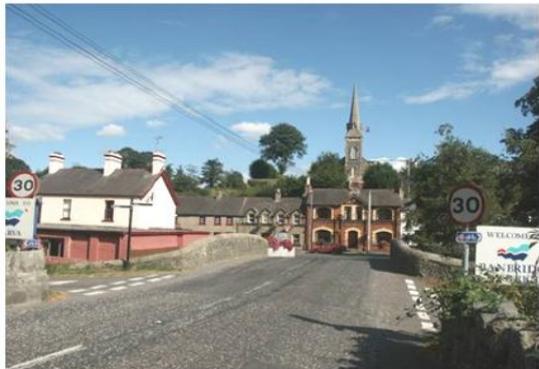


Armagh, Banbridge & Craigavon Local Development Plan Preparatory Studies



**Paper 2 : Housing Paper
November 2014**



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ACCOMMODATING HOUSING GROWTH ACROSS ARMAGH, BANBRIDGE & CRAIGAVON COUNCIL

PURPOSE

The purpose of this paper is to provide the Shadow Planning Committee with an overview of the current housing situation in the Armagh, Banbridge and Craigavon District Area and to consider the housing requirements up to 2030.

It provides information on:-

- (i) the regional policy context for formulating Local Development Plan housing strategies and policies ;
- (ii) a summary of the housing characteristics of Armagh, Banbridge and Craigavon District and household projections to 2030;
- (iii) an overview of the availability of housing land across the settlements of Armagh, Banbridge and Craigavon District
- (iv) An understanding of the options available for making housing allocations and the implications of such decisions.

RECOMMENDATION

That the Shadow Planning Committee note the paper findings and considers how future housing growth should be apportioned across settlements and the countryside through facilitated workshops.

1.0 Introduction

- 1.1** This is the second of four papers to be presented to the Shadow Planning Committee prior to the transfer of the majority of planning powers in April 2015.
- 1.2** The purpose of this paper is to inform the newly formed Shadow Planning Committee for Armagh, Banbridge and Craigavon on how housing land provision will be addressed in the future.
- 1.3** This paper sets out the regional context for housing, outlining the current situations regarding population and housing and the implications of new household formation and population growth in the Plan area. It provides an indication of how housing growth could be allocated across the existing settlement hierarchies of each district, taking into account the directions for balanced growth as set out in the Regional Development Strategy (RDS).
- 1.4** It then addresses land availability for housing across Armagh-Banbridge-Craigavon using information from the annual Urban Housing Land Availability Summary. It examines the take up of zoned and unzoned land within the current development plans and the amount of land remaining available for development and identifies whether any additional land is required to 2030.
- 1.5** This paper allows members to commence consideration of a housing growth strategy and to understand the options for allocating housing growth and the potential consequences of such allocations. However, at this stage the paper only aims to provide a foundation for future decision making which will need to be further informed by more detailed evaluation studies of the individual settlements (including settlement and environmental assets appraisals, urban capacity studies, landscape & housing evaluation framework assessments and development pressure analysis), a sustainability assessment, community plan & member input and public consultation.

2.0 Regional Policy Context

2.1 The Regional Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements. A summary of these documents as they relate to plan making and local housing policy is provided in the following sections.

(a) Regional Development Strategy

2.2 Prior to the publication of the Regional Development Strategy (RDS 2025), housing need was estimated by means of a “Predict and Provide” approach. District housing need was estimated by projecting trends in population and average household size, also taking into account house construction rates. The RDS introduced fundamental and significant changes to the manner in which area plans must now provide for future housing requirements. The approach now taken is known as “Plan, Monitor and Manage” which seeks to ensure that plans become more sustainable, balanced and integrated.

2.3 The RDS 2035 sets policy directions for the provision of housing that aim to deliver development in a more sustainable manner. This means growing the population in the Hubs by providing additional housing (SFG 12) and sustaining rural communities living in smaller settlements (i.e. smaller towns and villages) and the open countryside (SPG 13). It also provides Regional Guidance for housing development recognising the need to: -

- strengthen community cohesion through fostering a stronger community spirit and sense of place and encouraging mixed housing development (RG 6);
- support urban renaissance by encouraging and bringing forward under-utilised land and buildings, particularly for mixed use development and promoting regeneration in areas of social need (RG 7); and
- manage housing growth to achieve sustainable patterns of residential development by promoting more sustainable development within existing urban areas and ensuring an adequate and available supply of quality housing to meet the needs of everyone (RG 8).

2.4 Achieving balanced communities and strengthening community means the provision of good quality housing offering a variety of house types, sizes and tenures to meet different needs and development that provides opportunities for the community to share in local employment, shopping, leisure and social facilities is fundamental to the building of more balanced communities. In the first paper to Members on Population and Growth, the importance of providing housing to meet the needs of different groups was highlighted both in terms of families and single people. It was apparent that both the rise in elderly people, declining family sizes and young people

starting out was going to lead to increased demand for smaller units, which should be incorporated into new housing along with family housing to create more balanced communities.

- 2.5** The RDS emphasises a sustainable approach to housing growth, setting of a regional target of 60% of new housing to be located in appropriate “brownfield” sites within the urban footprints of settlements greater than 5000 population (RG 8) which would include Armagh, Banbridge, Craigavon Urban Area and Dromore. Brownfield land may encompass vacant or derelict land, infill sites and land occupied by redundant or underused buildings. Therefore, more housing through the recycling of land and buildings within existing urban areas is promoted. Councils are also required to take account of existing vacant housing and needs identified in the Housing Needs Assessment/Housing Market Analysis when allocating land. This includes land for social and intermediate housing such as shared ownership and affordable housing.
- 2.6** The RDS identifies regional housing needs as Housing Growth Indicators (HGIs) across Northern Ireland. HGIs have been produced as a guide for those preparing development plans. The figures are an estimate of the new dwelling requirement 2008-2015 for the existing District Councils. It has been derived by DRD from examining household projections, existing stock, vacancies etc. The HGI for 2008 to 2025 for the three ABC Council districts has been set at 5,500 dwellings for Armagh, 5,500 for Banbridge and 10,300 for Craigavon. A total ABC HGI of 21,300. When these figures are projected on to 2030 (22 years), the figures are 7,118 for Armagh District, 7,118 for Banbridge District and 13,329 for Craigavon District. The projected total ABC HGI to 2030 is an estimated 27,565 new dwellings. Members should note that DOE & DRD have commissioned a piece of work to clarify the allocation of HGIs across the new council clusters which will consider boundary changes.
- 2.7** The RDS leaves the issue of how the HGI should be allocated across the settlements and to the open countryside as a matter for each Council consideration taking into account its spatial framework guidance (SFG). This puts the focus on existing settlements by:
- taking into account the roles and functions of each settlement (SFG10),
 - putting the hubs as the primary focus of growth both in terms of economic development opportunities and population. (SFG11 and 12)
 - recognising the need to sustain rural communities living in smaller settlements and the open countryside, by consolidating and revitalising small towns and villages in their role as local service centres (SFG 13).
- 2.8.** To aid consideration, the RDS provides a Housing Evaluation Framework for considering growth, based on a series of tests such as each settlements resources, environmental capacity, transport links, economic development potential, character, and community services.

(b) Regional Planning Policy Statements

- 2.9** The RDS is complimented by the DOE's Planning Policy Statements, the most relevant of which is PPS12: Housing in Settlements. This document is to be replaced by the Strategic Planning Policy Statement (SPSS), a Draft of which was issued for consultation in February 2014. The draft SPSS does not represent a significant change to housing policy but helps to shorten and simplify the guidance for Councils. Both PPS 12 and the Draft SPSS set regional policy objectives underpinning the RDS and equally relevant to local development plans in terms of:
- managing housing needs in response to changing need;
 - directing and managing growth to achieve more sustainable patterns of residential development;
 - promoting a drive for more housing within urban areas; and
 - encouraging increased density appropriate to the scale and design of cities and towns of Northern Ireland.
- 2.10** The statements reiterate that in making housing allocations, Councils should apply the RDS Housing Evaluation Framework, take account of the Housing Needs Assessment (NIHE), existing commitments (built, approved, and likely to be approved) and potential windfall. It also advises that in preparing a plan a council should undertake an urban capacity study and where appropriate transport assessments.
- 2.11** The guidance sets a sequential approach to site identification, adopting existing urban sites first, before expansions to towns and cities and treating major expansion of a village or small rural settlement only in exceptional circumstances, and the creation of new settlements in the last resort.
- 2.12** PPS 12 also sets out the role of development plan in terms of meeting social housing needs through either the zoning of land or the outlining of key site requirements through the development plan process.
- 2.13** In relation to Housing in the Countryside, the Draft SPPS adopts a similar approach to PPS 21:Sustainable Development in the Countryside, setting policy objectives aimed at;
- managing growth to achieve appropriate and sustainable patterns of development which support a vibrant rural community;
 - conserving the landscape and natural resources of the rural area and to protect it from excessive, inappropriate or obtrusive development and from the actual or potential effects of pollution;
 - facilitating development which contributes to a sustainable rural economy; and
 - promoting high standards in the design, siting and landscaping of development.

- 2.14** The Draft SPPS also adopts a policy approach based on clustering, consolidating, and grouping new development, particularly new residential development, with existing established buildings and the re-use of previously used land and buildings.
- 2.15** The Council should bring forward a strategy for development in the countryside which should reflect the aim, objectives and policy approach of the Draft SPPS, tailored to the specific circumstances of Armagh, Banbridge and Craigavon. These specific circumstances can be identified through:
- Analysis of key assets or features of their rural community;
 - Environmental assets appraisal;
 - Development Pressure Analysis; and
 - Landscape assessment.
- 2.16** The Draft SPPS states that certain areas of the countryside exhibit exceptional landscapes such as mountains, lough shores and certain views or vistas, wherein the quality of the landscape and unique amenity value is such that development should only be permitted in exceptional circumstances. In these circumstances, Countryside Policy Areas may be introduced.
- 2.17** The Draft SPPS also refers to Dispersed Rural Communities (DRC) which ease controls on rural housing and can be identified in the countryside, where appropriate. DRCs are intended to reflect issues of remoteness, evidence of community activity associated with a focal point (schools, sports clubs, public houses) and an established dispersed pattern of development. In the Banbridge/Newry & Mourne Area Plan 2015 Adoption Statement, the Department confirmed that in liaison with District Councils, it will investigate the issue of Dispersed Rural Communities further to inform any proposals that may be contained in a new development plan after the transfer of planning powers in 2015.
- The Draft SPPS also advises that Councils should formulate policy to ensure that:
- development in the countryside integrates into its setting;
 - respects rural character; and
 - is designed appropriate to the local area.
- 2.18** Other regional policies currently contained in PPS7: Quality Residential Environments and PPS8: Open Space, Sport and Outdoor recreation that are relevant to housing policy, are reflected in the SPPS and are primarily concerned with issues related to design and layout. Draft Planning Policy Statement 22 (PPS22) deals with Affordable housing. These matters will be addressed later in this paper.

(e) Supplementary Planning Guidance

- 2.19** In addition to regional policy, supplementary planning guidance for residential development is provided by 'Creating Places - Achieving Quality in Residential

Development' (May 2000). It is the principle guide for use by prospective developers in the design of all new housing areas. DCAN 8: Housing in Existing Urban Areas, will also be material to the determination of planning applications for small unit housing within existing urban areas.

2.20 The publication 'Living Places: An Urban Stewardship and Design Guide for Northern Ireland' (September 2014) sets out the key principles behind good place making. It seeks to inform and inspire all those involved in the process of managing and making urban places, with a view to raising standards across Northern Ireland.

2.21 In conclusion, the role of the development plan is to provide housing land in accordance with the RDS. This means zoning sufficient housing land in the larger settlements and providing sufficient opportunities, including Housing Policy Areas (HPAs) in smaller settlements to meet the housing growth indicators. It also means ensuring that there is an adequate range of sites at suitable locations to provide a mix of house types and tenures to meet population needs. This paper focuses on identifying what the local housing needs are in relation to overall numbers and special needs. In demonstrating that the HGI is sufficient to cater for the needs of a growing population, the paper then examines how the HGI should be distributed across settlements under the provisions of the RDS and PPS 12 in order to promote sustainable and balanced growth.

3.0 EXTANT PLAN HOUSING CONTEXT: ARMAGH, BANBRIDGE/NEWRY & MOURNE AND CRAIGAVON AREA PLANS

3.1 In terms of housing provision, the dominance and strategic importance of the main settlements of Armagh City, Banbridge Town and Craigavon Urban Area (Portadown, Central Craigavon & Lurgan) within their respective districts was recognised in the Settlement Strategy of each Plan. This is illustrated on the ABC Settlement Map at Appendix 3. In addition to land zoned for housing, the urban areas defined within the development limits of the main and local towns contained significant areas of unzoned or white land. In all three Plans, the housing objectives (see below) were to identify sufficient land for new housing in the main and local towns to provide a choice of housing sites in convenient locations to support a range of dwelling types to meet different housing needs, and to protect the character of existing residential areas. A small amount of land was also zoned in villages and smaller settlements in order to provide options and allow flexibility.

3.2 The following are the key housing objectives from the respective extant plans:

CAP 2010 Plan objectives:

- the encouragement and facilitation of sustainable patterns of development;
- the maintenance of compact urban forms that respect the individual character and identity of settlements, avoid urban sprawl and reduce the need for expansion into the countryside;
- the most efficient use of existing infrastructure, buildings and transportation systems;
- the integration of land use and transportation to reduce congestion and the need for car journeys and encourage a shift towards more sustainable modes of transport, including walking and cycling; and
- the achievement of a high quality of layout, design and landscaping in new development.

The key elements in the CAP Plan Strategy are:

- recognition of the sub-regional significance of the CUA;
- the high growth potential of CUA, reflecting its role as the major service centre in mid-ulster...;
- the role of the CUA in meeting a significant proportion of the Boroughs housing need;

AAP 2004 Principal objectives are:

- to identify a settlement strategy consistent with the Regional Physical Development Strategy (NI) taking account of the local characteristics and circumstances prevailing within the Armagh District Council Area;
- to identify land within defined limits in urban areas to meet planned future development requirements in respect of housing.....;
- to encourage the efficient use of existing infrastructure and make provision for new infrastructure;

BNMAP 2015 Plan objectives are:

- to facilitate sustainable patterns of growth and development throughout the Plan Area ;
- to promote Banbridge and Newry as main hubs within Northern Irelandand;
-to allow for the expansion of Dromore to accommodate housing need related to the Belfast Metropolitan Area;
- to allocate land for additional housing development over the Plan period in accordance with the strategic objectives and guidelines contained in the RDS;
- to facilitate integration between land use and transportation in order to reduce congestion and the need for car journeys and to encourage a shift to more sustainable modes of transport, particularly walking, cycling and public transport.

3.3 Within most of the designated villages, it was anticipated that demand for development would be limited and primarily for housing and in keeping with the size and character of the settlement. The three Area Plans also designated small settlements based on a number of specified criteria. It was envisaged that these would be suitable for the development of small groups of houses and single dwellings. The scale of development was expected to be commensurate with the character of the settlement.

3.4 The Annual Housing Monitor provides an overall picture of the amount of land that has been developed on zoned housing land. The Tables below (1-6) provide details of the zoned land uptake and zoned area remaining in the three council areas main settlements up until 2013. They also detail the potential housing yield from live planning permissions on unzoned lands within the main settlements.

Table 1: Zoned Housing Land Uptake 2013 – Armagh City and Towns

Settlement	Total Area (ha)	Area Developed	Area Remaining
Armagh City	110.01	49.31	60.7
Keady	22.57	10.08	12.49
Markethill	15.39	6.78	8.61
Tandragee	29.69	18.28	11.41
Total District (City/Towns)	177.66	84.45	93.21

Table 2: Housing Land Uptake & Yield 2013 – Armagh City & Towns

Settlement	Zoned Area (Total)		Zoned Area (Developed)		Zoned Area (Remaining)		Unzoned Area (Developed)		Unzoned Area (Remaining Undeveloped with Approval)		Total Land Developed (Zoned & Unzoned)		Total Land Remaining (Zoned & Unzoned with Approval)	
	Area (ha)	Yield (unit)	Area (ha)	Yield (unit)	Area (ha)	Pot. Yield (unit)	Area (ha)	Yield (unit)	Area (ha)	Pot. Yield (unit)	Area (ha)	Yield (unit)	Area (ha)	Pot. Yield (unit)
Armagh City	110.1	2215	49.31	831	60.7	1384	46.74	852	49.27	1246	96.05	1683	109.97	2630
Keady	22.57	472	10.08	191	12.49	281	15.37	298	10.72	281	25.45	489	23.21	562
Markethill	15.39	347	6.78	127	8.61	220	10.35	123	3.62	246	17.13	250	12.23	466
Tandragee	29.69	596	18.28	309	11.41	287	12.81	248	7.42	373	31.09	557	18.83	660
Total District (City/ Towns)	177.66	3630	84.45	1458	93.21	2172	85.27	1521	71.03	2146	169.72	2979	164.24	4318

Source: 2013 Housing Monitor Reports

3.5 Within Armagh City & District Council Area, some 110 hectares of land were zoned for housing in Armagh City of which 45% has been developed, with approximately 61 hectares remaining (Table 1). In Keady, only 10 hectares (45%) has been developed of the total 23 hectares of zoned housing land. Similarly in Markethill, under 7 hectares (44%) have been developed of a total of over 15 hectares zoned housing lands, whilst in Tandragee, the area developed has been higher with 18.28 hectares (62%) developed of the total zoned housing land of 29.69 hectares.

Table 3: Zoned Housing Land Uptake 2013 – Banbridge Towns

Settlement	Total Area (ha)	Area Developed (ha)	Area Remaining (ha)
Banbridge Town	70.42	31.56	38.86
Dromore	27.52	8.34	19.18
Gilford	17.7	2.02	15.68
Rathfriland	9.55	4.28	5.27
Total District	125.19	46.2	78.99

Table 4: Housing Land Uptake & Yield 2013 – Banbridge Towns

Settlement	Zoned Area (Total)		Zoned Area (Developed)		Zoned Area (Remaining)		Unzoned Area (Developed)		Unzoned Area (Remaining Undeveloped with Approval)		Total Land Developed (Zoned & Unzoned)		Total Land Remaining (Zoned & Unzoned with Approval)	
	Area (ha)	Yield (unit)	Area (ha)	Yield (unit)	Area (ha)	Pot. Yield (unit)	Area (ha)	Yield (unit)	Area (ha)	Pot. Yield (unit)	Area (ha)	Yield (unit)	Area (ha)	Pot. Yield (unit)
Banbridge Town	70.42	1775	31.56	889	38.86	886	148.62	2559	16.28	485	180.18	3448	55.14	1371
Dromore	27.52	701	8.34	227	19.18	474	63.57	1233	11.69	986	71.91	1460	30.87	1460
Gilford	17.7	265	2.02	41	15.68	224	13.67	273	3.93	101	15.69	314	19.61	325
Rathfriland	9.55	241	4.28	115	5.27	126	9.56	186	4.18	122	13.84	301	9.45	248
Total District (City/Towns)	125.19	2982	46.2	1272	78.99	1710	235.42	4251	36.08	1694	281.62	5523	115.07	3404

3.6 Within Banbridge District Council, some 70 hectares of land were zoned for housing in Banbridge Town of which 32 hectares (45%) has been developed, with approximately 39 hectares remaining (Table 3). In Dromore, only 8 hectares (30%) has been developed of the total 28 hectares of zoned housing land. Markedly, in Gilford, just over 11% (2 hectares) have been developed of a total of almost 18 hectares of zoned housing lands, whilst in Rathfriland, the area developed was 4.28 hectares (45%) of the zoned housing land total of 9.55 hectares.

Table 5: Zoned Housing Land Uptake 2013: Craigavon Urban Area

Settlement *	Total Area (ha)	Area Developed (ha)	Area Remaining (ha)
Craigavon Urban Area	396.22	142.25	253.97

* No other towns or large settlements in the CBC area other than the Craigavon Urban Area.

** Housing monitor information as detailed above updated to 31 July 2013.

*** Craigavon Urban Area figures do not include Phase 2 Zoned Housing Lands.

Table 6: Housing Land Uptake & Yield 2013 – Craigavon Urban Area

Settlement	Zoned Area (Total)		Zoned Area (Developed)		Zoned Area (Remaining)		Unzoned Area (Developed)		Unzoned Area (Remaining Undeveloped with Approval)		Total Land Developed (Zoned & Unzoned)		Total Land Remaining (Zoned & Unzoned with Approval)	
	Area (ha)	Yield (unit)	Area (ha)	Yield (unit)	Area (ha)	Pot. Yield (unit)	Area (ha)	Yield (unit)	Area (ha)	Pot. Yield (unit)	Area (ha)	Yield (unit)	Area (ha)	Pot. Yield (unit)
Craigavon Urban Area	396.22	9222	142.25	3223	253.97	5999	306.90	6670	152.66	4598	449.15	9893	406.63	10597

* No other towns or large settlements in the CBC area other than the Craigavon Urban Area.

** Housing monitor information as detailed above updated to 31 July 2013.

*** Craigavon Urban Area figures do not include Phase 2 Zoned Housing Lands.

3.7 Within Craigavon Urban Area (CUA includes Portadown, Central Craigavon & Lurgan), almost 520 hectares of land are zoned for housing which is to be released in two phases (Phase 1 & Phase 2 Land). To date, no Phase 2 housing lands have been released. Of the 400 ha of Phase 1 housing land in the Craigavon Urban Area, only 142 hectares (36%) have been developed, with approximately 254 hectares remaining (Table 5 & 6).

3.8 However, in terms of delivering new housing, the new local development plan is required to take into account the number of houses built within the RDS period i.e. from 31st March 2008 rather than an examination of zoned housing land uptake since a Plans' adoption. This is explored further under Section 6.0 – Accommodating Housing Growth.

4.0 A profile of Characteristics of the Housing Stock in Armagh, Banbridge and Craigavon Districts

4.1 Planning has a role in providing for a mixture of tenures, housing types and providing access to affordable housing. Therefore, a profile of existing stock in terms of tenure, type, affordability, occupancy and unfitness needs to be considered.

4.2 As reported in the Population and Growth Paper, the rate of population growth between 2001 and 2011 in the three districts (particularly BDC & CBC) was above the NI average of 7.45%. The population of the Armagh, Banbridge and Craigavon districts increased between 2001 and 2011 by 9.36%, 16.78% and 15.31% respectively. Notably, the number of households has increased more rapidly over the same period - the number of households in Armagh increased by 16.91% to 21,594, by 20.51% to 18,303 in Banbridge and by 19.05% to 35,931 in Craigavon. This is due to a trend towards smaller household sizes with the average household size decreasing between 2001 and 2011 from 2.94 to 2.72 in Armagh, from 2.73 to 2.62 in

Banbridge and from 2.67 to 2.57 in Craigavon. In 2011, households occupied by 1-2 persons accounted for approximately 53% of all households in Armagh compared to 49% in 2001. Between 2001 and 2011, the proportion of 1-2 person households in Banbridge rose from 53% to 55% and from 55% to 56% in Craigavon. This trend for smaller households and an increase in the number of houses needs to be taken into account when planning for future housing stock.

- 4.3 It should be noted that in 2001, almost 80% of households in Craigavon District were located in the Craigavon Urban Area, compared to 38% of households in Banbridge District locating in Banbridge town and only 31% of households in Armagh District locating in Armagh City.

Table 7: ABC Population and Household Distribution (2001)

		Armagh District		Banbridge District		Craigavon District	
		Popn.	Households	Popn.	Households	Popn.	Households
Main City/ Town (Hub)	Popn.	14,590	5,682	14,740	5838	57,685	23,718
	(%)	27%	31%	36%	38%	72%	79%
Local/Small Towns	Popn.	7,392	2,874	8,620	3618	0,000	0,000
	(%)	13%	15%	21%	24%	00%	00%
Villages	Popn.	7,028	2,692	2,090	804	8,857	3,268
	(%)	13%	15%	5%	5%	11%	11%
Rural Remainder	Popn.	25,343	7,223	15,940	4,928	14,129	3,196
	(%)	47%	39%	39%	32%	18%	11%
TOTAL	Total Popn.	54,263	18,471	41,390	15,188	80,671	30,182

Source - NISRA

- 4.4 The proportion of households in 'other urban settlements' i.e. local towns and villages also differs between the three districts with these settlements in Armagh and Banbridge making up almost 30% of households. The number of households in the Rural Remainder (small settlements & the countryside) varies between the three districts, with Armagh making up almost 40%, Banbridge 32% and Craigavon only 11% (Table 7). The figures also serve to illustrate the dominance of the Craigavon Urban Area within its district compared to Armagh City or Banbridge and the importance of the network of small towns and villages in Armagh and Banbridge in serving a large scattered rural population.

Housing Tenure

- 4.5** The 2001 Census recorded that most of the houses in ABC were owner occupied and these figures were above the NI average (Table 8). Overall, Armagh, Banbridge and Craigavon Districts had a lower than average proportion of social housing, although Craigavon alone was slightly above the NI average. The proportion of ABC privately rented & other dwellings (8.64%) is similar to the NI average (9.19%).
- 4.6** The 2011 Census reveals that the proportion of owner occupied dwellings within all three ABC Councils has fallen slightly in line with the NI trend. The proportion of social housing within ABC has fallen considerably between 2001 and 2011 (18.61-11.27%) and the proportion of private rented & other dwellings (ie 'Other' includes employer of a household member and relative or friend of a household member) has risen significantly during this period (8.64-18.31%), which is consistent with the regional trend (Figure 1).

Table 8: NI & ABC Housing Tenure (2001 & 2011)

Location	No. / Year	Owner Occupied	Social Housing	Private Rented & Others	Total Households
N. Ireland	No (2011)	474751	104885	123639	703275
	2011 (%)	67.51%	14.91%	17.58%	
	2001 (%)	69.60%	21.21%	9.19%	
ABC	No (2011)	53402	8545	13881	75828
	2011 (%)	70.43%	11.27%	18.31%	
	2001 (%)	72.76%	18.61%	8.64%	
Armagh	No (2011)	15,928	2,029	3,637	21,594
	2011 (%)	73.76%	9.40%	16.84%	
	2001 (%)	76.87%	14.25%	8.88%	
Banbridge	No (2011)	13545	1806	2952	18,303
	2011 (%)	74.00%	9.87%	16.13%	
	2001 (%)	75.88%	16.62%	7.49%	
Craigavon	No (2011)	23,929	4,710	7,292	35,931
	2011 (%)	66.60%	13.11%	20.29%	
	2001 (%)	68.67%	22.27%	9.06%	

Source: Census 2001 & 2011 figures.

Figure 1: Change in ABC Housing Tenure 2001-2011



4.7 NISRA suggests that the key drivers in the increased demand for private rented accommodation are likely to have been: inward migration from EU accession countries; housing affordability issues associated with the mid-2000s upsurge in Northern Ireland house prices; and the particularly adverse impact on the Northern Ireland housing market of the post-2007 economic downturn, which has seen a marked reduction in property values, risk aversion among mortgage lenders and reduced confidence among prospective house purchasers, and, as a result, many households electing to rent rather than buy.

Housing Types

4.8 The mix of housing types has also changed slightly between 2001 and 2011 in ABC with a small increase in the proportion of detached dwellings and slight falls in the proportion of semi-detached dwellings, terraced dwellings and flats. In 2011, Armagh (53.84%) and Banbridge (49.51%) districts had a higher than NI average (37.04%) proportion of detached dwellings (Tables 9 & 10), whilst the Craigavon proportion was slightly lower (35.64%). This is partly due to the large proportion of housing in the countryside and partly due to the nature of post war, private sector housing development in settlements. In line with the trend across NI, there have been small increases in the proportion of detached dwellings between 2001 and 2011 in Armagh and Craigavon, whilst the proportion in Banbridge has fallen slightly. In 2011, the proportion of semi-detached dwellings within Craigavon (28.85%) was above the NI average (27.79%) with the other two areas a lower percentage. The proportion of semi-detached dwellings has increased between 2001 and 2011 in all three ABC

districts which is at odds with the downward regional trend. In 2011, the overall ABC proportion of terraced dwellings remains similar to the NI average (25.08%) with only the percentage of Banbridge district increasing since 2001. The proportion of flats within the three ABC districts has fallen slightly between 2001 and 2011 and remains notably below the NI averages. Of the three ABC districts, only Armagh shows a very small increase in the proportion of flats.

Table 9: NI & ABC Households by Type (2001)

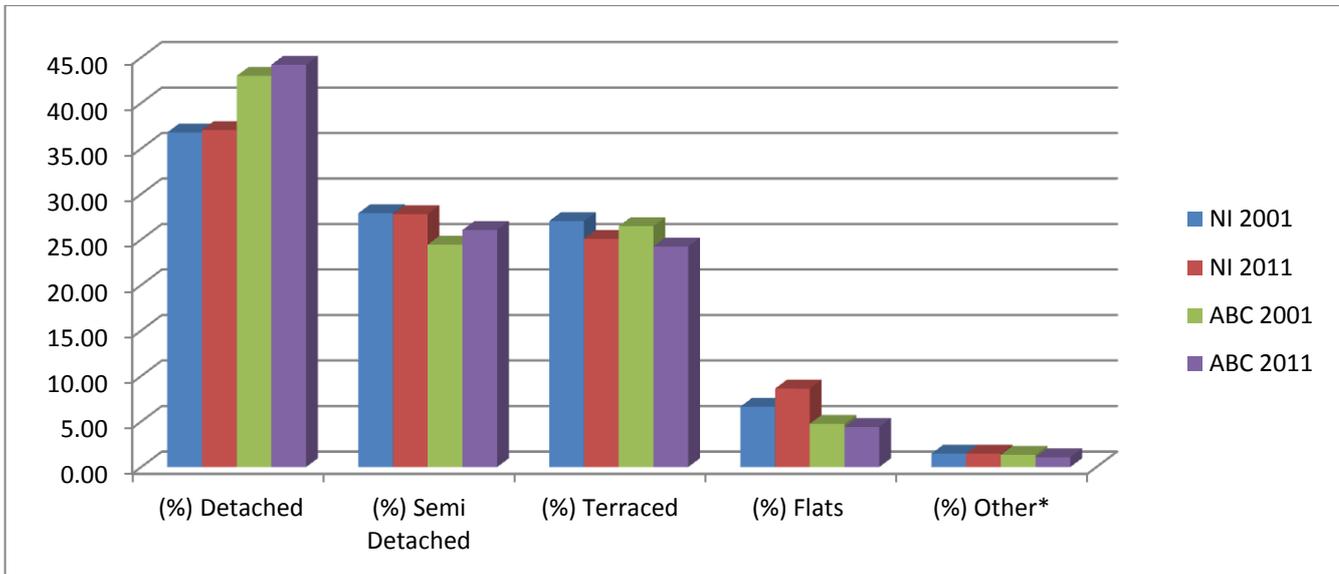
Area	Detached	(%)	Semi Detached	(%)	Terraced	(%)	Flats	(%)	Total	(%)	Total
NI	230406	36.77	174781	27.89	169433	27.04	42830	6.83	9208	1.47	626658
ABC	27443	42.99	15601	24.44	16900	26.47	3031	4.75	864	1.35	63839
ACDC	9767	52.88	4336	23.48	3491	18.90	543	2.94	332	1.80	18469
BDC	7664	50.46	3394	22.35	3272	21.54	662	4.36	196	1.29	15188
CBC	10012	33.17	7871	26.08	10137	33.59	1826	6.05	336	1.11	30182

Table 10: NI & ABC Households by Type (2011)

Area	Detached	(%)	Semi Detached	(%)	Terraced	(%)	Flats	(%)	Other *	(%)	Total
NI	277132	37.04	207904	27.79	187678	25.08	64518	8.62	11003	1.47	748235
ABC	35597	44.22	20966	26.05	19510	24.24	3555	4.42	866	1.08	80494
ACDC	12487	53.84	5556	23.96	4065	17.53	779	3.36	304	1.31	23191
BDC	9595	49.51	4467	23.05	4330	22.34	801	4.13	185	0.95 %	19378
CBC	13515	35.64	10943	28.85	11115	29.31	1975	5.21	377	0.99	37925

Source: NISRA - Census 2011 * Other includes caravan, mobile or temporary structure or shared dwelling

Figure 2: NI & ABC Change in Household Type (2001-2011)



Social Housing and Affordability

4.9 A gap in market provision can occur if house prices rise beyond that which is affordable. Affordability is determined by price, average incomes and access to borrowing and it remains an issue for first time buyers. In June 2014, the DOE published Draft Planning Policy Statement (PPS) 22: Affordable Housing for public consultation which sets out draft planning policy for securing developer contributions towards affordable housing.

4.10 Since 2001, the Housing Executive has published an affordability index developed in partnership with University of Ulster to provide an evidence base for how changes in the housing market were affecting first-time buyer’s ability to enter the market. Following a review in 2013, this affordability index has been refined and now uses the concept of an Affordable Limit (AL) to capture the ratio of the maximum allowable loan to income and assumes that the maximum monthly income which can be dedicated to repaying the mortgage is 35 per cent.

4.11 The emerging findings indicate that affordability over the period 2010-2012 has improved across most housing market areas, particularly Armagh & Craigavon, where the percentage of affordable homes for first time buyers was 42% in 2012 compared to only 23% in 2010. Similarly, in Newry, Down & Banbridge, the percentage of affordable homes for first time buyers was 37% in 2012 compared to

only 21% in 2010. There has been less of an improvement in the percentage of affordable homes for first time buyers in the Belfast area (See Table 11).

Table 11: NI Housing Market Areas Payment Affordability (2010-2012)

Housing Market Areas	2010		2011		2012	
	Afford Gap (£)	(%) Unafford	Afford Gap (£)	(%) Unafford	Afford Gap (£)	(%) Unafford
Armagh & Craigavon	-4,228	77	8,634	69	19,739	58
Newry, Down & Banbridge	-5,602	79	8,274	71	16,408	63
Belfast	-8,629	78	8,167	69	3,820	73

Source: Northern Ireland Housing Market Review & Perspectives 2014-2017

4.12 Although there have been significant reductions in house prices everywhere since 2007, affordability remains an issue for first time buyers who continue to experience difficulties in securing mortgages. Falling household incomes and an increasing level of unemployment have an impact on the housing market and the ability of first time buyers to enter the market. The private rented sector therefore remains very important.

Social Housing Need

4.13 When examining affordability, it is important to note that planning cannot control house prices which are primarily influenced by factors such as interest rates and the affordability of lending. Therefore, affordability in both urban and rural areas and meeting the needs of young people, single parents, migrant workers, and the needs of the elderly is addressed through the provision of social housing. The Banbridge/Newry & Mourne Area Plan (BNMAP) 2015 addresses social housing need within those two districts as directed by the NIHE. BNMAP 2015 introduced Housing Zoning Key Site Requirements to ensure a minimum number of social housing units were delivered in line with the NIHE Housing Needs Assessment. However, neither the Craigavon Area Plan 2010 or the Armagh Area Plan 2004 address social housing need as they did not zone social housing and therefore its provision is dealt with through the development management process.

4.14 The NIHE waiting list can be utilised to determine the pressure for social housing in an area. In Armagh District, 73% of those categorised as being in “housing stress” were accommodated in 2014, compared to almost 58% in Banbridge District and 55% in Craigavon (Table 12). Over the three Districts, only 24% of those who applied for social housing (waiting list) were allocated housing. This shows there is a latent demand for additional social housing provision across ABC and in particular in Craigavon.

4.15 In Armagh District, 44% of those in housing stress were single whereas in Banbridge District the figure was 46% and in Craigavon District, 41%. Across all three districts, the majority of those remaining in housing stress were comprised of small families and older people, indicating a need for smaller housing units.

Table 12: NIHE Stock & Housing Applicants on Waiting List (March 2014)

District	NIHE Housing Stock	Waiting List Applicants	Number in Housing Stress & (%)		Total Allocations
ABC Total	7,764	3,156	1,230	39%	742
Armagh	1,906	745	308	41%	225
Banbridge	1,772	576	276	48%	159
Craigavon	4,086	1835	646	35%	358

Source: - NIHE - Armagh, Banbridge & Craigavon District Housing Plans 2014-2015

4.16 Social housing need is also met by Housing Associations. The Census 2011 indicates that social housing stock (NIHE and housing associations) accounts for 2,029 dwellings in Armagh, 1,806 dwellings in Banbridge and 4,710 dwellings in Craigavon respectively. These 8,545 social dwellings represents 11.27% of the ABC overall total housing stock which is considerably less than the Northern Ireland average figure of 14.9%.

4.17 Social housing needs are influenced by affordability of housing, accessibility to finance, job/income status and family circumstances. NIHE based the most recent annual Housing Needs Assessment (HNA) on the March 2014 waiting list. Armagh District currently requires 73 units distributed across three areas including Armagh City, Banbridge currently requires 72 dwellings across the towns of Banbridge, Gilford and Dromore whilst the bulk of Craigavon District need of 191 is based in Portadown and Lurgan with North Lurgan requiring 150 units. Full NIHE District Housing Need Assessment details are provided in Appendix 4.

Specialised Housing Need

4.18 People present themselves as homeless for many reasons, the casual factors of which may include marriage/house sharing breakdown, family/relationship disputes and unsuitability of accommodation. NIHE, Housing Associations and other agencies are responsible for providing temporary accommodation for homeless people, Travellers as well as the provision and allocation of “supported housing”, which also provides rehabilitation for those who are elderly or disabled.

Table 13: ABC Levels of Homelessness (2009-2013)

LGD	Year	Total Number Presented	Awarded Full Duty Status*	
			No.	(%)
Armagh District	2009/2010	223	100	45%
Banbridge District		303	127	42%
Craigavon District		792	288	36%
Armagh District	2013/2014	252	127	50%
Banbridge District		324	156	48%
Craigavon District		754	291	39%

Source: Armagh, Banbridge & Craigavon District Housing Plans 2014-2015 (NIHE) * Statutory Homeless: Definition as detailed in the Housing (Northern Ireland) Order 1988 (amended 1989).

4.19 The number of people presenting themselves as homeless between 2009/2010 and 2013/14 in Armagh district has increased by 5%, in Banbridge by 6% and in Craigavon by 3% (Table 13). No social housing need has currently been identified for Travellers in Armagh, Banbridge or Craigavon Districts (NIHE). The third Comprehensive Traveller Needs Assessment is due for completion (in 2014) following which a new five year Traveller Accommodation Programme will be developed.

4.20 NIHE assists vulnerable people through its “Supporting People” programme offering long term support (sheltered accommodation and homes for life) and short term support (temporary accommodation).

Vacancy and Unfitness Levels

4.21 In order to translate the increase in households into a need for new housing units, account needs to be taken of vacancy levels and unfitness rates. The housing stock of an area includes occupied, vacant and unfit dwellings, which all influence the need for additional housing stock.

- 4.22** Apart from new-builds not yet occupied, properties may be empty for a number of reasons. With the collapse of the housing market in current times, some may be pending re-sale or re-letting. Some may be unfit for habitation or are pending repair or improvement whilst others may be second homes not permanently occupied. These properties are currently out of use and therefore reduce the supply of available housing. In order to address this, DSD in partnership with NIHE launched in September 2013 a new five year Empty Homes Strategy and Action Plan aimed at bringing empty homes back into use. It is estimated that there are around 32,000 empty homes across Northern Ireland.
- 4.23** Although the House Condition Survey 2011 does not provide vacancy rates at district level. However, it does distinguish between urban and rural areas and whilst the overall regional vacancy rate is 7.2% of total housing stock, the rate in rural areas (defined as small rural settlement and isolated rural) is 12.4% compared to 5.1% for district towns. The Census 2011 reported that there were 1,597 empty dwellings in Armagh District, 1,075 empty dwellings in Banbridge District and 1,994 empty dwellings in Craigavon District representing 7.4%, 5.9% and 5.6% respectively of the total housing stock compared to a NI average of 6.0%. Although these figures do not distinguish vacant from second/holiday homes, it is considered reasonable to assume that the rates are similar. Therefore, obviously there is scope to bring some of these vacant dwellings into use to contribute to the housing stock.
- 4.24** In 2009 the regional average of unfitness was 2.4% which was an improvement on the 2006 levels of 3.4%. However, the unfitness level in NI increased to 4.6% in 2011 reflective of the current economic climate, the higher rate of vacancy, particularly in the private sector, and the reduced availability of home improvement grants (NIHE). Armagh, Banbridge and Craigavon's unfitness rates for 2006 were 4.5%, 3.3% and 3.3% respectively. However, in 2009 the proposed new council area of Armagh, Banbridge and Craigavon District had an overall level of unfitness of 2.3% of dwellings. This is similar to the regional rate of 2.4% in 2006. It has not been possible to compare these findings with those from the House Condition Survey 2011 which do not detail findings by LGD. The 2011 NIHE House Condition Survey does confirm that the level of unfitness has fluctuated between 2001 (4.9%), 2006 (3.4%), 2009 (2.4%) and 2011 (4.6%). Further, it states that the average rates of unfitness are higher in rural areas, particularly in isolated rural areas, which depopulation may part explain. The 2011 NI rate of unfitness was marked for vacant dwellings which were 51.2% unfit.
- 4.25** In 2011, the proportion of vacant dwellings within NI recorded as unfit was 51% (28,000) compared to 44% (14,000) in 2001 demonstrating a clear link between unfitness and occupancy levels. In general there are more unfit dwellings in rural areas than urban areas and particularly in more isolated areas.

Conclusions

4.26 In relation to tenure, type, affordability, occupancy and unfitness, it can be concluded that:-

- there is a need to provide smaller house types e.g. two-bedroom houses;
- the private rented sector does not require planning intervention other than the control of Houses in Multiple Occupation;
- social housing can be addressed through the development management process provided there is a strategic policy in the local development plan to facilitate this; and
- unfitness can be addressed through the provision of policies on the renovation and improvement of dwellings.

5.0 The Need for Additional Housing Stock

5.1 The RDS Housing Growth Indicators for 2008-2025 have been set at 5,500 dwellings each in Armagh and Banbridge districts, whilst Craigavon has been allocated 10,300 dwellings. When projected further on a pro-rata basis to 2030, the figures are 7,118 dwellings in both Armagh and Banbridge and 13,329 dwellings in Craigavon. This gives a total ABC allocation of **27,565** dwellings for 2008-2030.

5.2 To examine whether this is acting as a constraint on growth, an examination has been undertaken using two methodologies based on past growth rates and household projections as follows:-

- (i) For the 10-year period between the 2001 and 2011 censuses, the number of households in ABC grew from 63,843 to 75,828 (increase of 11,985) representing a 18.8% growth rate. If applied to the period 31 March 2008-31 December 2030 (RDS date-Plan End=22.75 years), the number of additional households created could be **27,266** which is 300 units below the projected HGI figure.
- (ii) Alternatively, taking NISRA's population projections for ABC (2008-2023 & 2012-2037) and estimating the average ABC household size using the NISRA 2008-23 household projections (no updated NISRA LGD household data released until March 2015). These figures, which take account of population growth, a falling average household size and the changing age structure of the population, suggest the number of households in ABC could increase by approximately **27,288** households between 2008 and 2030 (Table 14). This figure is approximately 280 units below the projected HGI figure.

5.3 Both methods suggest that the allocated HGI figure is above the expected growth and that Armagh-Banbridge-Craigavon is not being constrained by the RDS housing growth indicator. The 2008 NISRA projections also predicted that the total number of households in Armagh-Banbridge-Craigavon in 2011 would be 78,500, which is higher than the actual 2011 census figure (75,506). It is anticipated that when the 2012-based settlement populations and household projections are made available (due for release in March 2015), these are likely to indicate lower levels of expected growth, taking into account the 2011 Census results. The NI regional figures for the period 2012-2062 have already been released and show lower projected population figures than the 2008-23 NISRA projections. Considering the provision and the reasonable expectation that populations will not grow as fast as originally forecast, it can be concluded that the HGI figure is adequate to meet future ABC housing needs.

Table 14 – NI & ABC Household Projections (2008-2030)

Year	2008 * Households	2030 ** Households	Household (%) Increase 2008-30	Household Increase 2008-30
NI	688,700	862,276	25.2	173,576
ABC	74,200	101,488	36.8	27,288

Source: - NISRA population projections. <http://www.nisra.gov.uk/demography/default.asp47.htm>

* 2008 Household figures from NISRA 2008-23 projections.

** 2030 Household figures from NISRA 2012-37 projections.

6.0 Accommodating Housing Growth

Options for Allocating Housing Growth Housing Growth Indicators

- 6.1** As stated in the RDS, the allocation of housing growth to specific locations in a district is a matter for decision through the development plan process. In the allocation process, account must be taken of the roles and functions of each settlement; the hubs should be given the primary focus for growth; small towns and villages should be consolidated and revitalised in their role as local service centres; and the need to sustain rural communities living in smaller settlements and the open countryside should be recognised.
- 6.2** Thus, how housing should be allocated across the settlement hierarchy should be based on an agreed settlement growth strategy which will be explored further in the workshops and should aim to:-
- focus major population and economic growth on the main hubs of Craigavon, Armagh and Banbridge and consequently these settlements will be the main focus for major new housing development;
 - provide balanced growth in the local /small towns in order to sustain, consolidate and revitalise them;
 - maintain villages as important local service centres to meet the daily needs of the rural area;
 - provide opportunities for individual dwellings or small groups of houses in the open countryside, small settlements or dispersed rural communities in order to sustain rural communities.
- 6.3** Although it is not possible at present to consider the precise allocation for any given settlement, it is reasonable to consider how housing should be apportioned across the various types of settlements taking into account regional policy, existing household levels and the existing or agreed settlement growth strategy. This will be further explored at a workshop with members. To aid discussion three options are identified (Tables 15, 16 & 17) using the HGIs as projected to 2030, (i.e. 7,118 for Armagh, 7,118 for Banbridge and 13,329 for Craigavon

These options are:

- Option 1 – this maintains the ‘status quo’ in each district being based on the proportion of households living in the main town, local towns, villages and countryside at the time of the 2001 Census;
- Option 2 – this maintains the ‘status quo’ in each district being based on the proportion of population living in the main town, local towns, villages and countryside at the time of the 2001 Census;
- Option 3 - this represents a focus on the main hubs reflecting the RDS direction to focus major population growth on the main hubs of Craigavon, Armagh and Banbridge;

In all three options, the proportions for the local towns and villages remain similar, reflecting the need to sustain, consolidate and revitalise these settlements.

Table 15: Accommodating Housing Growth in Armagh District

	Option 1		Option 2		Option 3	
	(Reinforce existing settlement household proportions)		(Reinforce existing settlement population proportions)		(Apportion majority of growth to existing larger settlements as per RDS direction)	
Settlement Category	(H/hold %)	Units	(Pop %)	Units	(%)	Units
Armagh City	30.76	2189.50	26.89	1914.03	40	2847.20
Local Towns	15.56	1107.56	13.45	957.37	20	1423.60
Villages	14.58	1037.80	12.95	921.78	15	1067.70
Rural Remainder (Small Settlements & Countryside)	39.1	2783.14	46.71	3324.82	25	1779.50
Total	100	7,118	100	7,118	100	7118.00

Table 16: Accommodating Housing Growth in Banbridge District

	Option 1		Option 2		Option 3	
	(Reinforce existing settlement household proportions)		(Reinforce existing settlement population proportions)		(Apportion majority of growth to existing larger settlements as per RDS direction)	
Settlement Category	(H/hold %)	Units	(Pop %)	Units	(%)	Units
Banbridge Town	38.44	2736.16	35.61	2534.72	45	3,203.1
Local Towns	23.82	1695.51	20.83	1482.68	25	1,779.50
Villages	5.29	376.54	5.05	359.46	5	355.90
Rural Remainder (Small Settlements & Countryside)	32.45	2309.79	38.51	2741.14	25	1,779.5
Total	100	7,118	100	7,118	100	7,118.00

Table 17: Accommodating Housing Growth in Craigavon Borough

	Option 1		Option 2		Option 3	
	(Reinforce existing settlement household proportions)		(Reinforce existing settlement population proportions)		(Apportion majority of growth to existing larger settlements as per RDS direction)	
Settlement Category	(H/hold %)	Units	(Pop %)	Units	(%)	Units
Craigavon Urban Area	78.58	10473.9	71.51	9531.5	80	10,663.2
Local Towns*	0	0.0	0	0.0	0	0.0
Villages	10.83	1443.5	10.98	1463.5	12	1,599.5
Rural Remainder (Small Settlements & Countryside)	10.59	1411.5	17.51	2333.9	8	1,066.3
Total	100	13329	100	13329	100	13,329

*No Local Towns in CBC.

- 6.4** If Option 1 is pursued, it would not satisfactorily achieve the objective of the RDS to focus growth on the main hubs, particularly in Armagh and Banbridge. Option 1 which relates to the existing % of households within the settlements would result in continued high growth in the countryside rather than sustaining rural community needs.
- 6.5** Similarly Option 2, would not satisfactorily achieve the objective of the RDS to focus growth on the main hubs, particularly in Armagh and Banbridge. Option 2 which relates to the existing % of population within the settlements would result in continued high growth in the countryside rather than sustaining rural community needs at a level even higher than option 1.
- 6.6** Option 3 reflects the RDS direction to focus major population growth on the main hubs, revitalising local towns & villages and sustain small settlements and the countryside. The share to the countryside may of course alter depending on whether any adjustments are made to existing hierarchies.
- 6.7** Once a figure has been allocated for housing in the countryside, an element can be “planned for” through the designation of small settlements or dispersed rural communities and, for the remaining land outside of these, it can be managed through rural planning policy. Apportioning more or less of the HGI to the main towns will

impact on the proportion that is allocated to the countryside and Members need to decide what is an appropriate level of housing allocation for the rural area and a rural policy to manage it. This will be discussed later in the paper.

Housing Land Availability in the Settlements

6.8 Having looked at the options for allocating housing across the existing settlement hierarchy, it is necessary to examine how much land is available in the settlements. In terms of delivering new housing, planning is required to take into account the number of houses built within the RDS period rather than an examination of zoned housing land uptake since a Plans' adoption. Prior to 1st April 2008 when the new HGIs took effect, it is estimated that between 1st January 1999 and 31st March 2008, 4,140 dwellings were built in the settlements of Armagh District with an estimated 1648 dwellings built in the open countryside. In Banbridge District, some 6089 dwellings were built in the settlements with an estimated 1231 dwellings built in the countryside. In Craigavon District, some 12214 dwellings were built in the settlements with an estimated 704 dwellings built in the countryside (Table 18). The period up to the end of March 2008 reflects the high building activity and annual build rates before the current economic recession.

Table 18: Housing Completions in the RDS period 01/01/99-31/03/08 (9.25 yrs)

No of units built in period 31-12-1998 to 31-03-2008	Armagh District	Per Annum Build Rate	Banbridge District	Per Annum Build Rate	Craigavon District	Per Annum Build Rate
Main City/ Town	1551	168	3236	350	9091	983
Local Towns	1218	132	1996	216	000	00
Villages	991	107	616	67	2543	275
Total Urban Settlements (City/towns/ villages)	3760	407	5848	632	11634	1258
Small Settlements	380	41	241	26	580	63
Countryside*	1648	178	1231	133	704	76
Total Rural (Small Settlements & Countryside)	2028	219	1472	159	1284	139
District Total	5788	626	7320	791	12918	1397

*Source: Annual Housing Monitor - *Figures for countryside are an estimate based on the average of the number of full and reserved matters applications approved for rural dwellings between 2004 and 2014 in the three districts x assumed 90% completion figure.*

Table 19: Housing Completions in the RDS period 01/04/08-31/07/13 (5.33yrs)

Settlement	Armagh		Banbridge		Craigavon	
	Built in RDS period	Potential Remaining (2013)	Built in RDS period	Potential Remaining (2013)	Built in RDS period	Potential Remaining (2013)***
Main Town	132	2633	212	1371	812	10640
Local Towns	78	1693	73	1343	000	000
Villages	133	1020	111	425	327	1401
Total Urban Settlements (City/ towns/ villages)	343	5346	396	3139	1139	12041
Small Settlements**	62	1103	46	333	56	745
Countryside*	485	-	341	-	211	-
Total Rural (Small Settlements & Countryside*)	547	1103**	387	333 **	267	745 **
District Total	890	6449	783	3472	1406	12786

*Source: Annual Housing Monitor - *Figures for countryside are estimates based on LPS average build rate figures for 2010-2013 projected to period 310308-310713. NB-Figure** relates to small settlements only. *** CBC remaining potential does not include Phase 2 CAP 2010 housing lands.*

6.9 From April 2008, coinciding with the start of the new RDS HGI figures, building rates have steadily declined and this has been most noticeable within the settlements with an average annual build rate (310308-310713) of 25 dwellings in Armagh City, 40 dwellings in Banbridge Town and 152 in the Craigavon Urban Area. In contrast, building in the countryside has been some five times higher (Table 19).

6.10 Planning permissions and undeveloped zonings provide opportunities for 6,449 dwellings in Armagh District. Of this figure, 2663 are in Armagh City and the remainder distributed across the local towns, villages and small settlements. In Banbridge District, there is potential to accommodate 3472 dwellings, of which 1371 are in Banbridge town and the remainder in the local towns, villages and small settlements. In Craigavon Borough, there is potential to accommodate 12786

dwellings, of which 10640 are in the Craigavon Urban Area and the remainder in the villages and small settlements (Table 19). These figures may be a conservative estimate as an average density of 15-25 houses per hectare of land has been used where the number of units has not been specified in the permission. Given the trend towards higher densities above 25 dwellings per hectare, the actual potential yield may be greater. In addition, there may be other land in the settlements which may be suitable for housing development such as whiteland, infill or opportunity sites which currently does not have planning approval but could potentially yield additional dwelling units. This potential would be assessed as part of an Urban Capacity Study undertaken during plan preparation.

- 6.11** Based on average build rates from 1999-2008 (Table 18), the existing housing land capacity at August 2013 (Source: DOE Northern Ireland Housing Land Availability Summary Report 2013 - Tables 20, 21 & 22) could potentially provide a 15 year supply of housing land in Armagh City, less than a four year supply of housing land in Banbridge town and just under an 11 year supply in the Craigavon Urban Area (not including phase 2 housing lands). However, there is a need to further explore these figures through urban capacity studies and consideration of the NISRA household and settlement information due for release in 2015. In relation to the main hubs, Armagh City currently has the capacity to provide approximately 37% of the total district HGI to 2030, Banbridge town only 19% whilst Craigavon Urban Area can provide almost 80% (Table 19).
- 6.12** Across the three local Armagh towns, there is almost a 13 year supply compared to the three Banbridge local towns where there is only a six year supply. In the villages, there is less than a ten year supply in Armagh District, a six year supply in Banbridge District and a five year supply in Craigavon Borough. The overall remaining potential (Table 19) in Armagh and Craigavon districts equates to a shortfall of 700 and 600 units below the HGI allocation (see paragraph 2.6) whilst Banbridge remaining potential shows a shortfall almost 3,500 units below the HGI allocation. The combined RDS HGI allocation for the three ABC Districts of 27,565 units also assumes an element of rural housing.
- 6.13** Thus, whilst there appears to be an adequate supply of housing land to grow the small towns and villages in line with the RDS objective of consolidating and revitalising these service centres, there is clearly inadequate supply of housing land allocated to the main hubs (in particular in Banbridge Town). However, it is important to compare housing land supply across the settlement hierarchy in relation to each of the three options (Tables 15, 16 & 17). In the following tables (Tables 20, 21 & 22), dwellings built to date during the RDS period have been taken into account and the difference between each option and the remaining potential provides an indication of whether there is an over or under supply of housing.

6.14 If Option 1 is chosen, there would be no shortage of land across the Armagh settlements, particularly in the city and local towns. If Option 1 is chosen in Banbridge, Banbridge Towns' remaining potential is below the HGI allocation whilst the local towns and villages have sufficient provision. If Option 1 is chosen in Craigavon, there is sufficient provision of housing land in the Craigavon Urban Area whilst the capacity of the villages and rural remainder are slightly below that suggested. However, this option does not satisfactorily meet the RDS objective of focusing growth on the hubs whilst revitalising the small towns, villages and sustaining the countryside. In Option 2, Banbridge Town shows a significant shortfall with a small shortfall in the Craigavon villages. Option 3 which is most compatible with RDS direction shows Armagh City to have a shortfall (214 units), Banbridge Town a significant shortfall (1832 units) and Craigavon Urban Area a minimal shortfall (23 units). The Armagh and Craigavon villages also show small shortfalls.

Given that the figures are indicative at this stage and an Urban Capacity Study has not yet been undertaken, it would be wrong to assume that there is no developable land remaining in the towns or other settlements. It may therefore be possible to accommodate new housing within the existing development limits through better utilisation of urban land and housing densities.

Within this RDS HGI allocation, an allowance will also have to be made for dwellings in the countryside. The level of expected rural housing will depend upon the rural policy direction adopted by the Council.

Table 20: Armagh District Housing Land Supply across the settlement hierarchy

Settlement category	Built in RDS (310308-310713)	Potential remaining (2013)	Difference between HGI Option 1 and potential +/-	Difference between HGI Option 2 and potential +/-	Difference between HGI Option 3 and potential +/-
Main City	132	2633	-443	-718	214
Local Towns	78	1693	-585	-736	-269
Villages	133	1020	18	-98	48
*Small Settlements	62	1103	1,680	2,221	677
Settlements Total	405	6449	670	669	670

*Small Settlement: Figure for difference between options 1-3 and potential include element for rural.

Table 21: Banbridge District Housing Land Supply across the settlement hierarchy

Settlement category	Built in RDS (310308-310713)	Potential remaining (2013)	Difference between HGI Option 1 and potential +/-	Difference between HGI Option 2 and potential +/-	Difference between HGI Option 3 and potential +/-
Main Town	212	1371	1,365	1,164	1832
Local Towns	83	2033	-337	-550	-253
Villages	111	425	-48	-66	-69
*Small Settlements	46	333	1,977	2,408	1,447
Settlements Total	452	4162	2957	2956	2957

*Small Settlement: Figure for difference between options 1-3 and potential include element for rural.

Table 22: Craigavon Borough Housing Land Supply across the settlement hierarchy

Settlement category	Built in RDS (310308-310713)	Potential remaining (2013)	Difference between HGI Option 1 and potential +/-	Difference between HGI Option 2 and potential +/-	Difference between HGI Option 3 and potential +/-
Main Urban Area	812	10640	-166	-1,108	23
Local Towns	N/A	N/A	N/A	N/A	N/A
Villages	326	1401	43	63	198
*Small Settlement	56	745	667	1,589	321
Settlements Total	1194	12786	544	544	542

*Small Settlement: Figure for difference between options 1-3 and potential include element for rural.

- 6.15** With regard to other settlements where there appears to be an over-generous supply of land for residential development within existing development limits, this may lead to excessive provision, if this land were to be comprehensively developed for high density housing. Thus there will be a continued need to carry out regular reviews to control housing supply with possible courses of action:
- a) reduce development limits;
 - b) introduce further controls on residential development on unzoned or 'white' urban land;
 - c) phase housing lands;
 - d) reinforce and/or revise the policies to ensure that any housing development is 'in scale and character' with that site and settlement.

Rural Housing

- 6.16** There is currently no rural housing monitor undertaken to assess the quantum of houses being built in the countryside and therefore an estimate can only be made based on the number of applications approved. Approvals for rural houses are currently considered under the policies set out in Planning Policy Statements (PPS 21: published in final form June 2010), the aim of which has been to manage growth in the countryside to achieve development in a sustainable manner that meets the essential needs of rural communities. Although it will be a matter for the new Council to bring forward its own strategy for development in the countryside after April 2015, this must reflect the aim, objectives and policy approach of the Strategy Planning Policy Statement (SPPS).
- 6.17** Prior to 2006 and the introduction of PPS 14, it has been estimated that between 90% and 95% of dwellings approved in rural areas were completed or at least started within 5 years¹. With the high volume of speculative proposals in anticipation of a revised rural policy, subsequent economic decline and changes in the housing market, it is likely that the number of starts and completions of rural houses has declined mirroring the situation within urban housing areas and therefore more permissions may remain unimplemented. Nevertheless, it should be noted that between April 2008 and March 2014 (the current RDS period), 918 rural dwellings have been approved in Armagh, 489 rural dwellings in Banbridge and 300 rural dwellings in Craigavon (Table 23).

¹ Estimate based on rural permissions and completions from a sample rural housing monitor 2003, 2005 and 2006

Table 23: ABC Planning Approvals for Rural New and Replacement Single Dwellings (Full and RM) 2004-2014

Year	Armagh		Banbridge		Craigavon	
	Total Number Approved	Approval Rate	Total Number Approved	Approval Rate	Total Number Approved	Approval Rate
2004-05	198	99%	182	98%	150	97%
2005-06	230	93%	212	95%	130	89%
2006-07	278	97%	252	91%	148	94%
2007-08	356	96%	344	95%	118	97%
2008-09	263	100%	177	98%	64	100%
2009-10	138	100%	97	100%	53	100%
2010-11	126	96%	65	73%	44	94%
2011-12	199	97%	62	95%	46	94%
2012-13	112	96%	55	93%	55	96%
2013-14	80	95%	33	92%	38	95%
Total	1980	97%	1479	94%	846	95%

Source: DOE Planning Statistics.

6.18 The challenge for the Plan is to allocate an appropriate level of housing for the rural area and a planning policy to manage it. It is therefore useful to compare the impact of PPS 21 to the rural planning policy of A Planning Strategy for Rural Northern Ireland (1993) by examining build rates. Prior to 2006-07 (when PPS 21's predecessor PPS 14 was introduced), single dwellings (Full & RM) including replacements were approved at an average rate (2004-2006) of 214 per year in Armagh, 197 in Banbridge and 140 per year in Craigavon. If this pre-PPS14/21 policy still remained in operation or reapplied, then it is reasonable to expect that some 3210 houses could be approved in Armagh district over the next 15 years, 2955 in Banbridge with a further 2100 in Craigavon. Cumulatively, this could mean that around 8265 dwellings could be built in the countryside. This would represent 30% of the projected HGI for the new council area.

6.19 In contrast, the number of approvals has generally declined since 2010 and in the last two years (2012-2014) - when it might be said that PPS 21 has 'bedded in' - the average number approved per year in Armagh, Banbridge and Craigavon has been

96, 44 and 47 respectively. Assuming these rates remained constant over a 15-year plan period, there could be 1,440 additional dwellings in the countryside in Armagh, 660 in Banbridge and 705 in Craigavon. A cumulative total of 2805 rural dwellings within ABC.

6.20 Alternatively, as there are currently 1760 farms in Armagh, 1053 farms in Banbridge and 561 farms in Craigavon (DARD 2013), it may be assumed that one additional house per farm could be built every 10 years under current PPS 21 policy. This could yield a total potential of more than 5,000 dwellings in the countryside over the plan period (ie $1760+1053+561=3374 \times 1.5$ dwellings under PPS21= potential maximum yield of 5061 units). However, it is recognised that not all farms will want or need a dwelling and a number have already utilised their 1 dwelling every 10 years. Under current rural policy, there are also opportunities for infill houses as well as meeting housing needs based on personal and domestic circumstances.

6.21 It is clear that PPS 21 has had a constraining influence on rural house building in contrast to the rural policy applied under A Planning Strategy for Rural Northern Ireland (1993). It is equally clear that a return to a more liberal rural policy would not allow the Plan to meet the objective within the RDS to grow the hubs. Taking into account permissions already granted since March 2008 coupled with what might be approved up to 2030 if PPS 21 continued in its present form, there would appear to be sufficient to meet future rural housing needs. However, we do not know how many of the Full and RM approvals post-2010 are reflective of the high number of outline permissions granted in previous years and how many of these will actually be built. It is also assumed that building rates are lower than previous years and are more likely to constitute 'starts' rather than completions. Therefore, it may be more appropriate to consider the PPS 21 figure for the 15 year period alone which would allow scope for some flexibility such as introducing Dispersed Rural Communities.

6.22 Members therefore need to consider if the present policies in PPS 21 need adjustment in order to meet local circumstances, bearing in mind that the scope of such adjustment must take account of the RDS direction and HGI allocation.

7.0 CONCLUSIONS & KEY FINDINGS

7.1 The purpose of this paper has been to provide base line information on the housing needs of the new Council area to assist in informing the Community Plan and to consider how future housing growth should be apportioned across settlements and the countryside. In compiling this paper, it is recognised that this evidence can be supplemented by the Community Plan process.

7.2 A summary of the key findings are as follows:-

- (i) social housing need is currently much greater in Craigavon (Lurgan) than in Banbridge or Armagh;
- (ii) to address future social housing needs, the local development plan should facilitate a reasonable mix and balance of housing tenures and types including smaller house types e.g. two-bedroom houses;
- (iii) unfitness can be addressed through the provision of policies on the renovation and improvement of dwellings;
- (iv) the HGI for Armagh-Banbridge-Craigavon for the period 2008-2030 is greater than NISRA's household projections (based on 2008 household data & 2012 population data) and is therefore considered sufficient for the plan period;
- (v) Other than Banbridge Town which has a significant shortfall and to a lesser degree Armagh City, housing supply across the settlement hierarchy is sufficient to meet future housing needs and in some settlements there may be potential for significant oversupply of housing;
- (vi) rural housing continues to make a contribution to overall housing supply albeit at a reduced rate since the introduction of PPS 21.

7.3 Members are invited to give their views on the proposed options for allocating housing across the settlement hierarchy including the implications for the countryside and the need for appropriate rural policies tailored to local needs.

PAPER APPENDICES:

- **APPENDIX 1: Craigavon Area Plan 2010 Phase 2 Housing Lands**
- **APPENDIX 2: 2013 Housing Monitor ABC Settlement Status**
- **APPENDIX 3: ABC Settlement Map**
- **APPENDIX 4: ABC NIHE Social Housing Need 2013-2018**

APPENDIX 1: Craigavon Area Plan 2010 Phase 2 Housing Lands

SITE REF	LOCATION	AREA	YIELD @ 25 DPH	
CRAIGAVON URBAN AREA (CENTRAL CRAIGAVON, LURGAN & PORTADOWN)				
Adj C/H 10	Knockmenagh Road, Central C'avon	32.64	816	
Adj L/H 6	North Circular Road, Lurgan	15.54	388.5	
Adj L/H 9	Banbridge Road, Lurgan	18.62	465.5	
Adj L/H 16	Gilford Road, Lurgan	8.57	214.25	
Adj P/H 13	N of Breagh Rd, P'down	26.07	651.75	
Adj P/H 1	N & S of Moy Road, Portadown	15.07	376.75	
Adj P/H 12	South of Old Gilford Road, P'down	1.89	47.25	
TOTAL CUA		118.4	2960	
* Village & SS Ha is GIS (EPIC) estimate - no site area/reference in CAP 2010		AREA *		
CAP 2010 VILLAGES				YIELD @ 20 DPH
Aghacommon	R/O Chestnut Grove, Ballynamony Rd	5.8		116
Aghagallon	Lurgan Road	1.97		39.4
Aghagallon	Colane Road	3.6		72
Aghagallon	Aghalee Road	1.04		20.8
Bleary	Deans Road	4.04		80.8
Donaghcloney	Monree Road	3.16		63.2
Drumnacanvy	West of Charnwood Grange	1.84		36.8
Drumnacanvy	NW of Charnwood Grange	1.38		27.6
Drumnacanvy	NE of Charnwood Grange	1.58		31.6
Drumnacanvy	NE of Bleary/Drumnacanvy Road	1.77		35.4
Waringstown	South of Clare Road	1.61		32.2
Waringstown	East of Banbridge Road	1.53		30.6
VILLAGE TOTAL		29.32		586.4

CAP 2010 SMALL SETTLEMENTS (SS)				YIELD @ 20 DPH
Ballynabragget	North of Moygannon Road	1.23		24.6
Ballynabragget	South of Moygannon Road	1.14		22.8
Blackskull	Blackskull Road	1.61		32.2
Charlestown	West of Lough Lane	1.44		28.8
Derrymacash	West of Raughland Meadows	2.08		41.6
Derrymore	South of Lough View	1.33		26.6
Derrytrasna	West of Derrytrasna Road	3.83		76.6
Derrytrasna	East of Derrytrasna Road	1.92		38.4
Maghery	Derrylee Road	1.54		30.8
Milltown (Co. Armagh)	Milltown Lane	1.35		27
Scotch Street	Moy Road (West)	1.2		24
Scotch Street	Moy Road (East)	2.43		48.6
S.S. TOTAL		21.1		422
RURAL TOTAL		50.42		1008.4
OVERALL TOTAL		168.82	2960	1008.4

OVERALL POTENTIAL PHASE 2 CAP 2010 YIELD (URBAN & RURAL) = 3968 UNITS (2960 & 1008).

APPENDIX 2: 2013 Housing Monitor ABC Settlement Status



NORTHERN IRELAND LANDUSE DATABASE HOUSING SITES

HOUSING COMPLETIONS ON MONITORABLE SITES IN
ARMAGH DISTRICT AS OF 1 AUGUST 2013

Settlement	Units Complete	Remaining Potential	Area Developed	Area Remaining
ACTON	2	92	0.2	3.7
AGHORY	5	95	0.7	3.7
ANNAGHMORE	4	87	1.0	3.8
ANNAGHMORE (MOSS ROAD)	35	16	1.7	0.9
ANNAHUGH	59	60	3.5	2.7
ADDRESS	18	31	1.5	2.0
ARMAGH	1683	2630	96.1	110.0
ARTASOOLY	60	51	3.3	3.0
AUGHLISH	1	9	0.1	0.9
BALLYMACNAB	3	27	0.8	1.4
BLACKWATERTOWN	79	31	3.6	1.7
BROOMHILL	14	25	0.4	0.7
CARRICKANESS	12	16	0.8	0.8
CHARLEMONT	1	20	0.1	0.9
CLADYMORE	18	1	0.7	0.1
CLARE	8	57	1.0	2.4
COLLEGELAND	9	47	2.2	4.0
DARKLEY	23	66	1.0	3.1
DERRYHALE	39	34	4.5	2.8

This report excludes Phase 2 Housing Land and Phase 2 Development Land

10 September 2014

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DERRYNOOSE	18	0	1.0	0.0
DERRYSCOLLOP	2	5	1.2	0.6
DRUMHILLERY	0	1	0.0	0.5
EDENAVEYS	12	0	0.9	0.0
EGLISH	13	14	0.6	0.9
GLENANNE	1	50	0.1	1.5
GLENANNE (LISDRUMCHOR)	13	84	0.5	3.4
GRANEMORE	3	46	0.4	2.5
HAMILTONSBAWN	233	44	9.9	2.2
KEADY	489	562	25.5	23.2
KILLYLEA	43	84	2.4	1.9
KILMORE	57	70	3.1	2.7
LAURELVALE	261	137	14.1	5.7
LISNADILL	0	1	0.0	0.1
LOUGHGALL	13	99	0.4	6.5
LOUGHGILLY	0	14	0.0	0.5
MADDEN	1	2	0.2	0.2
MARKETHILL	250	466	12.2	17.1
MIDDLETOWN	42	21	1.8	0.7
MILFORD	95	87	5.0	3.6
MILLTOWN (AGHORY)	32	30	1.1	0.6
MILLTOWN (BENBURB)	4	26	0.1	0.8
MOUNTNORRIS	0	31	0.0	2.4
MULLAGHBRACK	0	12	0.0	0.6

This report excludes Phase 2 Housing Land and Phase 2 Development Land

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POYNTZPASS	112	117	5.3	4.8
RICHHILL	203	146	13.2	9.6
SALTERS GRANGE	1	17	0.1	0.8
ST. MARY'S TERRACE	0	1	0.0	0.1
STONEBRIDGE	6	70	0.5	4.0
TANDRAGEE	557	660	31.1	18.8
TASSAGH	0	33	0.0	1.6
TULLYGOONIGAN	4	42	0.9	3.7
TULLYROAN CORNER	3	23	0.6	1.3
TYNAN	6	53	0.6	2.1
District Totals	4547	6443	255.6	273.6



NORTHERN IRELAND LANDUSE DATABASE

HOUSING SITES

HOUSING COMPLETIONS ON MONITORABLE SITES IN
BANBRIDGE DISTRICT AS OF 1 AUGUST 2013

Settlement	Units Complete	Remaining Potential	Area Developed	Area Remaining
ANNACLONE	26	40	1.6	1.5
ARDTANAGH	2	7	0.2	0.3
ASHFIELD/GOWDYSTOWN	6	64	0.8	2.5
BALLELA	0	15	0.0	0.6
BALLYRONEY	2	19	0.3	1.0
BALLYWARD	2	3	0.3	0.4
BANBRIDGE	3448	1371	180.2	55.1
CLOSKELT	4	19	0.3	1.1
CORBET	0	4	0.0	0.2
DECHOMET	0	1	0.0	0.9
DROMORE	1460	770	71.9	30.9
FINNIS	8	0	0.4	0.0
GILFORD	314	325	15.7	19.6
GLASKER	7	13	0.6	0.5
KATESBRIDGE	11	3	0.4	0.3
KILKINAMURRAY	2	0	0.1	0.0
KINALLEN	221	127	7.5	7.3
LAWRENCETOWN	231	35	12.5	2.0
LEITRIM	41	44	1.7	1.3

This report excludes Phase 2 Housing Land and Phase 2 Development Land

LENADERG	72	4	3.2	0.3
LOUGHBRICKLAND	158	138	8.0	6.7
MONEYSLANE	48	58	1.7	2.5
POYNTZPASS(BANBRIDGE)	5	1	0.2	0.1
RATHFRILAND	301	248	13.8	9.5
SCARVA	112	124	5.6	7.1
TULLYLISH	0	13	0.0	0.8
WARINGSFORD	44	26	1.5	1.7
District Totals	6525	3472	328.5	154.2

This report excludes Phase 2 Housing Land and Phase 2 Development Land

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NORTHERN IRELAND LANDUSE DATABASE

HOUSING SITES

HOUSING COMPLETIONS ON MONITORABLE SITES IN
CRAIGAVON DISTRICT AS OF 1 AUGUST 2013

Settlement	Units Complete	Remaining Potential	Area Developed	Area Remaining
AGHACOMMON	264	34	15.5	4.3
AGHAGALLON	182	49	10.4	1.9
BALLYMACMAINE	125	17	5.9	0.8
BALLYNABRAGGET	6	0	0.6	0.0
BLACKSKULL	97	25	5.5	1.6
BLEARY	80	102	5.2	4.1
CHARLESTOWN	5	16	0.2	0.9
CRAIGAVON URBAN AREA	9893	10597	449.1	406.6
DERRYADD	4	106	0.7	8.8
DERRYMACHASH	40	25	2.0	1.3
DERRYMORE	25	58	1.1	2.1
DERRYTRASNA	58	10	3.8	0.9
DOLLINGSTOWN	573	141	34.2	5.7
DONAGHCLONEY	444	346	23.4	15.8
DRUMNACANVY	155	133	11.2	6.5
GAMBLESTOWN	6	24	0.5	1.9
GIBSON'S HILL	0	2	0.0	0.3
MAGHERALIN	316	373	15.4	15.8
MAGHERY	11	82	0.9	3.7

This report excludes Phase 2 Housing Land and Phase 2 Development Land

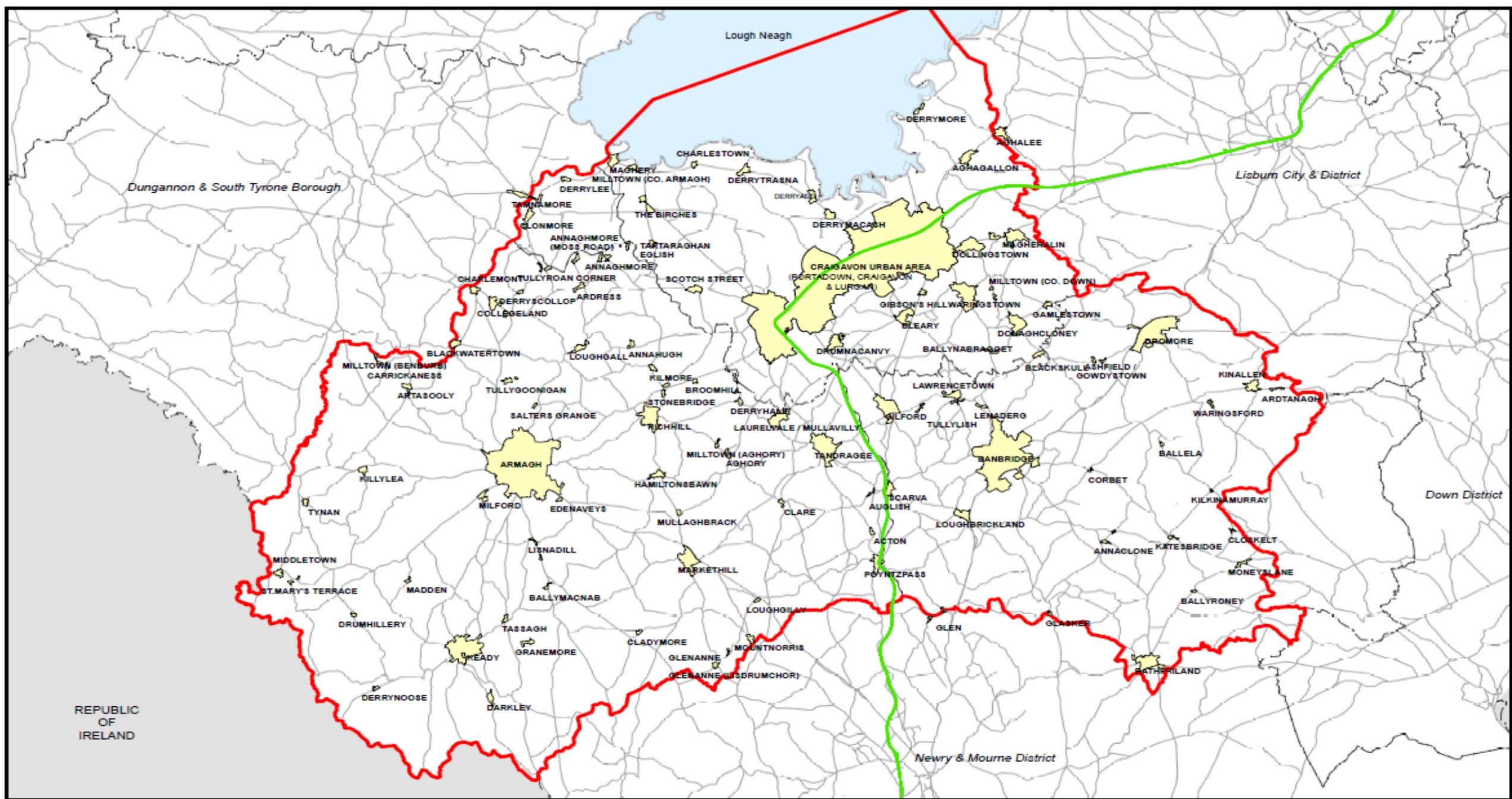
MILLTOWN (CO. ARMAGH)	0	9	0.0	1.6
MILLTOWN (CO. DOWN)	4	9	0.3	0.5
SCOTCH STREET	160	83	5.8	2.6
TARTARAGHAN	3	2	0.6	0.6
THE BIRCHES	109	310	4.5	13.4
WARINGSTOWN	856	223	47.5	8.4
District Totals	13416	12776	644.2	509.9

This report excludes Phase 2 Housing Land and Phase 2 Development Land

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APPENDIX 3: ABC Settlement Map



Armagh, Banbridge and Craigavon District Council Area 2015

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Legend

- Settlements
- Existing LGD boundaries
- ABC LGD Boundary post-2015
- A, B & C class roads
- Belfast - Dublin Railway Route
- Lough Neagh



APPENDIX 4: ABC NIHE Social Housing Need 2013-2018

Social HNA 2013-2018 in Armagh

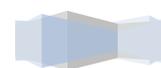
Settlement:	5 Year Projected Social Need:
Main Urban Centre	
Armagh 1	55
Armagh 2	0
Local Towns	
Keady	0
Markethill	0
Tandragee	0
Villages	
Charlemont / Blackwatertown / Carrickaness / Donnelly Hill	6
Drumhillery / Darkley / Derrynoose	0
Glenanne / Mountnorris / Loughgilly	0
Hamiltonsbawn / Edenaveys	0
Loughgall	0
Madden / Milford / Ballyards	0
Middletown	12
Poyntzpass	0
Richhill	0
Tynan / Killylea	0
Small Settlements	
Annaghmore / Eglishe	0
Annahugh	0
Clady / Corran / Ballymacnab	0



Total	73
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Social HNA 2013-2018 in Banbridge

Settlement:	5 Year Projected Social Need:
Main Urban Centre	
Banbridge Town	65
Local Towns	
Dromore	6
Gilford	1
Rathfriland	0
Villages	
Kinallen	0
Lawrencetown	0
Loughbrickland	0
Scarva	0
Small Settlements	
Annaclone	0
Ashfield / Tullyhenan	0
Ballela	0
Ballyroney	0
Banbridge Rural Cottages	0
Closkelt	0
Corbet	0
Dromore Rural Cottages	0
Katebridge	0
Lenaderg	0
Lisnagade / Ballyvarley	0



Seapatrick	0
Tullylish	0
Total	72

Social HNA 2013-2018 in Craigavon

Settlement:	5 Year Projected Social Need:
Central Craigavon	0
North Lurgan	150
South Lurgan	10
Portadown 1	10
Portadown 2	2
Villages	
Aghagallon	4
Bleary	0
Dollingstown	0
Donacloney	0
Magheralin	0
Waringstown	0
Small Settlements	
Carn (Elizabeth Terrace)	0
Derrymacash/Derrytrasna/ Kinnego	15
Drumnacanvey	0
Portadown Rural	0
Total	191



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