Spaces: 25 @ 1.56 per dwelling

Design Exercise 9

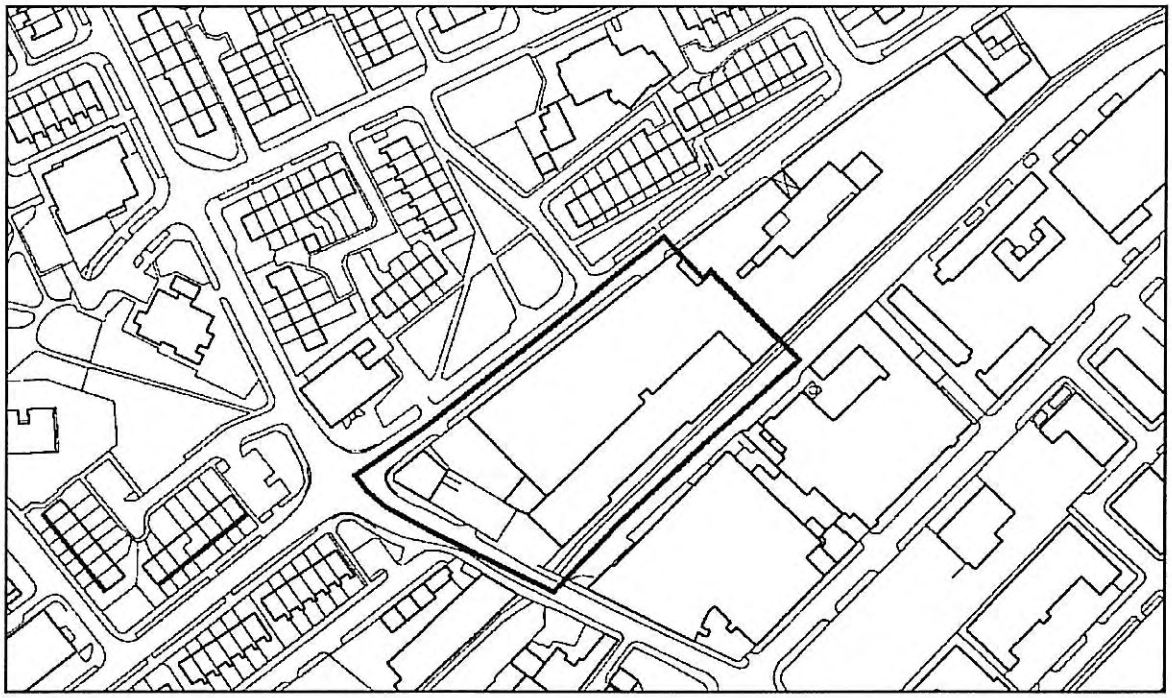


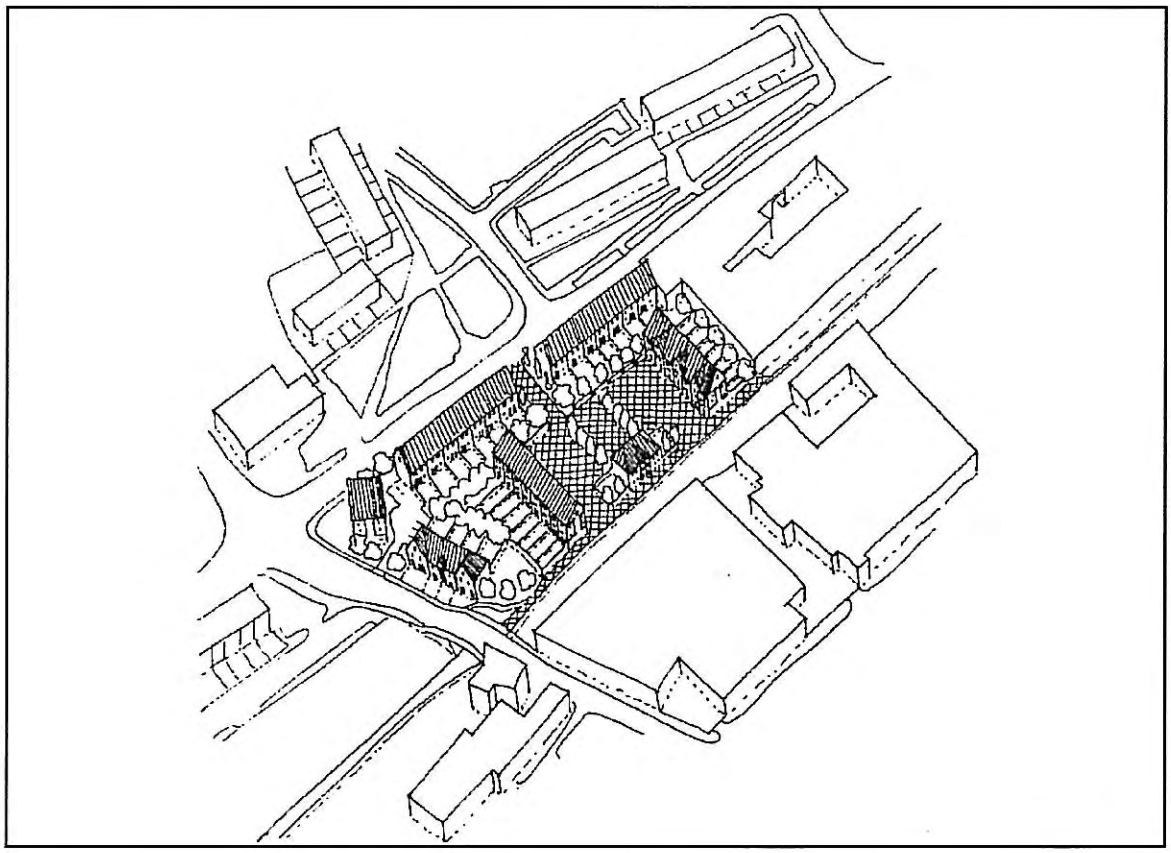


Schedule
Site Area (ha): 0.38
Density (dph): 50
No. of Dwellings: 19
Dwelling Type: 4 no. 1 Bed Flats, 15 no. 3 Bed Houses

No. of Car Parking Spaces: 19 @ 1 per dwelling

Design Exercise 18

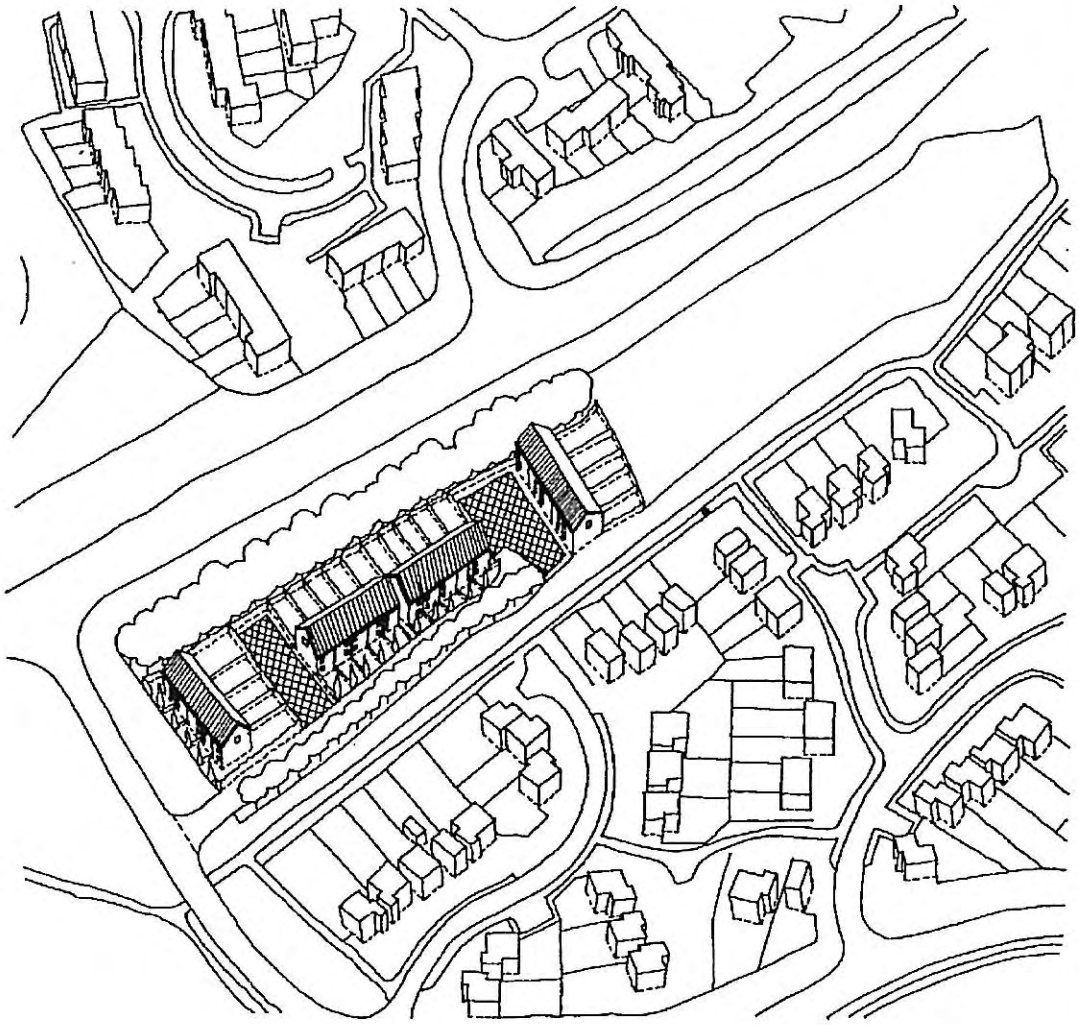




Schedule
Site Area (ha): 0.80
Density (dph): 51
No. of Dwellings: 41
Dwelling Type: 6 no. 2 Bed Flats, 23 no. 3 Bed Houses, 12 no. 4 Bed Houses

No. of Car Parking Spaces: 41 @ 1 per dwelling

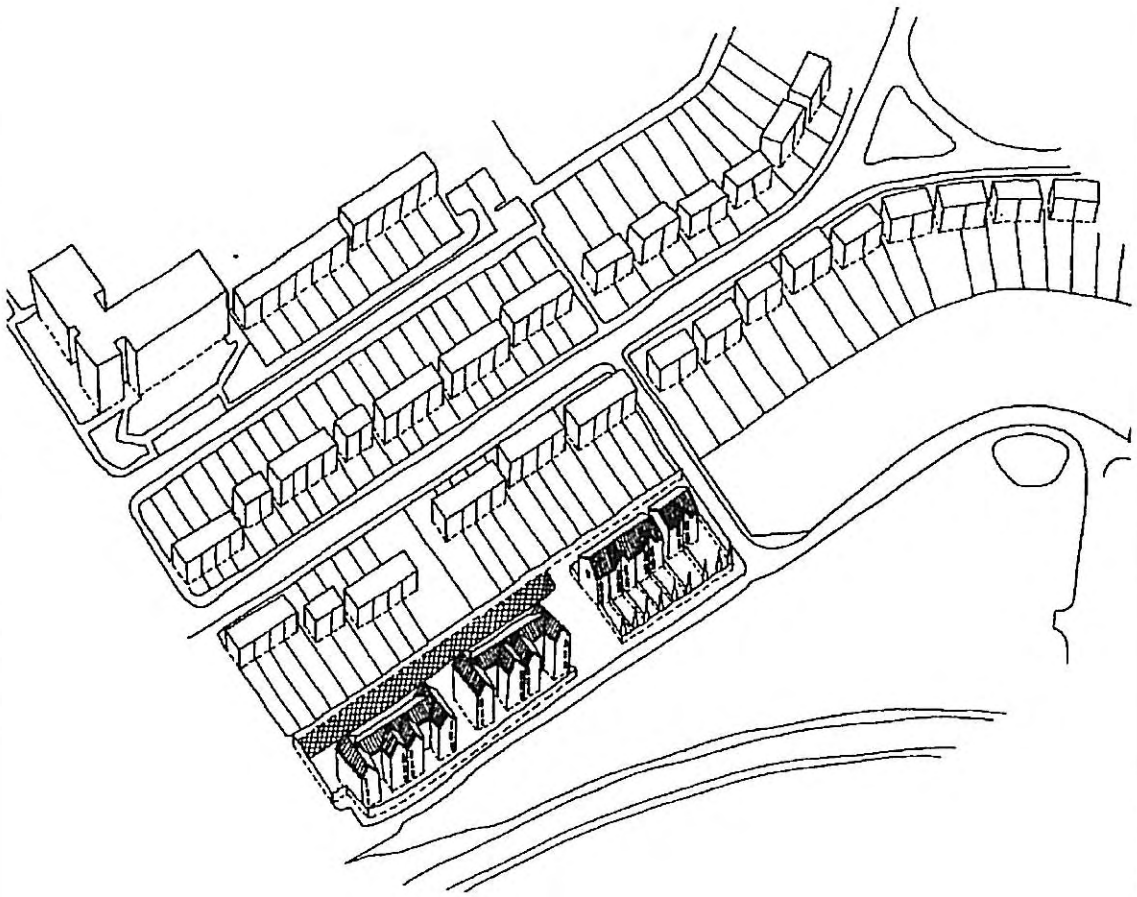
Design Exercise 53



Schedule
Site Area (ha): 0.58
Density (dph): 35
No. of Dwellings: 20
Dwelling Type: 20 no. 3 Bed Houses

No. of Car Parking Spaces: 30 @ 1.5 per dwelling

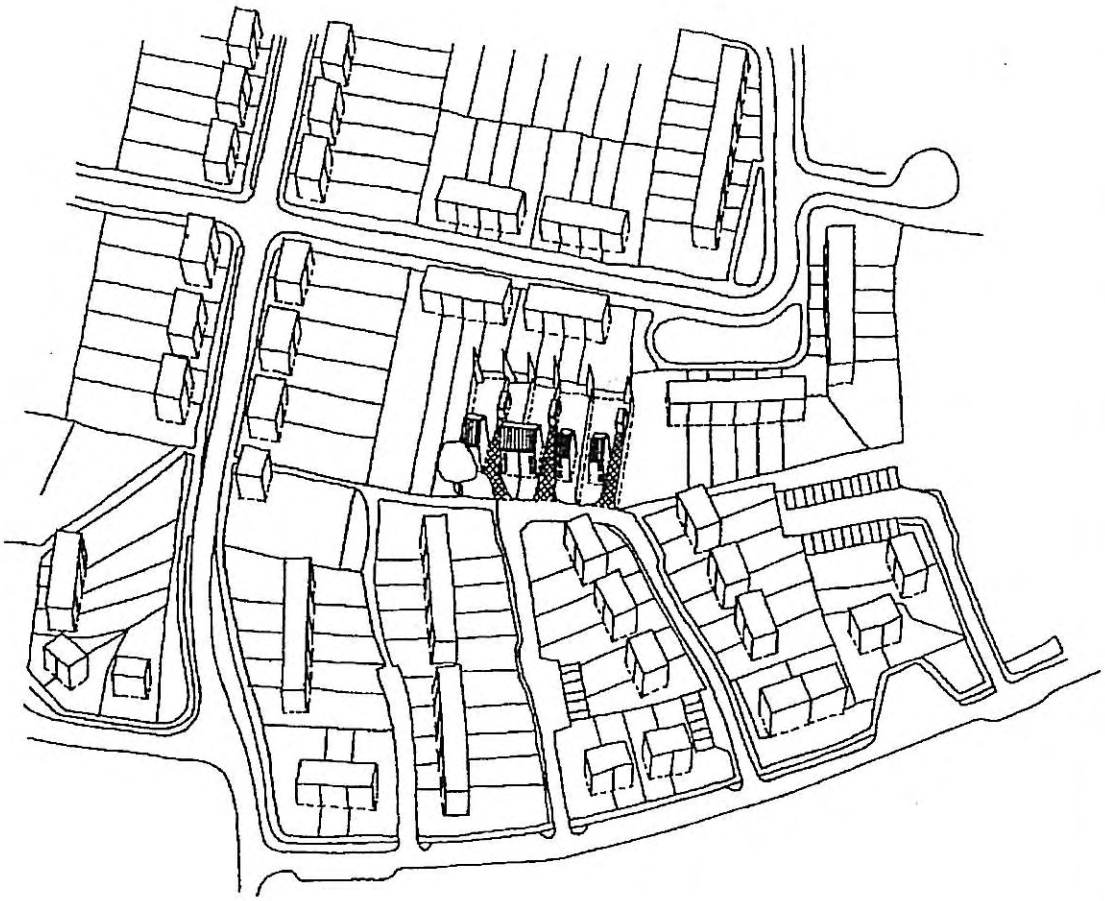
Design Exercise 56



Schedule
Site Area (ha): 0.45
Density (dph): 69
No. of Dwellings: 31
Dwelling Type: 24 no. 2 Bed Flats, 7 no. 3 Bed Houses

No. of Car Parking Spaces: 47 @ 1.5 per dwelling

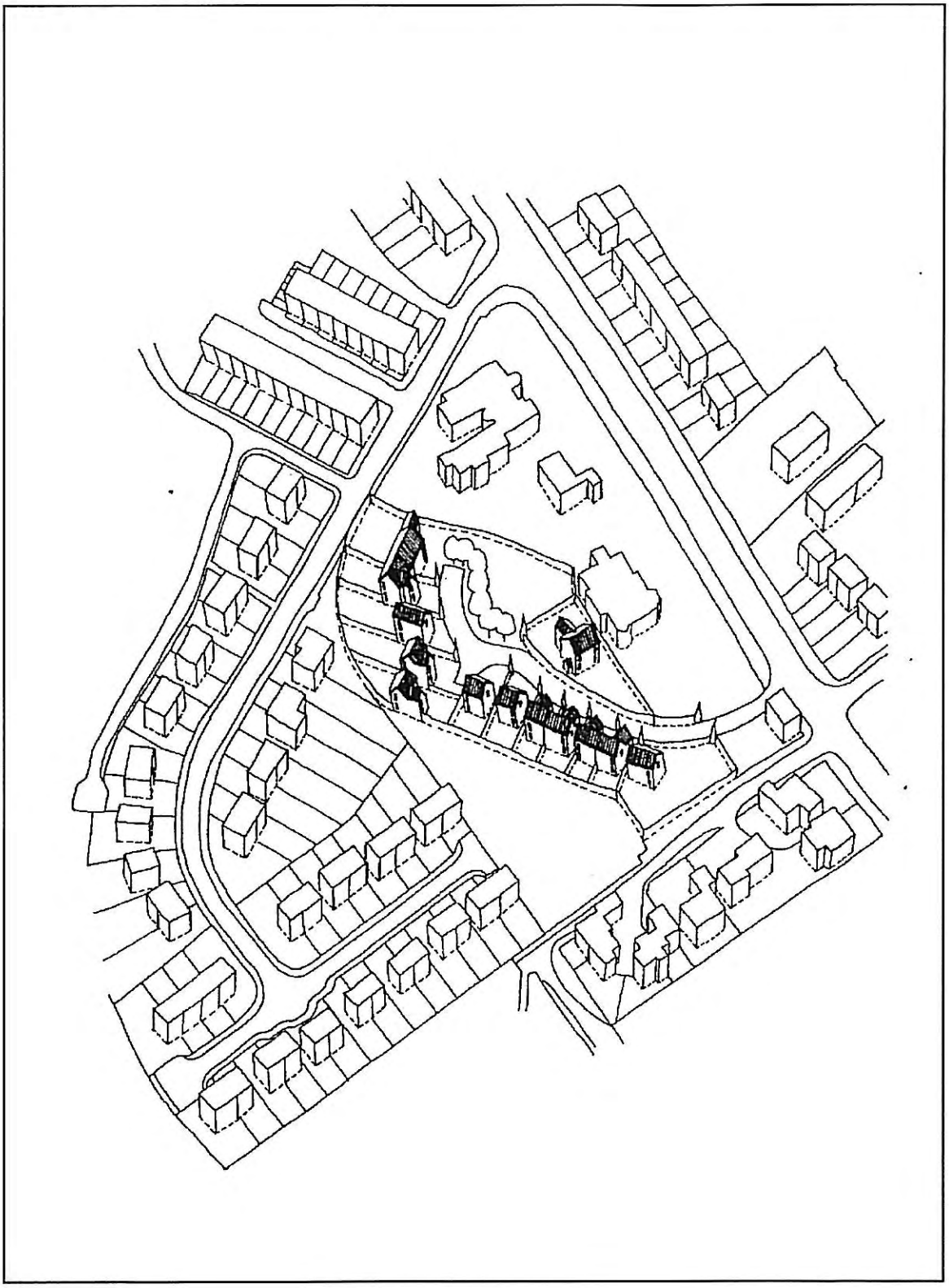
Design Exercise 57



Schedule
Site Area (ha): 0.127
Density (dph): 39
No. of Dwellings: 5
Dwelling Type: 3 no. 4 Bed Detached, 2 no. 3 Bed Semi-detached

No. of Car Parking Spaces: 5 @ 1 per dwelling

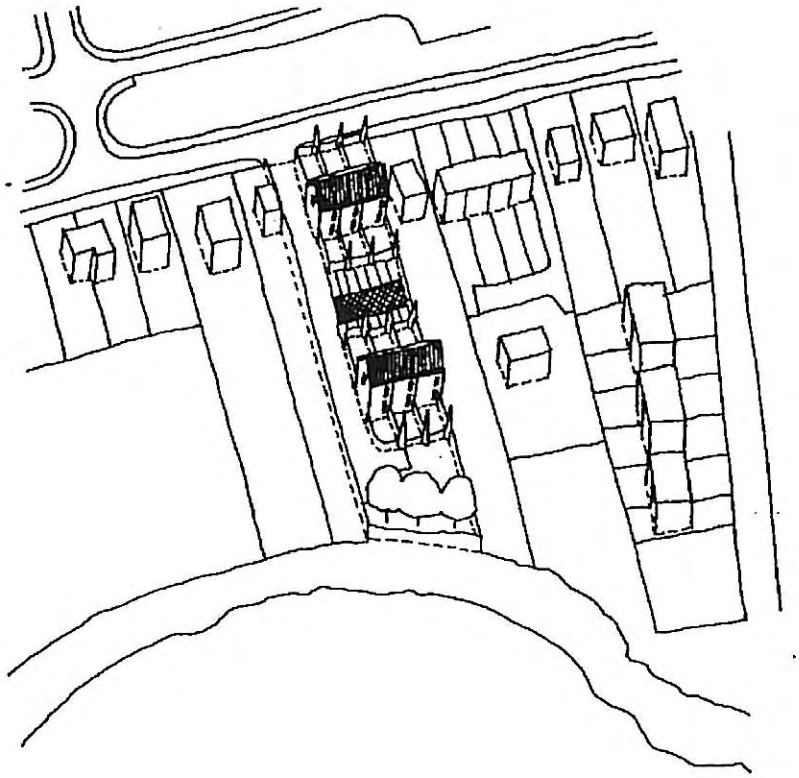
Design Exercise 59



Schedule
Site Area (ha): 0.68
Density (dph): 35
No. of Dwellings: 24
Dwelling Type: 12 no. 2 Bed Flats, 8 no. 3 Bed Houses, 4 no. 4 Bed Houses

No. of Car Parking Spaces: 24 @ 1 per dwelling

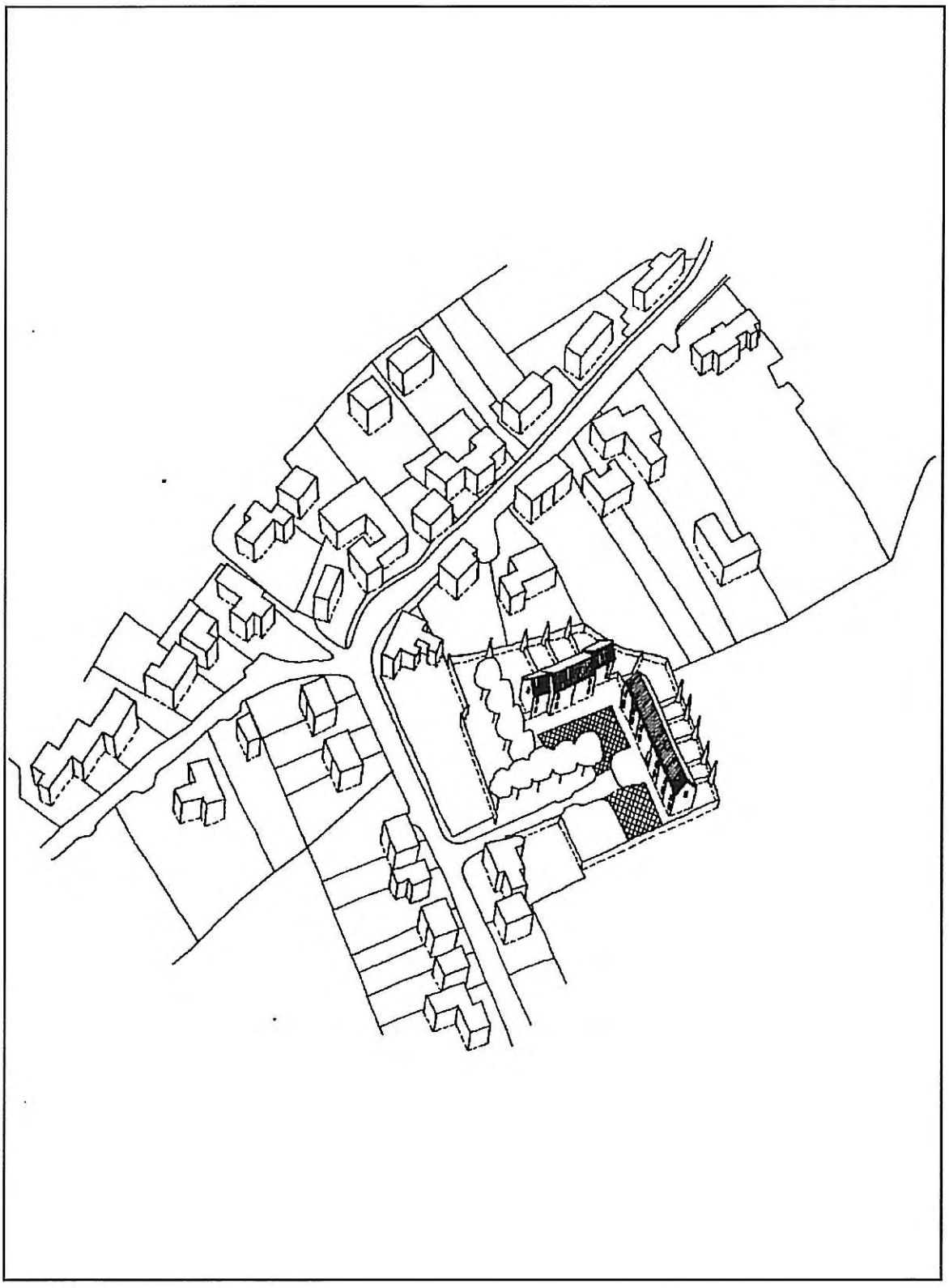
Design Exercise 60



Schedule
Site Area (ha): 0.26
Density (dph): 35
No. of Dwellings: 9
Dwelling Type: 9 no. Flats and Houses

No. of Car Parking Spaces: 14 @ 1.5 per dwelling

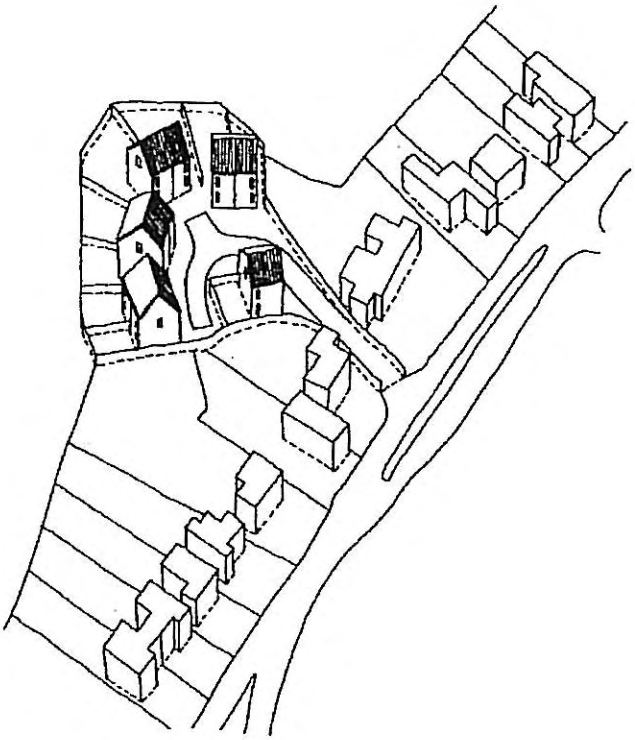
Design Exercise 62



Schedule
Site Area (ha): 0.38
Density (dph): 26
No. of Dwellings: 10
Dwelling Type: 6 no. 2 Bed Houses, 4 no. 3 Bed Houses

No. of Car Parking Spaces: 20 @ 2 per dwelling

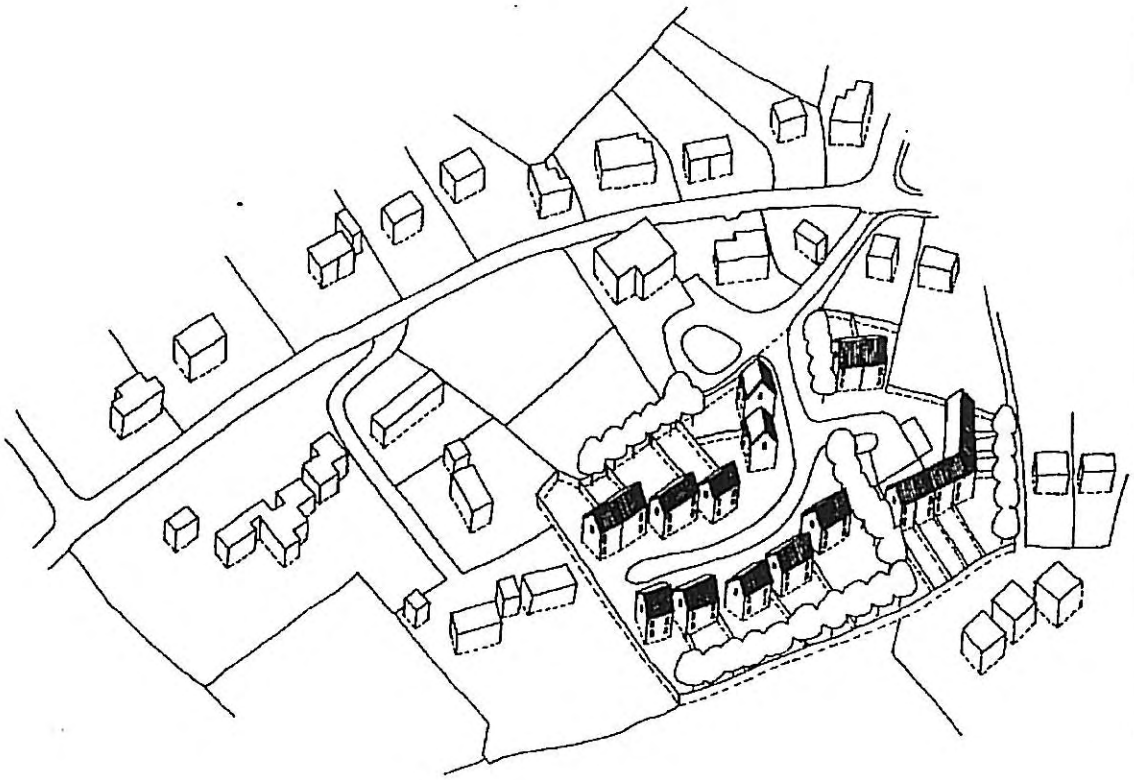
Design Exercise 63



Schedule
Site Area (ha): 0.26
Density (dph): 35
No. of Dwellings: 9
Dwelling Type: 8 no. 2 Bed Semi-detached, 1 no. 3 Bed Detached

No. of Car Parking Spaces: 9 @ 1 per dwelling

Design Exercise 64



Schedule
Site Area (ha): 0.92
Density (dph): 30
No. of Dwellings: 28
Dwelling Type: 7 no. 2 Bed Houses, 20 no. 3 Bed Semi-detached, 1 no. 3 Bed Detached

No. of Car Parking Spaces: 28 @ 1 per dwelling

Appendix I
Economic Viability Methodology and Analyses

39 Pages

Entec

Part I – Ceredigion County Council – Urban Capacity and Urban Extension Study: Economic Viability Methodology and Analyses

1. Assessment of Viability

To help ensure that assessments of the capacity of sites is robust, an assessment of the likely development economic constraints inform judgements on the theoretical estimate of development that can be accommodated upon them.

Economic viability is defined as whether the revenue from the development scheme covers the costs of development so as to provide the landowner with an adequate reward for selling land to a developer. This varies according to the type of development concerned and a comparative assessment of alternative uses will inform a view on the most viable use of a site.

This process is undertaken in two parts:

- As the relative population growth across the County and between the towns is an important issue for the LDP, an important consideration is the activity and health of the housing market. A quantitative and qualitative assessment of prevailing housing market conditions obtained through analysis of published data and validated through interviews with development stakeholders does, in large measure, identify the impacts of the market on the eventual capacity estimated. This helps the study to arbitrate between the viability of housing against other land uses in the context of the site's location. A Baseline Statement of the Housing Market is at **Part G** to the **Technical Appendix**; and
- Informed by the above, an economic viability analysis is undertaken for a sample of 21 sites that assesses build costs against current prices commanded in the local market. These analyses are conducted against a residual valuation method utilising a spreadsheet template drawn from Appendix 11 to the NWRA guide.

2. The Spreadsheet Analysis

2.1 Aims of the Analysis

The spreadsheet analysis has several functions. It aims to inform:

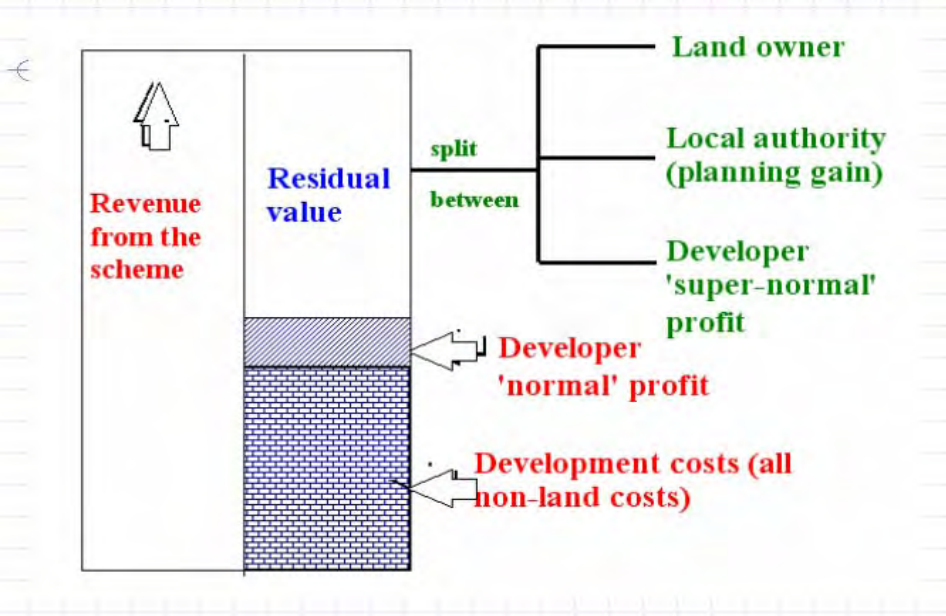
- Which sites are commercially viable for housing development, and which are not;
- An indication, via the sampling process, to which there should be a discount from assessed capacity to achieve a deliverable number of homes based on market impacts;
- How location, and sub markets, affect the viability of housing development;

- How location, combined with housing mix, impact on the likelihood of sites coming forward; and
- How, and where relevant (according to policy parameters), affordable housing looks achievable in viability terms;
- Against this baseline, determine whether other alternative land uses (employment, commercial, retail) are more likely to be viable given the location of the site and the likely development values. The findings will also be able to determine whether the economic benefits of housing could prompt a change of use from that which current operates.

2.2 Theoretical Underpinning

The spreadsheets are based on a residual development appraisal. Plate I1 shows the basic relationship between its elements:

Plate I1 Residual Site Value



This makes the fundamental assumption that site value is based on the difference between the revenue generated by the scheme and its non-land related costs as follows:

$$\mathbf{R^S = R^V - NLC}$$

Where:

$\mathbf{R^V}$ = Scheme revenue. This is the value of the sales that are generated from a site (for instance, 10 dwellings each sold at £100 000 will generate a scheme revenue of £1m). For the purposes of this exercise, this value is assumed to be fixed although in practice it may increase over time as a result of general (a rise in house prices) or specific (regeneration activity) processes;

NLC = The non land (development) costs associated with the construction of scheme such as materials and labour (base development costs) and fees (architects, engineers etc). For the purposes of this exercise, this value is assumed to be broadly fixed although in practice this will vary according to development constraints (slope, contamination, access difficulties). Also included is an element of normal profit (usually about 15% of NLC). The cost of the land is excluded from this element of the equation;

$\mathbf{R}^{S}$ = Site Residual Value. This is the amount that is available to 'share around' as a benefit of the development taking place. These elements all vary according to circumstance but include:

- Benefit to the developer in the form of 'super-normal' profit in excess of 15%. Some developers may seek such margins for commercial reasons or they may accrue as a result of negotiated decreased benefits to the planning authority and the landowner;
- Benefit to the planning authority in the form of planning gain which could take the form of the provision of affordable housing, play-space or a financial contribution to, say, education provision;
- The need to incorporate the cost implications of meeting the requirements of the various levels of BREEAM / Code for Sustainable Homes. These costs will vary according to the standard sought (good, very good, excellent) and the timing of the development. The implication of this may be increased costs associated with new currently unknown requirements, or conversely a reduction in costs as technological solutions become more mainstream, and
- Crucially, the amount that is paid to the landowner to buy the land. Unless this value meets the expectations of the owner then the site is unlikely to be available for development. These expectations may be based upon knowledge of the values secured by other landowners or simply upon a comparison with the value of the land for, say, agriculture. In some cases, longstanding option (or legal) agreements may exist that have set the parameters of any payment to the landowner.

These elements of the Site Residual Value are variable and subject to separate negotiation. However, for a site to be viable, the sum of all elements cannot exceed the difference between the scheme revenue and the development costs. This may only vary where a developer is willing to accept less than a 15% profit margin.

2.3 Spreadsheet Mechanics

An example of the spreadsheet is explained below. It has five sections split across three input areas which are:

1. Input Variables;
2. Development Appraisal; and

3, 4 & 5. Commercial Viability.

These are addressed in turn:

Section 1: Input Variables

Plate I.2 below shows the input variable section. This identifies the probable value of the scheme value ($\mathbf{R^V}$) and well as the base development cost element of the non-land related costs (**NLC**). These are both based upon the development density and dwelling 'mix' prescribed by the application of development templates applied in Section 5.3.2 above.

To derive the anticipated $\mathbf{R^V}$, selling prices based on postcode sectors are drawn from HM Land Registry. These provide an understanding for the sub markets of the towns, and hence a basis for making broader judgements about site capacity and potential. However, further verification will be required to verify whether site specifics reflect the broader sub market should negotiations with developers proceed.

Further key inputs are build costs and unit sizes. Build costs, on the basis of per square metre (Gross Internal) costs, are taken as standards from the RICS Building Cost Information Service. For houses, the unit sizes are taken as developer benchmarks although for flats, there is an additional adjustment from net to gross measurements to take account of common areas which, in theory, add cost but do not accrue value.

Plate I.2 Input Variables

SITE Ref: UCSBRY13		DESCRIPTION: Large Greenfield site in Brymbo							
1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS									
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	
Dwelling & Bedroom(s)	Construction	Build Type	Selling price	Units	Dev values	Build Cost (m^2)	Size (m2)	Build Costs	
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£	-
2 Bed Flats	2/3 Storey	Below 5 Storey	£ 108,000	14	£ 1,512,000	£ 918	75	£	963,900
2 Bed Town houses	2/3 Storey	Estate	£ 110,000	20	£ 2,200,000	£ 776	70	£	1,086,400
3 Bed Town houses	2/3 Storey	Estate	£ 127,000	14	£ 1,778,000	£ 776	80	£	869,120
3 Bed Semis	2 Storey	Estate	£ 131,000	24	£ 3,144,000	£ 772	85	£	1,574,880
4 Bed Semis	2 Storey	Estate	£ 144,000	10	£ 1,440,000	£ 772	95	£	733,400
3 Bed Detached	2 Storey	Estate	£ 186,000	8	£ 1,488,000	£ 772	105	£	648,480
4 Bed Detached	2 Storey	Estate	£ 238,000	6	£ 1,428,000	£ 772	125	£	579,000
				96			Base Build		
				GDV =	£ 12,990,000		Costs	£	6,455,180

2: Development Appraisal

This section (summarised in Plate I.3) takes forward the base build costs and applies a number of additional costs that a developer would normally expect to incur within a housing development. These include professional fees, finance costs, marketing or disposal fees, the estimated future requirements of BREEAM and a basic 15% profit margin) to derive a total development cost (**NLC**) to be compared against the scheme value ($\mathbf{R^V}$). For the purposes of these assessments, the costs associated within the proposed WAG Target for all new development to achieve BREEAM 'excellent' standard by 2011 are incorporated within the analyses. Due to the uncertain build costs associated with this target (Table 5.4 gives a range of between £5,000 and £16,000) a 'mid range' cost of £10,000 is assumed to be required for each dwelling.

This difference between the two allows a residual value ($\mathbf{R^S}$) for the site to be calculated. The information in this section is based on industry norms or standards. In addition, an allowance is made for the cost of financing land over the period of the development.

Plate I.3 Development Appraisal

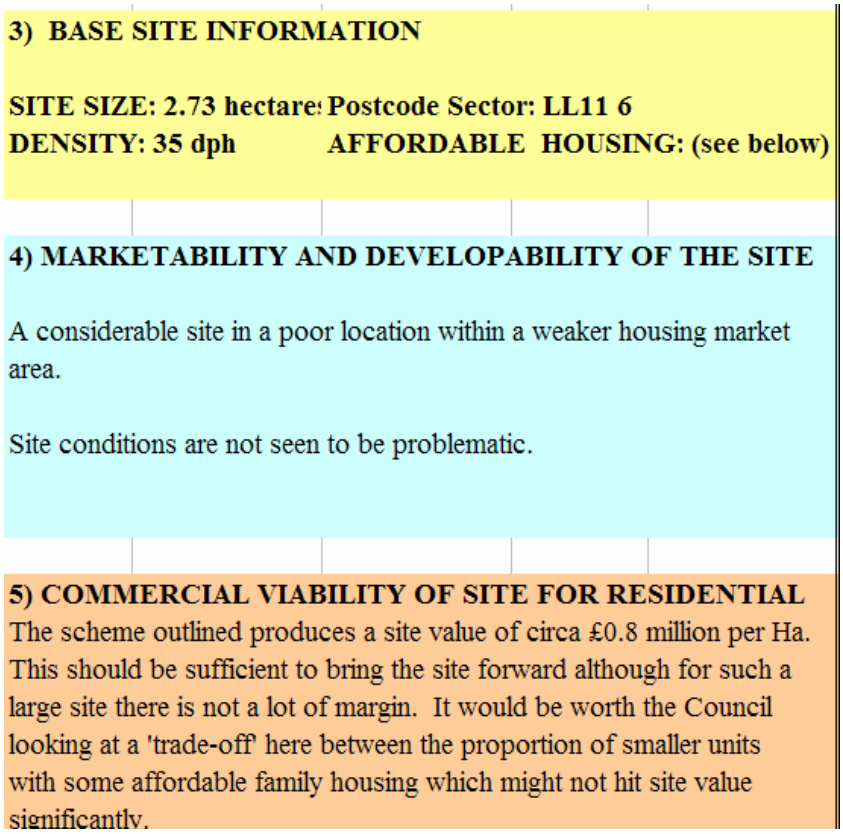
2) DEVELOPMENT APPRAISAL			
Build costs (carried down)			£ 6,455,180
Professional fees	£	774,622	
Disposal fees (4% GDV)	£	519,600	
Finance (6% Build costs)	£	387,311	
Dev Return (15% GDV)	£	1,948,500	
Internal overheads (10%)	£	645,518	
Abnormal costs	£	-	
Total Development costs			**£ 10,730,730**
GDV (carried forward)	**£**	**12,990,000**	
Residual land value for site			**£ 2,259,270**
Land finance @6%	£	135,556	
Final residual			**£ 2,123,713**
Site Area (Hectares)	2.73		
Residual value for 1 Hectare			**£ 777,917**

If relevant, any known abnormal costs can also be applied at this stage; this would need to be based upon broad assumptions as more precise details are not usually to hand. In general however, a brownfield site is likely to have to bear remediation costs and (all other factors being equal) is more likely to present viability issues than a green field site.

3, 4, 5: Commercial Viability

This provides a conclusion upon the viability of the site for residential development based upon the application of base information (3) and marketability and developability factors (4) under the assumptions made within the spreadsheets in **Appendix F**.

Plate I.4 Assessment of Marketability



3) BASE SITE INFORMATION

SITE SIZE: 2.73 hectare: Postcode Sector: LL11 6
DENSITY: 35 dph AFFORDABLE HOUSING: (see below)

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

A considerable site in a poor location within a weaker housing market area.

Site conditions are not seen to be problematic.

5) COMMERCIAL VIABILITY OF SITE FOR RESIDENTIAL

The scheme outlined produces a site value of circa £0.8 million per Ha. This should be sufficient to bring the site forward although for such a large site there is not a lot of margin. It would be worth the Council looking at a 'trade-off' here between the proportion of smaller units with some affordable family housing which might not hit site value significantly.

Base site information (3) comprises the site area as well as the development density assumptions agreed as part of the discounting consultation process in Section 5 above. Assessments of the marketability and developability of the site (4) are drawn from site survey work along with an impression formed of the local neighbourhood in the context of the relevant post code sector.

Finally a conclusion is drawn on the viability and likelihood of the site to come forward (5). This is informed by views expressed during consultations with developers and agents and, in particular, by the broad benchmark land values established during these consultations. For the study area as a whole this was ascertained to be in the order of £2 million per hectare.

2.4 The Interpretation of Results

These analyses provide an indication of likely site values under the range of assumptions made. As noted above, it is not only location that determines site viability, but also the development mix and the planning gain requirements of the planning authority. The application of development templates to each site has reflected current development conditions in the settlement concerned (albeit from a currently very low level of development activity) and the composition and mix of these templates has informed the assessed sample of sites.

It should be appreciated however that some locations offer the opportunity to maximise site value according to the specific mix adopted; the market for apartments is the best example of this. Ceredigion does not have a strong market in flats and hence whilst in some locations these might maximise land value, in many others, the highest land values will be achieved via a mix of family type and lower density housing.

It is important to appreciate that the absolute residual that can be realised from a scheme ($\mathbf{R}^{V}$) is very significant. Although a pro-rata (per hectare) site value may look robust, a developer may be unwilling to take on a low value site on the basis that marginal cost overruns (or failure to achieve expected selling prices) could cause the development to become unviable. This is particularly important for smaller sites where the absolute value is low.

2.5 The Impact of Local Affordable Housing Policies

Where affordable housing is sought, this can significantly impact negatively on site value although this is by no means always the case. For housing, viability can also depend to a great extent upon the level of grant and ACG (Acceptable Cost Guidance) funding which can mean that social rented housing with grant can often provide a better deal for the land owner/developer than market housing, particularly where the market is weak.

The analyses that follow have not dealt with affordable housing impacts in great detail and it would be difficult to do this without obtaining detailed information on rents, ownership shares and grant arrangements.

For sites that, by virtue of their size and location, represent particular opportunities, further testing should be conducted to specifically assess the impact of affordable housing and other planning obligations. Technical Advice Note 2 'Affordable Housing' already sets our an approach to assessing the cost impacts of affordable housing. In responding to TAN 2, many Welsh authorities have already adopted a common approach (Development Appraisal Toolkit) to assessing these impacts to inform their forward planning and development control decisions.

3. The Economic Viability Analyses

The remainder of this note sets out the economic viability analyses of those sites selected against the sampling matrix in Table 6.1 of the main report.

Author: Dr Andrew Golland

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Reviewer: John D Hall

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SITE ID: A1 **DESCRIPTION: Former pub, Queens Rd, Aberystwyth** **Current use: Derelict pub**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey	£ 120,000	3	£ 360,000	£ 1,000	55	£ 165,000
2 Bed Flats	2/3 Storey	Below 5 Storey	£ 165,000	5	£ 825,000	£ 1,000	72	£ 360,000
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Semis	2 Storey	Estate			£ -			£ -
3 Bed Detached	2 Storey	Estate			£ -			£ -
4 Bed Detached	2 Storey	Estate			£ -			£ -
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				8			**Base Build**	
				GDV =	**£ 1,185,000**		**Costs**	**£ 525,000**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	525,000
Professional fees	£	63,000		
Disposal fees (4% GDV)	£	47,400		
Finance (6% Build costs)	£	31,500		
Dev Return (15% GDV)	£	177,750		
Internal overheads (10%)	£	52,500		
BREEAM Excellent - £10k	£	80,000		
Total Development costs			**£**	**977,150**
GDV (carried forward)	**£**	**1,185,000**		
Residual land value for site			**£**	**207,850**
Land finance @ 6%	£	12,471		
Final residual			**£**	**195,379**
Site Area (Hectares)	0.1			
Residual value for 1 Hectare			**£**	**1,953,790**

3) BASE SITE INFORMATION

SITE SIZE: 0.1 hectares **PCS: SY23 2**
DENSITY: 84 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This is a good opportunity to bring forward a derelict building in a reasonably marketable area.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

The site value on the basis of the assumptions made looks around £2 million. There are a number of factors which are difficult to quantify here, namely the level of conversion costs and the local market demand.
Given the current state of the land in its commercial use, the site would be expected to come forward for housing.

SITE ID: A6 **DESCRIPTION: Site of Cambria Tyres, Aberystwyth** **Current use: Light industrial use**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey	£ 170,000	7	£ 1,190,000	£ 1,215	72	£ 612,360
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 250,000	4	£ 1,000,000	£ 988	74	£ 292,448
3 Bed Semis	2 Storey	Estate	£ 275,000	3	£ 825,000	£ 865	84	£ 217,980
3 Bed Detached	2 Storey	Estate			£ -			£ -
4 Bed Detached	2 Storey	Estate			£ -			£ -
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				14			**Base Build**	
				GDV =	**£ 3,015,000**		**Costs**	**£ 1,122,788**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	1,122,788
Professional fees	£	134,735		
Disposal fees (4% GDV)	£	120,600		
Finance (6% Build costs)	£	67,367		
Dev Return (15% GDV)	£	452,250		
Internal overheads (10%)	£	112,279		
BREEAM Excellent - £10k	£	140,000		
Total Development costs			**£**	**2,150,019**
GDV (carried forward)	**£**	**3,015,000**		
Residual land value for site			**£**	**864,981**
Land finance @ 6%	£	51,899		
Final residual			**£**	**813,082**
Site Area (Hectares)	0.24			
Residual value for 1 Hectare			**£**	**3,387,844**

3) BASE SITE INFORMATION

SITE SIZE: 0.24 hectares **PCS: SY23 2**
DENSITY: 60 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This has been identifies as a site which could bring housing, plus also possibly some commercial use.

The local area is seen as being suitable for this type of development solution

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

The site (against net developable area) generates a value of nearly £3.5M per hectare.

This is a good value and in our view would be sufficient to bring the site forward from its current use.

SITE ID: A7 **DESCRIPTION: Cleared site on A44, Aberystwyth** **Current use: Cleared site**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey	£ 180,000	4	£ 720,000	£ 1,215	72	£ 349,920
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Semis	2 Storey	Estate			£ -			£ -
3 Bed Detached	2 Storey	Estate			£ -			£ -
4 Bed Detached	2 Storey	Estate			£ -			£ -
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				4			**Base Build**	
				GDV =	**£ 720,000**		**Costs**	**£ 349,920**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	349,920
Professional fees	£	41,990		
Disposal fees (4% GDV)	£	28,800		
Finance (6% Build costs)	£	20,995		
Dev Return (15% GDV)	£	108,000		
Internal overheads (10%)	£	34,992		
BREEAM Excellent - £10k		£40,000		
Total Development costs			**£**	**624,698**
GDV (carried forward)	**£**	**720,000**		
Residual land value for site			**£**	**95,302**
Land finance @ 6%	£	5,718		
Final residual			**£**	**89,584**
Site Area (Hectares)	0.08			
Residual value for 1 Hectare			**£**	**1,119,803**

3) BASE SITE INFORMATION

SITE SIZE: 0.08 hectares PCS: SY23 2
DENSITY: 52 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This is a cleared site with good access. The site is in a marketable area.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

The site (against nett developable area) generates a value of £1.2 million per hectare.

This is reasonable value and in our view should be sufficient to bring the site forward from its current use despite its relatively low residual value.

SITE ID: A16 **DESCRIPTION: Garage in Eastgate Street, Aberystwyth** **Current use: Garage**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey	£ 130,000	2	£ 260,000	£ 1,215	55	£ 133,650
2 Bed Flats	2/3 Storey	Below 5 Storey	£ 180,000	3	£ 540,000	£ 1,215	72	£ 262,440
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Semis	2 Storey	Estate			£ -			£ -
3 Bed Detached	2 Storey	Estate			£ -			£ -
4 Bed Detached	2 Storey	Estate			£ -			£ -
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				5			**Base Build**	
				GDV =	**£ 800,000**		**Costs**	**£ 396,090**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	396,090
Professional fees	£	47,531		
Disposal fees (4% GDV)	£	32,000		
Finance (6% Build costs)	£	23,765		
Dev Return (15% GDV)	£	120,000		
Internal overheads (10%)	£	39,609		
BREEAM Excellent - £10k	£	50,000		
Total Development costs			**£**	**708,995**
GDV (carried forward)	**£**	**800,000**		
Residual land value for site			**£**	**91,005**
Land finance @ 6%	£	5,460		
Final residual			**£**	**85,545**
Site Area (Hectares)	0.06			
Residual value for 1 Hectare			**£**	**1,425,742**

3) BASE SITE INFORMATION

SITE SIZE: 0.08 hectares PCS: SY23 2
DENSITY: 84 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This is in a quiet area of the town; to the rear of the sea front.

The site has potential for residential use.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

The site (against nett developable area) generates a value of over £1.4 million per hectare.

This is however a very small site and the absolute residual generated at £85,000 is very low and may not be enough to encourage change of use.

SITE ID: A20 **DESCRIPTION: Church site, Aberystwyth** **Current use: Welsh Martyrs Catholic Church**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey	£ 130,000	2	£ 260,000	£ 1,215	55	£ 133,650
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 250,000	7	£ 1,750,000	£ 988	70	£ 484,120
3 Bed Semis	2 Storey	Estate			£ -			£ -
3 Bed Detached	2 Storey	Estate			£ -			£ -
4 Bed Detached	2 Storey	Estate			£ -			£ -
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				9			**Base Build**	
				GDV =	**£ 2,010,000**		**Costs**	**£ 617,770**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	617,770
Professional fees	£	74,132		
Disposal fees (4% GDV)	£	80,400		
Finance (6% Build costs)	£	37,066		
Dev Return (15% GDV)	£	301,500		
Internal overheads (10%)	£	61,777		
BREEAM Excellent - £10k	£	90,000		
Total Development costs			**£**	**1,262,646**
GDV (carried forward)	**£**	**2,010,000**		
Residual land value for site			**£**	**747,354**
Land finance @ 6%	£	44,841		
Final residual			**£**	**702,513**
Site Area (Hectares)	0.24			
Residual value for 1 Hectare			**£**	**2,927,138**

3) BASE SITE INFORMATION

SITE SIZE: 0.24 hectares PCS: SY23 2
DENSITY: 38 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This is in a marketable location on the edge of the town.

The site has potential for residential use.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

This is a site which should generate a substantial residual value both on a per hectare and an absolute basis.

The site should come forward for housing.

SITE ID: A38 **DESCRIPTION: Field on the B4572, Aberystwyth** **Current use: Green field**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey	£ 100,000	6	£ 600,000	£ 1,215	55	£ 400,950
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 185,000	10	£ 1,850,000	£ 988	70	£ 691,600
3 Bed Semis	2 Storey	Estate	£ 190,000	6	£ 1,140,000	£ 865	84	£ 435,960
3 Bed Detached	2 Storey	Estate	£ 275,000	9	£ 2,475,000	£ 865	94	£ 731,790
4 Bed Detached	2 Storey	Estate			£ -			£ -
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				31			**Base Build**	
				GDV =	**£ 6,065,000**		**Costs**	**£ 2,260,300**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	2,260,300
Professional fees	£	271,236		
Disposal fees (4% GDV)	£	242,600		
Finance (6% Build costs)	£	135,618		
Dev Return (15% GDV)	£	909,750		
Internal overheads (10%)	£	226,030		
BREEAM Excellent - £10k	£	310,000		
Total Development costs			**£**	**4,355,534**
GDV (carried forward)	**£**	**6,065,000**		
Residual land value for site			**£**	**1,709,466**
Land finance @ 6%	£	102,568		
Final residual			**£**	**1,606,898**
Site Area (Hectares)	0.87			
Residual value for 1 Hectare			**£**	**1,847,009**

3) BASE SITE INFORMATION

SITE SIZE: 0.87 hectares PCS: SY23 1
DENSITY: 36 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This is a green field site located on the edge of town opposite the University Halls.
The site has potential for residential use.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

This is a site which should generate a substantial residual value both on a per hectare and an absolute basis.

The site should come forward for housing and may, subject to policy, yield an affordable housing contribution

SITE ID: A54 **DESCRIPTION: Football pitch, Aberystwyth** **Current use: Recreation**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey	£ 120,000	8	£ 960,000	£ 1,215	55	£ 534,600
2 Bed Flats	2/3 Storey	Below 5 Storey	£ 165,000	41	£ 6,765,000	£ 1,215	72	£ 3,586,680
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Semis	2 Storey	Estate	£ 250,000	3	£ 750,000	£ 865	84	£ 217,980
3 Bed Detached	2 Storey	Estate	£ 300,000	3	£ 900,000	£ 865	94	£ 243,930
4 Bed Detached	2 Storey	Estate	£ 425,000	3	£ 1,275,000	£ 865	110	£ 285,450
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				58			**Base Build**	
				GDV =	**£ 10,650,000**		**Costs**	**£ 4,868,640**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)		£	4,868,640
Professional fees	£ 584,237		
Disposal fees (4% GDV)	£ 426,000		
Finance (6% Build costs)	£ 292,118		
Dev Return (15% GDV)	£ 1,597,500		
Internal overheads (10%)	£ 486,864		
BREEAM Excellent - £10k	£ 580,000		
Total Development costs		**£**	**8,835,359**
GDV (carried forward)	**£ 10,650,000**		
Residual land value for site		**£**	**1,814,641**
Land finance @ 6%	£ 108,878		
Final residual		**£**	**1,705,762**
Site Area (Hectares)	0.85		
Residual value for 1 Hectare		**£**	**2,006,779**

3) BASE SITE INFORMATION

SITE SIZE: 0.85 hectares PCS: SY23 2
DENSITY: 67 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

As a residential development opportunity this would generate a substantial residual value.

The site is well located on the edge of town in a marketable area.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

It is anticipated that a housing scheme will generate a significant surplus over and above existing use value and hence from a viability viewpoint this site should be considered as realistic capacity.
The site may, subject to policy constraints, be considered a good opportunity to bring foward affordable housing.

SITE ID: Ab5 **DESCRIPTION: Volvo garage, South Road, Aberaeron** **Current use: Garage and open space to rear**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 210,000	4	£ 840,000	£ 988	70	£ 276,640
3 Bed Semis	2 Storey	Estate	£ 235,000	3	£ 705,000	£ 865	84	£ 217,980
3 Bed Detached	2 Storey	Estate	£ 295,000	3	£ 885,000	£ 865	94	£ 243,930
4 Bed Detached	2 Storey	Estate	£ 340,000	2	£ 680,000	£ 865	110	£ 190,300
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				12			**Base Build**	
				GDV =	**£ 3,110,000**		**Costs**	**£ 928,850**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	928,850
Professional fees	£	111,462		
Disposal fees (4% GDV)	£	124,400		
Finance (6% Build costs)	£	55,731		
Dev Return (15% GDV)	£	466,500		
Internal overheads (10%)	£	92,885		
BREEAM Excellent - £10k		£120,000		
Total Development costs			**£**	**1,899,828**
GDV (carried forward)	**£**	**3,110,000**		
Residual land value for site			**£**	**1,210,172**
Land finance @ 6%	£	72,610		
Final residual			**£**	**1,137,562**
Site Area (Hectares)	0.61			
Residual value for 1 Hectare			**£**	**1,864,855**

3) BASE SITE INFORMATION

SITE SIZE: 0.61 hectares PCS: SA46 0
DENSITY: 23 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

The site contains the garage and back land, believed to be in a single ownership.

The location is reasonably strong from a marketability viewpoint.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

A residential scheme would be anticipated to generate a robust residual value for the site owners on both an an absolute and (per hectare) basis.

However, this will have to be offset against the current value of the business which needs to be established more precisely.

SITE ID: Ab8 **DESCRIPTION: Derelict house, South Road, Aberaeron** **Current use: Garage and open space to rear**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey	£ 150,000	3	£ 450,000	£ 1,215	66	£ 240,570
2 Bed Town houses	2/3 Storey	Estate	£ 180,000	4	£ 720,000	£ 988	70	£ 276,640
3 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Semis	2 Storey	Estate			£ -			£ -
3 Bed Detached	2 Storey	Estate			£ -			£ -
4 Bed Detached	2 Storey	Estate			£ -			£ -
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev			£ -			£ -
				7			**Base Build**	
				GDV =	**£ 1,170,000**		**Costs**	**£ 517,210**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	517,210
Professional fees	£	62,065		
Disposal fees (4% GDV)	£	46,800		
Finance (6% Build costs)	£	31,033		
Dev Return (15% GDV)	£	175,500		
Internal overheads (10%)	£	51,721		
BREEAM Excellent - £10k		£70,000		
Total Development costs			**£**	**954,329**
GDV (carried forward)	**£**	**1,170,000**		
Residual land value for site			**£**	**215,671**
Land finance @ 6%	£	12,940		
Final residual			**£**	**202,731**
Site Area (Hectares)	0.19			
Residual value for 1 Hectare			**£**	**1,067,005**

3) BASE SITE INFORMATION

SITE SIZE: 0.19 hectares PCS: SA46 0
DENSITY: 37 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This is a good location for housing development.

The site is under-used.
Possible TPO constraints.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

Aberaeron is a reasonably robust local market. The site should generate a receipt of about £200,000.

This will need to be offset against the chance that a developer may purchase the house for renovation and only a single dwelling come forward.

SITE ID: Ab12 **DESCRIPTION: Site on Lamepeter Road, Aberaeron** **Current use: Undeveloped JHLA site**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 210,000	13	£ 2,730,000	£ 988	70	£ 899,080
3 Bed Semis	2 Storey	Estate	£ 235,000	8	£ 1,880,000	£ 865	84	£ 581,280
3 Bed Detached	2 Storey	Estate	£ 295,000	8	£ 2,360,000	£ 865	94	£ 650,480
4 Bed Detached	2 Storey	Estate	£ 340,000	5	£ 1,700,000	£ 865	110	£ 475,750
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				34			**Base Build**	
				GDV =	**£ 8,670,000**		**Costs**	**£ 2,606,590**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	2,606,590
Professional fees	£	312,791		
Disposal fees (4% GDV)	£	346,800		
Finance (6% Build costs)	£	156,395		
Dev Return (15% GDV)	£	1,300,500		
Internal overheads (10%)	£	260,659		
BREEAM Excellent - £10k	£	340,000		
Total Development costs			**£**	**5,323,735**
GDV (carried forward)	**£**	**8,670,000**		
Residual land value for site			**£**	**3,346,265**
Land finance @ 6%	£	200,776		
Final residual			**£**	**3,145,489**
Site Area (Hectares)	1.48			
Residual value for 1 Hectare			**£**	**2,125,330**

3) BASE SITE INFORMATION

SITE SIZE: 1.48 hectares PCS: SA46 0
DENSITY: 23 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located in an area where residential development could be marketed successfully.

The site has some constraints with sloping.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

This type of scheme should come forward. This is a relatively undeveloped site which should generate a strong residual site value.

Possibly a candidate site for affordable housing subject to policy.

SITE ID: C1 **DESCRIPTION: Site off Tenby Road South, Cardigan** **Current use:**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 160,000	4	£ 640,000	£ 988	70	£ 276,640
3 Bed Semis	2 Storey	Estate	£ 185,000	2	£ 370,000	£ 865	84	£ 145,320
3 Bed Detached	2 Storey	Estate	£ 230,000	2	£ 460,000	£ 865	94	£ 162,620
4 Bed Detached	2 Storey	Estate			£ -			£ -
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				8			**Base Build**	
				GDV =	**£ 1,470,000**		**Costs**	**£ 584,580**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	584,580
Professional fees	£	70,150		
Disposal fees (4% GDV)	£	58,800		
Finance (6% Build costs)	£	35,075		
Dev Return (15% GDV)	£	220,500		
Internal overheads (10%)	£	58,458		
BREEAM Excellent - £10k		£80,000		
Total Development costs			**£**	**1,107,562**
GDV (carried forward)	**£**	**1,470,000**		
Residual land value for site			**£**	**362,438**
Land finance @ 6%	£	21,746		
Final residual			**£**	**340,691**
Site Area (Hectares)	0.24			
Residual value for 1 Hectare			**£**	**1,419,547**

3) BASE SITE INFORMATION

SITE SIZE: 0.24 hectares PCS: SA 43 3
DENSITY: 33 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located in a reasonable area from a marketing viewpoint.

The site has potential for residential use. Site is currently under planning application for three detached houses.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

This is a site which should generate a reasonable residual value both on a per hectare and an absolute basis.

The site should come forward for housing.

SITE ID: C14 **DESCRIPTION: Napier Gardens site, Cardigan** **Current use: UDP Housing allocation**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 165,000	6	£ 990,000	£ 988	70	£ 414,960
3 Bed Semis	2 Storey	Estate	£ 190,000	4	£ 760,000	£ 865	84	£ 290,640
3 Bed Detached	2 Storey	Estate	£ 240,000	3	£ 720,000	£ 865	94	£ 243,930
4 Bed Detached	2 Storey	Estate	£ 275,000	2	£ 550,000	£ 865	110	£ 190,300
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				15			**Base Build**	
				GDV =	**£ 3,020,000**		**Costs**	**£ 1,139,830**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	1,139,830
Professional fees	£	136,780		
Disposal fees (4% GDV)	£	120,800		
Finance (6% Build costs)	£	68,390		
Dev Return (15% GDV)	£	453,000		
Internal overheads (10%)	£	113,983		
BREEAM Excellent - £10k	£	150,000		
Total Development costs			**£**	**2,182,782**
GDV (carried forward)	**£**	**3,020,000**		
Residual land value for site			**£**	**837,218**
Land finance @ 6%	£	50,233		
Final residual			**£**	**786,985**
Site Area (Hectares)	0.69			
Residual value for 1 Hectare			**£**	**1,140,557**

3) BASE SITE INFORMATION

SITE SIZE: 0.69 hectares PCS: SA 43 1
DENSITY: 22 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located in a good area from a marketing viewpoint.

The site has potential for residential use.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

This site should generate a significant receipt and a substantial increase from existing use value which is believed to be green field.

The site should come forward for housing.

SITE ID: C19 **DESCRIPTION: Site at Heol Bedw, Cardigan** **Current use: UDP Housing allocation**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 165,000	12	£ 1,980,000	£ 988	70	£ 829,920
3 Bed Semis	2 Storey	Estate	£ 190,000	8	£ 1,520,000	£ 865	84	£ 581,280
3 Bed Detached	2 Storey	Estate	£ 240,000	9	£ 2,160,000	£ 865	94	£ 731,790
4 Bed Detached	2 Storey	Estate	£ 275,000	5	£ 1,375,000	£ 865	110	£ 475,750
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				34			**Base Build**	
				GDV =	**£ 7,035,000**		**Costs**	**£ 2,618,740**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	2,618,740
Professional fees	£	314,249		
Disposal fees (4% GDV)	£	281,400		
Finance (6% Build costs)	£	157,124		
Dev Return (15% GDV)	£	1,055,250		
Internal overheads (10%)	£	261,874		
BREEAM Excellent - £10k	£	340,000		
Total Development costs			**£**	**5,028,637**
GDV (carried forward)	**£**	**7,035,000**		
Residual land value for site			**£**	**2,006,363**
Land finance @ 6%	£	120,382		
Final residual			**£**	**1,885,981**
Site Area (Hectares)	1.47			
Residual value for 1 Hectare			**£**	**1,282,980**

3) BASE SITE INFORMATION

SITE SIZE: 1.47 hectares PCS: SA 43 1
DENSITY: 23 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located in a good area from a marketing viewpoint.

The site has potential for residential use.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

This is a UDP allocated site. We see no reason why the site should not come forward.

This type of site might yield an affordable housing Section 106 contribution.

SITE ID: L5 **DESCRIPTION: Bus Depot site, Lampeter** **Current use: Parking for buses**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Semis	2 Storey	Estate			£ -			£ -
3 Bed Detached	2 Storey	Estate	£ 215,000	2	£ 430,000	£ 865	94	£ 162,620
4 Bed Detached	2 Storey	Estate	£ 245,000	3	£ 735,000	£ 865	110	£ 285,450
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				5			**Base Build**	
				GDV =	**£ 1,165,000**		**Costs**	**£ 448,070**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	448,070
Professional fees	£	53,768		
Disposal fees (4% GDV)	£	46,600		
Finance (6% Build costs)	£	26,884		
Dev Return (15% GDV)	£	174,750		
Internal overheads (10%)	£	44,807		
BREEAM Excellent - £10k		£50,000		
Total Development costs			**£**	**844,880**
GDV (carried forward)	**£**	**1,165,000**		
Residual land value for site			**£**	**320,120**
Land finance @ 6%	£	19,207		
Final residual			**£**	**300,913**
Site Area (Hectares)	0.13			
Residual value for 1 Hectare			**£**	**2,314,717**

3) BASE SITE INFORMATION

SITE SIZE: 0.13 hectares PCS: SA 48 7
DENSITY: 39 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located in between residential uses; it is a good site for housing.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

If the site were to be developed for larger (detached) housing this would generate a substantial return for the land owner.

Whether the site would come forward for housing depends on current use value. An alternative bus depot would have to be identified by company.

SITE ID: L6 **DESCRIPTION: Mixed use site, Lampeter** **Current use: Mixed: BT; Scrap yard & Flower shop**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Semis	2 Storey	Estate			£ -			£ -
3 Bed Detached	2 Storey	Estate	£ 215,000	4	£ 860,000	£ 865	94	£ 325,240
4 Bed Detached	2 Storey	Estate	£ 245,000	6	£ 1,470,000	£ 865	110	£ 570,900
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				10			**Base Build**	
				GDV =	**£ 2,330,000**		**Costs**	**£ 896,140**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	896,140
Professional fees	£	107,537		
Disposal fees (4% GDV)	£	93,200		
Finance (6% Build costs)	£	53,768		
Dev Return (15% GDV)	£	349,500		
Internal overheads (10%)	£	89,614		
BREEAM Excellent - £10k		£100,000		
Total Development costs			**£**	**1,689,759**
GDV (carried forward)	**£**	**2,330,000**		
Residual land value for site			**£**	**640,241**
Land finance @ 6%	£	38,414		
Final residual			**£**	**601,826**
Site Area (Hectares)	0.27			
Residual value for 1 Hectare			**£**	**2,228,986**

3) BASE SITE INFORMATION

SITE SIZE: 0.27 hectares PCS: SA 48 7
DENSITY: 38 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

The site has been identifies as having potential for housing.

The locaolity is seen to be marketable for a residential scheme.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

The site generates a strong value on a per hectare basis.

However, the mix of commercial uses may mean that the site may not come forward. These include retail, industrial and the BT space. The site needs further appraisal work to ascertain discounted housing potential.

SITE ID: L11 **DESCRIPTION: Maes-y-Deri, Lampeter** **Current use: Public open space**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 145,000	5	£ 725,000	£ 988	70	£ 345,800
3 Bed Semis	2 Storey	Estate	£ 165,000	4	£ 660,000	£ 865	84	£ 290,640
3 Bed Detached	2 Storey	Estate	£ 215,000	5	£ 1,075,000	£ 865	94	£ 406,550
4 Bed Detached	2 Storey	Estate	£ 245,000	2	£ 490,000	£ 865	110	£ 190,300
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				16			**Base Build**	
				GDV =	**£ 2,950,000**		**Costs**	**£ 1,233,290**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	1,233,290
Professional fees	£	147,995		
Disposal fees (4% GDV)	£	118,000		
Finance (6% Build costs)	£	73,997		
Dev Return (15% GDV)	£	442,500		
Internal overheads (10%)	£	123,329		
BREEAM Excellent - £10k	£	160,000		
Total Development costs			**£**	**2,299,111**
GDV (carried forward)	**£**	**2,950,000**		
Residual land value for site			**£**	**650,889**
Land finance @ 6%	£	39,053		
Final residual			**£**	**611,835**
Site Area (Hectares)	0.69			
Residual value for 1 Hectare			**£**	**886,718**

3) BASE SITE INFORMATION

SITE SIZE: 0.69 hectares PCS: SA48 7
DENSITY: 23 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located in a good area from a marketing viewpoint.

The site has potential for residential use. The site is currently in poorly maintained state.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

The opportunity cost of keeping this site in its current use is very high relative to the value of the site for housing.

From a viability viewpoint, we see no reason why the site should not come forward.

SITE ID: LD11 **DESCRIPTION: Site on Church Street, Llandysul** **Current use: Pasture land**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey	£ 120,000	4	£ 480,000	£ 1,458	66	£ 384,912
2 Bed Town houses	2/3 Storey	Estate	£ 150,000	11	£ 1,650,000	£ 1,235	70	£ 950,950
3 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Semis	2 Storey	Estate			£ -			£ -
3 Bed Detached	2 Storey	Estate	£ 200,000	1	£ 200,000	£ 1,081	94	£ 101,614
4 Bed Detached	2 Storey	Estate			£ -			£ -
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				16			**Base Build**	
				GDV =	**£ 2,330,000**		**Costs**	**£ 1,437,476**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)		£	1,437,476
Professional fees	£ 172,497		
Disposal fees (4% GDV)	£ 93,200		
Finance (6% Build costs)	£ 86,249		
Dev Return (15% GDV)	£ 349,500		
Internal overheads (10%)	£ 143,748		
BREEAM Excellent - £10k	£160,000		
Total Development costs		**£**	**2,442,669**
GDV (carried forward)	**£ 2,330,000**		
Residual land value for site		**-£**	**112,669**
Land finance @ 6%	-£ 6,760		
Final residual		**-£**	**105,909**
Site Area (Hectares)	0.48		
Residual value for 1 Hectare		**-£**	**220,644**

3) BASE SITE INFORMATION

SITE SIZE: 0.48 hectares PCS: SA44 4
DENSITY: 33 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located to the edge of town in a reasonably marketable area.

The site is however located on a very steep slope which will make it costly to develop.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

To account for the slope we have increased build costs by 25%.

This makes the site very likely to be unviable. It would still be marginal even if unless BREEAM Excellent is not sought.

SITE ID: Ll15 **DESCRIPTION: Field site, Heol-Y-Gilfach, Llandysul** **Current use: Pasture land**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey	£ 120,000	3	£ 360,000	£ 1,215	66	£ 240,570
2 Bed Town houses	2/3 Storey	Estate	£ 150,000	3	£ 450,000	£ 988	70	£ 207,480
3 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Semis	2 Storey	Estate			£ -			£ -
3 Bed Detached	2 Storey	Estate			£ -			£ -
4 Bed Detached	2 Storey	Estate			£ -			£ -
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev			£ -			£ -
				6			**Base Build**	
				GDV =	**£ 810,000**		**Costs**	**£ 448,050**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	448,050
Professional fees	£	53,766		
Disposal fees (4% GDV)	£	32,400		
Finance (6% Build costs)	£	26,883		
Dev Return (15% GDV)	£	121,500		
Internal overheads (10%)	£	44,805		
BREEAM Excellent - £10k	£	60,000		
Total Development costs			**£**	**787,404**
GDV (carried forward)	**£**	**810,000**		
Residual land value for site			**£**	**22,596**
Land finance @ 6%	£	1,356		
Final residual			**£**	**21,240**
Site Area (Hectares)	0.17			
Residual value for 1 Hectare			**£**	**124,943**

3) BASE SITE INFORMATION

SITE SIZE: 1.48 hectares PCS: SA44 4
DENSITY: 36 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located to the edge of town in a reasonably marketable area.

The site has residential nearby.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

This scheme would not generate a significant residual value.

However, on the basis of current use value as pasture land, it may still come forward.

SITE ID: Ll16 **DESCRIPTION: JHLA site, Heol-Y-Gilfach, Llandysul** **Current use: JHLA allocated site**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 140,000	12	£ 1,680,000	£ 988	70	£ 829,920
3 Bed Semis	2 Storey	Estate	£ 160,000	8	£ 1,280,000	£ 865	84	£ 581,280
3 Bed Detached	2 Storey	Estate	£ 200,000	10	£ 2,000,000	£ 865	94	£ 813,100
4 Bed Detached	2 Storey	Estate	£ 225,000	7	£ 1,575,000	£ 865	110	£ 666,050
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				37			**Base Build**	
				GDV =	**£ 6,535,000**		**Costs**	**£ 2,890,350**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)		£	2,890,350
Professional fees	£ 346,842		
Disposal fees (4% GDV)	£ 261,400		
Finance (6% Build costs)	£ 173,421		
Dev Return (15% GDV)	£ 980,250		
Internal overheads (10%)	£ 289,035		
BREEAM Excellent - £10k	£370,000		
Total Development costs		**£**	**5,311,298**
GDV (carried forward)	**£ 6,535,000**		
Residual land value for site		**£**	**1,223,702**
Land finance @ 6%	£ 73,422		
Final residual		**£**	**1,150,280**
Site Area (Hectares)	1.88		
Residual value for 1 Hectare		**£**	**611,851**

3) BASE SITE INFORMATION

SITE SIZE: 1.88 hectares PCS: SA44 4
DENSITY: 23 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located in an area where residential development could be marketed successfully.

The site has some constraints with sloping.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

This is not a strong local market in the wider context of Ceredigion. However the site should generate, on the basis of the assumptions made, a value around £1.2 million which should be sufficient to encourage a change of use.

SITE ID: T8 **DESCRIPTION: Recycling centre site, Tregaron** **Current use: Recycling centre - but appears underused**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate	£ 210,000	2	£ 420,000	£ 988	70	£ 138,320
3 Bed Semis	2 Storey	Estate	£ 235,000	2	£ 470,000	£ 865	84	£ 145,320
3 Bed Detached	2 Storey	Estate	£ 295,000	10	£ 2,950,000	£ 865	94	£ 813,100
4 Bed Detached	2 Storey	Estate	£ 340,000	11	£ 3,740,000	£ 865	110	£ 1,046,650
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				25			**Base Build**	
				GDV =	**£ 7,580,000**		**Costs**	**£ 2,143,390**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)		£	2,143,390
Professional fees	£ 257,207		
Disposal fees (4% GDV)	£ 303,200		
Finance (6% Build costs)	£ 128,603		
Dev Return (15% GDV)	£ 1,137,000		
Internal overheads (10%)	£ 214,339		
BREEAM Excellent - £10k	£250,000		
Total Development costs		**£**	**4,433,739**
GDV (carried forward)	**£ 7,580,000**		
Residual land value for site		**£**	**3,146,261**
Land finance @ 6%	£ 188,776		
Final residual		**£**	**2,957,485**
Site Area (Hectares)	0.92		
Residual value for 1 Hectare		**£**	**3,214,658**

3) BASE SITE INFORMATION

SITE SIZE: 0.92 hectares PCS: SY25 6
DENSITY: 28 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located in an area where residential development would work.

A scheme would involve some substantial demolition.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

The scheme should generate a robust residual value sufficient to encourage the site to come forward.

SITE ID: T15 **DESCRIPTION: Field opposite school, Tregaron** **Current use: Pasture**

1) INPUT VARIABLES: MARKET VALUES, COSTS AND DEVELOPMENT DETAILS

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)
Dwelling & Bedroom(s)	**Construction**	**Build Type**	**Selling price**	**Units**	**Dev values**	**Build Cost (m^2)**	**Size (m2)**	**Build Costs**
1 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Flats	2/3 Storey	Below 5 Storey			£ -			£ -
2 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Town houses	2/3 Storey	Estate			£ -			£ -
3 Bed Semis	2 Storey	Estate	£ 235,000	4	£ 940,000	£ 865	84	£ 290,640
3 Bed Detached	2 Storey	Estate	£ 295,000	6	£ 1,770,000	£ 865	94	£ 487,860
4 Bed Detached	2 Storey	Estate	£ 340,000	8	£ 2,720,000	£ 865	110	£ 761,200
Semis	2 Storey	"One-off" Dev			£ -			£ -
Detached	2 Storey	"One-off" Dev		-	£ -			£ -
				18			**Base Build**	
				GDV =	**£ 5,430,000**		**Costs**	**£ 1,539,700**

2) DEVELOPMENT APPRAISAL

Build costs (carried down)			£	1,539,700
Professional fees	£	184,764		
Disposal fees (4% GDV)	£	217,200		
Finance (6% Build costs)	£	92,382		
Dev Return (15% GDV)	£	814,500		
Internal overheads (10%)	£	153,970		
BREEAM Excellent - £10k		£180,000		
Total Development costs			**£**	**3,182,516**
GDV (carried forward)	**£**	**5,430,000**		
Residual land value for site			**£**	**2,247,484**
Land finance @ 6%	£	134,849		
Final residual			**£**	**2,112,635**
Site Area (Hectares)	0.62			
Residual value for 1 Hectare			**£**	**3,407,476**

3) BASE SITE INFORMATION

SITE SIZE: 0.62 hectares **PCS: SY25 6**
DENSITY: 29 dph

4) MARKETABILITY AND DEVELOPABILITY OF THE SITE

This site is located in an area where residential development would work.

5) COMMERCIAL VIABILITY FOR RESIDENTIAL

The scheme should generate a robust residual value on an absolute value and on a per hectare basis.

Subject to policy, the site might viably sustain affordable housing.