

Report to: Strategic Planning Committee



Date of Meeting 25th November 2025

Document classification: Part A Public Document

Exemption applied: None

Review date for release N/A

Housing Monitoring Update to year ending 31 March 2025

Report summary:

This report provides a summary of house building monitoring information to the year ending 31 March 2025. The report confirms that, looking forward, we have a 3.50 year Housing Land Supply. Although this is an improvement on the previous monitoring period there is a need to continue to bolster supply through the granting of permissions through application of the tilted balance and the presumption in favour of sustainable development.

Is the proposed decision in accordance with:

Budget Yes ☒ No ☐

Policy Framework Yes ☒ No ☐

Recommendation:

- 1). Note the residential dwellings completion data and future projections for the district including comments on future supply risks detailed in section 5 of the report;
- 2). Note the district Five Year Housing Land Supply position and impacts for decision making as set out in this report;
- 3). Note that the Housing Monitoring Update will be published on the Council's website.

Reason for recommendation:

To keep members informed of housing completions and forward projections.

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Portfolio(s) (check which apply):

- ☐ Climate Action and Emergency Response
- ☐ Coast, Country and Environment
- ☐ Council and Corporate Co-ordination
- ☐ Communications and Democracy
- ☐ Economy
- ☐ Finance and Assets
- ☒ Strategic Planning
- ☐ Sustainable Homes and Communities

☐ Culture, Leisure, Sport and Tourism

Equalities impact Low impact;

Climate change Low Impact;

Risk: Low Risk;

Links to background information <https://eastdevon.gov.uk/planning/planning-policy/monitoring>

Link to [Council Plan](#)

Priorities (check which apply)

☒ Better homes and communities for all

☐ A greener East Devon

☐ A resilient economy

1. Introduction

- 1.1 Through the Planning Policy team, the East Devon District Council (EDDC) produces an annual Housing Monitoring Update (HMU). This report to Committee forms the monitoring report for the year ending 31 March 2025. This document largely focuses on whether the Council can demonstrate a five year housing land supply for the purposes of NPPF paragraph 78 detailed below.
- 1.2 It is drawn to committee attention that this paper is drafted on the basis of, and in respect to, the new housing requirement figures published alongside the NPPF update in December 2024. Housing requirements set by Government has gone up and as a result, the five year land supply figure that we report has gone down.

2. Housing Need and Supply in East Devon

- 2.1 The East Devon Local Plan, specifically in respect of housing supply and monitoring purposes, covers the 18 years from 01 April 2013 to 31 March 2031 (however it is relevant to note that the new plan, currently preparing for second Reg 19 consultation, will supersede the current plan long before this end date as a plan is considered out of date after five years). For this 18 year period the plan establishes an objectively assessed need for 17,100 new homes to be created in East Devon. This averages out at 950 homes per year. However, as the current plan was now adopted more than five years ago, we now need to use the latest Government guidance to calculate our baseline figure, the local housing need which is 1,156 homes per year. This takes into account the increases seen in housing targets published alongside the NPPF update in December 2024.
- 2.2 The table below breaks down the net completions recorded in the twelve years running from 2013 to 2025.

Table 1: Net Total Completions 2013 to 2025

| | Apr 13 to Mar 14 | Apr 14 to Mar 15 | Apr 15 to Mar 16 | Apr 16 to Mar 17 | Apr 17 to Mar 18 | Apr 18 to Mar 19 | Apr 19 to Mar 20 | Apr 20 to Mar 21 | Apr 21 to Mar 22 | Apr 22 to Mar 23 | Apr 23 to Mar 24 | Apr 24 to Mar 25 |
|-----------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---|---|---|---|---|
| West End | 486 | 531 | 403 | 335 | 326 | 392 | 560 | 455 | 568 | 518 | 358 | 393 |
| Rest of East Devon | 344 | 498 | 624 | 389 | 540 | 537 | 505 | 417 | 479 | 443 | 276 | 297 |
| Annual TOTAL | 830 | 1,029 | 1,027 | 724 | 866 | 929 | 1,065 | 872 Revised to 867 by the MHCLG after taking the net loss of 9 care home bedroom s into account | 1,047 Revised to 1,039 by the MHCLG after taking the net loss of 15 care home bedroom s into account | 961 Expected to be revised to 998 by the MHCLG after taking the net gain of 67 care home bedroom s into account | 634 Expected to be revised to 623 by the MHCLG after taking the net loss of 20 care home bedroom s into account | 690 Expected to be revised to 696 by the MHCLG after taking the net gain of 12 care home bedroom s into account |

* The Housing Delivery Test measurement results published by Government is the source for confirming the revised figures (taking into account care home moderations), The 2023 HDT measurement was published in December 2024. See also 4.1 to 4.9.

- 2.3 There were **10,674** net total dwelling completions in East Devon (including dwelling equivalents from care home accommodation) from 1 April 2013 to 31 March 2025, **690** were in the 2024/25 monitoring year.
- 2.4 Including the 2024/25 figures, the average level of completions over the last five years is now **845** (including care homes), which is below the adopted local plan housing requirement of 950.
- 2.5 The annual average since the start of the plan period is **891** dwelling completions which is below the annualised requirement of 950. The increased delivery rate in the last five years has not yet mitigated the slower delivery rate in the first five years. It has not been sufficient to result in a surplus or “oversupply” at the 2025 Monitoring Point.
- 3. Five Year Housing Land Supply Assessment**
- 3.1 The Council is required to examine its five year housing land supply annually. This is an assessment of whether the projected levels of future house building, taking into account what has been built in the past, is sufficient to meet the levels of housing required by the local plan for the next five years.
- 3.2 The equations below, with associated explanation, establish the calculated housing land supply in East Devon at a base position of 1 April 2025.

Table 2: Five year requirement plus buffer calculations

| East Devon housing requirement and buffer for 01 April 2025 to 31 March 2030 | | | |
|---|--------------------|-------------------------|--|
| | Calculation | No. of dwellings | Item |
| A | | 1,156 | Local Housing Need |
| B | Ax5 | 5,780 | Five year requirement target |
| C | A/20 | 58 | 5% buffer |
| D | B+C | 5,838 | Five year requirement target with 5% buffer |
| E | D/5 | 1,168 | Annual Requirement |

Table 3: Five year supply calculations

| Supply sources at 31 March 2025 with realistic prospects of delivering dwellings 1st April 2025 to 31st March 2030 | | | |
|---|--------------------|-------------------------|---|
| | Calculation | No. of dwellings | Supply sources |
| F | | 2,752 | Extant permissions |
| G | | 895 | Cranbrook Plan DPD expansion zones without Reserve Matters or Unconsented** |
| H | | 445 | Future windfalls |
| I | F+G+H | 4,092 | Total five years deliverable supply |
| J | D-I | 1,746 | Five year shortfall figure |
| Five year housing land supply position at 2025 Monitoring Point | | | |
| K | I/E | 3.50 | Years of land supply |

* Annual requirement based on Local Housing Need (standard method)

** Planning applications on three of the four Cranbrook expansion areas received Planning Committee 'Resolution to grant approval' after the 2023 Monitoring Point and stands for the 2025 Monitoring Point.

4. Five Year Land Supply Position – conclusion

- 4.1 At the 31st of March 2025, East Devon District Council can demonstrate a **3.50** year housing land supply position against the annual requirement of **1,168**. The total number of dwellings deemed deliverable in the five year period being 4,092 dwellings. Comparing the 4,092 forecasted five year supply (including dwelling equivalents from care homes) to the 5,838 net dwellings five year requirement indicates a district supply **shortfall of 1,746** dwellings.
- 4.2 The results and conclusions in this document supersede all previous East Devon Housing Monitoring Updates reports regarding the previous four and five year housing land supply position.

- 4.3 Finally, for the avoidance of doubt, the five year housing land supply assessment does not prejudice or predetermine the rolling five year housing land supply assessment to be made in the future relating to the emerging East Devon Local Plan, including the five year land supply position at the anticipated point of plan adoption. The rolling five year housing land supply assessment for the Local Plan will need to be consistent with NPPF and PPG specifically regarding plan-making

5. Housing Delivery Test

- 5.1 Since November 2018, Councils have also had to pass the new Housing Delivery Test (HDT). Rather than simply looking at what *can* be achieved over the following five years, the HDT checks what *has* been achieved over the previous three, with delivery of the full amount resulting in a score of 100%.

$$\text{Housing Delivery Test (\%)} = \frac{\text{Total net homes delivered over three year period}}{\text{Total number of homes required over three year period}}$$

- 5.2 The number of net homes delivered is the national statistic for net additional dwellings over a rolling three year period, with adjustments for net student / other communal accommodation.

Net homes delivered in a year

= Net Additional Dwellings National Statistic

PLUS

$$\frac{\text{net increase in bedrooms in student communal accommodation in local authority}}{\text{average number of students in student only households in England}}$$

PLUS

$$\frac{\text{net increase in bedrooms in other communal accommodation in local authority}}{\text{average number of adults in households in England}}$$

- 5.3 The HDT comprises three elements:

- i) If delivery has been less than 95%, the council should prepare an Action Plan to address the reason for the shortfall;
- ii) If delivery has been less than 85%, the council should also include a 20% buffer in calculating its Five Year Land Supply (rather than 5% or 10%);
- iii) If delivery has been less than 75%, the presumption in favour of sustainable development would then apply.

- 5.4 The results of the Sixth HDT (covering 2020/21 to 2022/23) were released in December 2024. East Devon District Council passed the test with a score of 118%, meaning no action is required.

- 5.5 Previous Housing Delivery Test measurement results for East Devon were as follows:

| | |
|---------------------------------|------|
| First HDT (2015/16 to 2017/18) | 149% |
| Second HDT (2016/17 to 2018/19) | 121% |
| Third HDT (2017/18 to 2019/20) | 122% |

| | |
|---------------------------------|------|
| Fourth HDT (2018/19 to 2020/21) | 123% |
| Fifth HDT (2019/20 to 2021/22) | 126% |
| Sixth HDT (2020/21 to 2022/23) | 118% |

- 5.6 The result of the seventh HDT (covering 2021/22 to 2023/24) is anticipated at time of writing.
- 5.7 In the absence of the seventh HDT measurement being published by Government, the Council continues to use the previously published fourth Housing Delivery Test. This is consistent with NPPF paragraph 22 which states that “*Until new Housing Delivery Test results are published, the previously published result should be used.*”
- 5.8 East Devon passed the sixth Housing Delivery Test with a score of 118%. This means that no buffer is required in the five year housing land supply calculation for the 2025 Monitoring Point in this document.
- 5.9 Figures used in the calculation of the sixth Housing Delivery Test can be found in the full 2025 HMU report.

6. **Buffer ensuring choice and competition**

- 6.1 The NPPF sets out that to allow fair choice and competition or previous undersupply, buffers should be added. Paragraph 78 looks to
- 6.2 “The supply of specific deliverable sites should in addition include a buffer (moved forward from later in the plan period) of:
- a) 5% to ensure choice and competition in the market for land; or
 - b) 20% where there has been significant under delivery of housing over the previous three years, to improve the prospect of achieving the planned supply; or
 - c) From 1 July 2026, for the purposes of decision-making only, 20% where a local planning authority has a housing requirement adopted in the last five years examined against a previous version of this Framework, and whose annual average housing requirement⁴² is 80% or less of the most up to date local housing need figure calculated using the standard method set out in national planning practice guidance.”
- 6.3 The HDT currently shows there is no significant under delivery of housing so no 20% buffer is needed at this time. However, to ensure choice and competition, a 5% buffer is required to be added to the annual target. We will need to await the Housing Delivery Test result for 2025. In the event that delivery is below 95% of the requirement, we would need to prepare an action plan to address under-delivery. If delivery is below 85%, a 20% buffer is added to the five-year housing land supply requirement, and an action plan is still needed. If delivery is below 75%, the “presumption in favour of sustainable development” applies to planning applications. Clearly the 20% buffer would present the greatest challenge since we are progressing actions to bolster our housing land supply already and the presumption in favour is already in place due to our lack of a 5 year housing land supply.

7. **Five year housing land supply by sub-area**

- 7.1 The table below breaks down the net completions recorded in the ten years running from 2013 to 2025 in both the West End (*Cranbrook and other big strategic housing sites on the Western side of the District*) and the Rest of East Devon excluding adjustments for care homes.

Table 4: Net Total Completions 2013 to 2025

| | Apr 13 to Mar 14 | Apr 14 to Mar 15 | Apr 15 to Mar 16 | Apr 16 to Mar 17 | Apr 17 to Mar 18 | Apr 18 to Mar 19 | Apr 19 to Mar 20 | Apr 20 to Mar 21 | Apr 21 to Mar 22 | Apr 22 to Mar 23 | Apr 23 to Mar 24 | Apr 24 to Mar 25 |
|-----------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| West End | 486 | 531 | 403 | 335 | 326 | 392 | 560 | 455 | 568 | 518 | 358 | 393 |
| Rest of East Devon | 344 | 498 | 624 | 389 | 540 | 537 | 505 | 417 | 479 | 443 | 276 | 297 |

7.2 Applying the five year housing land supply calculations in Table 3 with data from Table 4, the two sub areas results in the following five year housing land supply positions:

- West End 3.49 years supply
- Rest of East Devon 3.61 years supply

7.3 The positions shown above highlight the issues seen in both the West End and in the rest of East Devon on supply. Action to rectify the position has occurred, namely:

- The Cranbrook Plan DPD was adopted.
- In three of the four Expansion Areas, there are recent planning applications where Planning Committee resolved to grant planning approval, subject to S106 agreements.
- Master planning is underway for the creation of Marcombe, a new town situated in the West End.
- Work is ongoing on the new Local Plan which is currently nearing 2nd Reg 19 stage which allocates a range of sites for housing and mixed use development across all of East Devon.

7.4 This is the first year of the updated standard method which has seen an increase in Local Housing Need from 893 to 1156, it will take time to achieve these figures given the 29% increase. On top of this, there is a new requirement to increase the annual target by 5%, leading to a 1,168 Annual Requirement.

8. Conclusion in respect of current requirements

8.1 At 31 March 2025, East Devon District Council can demonstrate a **3.50** year housing land supply against the annual requirement of 1,168 dwellings. The total number of dwellings deemed deliverable in the five year period is 4,092 meaning there is a supply shortfall of 1,688 dwellings against the five year housing requirement of 5,838.

9. Key considerations looking forward

9.1 As expected, the Government elected in July 2024 changed the Local Housing Requirements for East Devon to those issued within the consultation in the summer of 2024. East Devon LHN figures were published with new numbers for the whole of England alongside an update to the NPPF in December 2024. For most local authorities, including for East Devon, numbers have gone up (for England as a whole they go up quite

substantially). The higher housing numbers established by Government for East Devon have severely reduced the housing land supply figure stated in this report.

- 9.2 Although the housing land supply position has improved since the previous monitoring period it is essential that the Council continues to grant planning approvals in order to maintain and improve housing supply in future years.
- 9.3 The Council will need to give appropriate weight to the lack of a 5-year housing land supply as part of the planning judgement made when determining planning applications. This is particularly important when determining full and reserved matters planning applications. Detailed planning approvals and resolution to grant planning approval are currently the most effective way to provide 'clear evidence' that sites are deliverable and can be included in the five-year housing land supply.
- 9.4 The Council will soon need to be able to demonstrate to a planning inspector at plan examination that there will be a five year land supply at the point of local plan adoption, this is projected to be in late 2026. To get to this position we will be on vulnerable ground if we are to seek to argue that allocated sites, without a planning permission, will rapidly gain permission and start accommodating development at a rapid rate and such make a substantive contribution to the future five year land supply. As such there is a very real vulnerability in the ability to secure a positive report from an inspector on the local plan, allowing for plan adoption, unless we start to grant additional planning permissions for development.
- 9.5 A number of allocation sites are however, progressing through the planning application process, having applied since consultation on sites was completed in spring 2025, showing there is an appetite from developers. Further work on the local plan trajectory has involved the consultation of developers to gain a better understanding of future supply. However, land without planning permission at the point of monitoring are not eligible to be included, exceptions are made for areas with resolution to grant (e.g. Cranbrook expansion areas).

Financial implications:

There are no direct financial implications identified within the report. (AB/13/11/2025)

Legal implications:

The legal implications are covered in this report (002533/14 November 2025/DH)