Powys Local Development Plan
Topic Paper

LDP Strategy

DEPOSIT VERSION PAPER

June 2015

Powys

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1.0 Introduction

1.1 The planning system regulates the development and use of land in the public interest. It should reconcile the needs of development and conservation, securing economy, efficiency and amenity in the use of land, thereby contributing to sustainable development.

1.2 In 2004, the Planning and Compulsory Purchase Act introduced a new Local Plan process for Wales. The new system requires each authority in Wales to prepare a Local Development Plan (LDP) for their area which, once adopted, replaces any existing development plan, which for Powys is the Powys Unitary Development Plan (UDP).

1.3 Welsh Assembly Government guidance on the preparation of LDPs includes, within Paragraph 4.3 of Local Development Plans Wales: Policy on Preparation of LDPs (WAG, 2005), that local planning authorities are required to prepare, maintain or have access to an up-to-date information base on sufficient aspects of the economic, environmental and social characteristics of their area in order to ensure that its development plan policies and proposals are founded on a thorough understanding of the area's needs, opportunities and constraints.

1.4 This paper is therefore one of a series of topic papers being prepared by Powys County Council as part of its preparation of the Powys Local Development Plan. The purpose of this paper is to provide detailed clarification and explanation of the Vision and Strategy of the Local Development Plan (Section 3 of the Deposit LDP), including how the Vision and Strategy influence key topic areas and the linkages between those topic areas and the sustainable settlement hierarchy.

2.0 Vision & Objectives

2.1 As detailed within Planning Policy Wales, Local Development Plans (LDPs) should set out a vision-based strategy for the plan area. A number of issues and considerations that influence the vision and strategic direction of the Powys LDP include:

- National, Regional and Local Plans, Strategies and Programmes;
- Baseline Evidence detailed within the Topic Papers that accompany and support the LDP;
- LDP Appraisals and Assessments including Sustainability Appraisal, Strategic Environmental Assessment, Powys Employment Needs Assessment and Renewable & Low Carbon Energy Assessment; and
- Responses to public consultation undertaken as part of the preparation of the LDP.

48 issues and considerations facing Powys, which the LDP seeks to address, have been identified and are detailed within the Plan.

2.2 Many of the issues and considerations that influence the vision and strategic direction of the Powys LDP have emerged, or have been subject to change, during the Plan's preparation process (for example, through representations and comments received during various consultation stages (including at the Preferred Strategy and first Deposit stages of the Plan's preparation) and, in 2014, when Powys Council merged its improvement plan into the One Powys Plan (the Community Strategy for Powys). The vision and strategy of the LDP has therefore been influenced by and has been subject to revision to take into account such changes since the Preferred Strategy stage.

2.3 The vision statements of national, regional and local plans, strategies and programmes are also key considerations in determining the LDP's vision, and include:

- The Wales Spatial Plan's vision for the *Central Wales* Spatial Plan Area -
  "High-quality living and working in smaller-scale settlements set within a superb environment, providing dynamic models of rural sustainable development, moving all sectors to higher value-added activities";
- The Wales Spatial Plan's vision for the *Swansea Bay – Waterfront and Western Valleys* Spatial Plan Area (relevant to the Ystradgynlais area of Powys) -
  "An area of planned sustainable growth and environmental improvement, realising its potential, supported by integrated transport within the area and externally and spreading prosperity to support the revitalisation of West Wales";
- The One Powys Plan's stated vision –
  "We will work together to meet the needs of Powys citizens";
- Powys County Council's vision –
  "Strong communities in the green heart of Wales";
- Powys Regeneration Strategy's vision –
  "Regeneration in Powys will nurture and promote the County's assets and strengths as the means to addressing its weaknesses, by establishing a robust and sustainable economy that is based upon vibrant communities,

and which enhances and protects the physical, social and cultural environment of Powys";

- The long term vision of the One Powys Local Action Group (formed to develop the Powys Local Development Strategy) -
  "By 2020 we aim to see vibrant, empowered and connected local communities, delivering sustainable and innovative solutions to current and future economic, social and environmental issues, to enhance the economic wealth of the County";

Whilst some of these vision statements are of limited relevance to spatial planning, objectives and priorities included within the documents underpinning the vision statements can be of more relevance, particularly to individual topic areas of the LDP. Such objectives and priorities have therefore also been considered in the preparation of the Plan and are identified in LDP topic papers.

2.4 From the above-mentioned issues and considerations, a number of significant strengths and opportunities have been identified, including that:

- the area has a wide economic base;
- the natural and historic landscape, including Powys' towns and villages, are diverse, of distinctive quality and scenically and historically important; and
- there are traditional Welsh language strongholds in the area.

In addition to these strengths and opportunities, issues and considerations identify a number of significant weaknesses and threats, including that:

- the area's outstanding natural and built heritage resources are coming under increasing development pressure and must be carefully managed to reconcile competing demands;
- Welsh language usage is falling in the area's Welsh language strongholds;
- The outward migration of 21-30 year olds is considered to be due to low wages, poor employment opportunities and high housing costs;
- Powys' ageing population places increasing pressure on the area's community services and facilities;
- The area's dispersed rural population makes it challenging to deliver sustainable travel opportunities and other community services and facilities;
- The area's population is reliant on out-of-county services and facilities (e.g. general hospitals); and
- the Plan area's stock of manufacturing premises is ageing and does not meet current requirements.

An important message influencing the vision and strategic direction of the Powys LDP is the importance placed upon nurturing and promoting the County's assets and strengths in order to address its weaknesses. In this regard the Plan therefore endeavours to:

- Provide a level of growth that will support the area's social and economic needs, including enabling the provision of housing and employment in appropriate locations so as to both retain and attract the working age population and improve opportunities for the younger generations.
- Consider the specialist needs arising from the ageing population in Powys.

- Promote the area's network of strong and vibrant towns and large villages as the foci for development in order to reinforce and enhance their attractiveness as places to live & work and their ability to provide & sustain community services and facilities. In this regard, Towns (such as Welshpool, Newtown, Llandrindod Wells and Ystradgynlais) will benefit from an improved housing stock, improved employment premises and the provision of a wide range of services and facilities that serve a wider hinterland in order that they may compete with the attractions of larger centres situated outside of the plan area. Large villages will also benefit from an improved housing stock, employment opportunities and viable community services and facilities that support the local community and its hinterland.
- Enable an appropriate level of development in smaller villages and rural areas to increase sustainability, helping to support rural services & facilities and meeting the housing needs of the local community; and
- Protect and enhance the County's outstanding physical, social and cultural environment, including the outstanding natural landscape, historic built environment and traditional Welsh language strongholds in order that these important aspects of the plan area are sustained for future generations.

- 2.5 The LDP's Vision for the Plan area by 2026 is:

  Powys is a county of considerable variety extending from the South Wales Valleys to the Berwyn Mountains in the north, and from the Cambrian Mountains in the west to the English border in the east.

  As the 'green heart of Wales', Powys will be a place of vibrant and resilient communities providing sustainable development and economic opportunities set in a healthy, safe environment, whilst celebrating, protecting, enhancing and sustainably managing its natural resources, native wildlife and habitats, heritage and distinctive characteristics.

  Powys' towns and larger villages will be vibrant and accessible service centres. They will be the focus for integrating housing, economic and service development to meet their own needs and those of their surrounding communities.

  Powys' rural areas will be a working countryside of sustainable communities supported by a thriving and diverse rural economy of small businesses.

2.6 This Vision will be realised through a series of 16 strategic objectives, split into 5 themes. These objectives aim to address the 48 key issues and considerations identified and provide the context for the policies and proposals contained within the Plan.

2.7 The 48 key issues & considerations and the 16 strategic objectives are detailed in the LDP and are also attached as Appendix A of this document. The inter-relationship between the key issues / considerations and the strategic objectives is detailed in the topic papers that accompany the LDP and is summarised in the following table:

Theme / Objective	Issue / Consideration Addressed
Planning for Growth in Sustainable Places	
LDP Objective 1 – Meeting Future Needs	6, 7, 9, 10, 19, 20, 21, 23, 24, 26, 27, 30, 33
LDP Objective 2 – Sustainable Settlements and Communities	5, 6, 7, 9, 19, 32, 33, 36, 41
LDP Objective 3 – Efficient Use of Land	5, 8, 11,13,17,18, 32, 36
LDP Objective 4 – Climate Change and Flooding	4,16,28, 44, 45
LDP Objective 5 – Energy and Water	4, 5, 11, 13, 18, 28, 42, 43, 44
Supporting the Powys Economy	
LDP Objective 6 – Vibrant Economy	1, 4, 5, 7, 9, 20, 33
LDP Objective 7 – Key Economic Sectors	2, 4, 7, 8, 9, 10, 20, 33
LDP Objective 8 - Regeneration	3, 8, 9, 33, 38
Infrastructure and Services	
LDP Objective 9 – Infrastructure and Services	5, 9, 19, 32, 33, 34, 35, 38, 39, 40, 41, 45
LDP Objective 10 – Important Assets	39, 48
Natural and Built Assets	
LDP Objective 11 – Natural Heritage	11, 12, 13, 18, 42
LDP Objective 12 – Resources	11, 12, 13, 18, 46, 47
LDP Objective 13 – Built Heritage	14, 15
Supporting Healthy Communities	
LDP Objective 14 – Healthy Lifestyles	5, 10, 11, 25, 26, 27, 32, 34
LDP Objective 15 – Welsh Language and Culture	31
LDP Objective 16 – Community Well-being	8, 9, 32, 34

2.8 The Vision and 16 strategic objectives of the LDP provide an appropriate land use planning strategy for the Plan period as they set out broad intentions for managing development up to 2026. The following table summarises these intentions under each of the 5 themes identified above:

Planning for Growth in Sustainable Places
a. Enabling the provision of land to meet the needs of our communities in accordance with a sustainable settlement hierarchy to support sustainable development. b. Protecting, enhancing and making the most of natural resources including the open countryside, water and renewable energy resources.
Supporting the Powys Economy
c. Supporting a diverse, robust and vibrant economy including key economic sectors and the rural economy. d. Enabling the regeneration and renewal of Powys' built environment to ensure vital, viable and attractive town centres and employment premises that meet the requirements of modern businesses.
Infrastructure and Services
e. Supporting the provision, operation and development of infrastructure and services.
Natural and Built Assets
f. Conserving, protecting, enhancing and making the most of Powys' natural and built heritage assets.
Supporting Healthy Communities
g. Promoting development that supports community wellbeing and cohesion including encouraging healthy lifestyles. h. Supporting and protecting Welsh language and culture.

3.0 The Spatial Strategy

3.1 The spatial element of the LDP Strategy identifies where development should be located during the Plan period, with the aim of ensuring that development meets the needs of Powys' communities and is directed to locations that are sustainable in terms of their size, function, character, facilities, transport linkages, social and environmental capacity.

3.2 As detailed within the key issues and considerations (attached as Appendix A) Powys is a rural County with a dispersed population, where nearly 59% of the population live in villages, hamlets and rural areas. Car ownership and dependency is therefore high in the County and realising the sustainability benefits of reducing the need for people to travel is challenging to deliver.

3.3 In order to secure a sustainable settlement pattern, which "meets the needs of the economy, the environment and health, while respecting local diversity and protecting the character and cultural identity of communities" (Planning Policy Wales Edition 7 – July 2014, para. 4.7.2) a sustainable settlement hierarchy has been developed in the LDP. This hierarchy builds upon that which underpins the Powys Unitary Development Plan (UDP) and provides an opportunity to consider the role and function of settlements, both within Powys and in neighbouring areas and reflects Planning Policy Wales and the Wales Spatial Plan, focussing development in key settlements (hubs and clusters).

3.4 The LDP settlement hierarchy seeks to:

- Provide the framework for distributing development proposals to meet the planned growth in housing and employment in the County;
- Provide a focus for service provision and investment plans / opportunities;
- Support the appropriate co-location of different land uses;

and

- Carefully control development in the less sustainable areas so as to address the problems associated with rural dispersal, encourage the take up of urban brownfield sites and move towards a more sustainable overall development pattern for the future.

3.5 *Spatial Strategy – Preferred Strategy stage*

3.5.1 The Deposit LDP Strategy has been developed from the Preferred Spatial Option published in 2012 which was:

> "A settlement hierarchy based on levels of service provision and size of settlement (population) subject to environmental and infrastructure capacity. Higher levels of growth should be directed to those settlements along a central growth corridor in accordance with the Settlement Hierarchy".

3.5.2 To inform the sustainable settlement hierarchy, information on service provision was taken from the Powys UDP (2010) and Community & Town Councils via a facilities questionnaire undertaken in 2011. This included gathering information on whether a settlement benefits from:

- community hall
- school
- shop
- post office
- railway station / halt
- bus service
- play space / park
- hospital
- a local employment site / facility/ venue / business
- public house

3.5.3 Information on households was taken from the Welsh Government household projections, based on the 2001 Census. Settlements were ranked and a draft hierarchy formed part of the LDP Preferred Strategy for consultation in 2012 (Copy at Appendix B).

3.5.4 At the Preferred Strategy stage the hierarchy was based on a scoring system derived from households x facilities and comprised the following tiers:

- Towns = recognised as such by having Town Councils rather than on any scoring
- Large Villages
- Villages
- Hamlets
- Rural Settlements (Individual settlements not named, definition)
- Open Countryside (definition)

Using the scoring as a basis, proposed categorisations for settlements were made taking into account other factors including:

- Public transport links
- Previous rate of growth
- Development constraints
- Important services
- Proximity to Towns
- Appropriateness of proposed approach to development

3.5.5 Based on evidence at the time, the LDP Preferred Strategy proposed that the Plan would provide 7,700 dwellings across the Powys LDP Area together with 42 hectares of employment land.

3.5.6 Of the 7,700 dwellings estimated as required overall, the Preferred Strategy calculated a new dwelling requirement (via housing land allocations) of 3,500 to be accommodated in settlements in only the top three tiers of the settlement hierarchy. The Preferred Strategy suggested that each settlement in the Towns, Large Villages and Villages category would receive

approximately 11% growth in housing through new housing allocations. The Central Growth Corridor concept meant that settlements therein would take up any displaced growth that could not be accommodated elsewhere for environmental or capacity reasons.

3.5.7 The Preferred Strategy was intentionally broad, creating a framework for the proposed spatial approach but not going into detail on exactly where growth would occur as the underlying evidence base was still being investigated and updated. This included the detailed analysis of the candidate sites which had been proposed during the earlier Plan stages.

3.5.8 Figures in the Preferred Strategy have since been superseded by new evidence on housing needs and housing land availability and are discussed in the LDP topic paper "Population and Housing".

3.5.9 A Central Growth Corridor was proposed to absorb any additional growth that could not be accommodated in accordance with the settlement hierarchy. The identified corridor ran through the centre of the County following the County's major road network. Most of the towns and larger settlements in the plan area are found along this corridor.

3.5.10 The preferred strategy consultation provided an opportunity for feedback on the draft settlement hierarchy and the information on which it was based. Comments were also received suggesting that there were too many levels/tiers making the hierarchy unnecessarily complicated. It was suggested that the number of levels/tiers in the hierarchy should be reduced and simplified.

3.5.11 At the preferred strategy stage it is important to note a difference in approach between Large Villages and Villages –whilst the classification would not alter the amount of development directed to the settlement (both would receive 'in proportion' growth, it would affect the way in which it would be accommodated. Large Villages would be afforded greater certainty through allocations and development boundaries and Villages would be provided with opportunities for organic growth with a policy led, rather than mapped, approach to development.

3.6 *Spatial Strategy – Deposit Draft stages*

3.6.1 The settlement hierarchy in the deposit plan is grounded on the work undertaken at the preferred strategy stage, and has responded to the responses received through statutory consultation. The hierarchy approach has also been informed by the sustainability appraisal and strategic environmental assessment processes.

3.6.2 There are significant differences in the approach proposed in the Preferred Strategy and the Deposit Plan, namely:

- The reduced level of housing growth now projected and planned for (2011 Census) means that the 'growth corridor' is superfluous.

- Further changes to the hierarchy include the fact that the 'Village' tier has been renamed as a 'Small Village' tier to provide greater clarity when referring to 'Villages' in the written statement (they are now either large or small villages).
- The 'Hamlet' and 'Rural Settlements' tiers have been brought together in the 'Rural Settlements' category which are defined by character but not named in the Deposit Plan.
- The categorisation of some settlements has been amended from the Preferred Strategy, some because the underlying assumptions were proven incorrect, others based on 'planning judgement' factors (details are provided in Appendix C).
- The proposed pro-rata apportionment of growth to Towns and Large Villages has not been achieved in some settlements (details are provided in Appendix D) but overall the LDP has been developed to ensure that the housing and employment land requirements are met across the Plan area and that higher levels of growth are directed to the most sustainable settlements.
- The Deposit Plan confirms the decision that the third tier settlements (Small Villages) will not be provided with development boundaries/inset maps or land allocations in the LDP. Instead housing development here will be governed by an infill development policy so as to appropriately control open market housing within these smaller, but important, local service centres.

3.6.3 The Deposit Draft LDP settlement hierarchy is as follows:

- Towns
- Large Villages
- Small Villages
- Rural Settlements
- Open Countryside

A description of each of the tiers in the settlement hierarchy is below:

- Towns:

Towns are seen by the Council as the principal location for accommodating housing (open market and affordable), employment land and retail growth, public services and developments that require a large number of trips. Towns are the most accessible of settlements and will be the main focus for development in the County. In order to control development towns will have an inset map with allocations and development boundaries defined.

Builth Wells (including Llanelwedd), Knighton, Llandrindod Wells, Llanfair Caereinion, Llanfyllin, Llanidloes, Llanwrtyd Wells, Machynlleth, Montgomery, Newtown, Presteigne, Rhayader, Welshpool, Ystradgynlais, Hay-on-Wye (BBNP)

- Large Villages

Using the settlement hierarchy it has been possible to distinguish a category of 'large villages'. These are mostly smaller in population than towns and provide important local services to their own and surrounding communities

but they do not possess the wide range of facilities and functions found in towns.

Large villages will accommodate housing growth (open market and affordable) in proportion to their size and facilities and according to their capacity to accommodate growth due to environmental and infrastructure capacity constraints. Economic development and the provision of local services is supported by policy and in some employment land will be allocated. In order to control development and provide certainty, all large villages have an inset map with allocations and development boundaries identified.

Abercrave, Abermule, Arddleen, Berriew, Bettws Cedewain, Boughrood & Llyswen, Bronllys, Caersws, Carno, Castle Caereinion, Churchstoke, Clyro, Coelbren, Crewgreen, Crossgates, Forden and Kingswood, Four Crosses, Glasbury, Guilsfield, Howey, Kerry, Knucklas, Llanbrynmair, Llandinam, Llandrinio, Llanfechain, Llangurig, Llangynog, Llanrhaeadr-ym-Mochnant, Llansantffraid-ym-Mechain, Llansilin, Llanymynech, Llanyre, Meifod, Middletown, New Radnor, Newbridge on Wye, Penybontfawr, Pontrobert, Three Cocks, Trefeglwys, Tregynon, Trewern

- Small Villages

Powys contains many smaller settlements, but the settlements in this small village category provide a narrow range of local services and facilities, generally less than those offered by large villages but more than lower tier settlements. These small villages are important to their local communities and provide a focus for rural living and opportunities for social interaction.

Housing growth in small villages is generally limited to infill sites with an exception for affordable housing. Development on larger infill sites will need to be agreed in an adopted Supplementary Planning Guidance (Village Plan) so as to ensure that it is appropriate for the village. All development proposals will need to accord with the general and specific development management policies as set out in the Plan and any national and local guidance on design etc. Environmental and infrastructure capacity will be taken into account in decision making.

Inset maps for small villages are not provided by the LDP and consequently development boundaries and allocations of land for development or for protection from development are not identified for small villages. Instead a policy approach is taken to enable and control the development of housing. By virtue of the policy wording, which restricts general new housing to only small infill sites, the policy is considered to be self-controlling. There will be a finite resource of such sites within each settlement in this tier. Monitoring of the Plan will be undertaken to ensure that development in this tier is commensurate to the place that Small Villages hold in the hierarchy, so that intervention measures can be taken if deemed necessary.

Abbeycwmhir, Aberedw, Abertridwr, Adfa, Beulah, Builth Road, Bwlch Y Cibau, Caehopkin, Cemmaes, Cilmery, Cwm Linau, Derwenlas, Erwood, Esgairgeiliog Ceinws, Felinfach, Foel, Garth, Gladestry, Glantwmyn, Groes-lwyd, Leighton, Llanbadarn Fynydd , Llanbister, Llanddew, Llandewi Ystradenni, Llandyssil, Llanerfyl, Llanfihangel Tal-y-llyn, Llangadfan, Llangammarch Wells, Llangedwyn, Llangunllo, Llanigon, Llanwddyn, Llanwrthwl, Nantmel, Norton, Pant y dwr, Penegoes, Penybont, Refail, Sarn,

St Harmon, Velindre (Brecknock), Y Fan.

- Rural Settlements

They are the smallest tier of settlement in size (number of households) and function and often possess few, if any services.
These are not named but are defined by the following characteristics:

- historically recognised settlements
- located in a rural setting and contain at least 10 dwelling
- can be clusters of dwellings or more dispersed

These settlements are considered suitable for limited development to meet affordable housing for local needs through single rural affordable homes, where they are well integrated into the settlement and are acceptable in terms of environmental and infrastructure capacity constraints. Rural affordable homes will be enabled by policy.

- Open Countryside

Powys' countryside is extensive and accommodates many isolated dwellings reflecting the county's agricultural and rural economy. The countryside is a finite resource and will be protected from inappropriate development.
In terms of new dwellings, only Rural Enterprise Worker Dwellings and One Planet Developments will be permitted where justified. Reuse of rural buildings for economic and residential purposes will also be supported where justified. Other types of development in the countryside which require planning permission, such as certain tourism developments (e.g. caravan and chalet developments) are addressed through detailed policies within the LDP.

3.6.4 Planning growth across the County provides a huge number of development opportunities. These opportunities are relatively small individually but are nonetheless locally significant. The size of sites reflects the relatively small scale of site deliverable by the local development industry.

3.6.5 The LDP also plans for a number of sites that cannot be easily categorised in the sustainable settlement hierarchy. Some of these sites are previously developed land, which meet the PPW definition (PPW page 58 fig. 4.3) and others are large sites that require planning policy to provide direction and guidance for future development. Inset maps for these sites are included in the LDP where appropriate such as Buttington Quarry (East of Welshpool).

3.7 In summary, the LDP's Spatial Strategy and its Sustainable Settlement Hierarchy disperses development proportionately around the Plan area in order to meet the needs of our communities. Development outside of the main towns and large villages is strictly controlled. This ensures that the higher tier settlements within the County remain as foci for housing, employment and services, contributing to their vitality and promoting vibrant and sustainable communities. It also ensures that an appropriate balance is struck between sustaining our more rural communities, meeting needs locally, whilst protecting the County's natural assets. This approach should ensure that infrastructure provision (both social and physical) is reinforced and that the need to travel is reduced. The Plan will be subject to Monitoring to ensure that it's aims and objectives are being met.

3.8 The ability to achieve the proposed spatial distribution of development on a settlement by settlement basis is influenced to a degree by a number of considerations. These considerations include the ability of a settlement to accommodate development. In this regard, sites chosen for each settlement have resulted from a detailed analysis of individual settlements and the different site options that have come forward. Further information on this analysis is contained within the Candidate Sites Process and Site Assessment Methodology Topic Paper, which accompanies the Plan. The existing supply of sites with planning permission also influences the overall spatial strategy. The existing housing supply consists of a number of sites with planning permission that are identified in the Plan (as committed sites). Similarly there are also sites for employment and retail uses that also benefit from planning permission. In effect, they comprise the land bank that is taken forward into the Local Development Plan from past planning decisions. All of these sites impact upon the overall spatial distribution of development.

4.0 The Economic Strategy

4.1 As detailed within national planning policy and guidance, LDPs should set out an economic vision for the Plan as part of its overall vision for the Plan area. This economic vision is a key aspect of the Plan, as identified and detailed in the Economy – Employment and Economic Development Topic Paper that accompanies the Plan. Vision statements relating to Powys' economy, that are subsumed within the Plan's overall vision, include "Powys will be a place of vibrant and resilient communities providing … economic opportunities", with "towns and larger villages … the focus for integrating housing, economic and service development to meet their own needs and those of their surrounding communities" whilst "Powys' rural areas will be a working countryside of sustainable communities supported by a thriving and diverse rural economy of small businesses".

4.2 The economic vision therefore clearly accords with, and will be realised by, the LDP's Spatial Strategy and its Sustainable Settlement Hierarchy which seeks to ensure that the higher tier settlements within the County remain as foci for housing, employment and services, whilst also ensuring that an appropriate balance is struck between sustaining our more rural communities, meeting needs locally and protecting the County's natural assets (see Section 3.7 above).

4.3 In order to meet the economic vision of the Plan it was essential to determine the economic needs of our communities. An Employment Needs Assessment (2012) has therefore been undertaken to support the Plan and has been published as a background paper to accompany the Plan. This Assessment was also augmented and updated by an Employment Needs Assessment Addendum in 2015, which has also been published to accompany the Plan. Further reference to the Employment Needs Assessment (ENA) in this paper is therefore referring to both the original assessment and its subsequent addendum.

4.4 The ENA and consideration of other information, as detailed within the Economy – Employment and Economic Development Topic Paper, leads to the identification of a number of LDP objectives relating to the economy for inclusion within the Plan that should help realise the Vision of the Plan. Section 2.8 of this paper summarises the intentions of the Plan's objectives. Those intentions of most relevance to the economy are:

a. Enabling the provision of land to meet the needs of our communities in accordance with a sustainable settlement hierarchy to support sustainable development.
c. Supporting a diverse, robust and vibrant economy including key economic sectors and the rural economy.
d. Enabling the regeneration and renewal of Powys' built environment to ensure … employment premises that meet the requirements of modern businesses.

4.5 With specific regard to these intentions, the ENA and consideration of other information has led to the identification of 49 hectares of land within the

Plan that has been distributed in accordance with the sustainable settlement hierarchy to ensure that towns and large villages are the main focus for such development. In the Preferred Strategy a figure of 42ha was identified as it was at the top of the range identified in the assessment of 30-42ha (and therefore also within the range identified when a 5yr flexibility allowance was included 40-56ha.). However, a figure of 49ha was later established once a detailed assessment of sites had been undertaken.

4.6 It is acknowledged that the proposed level of provision is significantly in excess of historic take up levels, which are estimated at closer to 1 hectare per annum. Nonetheless, there are a number of significant issues and considerations (detailed within section 7.2 of the Economy – Employment and Economic Development Topic Paper) that suggest this level of provision is appropriate, as follows:

4.6.1 Economic Scenarios

The level of provision has been tested across a number of economic scenarios which indicate a relatively modest amount of land required to accommodate expansion of the economy. Nonetheless, the Plan is being produced when the Plan area is still experiencing the impact of the recession. There is, however, optimism and increasing confidence within the business community in the Plan area, evidenced by the recent work being undertaken by the Mid Wales Manufacturing Group and the Welsh Government on employment property development, and by providing an ambitious level of employment land the Authority seeks to ensure that economic growth is not constrained within the Plan area.

4.6.2 Churn and Replacement of Existing Premises

The ENA identifies the primary driver of future employment land provision is the need to replace and upgrade the existing supply of premises, a significant amount of land has therefore been included to meet this specific requirement. Provision of land in this regard is considered appropriate given the enabling work currently being undertaken, as highlighted in Welsh Government Business Minister Edwina Hart AM's meeting with representatives of Powys Businesses on the 20th November 2014 where it was identified that a report is being prepared in regards to business accommodation in Powys and the possibility of Welsh Government re-entering the property market in response to concerns that existing property is becoming out-dated, not fit for modern business needs, in need of investment and the number of vacant suitable premises for business growth is just not available. This leads to the conclusion that the LDP must plan for the allocation of suitable land which is readily available and which can accommodate new, bespoke and fit-for-purpose employment units.

4.6.3 Geographical Scale of the County

The geographical scale of the County is a significant consideration in determining the level of provision of employment sites in the Plan area for the following reasons:

- The need to provide a choice and range across types, settings and locations of sites throughout the Plan area to ensure that businesses are able to identify sites best suited to their individual needs
- The need to reduce the demand to travel by providing local employment opportunities
- The need to address the employment needs of Powys' disadvantaged communities, which are dispersed throughout the Plan area
- The need to support important business and technology clusters in the Plan area

The scale of the Plan area therefore requires a minimum level of provision to ensure that the above mentioned issues are addressed.

4.6.4 Viability

As detailed within both the ENA and the LDP & CIL Viability Assessment that accompanies the Plan, the final value of commercial employment property is typically lower than the input costs and therefore most non-residential development across the Plan area is therefore not viable. Whilst this suggests that ambitious employment land provision is not deliverable there are a number of factors that may address the viability issue and therefore support the proposed level of provision, including:

- The increasing optimism and confidence within the business community in the Plan area
- The role of the Welsh Government, which owns significant existing provision of serviced employment land and is considering re-entering the employment property market in the Plan area
- Emerging regeneration initiatives, such as the Local Growth Zones Initiative and projects under the Rural Development Plan
- Increased flexibility in policy to enable complementary ancillary employment uses falling outside of the B use classes on employment sites if this improves site viability and enables new site development
- That the primary driver for employment land allocations is the need to accommodate churn and replacement of existing stock (i.e. development being brought forward by end-users rather than speculative property developers – see section 11.6 of the LDP and CIL Viability Assessment that accompanies the Plan).

The Authority therefore considers it inappropriate to assume, and plan for, viability issues continuing to constrain the development of employment premises throughout the Plan period.

4.6.5 Existing Supply of Employment Land

The ENA has undertaken a comprehensive assessment of the existing employment land supply in the Plan area and identifies an existing supply of employment land in the Plan area that is more than sufficient to meet the identified requirement for the Plan period. However, as detailed in section 4.5, the proposed level of employment land provision is significantly in excess of historic take up levels.

Therefore, in order that only the most appropriate land allocations are identified in the Plan the following criteria have been used to help determine site allocations:

- Sites should be supported by evidence that there is an intention to develop the site for employment purposes within the Plan period - One of the most important factors in this consideration is that the site was proposed as a Candidate Site for employment use during the Plan preparation process
- There should be evidence that the development of the site is viable – for example, sites with existing site infrastructure in place, sites delivered under regeneration initiatives, sites which may attract public sector funding or sites capable of accommodating a mix of uses

4.6.6 Employment Land Allocations Justification

As detailed in section 4.5 of Welsh Government's Technical Advice Note 23 (TAN23) "persistent oversupply of employment land may cause harm where the planned land supply exceeds demand, so that allocated employment sites remain vacant for long periods and frustrate development for other land uses". The Authority has therefore followed the guidance within TAN23 and assessed the economic benefits of identifying land against the likelihood of these adverse effects. The result of this analysis has found that the proposed employment land allocations meet one or more of the following criteria:

- Site is owned and promoted by Welsh Government for employment purposes
- Site has benefitted from public sector funding to enable infrastructure works and such funding restricts alternative uses of the site (e.g. residential)
- Site is an extension of an existing employment site/park and residential use of the site would therefore be incompatible with the existing adjoining employment use
- Site is a committed employment allocation (i.e. benefits from planning permission for employment use)
- Site is located some distance from a settlement's services and facilities and would therefore be an unsuitable location for alternative uses such as housing
- Site is proposed for mixed uses, with the precise mix on the site being established through the preparation of a development brief

It is therefore considered that the employment land provision is justified as the allocations would not be appropriate for, and therefore do not frustrate, other uses. Should the employment land allocations not be developed within the Plan period then they would provide longer term capacity. Further site specific information is contained within Appendix E of this paper.

4.7 As detailed above, the spatial distribution of employment land within the Plan is intended to accord with the Plan's strategic settlement hierarchy. The strategy proposes that the higher tier settlements within the County remain as foci for employment development whilst an appropriate balance is struck between sustaining our more rural communities, meeting needs locally, and protecting the County's natural assets.

4.7.1 As detailed within section 4.5.2 above, the most significant driver of future employment land provision is the need to replace and upgrade the existing supply of premises in the Plan area. It is assumed that, in general,

existing businesses would not wish to relocate a significant distance from their existing premises due to issues such as labour force retention. The distribution of the existing supply of premises is therefore a significant factor in determining future employment land distribution. In addition, given the viability issues associated with speculative employment development detailed above, the existing supply of sites with infrastructure and/or planning permission for employment uses also significantly influences the overall spatial distribution of employment development.

4.7.2 The location of the existing supply of employment premises and the location of sites with infrastructure and/or planning permission for employment uses broadly accords with the proposed strategic settlement hierarchy, and therefore supports:

- The proposed allocation of employment land in accordance with the strategic settlement hierarchy reinforcing the larger settlements as foci for employment uses (as evidenced in the table attached as Appendix F of this paper)
- The proposed employment policy framework of enabling employment development:
  - on non-allocated sites of up to 0.5Ha. within or adjoining a settlement with a development boundary
  - for the limited expansion, extension or environmental improvement of existing employment sites and buildings

4.7.3 In more rural areas, outside of the Plan area's towns and large villages, the Plan's strategy is to support a diverse, robust and vibrant rural economy whilst ensuring that the Plan area's natural assets are protected, enhanced and made the most of. It is therefore considered appropriate that the Plan's policy framework enables economic development in the more rural areas where the location is justified by the nature of the proposal.

5.0 The Retail Strategy

5.1 As detailed within national planning policy and guidance, LDPs should set out a clear strategy for retail development that seeks to achieve vital, attractive and viable centres as part of its overall vision for the Plan area. This retail strategy is a key aspect of the Plan, as identified and detailed in the Economy – Town Centres & Retail Development Topic Paper that accompanies the Plan. Part of the Plan's overall vision relates to Powys' town centres and retail economy, and states that "Powys' towns and larger villages will be vibrant and accessible service centres. They will be the focus for integrating housing, economic and service development to meet their own needs and those of their surrounding communities".

5.2 This vision statement clearly accords with, and will be realised by, the LDP's Spatial Strategy and its Sustainable Settlement Hierarchy which seeks to ensure that the higher tier settlements within the County remain as foci for housing, employment and services, whilst also ensuring that an appropriate balance is struck between sustaining our more rural communities, meeting needs locally and protecting the County's natural assets (see Section 3.7 above).

5.3 In order to meet the vision of the Plan it was essential to determine the retail needs of our communities. A Retail Study (2012) has therefore been undertaken to support the Plan and has been published as a background paper to accompany the Plan. This Study was also augmented and updated by a Retail Study Addendum in 2015, which has also been published to accompany the Plan. Further reference to the Powys Retail Study (PRS) in this paper is therefore referring to both the original (2012) assessment and its subsequent addendum (2015).

5.4 The PRS and consideration of other information, as detailed within the Economy – Town Centres & Retail Development Topic Paper, leads to the identification of a number of LDP objectives relating to town centres and the retail economy for inclusion within the Plan that should help realise the Vision of the Plan. Section 2.8 of this paper summarises the intentions of the Plan's objectives. Those intentions of most relevance to town centres and the retail economy are:

a. Enabling the provision of land to meet the needs of our communities in accordance with a sustainable settlement hierarchy to support sustainable development.
c. Supporting a diverse, robust and vibrant economy including key economic sectors and the rural economy.
d. Enabling the regeneration and renewal of Powys' built environment to ensure vital, viable and attractive town centres.
g. Promoting development that supports community wellbeing and cohesion including encouraging healthy lifestyles.

5.5 With specific regard to these intentions, the PRS and consideration of other information (as detailed within the Economy – Town Centres & Retail Development Topic Paper) has led to a number of specific proposals with

regard to the distribution and level of retail development in the Plan area over the Plan period as detailed below.

5.6 There is a clear network of retail centres within the Plan area, which takes the form of a hierarchy, as follows:

Area Retail Centres:	Llandrindod Wells, Llanidloes, Machynlleth, Newtown and Welshpool
District Retail Centres:	Builth Wells, Knighton, Presteigne, Rhayader and Ystradgynlais
Local Retail Centres:	Llanfair Caereinion, Llanfyllin, Llanwrtyd Wells and Montgomery

Future retail development is directed to the retail centres identified in the retail hierarchy in order to support their vitality, viability and attractiveness. The retail centre hierarchy is in accordance with the strategic settlement hierarchy as all of the retail centres identified fall within the top tier (of “towns”) in the settlement hierarchy (see table attached as Appendix F of this paper).

5.7 As detailed in section 5.3 above, in order to determine the level of retail development to be distributed to the retail centres, the PRS was undertaken. However, the PRS concludes that there is insufficient quantitative need to justify allocating land for retail use in the LDP in the short term (up to 2021) and whilst there is need identified in the longer term (up to 2026) it would be inappropriate to seek to plan to meet this need given future economic uncertainties. The longer term need being addressed in subsequent Plan reviews.
The only exception to this approach is where the PRS identifies some quantitative capacity and qualitative deficiency that justifies the consideration of new retail floor-space proposals in Presteigne.

5.8 The LDP does not, therefore, identify any retail allocations within the Plan area (other than for some retail floor-space within a mixed use development allocation proposal in Presteigne). This is a cautionary approach intended to support Powys’ existing retail sector and enable the regeneration and renewal of Powys’ built environment to ensure vital, viable and attractive town centres. Such an approach is in response to the conclusions of the PRS and is supported by other issues and considerations detailed within section 7.0 of the Economy – Town Centres & Retail Development Topic Paper and outlined below:

5.8.1 The Powys’ Regeneration Strategy identifies that one of Powys’ most prominent assets is the distinctive quality of its network of market towns & villages and places a priority on facilitating their resilience and renaissance. In this regard, the Wales Spatial Plan - Central Wales Strategy emphasises the importance of “reinforcing the current mosaic and scale of towns, enhancing

their attractiveness as places in which to live and work creatively". However, there are significant challenges facing the County's centres including:

- E-Commerce – As detailed within the Welsh Government's Vibrant and Viable Places document, the traditional high street is declining with changing shopping habits including the significant growth in online shopping since the late 1990's. The PRS considers this issue further and identifies continued rapid growth in new forms of retailing as an alternative to more traditional forms of shopping.
- Economic Climate – The Plan is being prepared during a period of economic uncertainty and whilst the PRS is based on the best available economic projections these projections are subject to change. In this regard, the expenditure projections in the original 2012 PRS have been reduced in the 2015 PRS Addendum. Such uncertainty means that predictions of growth based on such projections should be treated with caution.

In response to the challenges being faced by the County's centres a number of key economic regeneration initiatives have been undertaken , are taking place or are planned in the County (e.g. the Severn Valley Strategic Regeneration Programme and initiatives under the Powys Local Growth Zones programme). It is essential that the LDP is supportive of these regeneration initiatives and do not undermine such work (for example, through inappropriate land allocations).

5.9 In addition to the approach taken to retail allocations within the Plan, the PRS also identifies a number of other mechanisms for inclusion in the Plan to ensure the resilience and renaissance of Powys' centres including amending town centre boundaries and shopping frontages.

5.10 Alongside the resilience and renaissance of town centres, an important aspect of the LDP's retail strategy is to ensure that rural retail provision meets the needs of our more rural communities, helping to sustain those communities and supporting their well-being and cohesion. The PRS and the Economy – Town Centres & Retail Development Topic Paper identify that appropriate rural retail provision is essential as:

- The inability to access basic provisions is a key determinant of deprivation and has a significant impact on an individual's health and well-being; and
- It supports the vitality and viability of rural villages, providing an important focal point for rural village life

Given the geography of the county, and the issues of climate change and peak oil, this issue is particularly acute in Powys.

6.0 The Housing Strategy

6.1 The LDP strategy promotes proportionate growth to reinforce the network of market towns and villages within Powys. The Deposit Plan's Strategy is to distribute growth pro-rata according to a settlement's existing population/size and the services/facilities available. This approach enables the most growth to be distributed to the most sustainable locations.

6.2 The sustainable settlement hierarchy underpins the decisions on allocating new housing growth across the Plan period (to 2026). The majority of housing growth will therefore go to the largest existing settlements classified as Towns and Large Villages. Small Villages are still regarded as sustainable, although due to their narrow range of services and facilities they will be generally suitable for only limited growth.

6.3 The starting point in the distribution of housing growth was to establish a pro-rata growth figure. This was based on a settlement's existing population and households. Appendix F shows how housing growth is distributed across the Towns and Large Villages in Powys. Once the housing land bank (ie dwellings already committed to from the start of the Plan period at 1.1.11) has been taken into consideration, the shortfall of housing growth to meet the needs of Powys is generally met by the apportionment of new dwellings to the settlements in the top three tiers of the hierarchy. Deviations from the baseline pro-rata growth figure are explained in Appendix D. Housing land allocations are only made for large sites (5+ dwellings) in the Towns and Large Villages. These are fully detailed in Appendix 1 (Settlement Allocations table) of the Deposit Plan. New housing growth in Small Villages is controlled by a policy approach that restricts most housing to small infill sites only and Small Villages therefore do not have inset maps or land allocations.

6.4 By locating larger new housing sites in Towns and Large Villages the apportionment of housing growth supports the employment strategy. In this way, both housing and employment land uses will be in close proximity to each other, generally in large service centres, sustaining the local workforce, reducing the need to travel and ensuring new development makes use of available existing infrastructure.

6.5 Whilst Small Villages, as third tier settlements, are considered sustainable locations, they are by their nature suitable for only limited growth which will be controlled by a criteria-based Policy approach in the Local Development Plan rather than through land allocations or the imposition of development boundaries. In this tier, for larger housing sites, the LDP introduces an emphasis on community-led Village Plans which can be worked up with community involvement and implemented through Supplementary Planning Guidance.

6.6 To support rural communities the Plan enables local affordable housing, including single affordable homes within rural settlements (not named in the

Plan but defined by criteria), whilst development in the open countryside follows national advice.

6.7 The Plan also provides for affordable housing exception sites to assist in addressing specialist housing needs.

6.8 Calculating the Dwelling Requirement
An assessment of the housing requirement for Powys has been made (see Population and Housing topic paper) using the latest Welsh Government Household Projections as a starting point. The Deposit LDP plans for:

- 6,071 new homes to meet the identified dwelling requirement of 5,519.
- These are updated figures from those published in the Preferred Strategy in 2012 and the first Deposit Plan in 2014. The difference between the Preferred Strategy and the Deposit Plan figures is primarily that the Preferred Strategy was based on the 2008-based household projections whilst the Deposit Plan used the 2011-based projections that were informed by the 2011 Census.
- The Population and Housing Topic Paper explains the evidence base in more detail and describes how the second Deposit Plan has further evidenced the housing requirement to arrive at a revised plan figure of 5,519. When a 10% contingency is applied the overall dwelling provision figure is 6,071.

6.9 The housing requirement figure set in the revised Deposit Plan is 5519. This figure is derived from the starting point of the 2011 WG Principal Household Projection which has been converted into a dwelling requirement as shown in the table below:

LDP Dwelling Requirement derived from the 2011 Principal Projection

	Projected increase in Powys Households 2011-2026	Projected increase in Powys LDP Area Households 2011-2026 (ie Less 17.74% Households in BBNP)	Conversion Rate 1:1.08 (based on Powys Census vacancy level)
Dwelling Requirement derived from 2011 Principal Projection	4600	3784	4087

6.10 A figure of 4087 would equate to a build rate of 272 dwellings per annum which is not reflective of the higher historical build rates experienced in Powys in past years. With consideration to the effect of the economic downturn from late 2007 and the slow but gradual recovery, the revised

Deposit LDP opts for a more representative annual average build rate of 368 dwellings per annum and a housing requirement figure of 5519.

6.11 The figure of 5519 is an update to the housing requirement figure of 4,500 as published in the first Deposit Plan and has been calculated mainly through further assessment work regarding the likelihood of future windfall development (ie unallocated sites including small sites with 5 or less dwellings) as it is recognised that these types of sites contribute significantly to annual housing provision across the Powys LDP Area and can be considered a reliable source of new housing (as evidenced by past Joint Housing Land Availability Studies). When a 10% contingency is applied to account for sites that may not come forward as anticipated, the dwelling provision figure is 6071.

6.12 The breakdown of the 6071 dwelling provision is shown below:

	Source:	Towns	Large Villages	Small Villages	Rural/Open Countryside	**Totals**
	Housing Land Bank (Dwellings)	1200	580	229	431	**2440**
	Windfall Projection	224	188	68	528	**1008**
	Dwellings Enabled by New Land Allocations	1790	833	n/a	n/a	**2623**
Total		3214	1601	297	959	**6071**
As % of Total Growth		53%	26%	5%	16%	**100%**

6.13 In summary, the housing requirement in the deposit LDP has been substantially increased from the LDP that was placed on deposit in 2014 in order to both take account of the economic and social aspirations of the Plan and the letter sent to all local planning authorities in 2014 from the Minister of Natural Resources urging local planning authorities to take a cautious approach to using the 2011 projections when calculating their housing requirements as they were based on a 5 year migration trend that spanned the years of the economic downturn. It is considered that the revised housing figures are feasible and realistic.

7.0 Strategy Synergy

7.1 In order to ensure that the LDP's Strategy is appropriate, coherent and robust it is important to consider the synergy of the strategy, how the key aspects of the Strategy (detailed in previous sections of this paper) link together.

7.2 There are a number of cross-cutting issues and inter-relationships between the key aspects of the Plan to consider when determining the synergy of the Plan's Strategy for housing, employment and retail uses in the Plan period, as follows:

7.2.1 *Population Projections*
One of the most significant considerations common to all of these aspect areas is the projection of population growth to be experienced during the Plan period. Population growth has a direct impact upon the Plan's housing requirement in that it is essential that the Plan meets the population's housing needs over the Plan period. Population growth also impacts upon employment growth in that an imbalance between labour force and jobs has potentially adverse impacts such as an increase in unemployment, deprivation and out-commuting or a lack of labour force and a constrained economy. Population growth also impacts upon retail growth in that changes to the level of population growth have a direct impact on the level of retail spend and therefore retail need in the Plan area. Therefore, in order to ensure that housing, employment and retail growth are aligned in the Plan, a common population projection was used as a starting point when determining levels of growth in these aspect areas.

During the initial stages of the Plan's preparation process the Plan was based on the 2008 population projections with research and evidence collected based on these projections, including the Powys Retail Study 2012 and the Employment Needs Assessment 2012. At the Preferred Strategy stage in the Plan's preparation process the Plan's housing requirement was based on the 2008 Lower Variant Household Projection, although it was recognised at that time that the 2011 census results were emerging and would be used to inform the level of housing requirement for the Deposit Plan. Whilst the 2012 PRS and ENA were both based on a higher population projection than that proposed for housing at Preferred Strategy stage it was not considered necessary to re-run the studies and amend the level of growth proposed for employment and retail uses because:

- The 2012 PRS identified that there was no significant need for additional convenience or comparison goods floor-space and therefore no need for any land allocations in the Plan. Given this finding it was clear that re-running the 2012 PRS at the Preferred Strategy stage using a lower population projection (to align with the housing element) would not have resulted in a different level of provision being identified.
- Similarly, whilst the 2012 ENA identified a significant employment land requirement this requirement was unrelated to the population projection and was associated with issues such as churn & replacement and choice

& range of provision. It would not have resulted in a different level of provision being identified.

Since the Preferred Strategy stage of the Plan's preparation process the 2011 Census population and household projections have been published and there has been a significant change in the economic outlook. Therefore, to inform the preparation of the Deposit Draft Plan, a review of the evidence base has taken place. This review has included further consideration of the appropriate level of growth for housing, employment and retail uses in the Plan period and resulted in the housing growth requirement in the Plan period being based on the 2011 principal projection as a starting point. The PRS and ENA have also been re-run reflect the 2011 principal projection. The result of this work is that the housing growth requirement has been reduced in the Deposit Plan when compared to the earlier Preferred Strategy, but that the Employment and Retail growth requirements remain unchanged, reinforcing the reasoning (contained in the bullets) above.

7.2.2 *Economic Projections*

Another significant consideration common to housing, employment and retail aspect areas is the projection of economic growth to be experienced during the Plan period. Economic growth or decline directly impacts upon the Plan's housing, employment and retail land requirements. For example, in periods of economic growth household size tends to decrease reflecting the increased confidence and ability of people to purchase their own homes, similarly economic growth increases the ability of people to purchase more convenience and comparison goods resulting in an increase in demand for retail facilities.

Whilst the Plan has been prepared during a period of economic uncertainty, there are encouraging signs of increased business confidence in the Plan area (see section 4.6.1 above) and it is the Authority's view that the Plan should therefore be aspirational in terms of the amount of growth it plans for during the Plan period in order to ensure that economic growth is not constrained.

Therefore, the Plan has been tested against the most likely economic scenarios (see the LDP Housing Topic Paper, PRS 2015 and ENA 2015) and it is concluded that the housing, employment and retail growth requirements in the Deposit Plan are both appropriate and aspirational, as follows:

- As detailed within the LDP's Housing topic paper, the Plan's housing land supply is sufficiently flexible to accommodate a significant increase in the level of demand (over that identified in the 2011 Census principal projection) during the Plan period. Whilst housing land availability will of course be subject of significant monitoring during the Plan period to ensure adequacy of supply.
- The Plan's employment land supply similarly provides a significant amount of flexibility to absorb any increased level of demand (over the relatively modest amount identified for economic growth (3-5Ha.) in the ENA) during the Plan period. Whilst employment land availability will of course also be subject of significant monitoring during the Plan period to ensure adequacy of supply.

- The retail land supply does not provide a similar level of flexibility to accommodate an increased level of demand over the Plan period as such an approach is considered to have significant down side risks given the current pressures being experienced by the County's retail centres (see Section 5.8 above) and the current vacancy levels being experienced. However, it does provide a policy approach that will enable needs arising during the Plan period to be met whilst regular updating of the PRS will also ensure that the Development Plan is able to react positively to any increase in requirement.

7.2.3 *Labour Market Balance*

One of the key considerations in determining an appropriate, coherent and robust Strategy is the correlation between jobs growth and labour market capacity over the Plan period. Where one aspect exceeds the other then adverse impacts may be experienced. As identified in section 7.2.1 above, examples of such impacts include increasing unemployment, deprivation, out-commuting and a constrained economy.

The ENA has considered this issue in detail (see section 5.2.3 of Technical Report 3 (2012) and Addendum Report (2015)). The key finding of this consideration is that the projected employment growth and labour force change over the Plan period are broadly in balance, and therefore there is neither:

- a labour supply imperative to deliver a greater level of economic growth; or
- employment requirements and aspirations to drive a greater level of housing growth.

Nonetheless, as detailed within section 7.2.2 above, it is considered that the Plan is sufficiently flexible to enable growth in the economy above projected levels to be accommodated both in terms of employment land and housing land (labour market) supply.

Whilst the analysis identified above provides a robust quantitative assessment of labour market balance in the County, the Authority is also aware that there are other, more qualitative, issues associated with labour market balance that are more a matter of judgement. As detailed within section 7.2.3d of the Economy – Employment and Economic Development Topic Paper these issues include that within Powys a relatively low unemployment rate masks a more complex picture of high levels of self-employment and under-employment in the form of part-time, seasonal and casual work (which are particularly associated with Powys' low wage economy). Whilst the means by which the Plan can directly facilitate an improvement to address these issues is limited, it may assist through its key role of ensuring a sufficient supply of land is available to enable a greater range of employment opportunities. This therefore contributes to the justification for the Plan's aspirational approach to employment land provision and enabling policies.

7.2.4 *Alignment of Housing, Employment and Services*

Reducing the need to travel is a key sustainability objective and Welsh Government's National Planning Policy therefore identifies that LDPs should

seek to align jobs and services with housing wherever possible in order to reduce the need for travel, especially by car.
The alignment of housing, employment and service provision is therefore also a key consideration in determining an appropriate, coherent and robust Strategy and in this regard, as detailed within section 3.4 of this paper, the LDP seeks to distribute development in accordance with a strategic settlement hierarchy, in order to meet the forecast growth in housing and employment in the County, to provide a focus for service provision and investment plans / opportunities and to support the appropriate co-location of different land uses (thereby reducing the need to travel).
The distribution of housing, employment and retail development throughout the different tiers of the strategic settlement hierarchy is indicated in the table in Appendix F, which illustrates the correlation between these key development types. The need for retail growth is addressed predominantly through a policy approach which directs new retail development in accordance with a retail centre hierarchy. Therefore the retail hierarchy is outlined in the table to demonstrate that any retail growth to meet future needs will be focussed on the highest tier in the hierarchy.

It can be seen that there exists a general geographical correlation between the distribution of housing, employment and retail growth with the majority in all cases being located within the Towns and Large Villages.
As the majority of development growth is distributed to the larger settlements in terms of their size, population, services and facilities this should support improved accessibility to essential services and facilities and reduce the need to travel.

In addition, the most significant demand for employment land within the Plan period arises from churn and replacement of existing premises. As detailed within section 4.7.1 above, in general it is assumed that existing businesses would require new provision close to their existing premises. The ENA has considered the spatial distribution of employment land and concludes (ENA Addendum 2015, Section 6) that the supply of employment land broadly mirrors the forecast allowance for each of the geographic sub-areas identified in the ENA and accords broadly with both the strategic settlement hierarchy and the proposed distribution of housing. The Plan's spatial strategy of reinforcing the larger settlements therefore accords with the requirement for churn and replacement as it provides new housing and employment opportunities in those locations where the need arises (i.e. where existing businesses, their associated workforce and existing employment sites are located).

In determining the alignment of housing, employment and service provision consideration has been given to whether there is an opportunity to address any existing issues with travel to work and out commuting patterns in the County. As detailed within the ENA and section 7.2.3f of the Economy – Employment & Economic Development Topic Paper, Powys' existing travel to work data indicates that Powys is a net exporter of labour with a proportion of workers travelling long distances to work, but within the County travel to work patterns are fairly localised and contained around major settlements.

Reasons for this include that long journey times between settlements mean that settlements within the area have few competing centres within an acceptable journey to work time but only larger urban areas have sufficient population and employment to provide the variety of jobs required to support relative self-containment. Therefore, the large range of employment opportunities required to meet the needs of the economically active population is likely to result in a continuation of out-commuting from the Plan area into surrounding areas. Whilst the provision of more jobs than housing could lead to a reduction in out commuting, overall the level of net outward commuting is unlikely to be reduced dramatically, due to the rural nature of the Plan area. Indeed, the "North West & Mid Wales Integrated Transport Network – Technical Report" (AECOM, April 2014) undertaken to inform the development of Local Transport Plans and the regional elements of the National Transport Plan from 2015, identifies that there are strategic economic benefits that would arise from longer distance connectivity enhancements to assist in widening labour markets and address some of the underlying factors that contribute to the area's high level of containment.

A further consideration in determining the alignment of housing, employment and service provision is the need to deliver employment opportunities to disadvantaged communities. Therefore, as detailed in section 7.2.3g of the Economy – Employment & Economic Development Topic Paper, the location of Powys' disadvantaged communities is a consideration in the distribution of development. As these communities are located within settlements in the highest tier of the strategic settlement hierarchy this issue supports the appropriateness of the Plan's spatial strategy of reinforcing the larger settlements as it provides housing and employment opportunities in the most disadvantaged communities.

Appendix A: Key Issues / Considerations and Strategic Objectives

- Key Issues / Considerations

Economic Considerations

1. Powys has a wide economic base focussed on agriculture, tourism, manufacturing, the public sector, and services and supports a high number of SMEs with few large private sector companies. Challenges such as the global economy and constraints on public sector finance and European funding will have significant implications not only for these sectors but for the entire economy of Powys.

2. The manufacturing sector is economically important in certain parts of the county such as the Severn Valley and Ystradgynlais areas, reflecting the proximity to motorway networks, proximity to external markets, workforce skills and availability, and the history of public sector investment in these areas.

3. An ageing stock of manufacturing premises is placing competitive pressure on this sector. Refurbishment of premises or re-location to modern energy-efficient premises is anticipated depending upon development viability (as costs of development often exceed end values).

4. Rising energy costs and peak oil are impacting on all economic sectors given the rural geography of the county. Adapting to these changes and the transition to a low carbon / green economy to ensure a more sustainable and resilient economy needs to be supported by the LDP.

5. Sustainable travel to work opportunities should be promoted through the LDP co-locating employment, housing and public transport and supporting home-working.

6. A range of employment sites and supportive policies are needed to meet the employment needs and demands of businesses, particularly given Powys' size and dispersed settlement pattern.

7. The county shows relatively high employment rates overall, with lower levels of unemployment and inactivity, and very high levels of self-employment and part-time employment. There is also a dominance of micro and small businesses and high levels of new business start-ups in the county.

8. Activities and initiatives that support social and economic regeneration must be supported by the LDP.

9. One of Powys' most prominent assets is the distinctive quality of its towns and villages. The economic climate and online shopping present significant challenges for the county's town centres and have led to vacancies in some towns. The LDP will need to support the resilience and renaissance of town centres, whilst at the same time facilitating sustainable rural retail provision and enabling the opportunities of e-commerce to be realised.

10. Tourism is important to the Powys economy, although employment in the sector can often be seasonal and part-time. Visitors to Powys are drawn to the area for its outstanding scenery, heritage and recreational activities. Protecting these attractions and supporting a sustainable and year-round tourism sector is a must for the LDP.

Environmental Considerations

11. As a rural county, Powys' natural resources and ecosystems are important for carbon storage (soil and vegetation), renewable energy generation, food, materials, water, flood alleviation, recreation and amenity. The LDP must manage development carefully to protect these resources and reconcile competing demands.

12. Powys' important internationally, nationally and locally designated sites of biodiversity and geodiversity interest as well as sites of importance in the wider environment should be protected and enhanced. Wildlife corridors such as hedgerows and streams are important for many species and should also be protected.

13. The landscape of Powys is extremely diverse and includes upland landscapes and valleys that are scenically and historically important. Development which impacts on the landscape must be carefully managed and appropriately designed particularly in terms of visual impact.

14. Powys has an exceptional historic environment and contains 13% of Wales' listed buildings and 22% of Wales' Scheduled Ancient Monuments. However, a fifth of its listed buildings are considered to be 'at risk' or vulnerable. Some archaeological sites and their settings, notably Offa's Dyke, are being eroded and compromised by development.

15. Many of Powys's towns and villages have conservation areas protecting their distinct character and architecture. It is important to protect and enhance local distinctiveness through good quality and sensitively designed development.

16. Most settlements in Powys are located in valleys close to rivers which are susceptible to flooding. New development must be directed away from areas at high risk from flooding and must not increase flood risk elsewhere, and where possible should aid the reduction or better management of existing flood risk for communities, infrastructure and businesses. Powys is also important as an upstream catchment for several major rivers including the Wye and Severn, providing for water storage and alleviating flooding downstream.

17. Where possible, development should be directed to appropriately located brownfield sites (previously developed land) and should re-use vacant buildings in order to protect greenfield land, assist in the remediation of contaminated land and facilitate regeneration opportunities.

18. The LDP must protect air, water and land resources and quality, prevent pollution and inappropriate development and deal with the consequences of climate change. For instance, it should support: the protection of quality of the water environment in line with the Water Framework Directive; the reduction of greenhouse gas emissions in line with Welsh Government targets (3% each year from 2011); and ensure that Special Areas of Conservation (SACs) in Powys do not suffer from increased levels of nitrogen deposition as a result of development in Powys.

Population and Housing Considerations

19. Powys has an ageing population and it is projected that 31.3% of the population will be aged over 65 by 2026[1]. The needs of the oldest in the population, such as access to services, public transport, and accommodation requirements must be taken into account.

[1] Source: 2011 Based Population Projections, Welsh Government © Crown Copyright

20. Whilst the lack of a university within the county accounts for the large net outward migration of 18 to 20 year olds from the county, low wages, poor employment opportunities and high housing costs are considered to be the main reasons for outward migration of adults aged 21 to 30 from the county. Although there is a net gain from inward migration to the county of this age group, it needs to be higher if the size of workforce is to be sustained.

21. The population of the county is projected to continue to increase slightly as a result of continuing net inward migration. This modest population growth combined with a projected continuing fall in household size leads to a requirement for more dwellings which the LDP must plan in sustainable locations.

22. House building averaged 194 dwellings per annum between 2009 and 2013 which was below the projected housing need. The recession and economic downturn in 2008 limited the availability of development finance and mortgages. The LDP will need to consider how its policies can assist in the construction of dwellings in order to meet need.

23. Powys has a dispersed rural population with nearly 59% of the population living in villages, hamlets and rural areas. The housing needs of rural areas must be addressed as well as those of larger towns and villages.

24. The average household size in Powys is projected to decrease from 2.24 persons in 2011 to 2.13 persons in 2026 (based on the 2011-based Local Authority Population Projections produced by the Welsh Government). Smaller households, and changes to the welfare system, will increase the need and demand for 1 and 2 bedroom properties, although these must be designed with adequate amenity space.

25. Obesity levels and related health problems are increasing amongst Powys' population. Development should be located and designed to enable and encourage active and healthy lifestyles.

26. Any shortfall in the provision of space and facilities for play, recreation and sport should be met wherever possible through development opportunities.

27. Allotments should be protected from development and further provision encouraged enabling more locally grown produce, community cohesion and healthy lifestyles.

28. Increasing energy bills combined with extreme weather events are causing fuel poverty amongst households living in energy inefficient properties. Sympathetic retro-fitting of existing properties and designing new developments to be energy efficient should be facilitated by the LDP.

29. A combination of high house prices and a low wage economy makes housing unaffordable to a significant proportion of Powys' households.

30. An Affordable Housing Target, expressed as numbers of homes, will be set by the LDP although this will need to reflect development viability. Innovative policies to enable house builders in the private sector to provide affordable housing should be considered through the LDP.

31. Levels of Welsh language use vary across the county with higher usage found in the west and south-west, although there are concerns that usage is falling in these traditional Welsh language strongholds. The LDP needs to consider how it can contribute to promoting the use of the language and protecting Welsh culture.

Infrastructure and Resource Considerations

32. One of the challenges for the LDP, given the rural nature of Powys and its dispersed population, will be to direct development to accessible locations which ideally provide a choice of transport modes such as walking, cycling and public transport.

33. The LDP will need to direct development to locations that are best served by existing and potential infrastructure and services and to ensure that the location of development is co-ordinated with the review of public service provision.

34. The LDP will support the provision and retention of community facilities and seek contributions from development to provision where appropriate.

35. Powys has no general hospital so access to out-of-county health care provision is important for the county's population.

36. In spite of rising fuel costs, car ownership is high reflecting the rural and dispersed population of the county and the high costs associated with public transport provision.

37. Frequent and regular public transport services are predominantly limited to key strategic road and rail routes in the county, such as the Traws Cambria bus service between Merthyr Tydfil and Newtown.

38. Future development and regeneration opportunities in some parts of Powys are reliant on transport network improvements such as the Newtown bypass.

39. Improvements to the transport infrastructure are important within Powys and to connect Powys with adjoining regions. The LDP must safeguard the routes of planned improvements and seek contributions from development towards improvements where appropriate.

40. The LDP should facilitate broadband access throughout the county to enable socio-economic opportunities and electronic access to services to be improved.

41. Utility infrastructure, such as public sewers, sewage treatment works and mains gas supply, are not available or are operating at capacity in some parts of the county which can act as a constraint to development.

42. The LDP should encourage the conservation of water and reduction in the demand for water and seek to minimise the effects of water abstraction on the natural environment and important ecological habitats.

43. The energy requirements of development should be minimised and renewable energy opportunities grasped wherever feasible.

44. Utilisation of Powys's renewable energy resource and associated infrastructure should be supported where cumulative, environmental, socio-economic effects are acceptable.

45. The LDP should seek to reduce levels of waste sent to landfill, and to provide a range and choice of sites across the county to support waste management operations.

46. The LDP should ensure that Powys contributes to the regional supply of aggregates and the encouragement of minerals transportation by rail.

47. The LDP should ensure that the sustainable management and safeguarding of important mineral resources found in Powys.

48. The LDP needs to safeguard and support the MoD's Sennybridge Training Area on Mynydd Epynt as a nationally important military training area.

- Strategic Objectives

Planning for Growth in Sustainable Places

LDP Objective 1 – Meeting Future Needs
To meet the needs arising in Powys over the plan period up to 2026, to provide adequate, appropriately located land for:

i. 6,071 dwellings to deliver a dwelling requirement of 5,519 which will meet all the housing needs of Powys' increasing and ageing population and its decreasing size of households, including open market and affordable housing, gypsy and traveller accommodation and other specialist housing needs.
ii. 49 hectares of employment and economic development uses.
iii. Retail, tourism, recreation, infrastructure, services and other needs.

LDP Objective 2 – Sustainable Settlements and Communities
To support sustainable development, access to services and the integration of land uses, by directing housing, employment and services development in accordance with a sustainable settlement hierarchy. Higher levels of development will be directed to Powys' towns and larger villages but where these are unable to sustain further growth due to capacity constraints, development will be accommodated in nearby towns or large villages.

LDP Objective 3 – Efficient Use of Land
To support the re-use and remediation of suitably and sustainably located previously developed land and where this is not possible to make efficient use of green field sites. To apply a general presumption against unsustainable development in the open countryside and development on soils of high value and important mineral resources which are recognised as finite resources.

LDP Objective 4 – Climate Change and Flooding
To support the transition to a low carbon and low waste Powys through all development, including the reduction of waste to landfill and by directing development away from high flood risk and, where possible, to reduce or better manage existing flood risk for communities, infrastructure and businesses.

LDP Objective 5 – Energy and Water
To support the conservation of energy and water and to generate energy from appropriately located renewable resources to enable households, businesses and communities to meet their needs where acceptable in terms of the economic, social, environmental and cumulative impacts.

In particular, to:

i. Contribute to the achievement of the Water Framework Directive targets in Powys.
ii. Provide an additional 50,000kW installed capacity of renewable electricity generating technology, 30,000kWt renewable biomass and 16,000kWt building integrated heat generating technology.

Supporting the Powys Economy

LDP Objective 6 – Vibrant Economy
To support a diverse, robust and vibrant economy for Powys, including a strong rural economy, which is sustainable and responsive to change. To ensure towns and larger villages are the main focus for economic development and that town centres are vital, viable and attractive.

LDP Objective 7 – Key Economic Sectors
To maintain and strengthen key economic sectors within Powys including manufacturing in the Severn Valley and Ystradgynlais, sustainable year-round tourism opportunities, agriculture and the rural economy.

LDP Objective 8 - Regeneration
To support the regeneration and renewal of Powys' built environment, its historic towns and employment premises and to support regeneration activities such as the Powys Local Growth Zone initiative.

Infrastructure and Services

LDP Objective 9 – Infrastructure and Services
To support the provision of infrastructure and services to meet the future needs of Powys' communities.

LDP Objective 10 – Important Assets
To support the operation and development of regionally and nationally important assets located in Powys.

Natural and Built Assets

LDP Objective 11 – Natural Heritage
To conserve and protect Powys' land, air and water resources important for environmental quality, geodiversity and biodiversity and where possible to ensure development enhances them and produces a net gain for biodiversity.

LDP Objective 12 - Resources
To facilitate the sustainable management of Powys' natural and environmental resources whilst enabling development to take place including the provision of at least a 25 year landbank of crushed rock aggregates

LDP Objective 13 – The Historic Environment
To protect, preserve and/or enhance the distinctive built heritage, landscape and cultural assets of Powys and adjoining areas, including its architectural and archaeological heritage and protected landscapes. In particular to facilitate the reduction of listed buildings at risk.

Supporting Healthy Communities

LDP Objective 14 – Healthy Lifestyles
To encourage active healthy lifestyles by enabling access to open spaces, areas for recreation and amenity including allotments or growing spaces, and to ensure development provides opportunities for walking, cycling, open and play spaces where required.

LDP Objective 15 – Welsh Language and Culture
To support and protect Welsh language and culture in Powys and specifically the Welsh speaking strongholds of the north-west and south-west.

LDP Objective 16 – Community Well-being
To promote development that supports community wellbeing and cohesion, especially in communities suffering from multiple deprivation and social exclusion.

Appendix B: Preferred Strategy Settlement Hierarchy Table 2012

Name (A-Z)	1. In Growth Corridor	2. Pop X facilities	3. Population estimate	4.Total Main Facilities	5. Pub	6. Community Hall	7. Village Shop	8. Education / School	9. Post Office inc mobile	10. Railway Station	11. Bus Service (5 days a wk or school service)	12. Park/Play Space	13. Hospital	14. Employment / industry
Towns	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	**14**
Builth Wells & Llanelwedd	Y	**24381**	2709	9	1	1	1	1	1		1	1	1	1
Knighton	N	**27400**	2740	10	1	1	1	1	1	1	1	1	1	1
Llandrindod Wells	Y	**48500**	4850	10	1	1	1	1	1	1	1	1	1	1
Llanfair Caereinion	N	**8320**	1040	8	1	1	1	1	1		1	1		1
Llanfyllin	N	**8960**	1120	8	1	1	1	1	1		1	1		1
Llanidloes	Y	**23580**	2620	9	1	1	1	1	1		1	1	1	1
Llanwrtyd Wells	N	**5400**	600	9	1	1	1	1	1	1	1	1		1
Machynlleth	N	**20500**	2050	10	1	1	1	1	1	1	1	1	1	1
Montgomery	N	**8400**	1050	8	1	1	1	1	1		1	1		1
Newtown	Y	**105100**	10510	10	1	1	1	1	1	1	1	1	1	1
Presteigne	N	**14720**	1840	8	1	1	1	1	1		1	1		1
Rhayader	Y	**14160**	1770	8	1	1	1	1	1		1	1		1
Welshpool & Buttington	Y	**58700**	5870	10	1	1	1	1	1	1	1	1	1	1
Ystradgynlais	Y	**61920**	6880	9	1	1	1	1	1		1	1	1	1
Large Villages														
Abercrave	Y	**4560**	570	8	1	1	1	1	1		1	1		1
Abermule	Y	**5040**	630	8	1	1	1	1	1		1	1		1
Arddleen	Y	**2800**	400	7	1	1		1	1		1	1		1
Berriew	Y	**2400**	300	8	1	1	1	1	1		1	1		1
Bettws Cedewain	N	**1200**	240	5	1	1		1	1			1		
Boughrood & Llyswen	Y	**2660**	380	7	1	1	1	1	1		1	1		
Bronllys	Y	**3780**	420	9	1	1	1	1	1		1	1	1	1
Caersws	Y	**7290**	810	9	1	1	1	1	1	1	1	1		1
Carno	N	**4320**	540	8	1	1	1	1	1		1	1		1
Castle Caereinion	N	**1260**	210	6	1	1	1	1			1	1		
Churchstoke	N	**4960**	620	8	1	1	1	1	1		1	1		1
Clyro	N	**2560**	320	8	1	1	1	1	1		1	1		1
Coelbren	N	**2800**	560	5	1			1	1		1	1		
Crewgreen	Y	**1760**	440	4		1		1			1	1		

Crossgates / Fron	Y	**3500**	500	7	1	1	1	1	1		1	1		
Forden	N	**910**	130	7	1	1	1	1			1	1		1
Four Crosses	Y	**6960**	870	8	1	1	1	1	1		1	1		1
Glasbury	N	**2800**	400	7	1	1	1	1	1		1	1		
Guilsfield	N	**7980**	1140	7	1	1	1	1	1		1	1		
Howey	Y	**2240**	560	4	1	1	1					1		
Kerry	N	**4800**	800	6	1	1	1	1	1			1		
Kingswood	N	**1920**	480	4	1	1					1	1		
Knucklas	N	**1300**	260	5	1	1				1	1	1		
Llanbrynmair	N	**1540**	220	7	1	1	1	1	1		1	1		
Llandinam	Y	**2000**	250	8	1	1	1	1	1		1	1		1
Llandrinio	Y	**2590**	370	7	1	1	1		1		1	1		1
Llandyssil	N	**840**	210	4	1	1	1					1		
Llanfechain	N	**2380**	340	7	1	1	1	1	1		1	1		
Llangammarch Wells	N	**1520**	190	8	1	1	1		1	1	1	1		1
Llangurig	Y	**1020**	170	6	1	1	1		1		1	1		
Llangynog	N	**1100**	220	5	1	1			1			1		1
Llanrhaeadr-ym-Mochnant	N	**4480**	560	8	1	1	1	1	1		1	1		1
Llansantffraid-ym-Mechain	N	**6800**	850	8	1	1	1	1	1		1	1		1
Llansilin	N	**1260**	210	6	1	1	1	1	1			1		
Llanymynech	Y	**3300**	550	6	1		1	1	1		1	1		
Llanyre	Y	**1400**	280	5	1	1					1	1		1
Meifod	N	**2800**	400	7	1	1	1	1	1		1	1		
Middletown	Y	**1440**	360	4	1	1					1	1		
New Radnor	N	**1890**	270	7	1	1	1	1	1		1	1		
Newbridge on Wye	Y	**4480**	560	8	1	1	1	1	1		1	1		1
Penybontfawr	N	**1680**	280	6	1	1	1	1	1			1		
Pontrobert	N	**1080**	180	6	1	1		1	1			1		1
Three Cocks	N	**1600**	320	5	1		1	1			1	1		
Trefeglwys	N	**1470**	210	7	1	1	1	1	1		1	1		
Tregynon	N	**3060**	510	6		1	1	1	1			1		1
Trewern	Y	**2350**	470	5		1		1			1	1		1
Villages														
Abbeycwmhir	N	**294**	49	6	1	1	1		1			1		1
Aberedw	Y	**360**	90	4	1	1			1		1			
Abertridwr	N	**400**	100	4		1	1		1			1		
Adfa	N	**560**	140	4		1			1		1	1		
Beulah	N	**600**	100	6	1	1	1		1		1	1		
Builth Road	Y	**550**	110	5	1					1	1	1		1
Caehopkin	Y	**630**	210	3				1			1	1		
Cemmaes	N	**480**	120	4	1	1					1	1		
Cilmery	N	**760**	190	4	1	1				1	1			
Cwm Linau	N	**400**	80	5		1	1		1		1	1		

Derwenlas	N	**240**	60	4	1	1					1	1		
Erwood	Y	**650**	130	5	1	1			1		1	1		
Esgairgeiliog Ceinws	N	**440**	110	4	1		1		1		1			
Felinfach	Y	**270**	90	3	1						1	1		
Foel	N	**480**	80	6	1	1		1			1	1		1
Garth	N	**450**	90	5		1		1		1	1	1		
Gladestry	N	**350**	70	5	1	1		1	1			1		
Glantwmyn	N	**490**	70	7	1	1	1	1			1	1		1
Groes-lwyd	N	**240**	60	4	1	1					1	1		
Leighton Pentre	Y	**600**	100	6		1		1	1		1	1		1
Llanbadarn Fynydd	N	**245**	49	5	1	1	1				1	1		
Llanbister	N	**420**	70	6	1	1		1	1		1	1		
Llanddew	N	**280**	140	2		1						1		
Llandewi Ystradenni	N	**240**	80	3		1					1	1		
Llanerfyl	N	**420**	140	3			1				1			1
Llanfihangel Tal-y-llyn	N	**660**	220	3	1	1						1		
Llangadfan	N	**600**	120	5	1	1		1			1	1		
Llangedwyn	N	**280**	70	4		1		1				1		1
Llangunllo	N	**280**	70	4	1	1			1	1				
Llanwddyn	N	**250**	50	5	1	1	1		1			1		
Llanwrthwl	Y	**240**	60	4		1			1		1	1		
Nantmel	Y	**245**	49	5	1		1	1	1		1			
Norton	N	**600**	300	2							1			1
Pant y dwr	N	**450**	90	5	1	1			1		1	1		
Penegoes	N	**360**	180	2							1	1		
Penybont	N	**540**	180	3	1	1					1			
Refail	Y	**270**	90	3		1					1	1		
Sarn	N	**680**	170	4	1	1		1				1		
St Harmon	N	**390**	130	3	1						1	1		
Y Fan	N	**280**	140	2		1								1
Hamlets														
Aberbechan	Y	**0**	49	0										
Abercegir	N	**0**	70	0										
Aberhafesp	Y	**110**	110	1		1								
Aberhosan	N	**49**	49	1		1								
Battle	N	**0**	70	0										
Beguildy	N	**180**	60	3	1		1		1					
Bleddfa	N	**98**	49	2	1							1		
Bont-dolgadfan	N	**0**	60	0										
Bwlch-y-cibau	N	**147**	49	3	1	1					1			
Bwlch-y-ffridd	N	**0**	49	0										
Caerhowel	N	**120**	120	1	1									
Cefn Coch	N	**150**	50	3	1	1					1			
Cefn Gorwydd	N	**0**	49	0										

Clatter	N	**140**	70	2		1						1		
Coedway	N	**210**	70	3	1						1			1
Commins Coch	N	**70**	70	1							1			
Cradoc	N	**150**	50	3				1			1	1		
Cwmbach Llechryd	N	**49**	49	1							1			
Cwmbelan	Y	**50**	50	1							1			
Darowen	N	**49**	49	1								1		
Dolanog	N	**196**	49	4		1	1				1	1		
Dolau	N	**49**	49	1						1				
Dolfor	N	**196**	49	4	1			1			1	1		
Elan Village/Cwmdauddwr	N	**200**	50	4	1	1						1		1
Evenjobb	N	**80**	80	1		1								
Felindre	N	**98**	49	2	1	1								
Ffynnon Gynydd	N	**98**	49	2				1				1		
Forge	N	**0**	50	0										
Frank's Bridge	N	**140**	70	2				1				1		
Fron Bank	Y	**98**	49	2	1									1
Garthmyl	Y	**100**	50	2	1						1			
Groesffordd	Y	**200**	100	2			1				1			
Hundred House	N	**150**	50	3	1	1			1					
Kinnerton	N	**147**	49	3		1					1	1		
Llan	N	**0**	50	0										
Llandegley	N	**98**	49	2		1					1			
Llanfihangel	N	**150**	50	3	1	1						1		
Llanfilo	Y	**0**	70	0										
Llanigon	N	**147**	49	3		1		1				1		
Llanwnog	N	**0**	80	0										
Llanwrin	N	**49**	49	1							1			
Llawr-y-glyn	N	**0**	50	0										
Llowes	N	**120**	60	2	1						1			
Lloyney	N	**100**	50	2	1						1			
Lower Chapel	N	**49**	49	1		1								
Manafon	N	**60**	60	1	1									
Nantglas	Y	**196**	49	4			1	1	1			1		
New Mills	N	**49**	49	1		1								
Newchurch	N	**0**	49	0										
Old Radnor	N	**100**	50	2	1							1		
Painscastle	N	**180**	90	2	1	1								
Pen-y-bont Llanerch Emrys	N	**98**	49	2	1						1			
Pool Quay	Y	**150**	50	3	1						1	1		
Rhosgoch	N	**140**	70	2				1				1		
Sarnau , Mont.	N	**100**	50	2					1					1
Stepaside	Y	**160**	160	1	1									

Talerddig	N	**49**	49	1							1			
Tanhouse	N	**98**	49	2		1		1						
Velindre (Brecknock)	N	**147**	49	3	1	1						1		
Walton	N	**196**	49	4	1	1			1		1			
Whitton	N	**180**	60	3		1		1			1			

Appendix C: Reasoning for Settlement Categorisation Amendments

The categorisation of the following settlements has been amended from the preferred strategy, some because the underlying assumptions were proven incorrect, others based on 'planning judgement' factors. Where this is the case the reasons are provided below:

Hay on Wye
The majority of the settlement is identified as a Key settlement in the Brecon Beacons National Park Local Development Plan (BBNP LDP). For consistency and to reflect the settlements' position in the BBNP LDP settlement hierarchy, Hay on Wye has been identified as a Town in the Powys LDP settlement hierarchy.

Bwlch y Cibau
The settlement's re-classification as a "Small Village" is a reflection of a combination of factors including community & political support for a reclassification and further work on settlement size & consideration of the ability of the settlement to accommodate growth.

Llandyssil
The Sustainability Appraisal Assessment identified a negative sustainability impact on access for the village of Llandyssil. The access issues were reflected in different elements of the assessment including the questions relating to existing services, access and footway/cycleways. The settlement has therefore been reclassified from a large village to a small village.

Llangammarch Wells
Following assessment of the candidate sites, none were identified as suitable for development of a scale large enough to justify allocation. In addition, given the current settlement size and services, it was considered appropriate to re-classify the settlement as a small village. This amendment would also enable greater flexibility for small scale development opportunities to come forward in line with relevant policies within the plan.

Llanigon
This settlement was re-classified as a small village to reflect the number of households resident in the settlement on both sides of the Brecon Beacons National Park boundary.

Velindre
This settlement was re-classified as a small village to reflect the number of households resident in the settlement on both sides of the Brecon Beacons National Park boundary.

Leighton
This settlement has been re-classified as "Leighton" from "Leighton Pentre" to acknowledge that the settlement comprises a number of clusters of dwellings.

Forden / Kingswood

These were classified as separate large villages but re-classifying them as "Forden / Kingswood" recognises that they function as a single settlement.

Crossgates

This has been renamed in the Deposit Plan from Crossgates/ Fron because development proposals are centred in Crossgates. Fron will be considered as a Rural Settlement.

Appendix D: Explanation of Deviation from Pro-Rata Apportionment

The level of growth apportioned to Towns and Large Villages has followed a pro rata apportionment based on the household numbers of the settlements. It is not reasonable to precisely align settlement allocations to the pro rata apportionment; however in the vast majority of cases they are close. The following paragraphs explain the reasons why there is significant deviation from the pro rata apportionment in some settlements:

Llandrindod Wells accommodating 466 (pro rata 319).
Political decision to allocate land at Ridgebourne Road (P28 HA4) adding approx. 100 dwellings. Llandrindod Wells has a good range of services and facilities and is considered a sustainable place to focus growth.

Crossgates accommodating 39 (pro rata 26).
Crossgates has a good range of services and facilities for a Large Village and is close to Llandrindod Wells. It was recommended and agreed to allocate land south of Studio Cottage (P16 HA1) to provide a choice of development sites in the Large Village. The housing commitment at Oaktree Meadows (P16 HC1) has yet to be built.

Knucklas accommodating 24 (pro rata 13).
This simply reflects the position of an advanced planning application on land at Castle Green (P25 HA1) and takes into account development that has happened in the Village in the Plan Period to date. A large housing site in the village benefits from a technical start however this is classified as Category 3 in the Joint Housing Land Availability Study (2013) as it is considered unlikely to be brought forward. Other opportunities for development are available in the Village.

Llanfyllin 179 (pro rata 60)
The level of housing growth in the settlement has been exceeded in order to ensure that sufficient land is provided to facilitate an appropriate highway access into the proposed housing allocations and the creation of a new gateway to the town.

Llanwrtyd Wells 84 (pro rata 34)
The growth required for this settlement has been met and exceeded by sites with planning permission which have been identified as commitments. It was therefore not necessary to allocated additional land for housing.

Machynlleth 72 (pro rata 127)
The level of housing growth in the settlement is less than the pro-rata apportionment due to a lack of suitable housing sites being identified. This is a reflection of the number of constraints to development in the immediate hinterland of the settlement including flood plain, topography, common land, historic park/garden and highway access.

Ystradgynlais 314 (pro rata 403)
The level of housing growth in the settlement is less than the pro-rata apportionment due to a lack of suitable housing sites being identified. This is a reflection of a combination of factors including community views, political decisions and the number of constraints to development in the immediate hinterland of the settlement including the flood plain, topography, landscape and visual impact, highway access, land stability and contamination (in particular from past mining activities) and ecologically sensitive habitats and species. Due to the high level of constraints, site viability and deliverability became questionable for a number of sites.

Berriew 0 (pro rata 17)
Housing allocations have not been made in the settlement due to a lack of suitable housing sites being identified through the Candidate Site process. Nonetheless, opportunities have been retained in the development boundary to facilitate housing provision which may meet the pro-rata requirement.

Boughrood and Llyswen 118 (pro rata 21)
The level of housing growth in the settlement has been exceeded due to a number of housing commitments which have already been completed or are under construction during the initial years of the plan period. This indicated both need and demand for additional housing development to meet future needs during the remainder of the plan period. There are a number of sites considered suitable for allocation and political support for identifying additional land for housing.

Bronllys 95 (pro rata 22)
The level of housing growth in the settlement has been exceeded due to a number of existing housing commitments and additional housing allocations. Bronllys has a number of services and facilities and is strategically located on the edge of the Brecon Beacons National Park close to the Primary settlement of Brecon and the Key Settlement of Talgarth. There are a number of sites considered suitable for allocation and there is political support for identifying additional land for housing. It is therefore considered that Bronllys has the ability to absorb additional housing growth.

Castle Caereinion 25 (pro rata 12)
The level of housing growth in the settlement has been exceeded due to a number of existing housing commitments.

Churchstoke 52 (pro rata 33)
The level of housing growth in the settlement has been exceeded due to a number of existing housing commitments.

Kerry 65 (pro rata 42)
This settlement's housing growth reflects the position of an advanced planning application on land at Dolforgan View (P23 HA1) which the Council has resolved to permit subject to a Section 106 agreement. It is therefore anticipated that the site will be developed within the Plan period.

Llanbrynmair 25 (pro rata 11)
The level of housing growth in the settlement has been exceeded as the guideline density figure of 25 dwellings per hectare may not be achievable on the housing allocation whilst the provision of dwellings over the pro rata figure would enable the settlement to absorb additional growth to help address a lack of suitable sites in the nearest town (Machynlleth).

Llangurig 27 (pro rata 9)
The settlement's housing growth reflects a housing commitment which has stalled and a new allocation to provide further opportunity for housing growth within the settlement. The settlement will therefore also have the ability to absorb additional growth due to a lack of suitable sites in the nearby settlement of Llandinam.

Llansilin 28 (pro rata 12)
The level of housing growth in the settlement has been exceeded due to a number of existing housing commitments.

Trefeglwys 20 (pro rata 11)
The level of housing growth in the settlement has been exceeded due to a number of existing housing commitments.

Appendix E: Employment Land Allocation Justification Table

Ystradgynlais				
Site Name	**Location**	**Category**	**Allocation Ha.**	**Justification**
Woodlands Business Park	Ystradgynlais	High Quality	2.31Ha.	COMMITTED SITE Welsh Government proposal Existing UDP allocation that was proposed during the Candidate Site process for employment uses.
Central				
Site Name	**Location**	**Category**	**Allocation Ha.**	**Justification**
Wyeside Enterprise Park	Builth Wells	High Quality	1.2Ha.	COMMITTED SITE Welsh Government proposal Existing UDP allocation that was proposed for employment during the Candidate Site process.
Gypsy Castle Lane	Hay-on-Wye	Mixed Use	2.4Ha.	Promoted for mixed use as a Candidate Site. Cross boundary development, Hay is predominantly in the Brecon Beacons National Park's planning area.
Heart of Wales Business Park	Llandrindod Wells	Prestige	4.3Ha.	COMMITTED SITE Welsh Government proposal Existing UDP allocation, part of which was proposed during the Candidate Site process for general employment. Given a potential ecological issue on that part of the candidate site surrounding the pond, part of the UDP allocation on field SE of candidate site has also been included.
Broadaxe Business Park	Presteigne	Local	2.4Ha.	COMMITTED SITE Welsh Government proposal Existing UDP allocation that was proposed during the Candidate Site process.
Brynberth Enterprise Park	Rhayader	Local	3.7Ha.	COMMITTED SITE Welsh Government / Town Council proposal. Includes majority of undeveloped UDP allocation that was proposed during the Candidate Site process for general employment use and additional, well located logical, land proposed during the Candidate Site process for general employment use
Land adj. Gwernyfed Avenue	Three Cocks	High Quality	3.4Ha.	Approved as an exception during UDP, part for agricultural contractor / machinery sales & part for Laura Ashley factory & office accommodation. Promoted for mixed use as a Candidate Site.
Severn Valley & North				
Site Name	**Location**	**Category**	**Allocation Ha.**	**Justification**
Great Oaks Business Park	Llanidloes	High Quality	0.4Ha.	Welsh Government proposal Remaining plots on a recent employment development with high take-up rates. Site was also put forward under the Candidate Site process.
Parc Hafren	Llanidloes	Local	1.68Ha.	Welsh Government proposal Remaining land on an existing employment development. Serviced plots put forward as a Candidate Site.
Llanidloes Road	Newtown	High Quality		Coleg Powys proposal

			2Ha.	Existing UDP allocation that was proposed during the Candidate Site process. Site partially floods therefore only 2Ha. is developable.
St. Giles Golf Course	Newtown	Mixed Use	4ha.	Existing UDP employment allocation. Employment Needs Study proposes that the site is de-allocated due to its current use as a Golf Course. Nonetheless, the site has been proposed under the Candidate Site process for mixed use development. Mixed use development proposals are encouraged in the Study to address viability issues associated with economic development. The site has therefore been allocated to provide mixed use opportunities and in order to enable the Golf Club to realise its aspirations for the Club and the site.
Abermule Business Park	Abermule	High Quality	2.6Ha.	COMMITTED SITE Welsh Government proposal UDP employment allocation that has had infrastructure works completed (e.g highways and services) during UDP period under the EU funded Welsh Government / Powys County Council Severn Valley Strategic Regeneration Programme. Site was also put forward under the Candidate Site process.
Churchstoke	Churchstoke	Local	1.54Ha.	Existing UDP allocation that was proposed during the Candidate Site process.
Buttington Cross Enterprise Park	Welshpool	Prestige	1.5Ha.	COMMITTED SITE Welsh Government proposal Remaining plots on a recent employment development with high take-up rates. Site was also put forward under the Candidate Site process.
Buttington Quarry	Trewern	Local	6Ha.	Site has partially been reused for employment purposes and benefits from permission for a new highway access that would serve employment development on the remainder of the site. The site was also proposed at the Candidate Site stage. Given that Welshpool has two prestige allocations but no allocations to accommodate more varied industrial uses and that there is relatively low vacancy levels on the town's industrial estates it is considered appropriate to allocate to accommodate varied industrial uses.
Offa's Dyke Business Park	Welshpool	Prestige	7.3Ha.	COMMITTED SITE Welsh Government proposal UDP employment allocation that has had infrastructure works completed (e.g highways and services) during the UDP period under the EU funded Welsh Government / Powys County Council Severn Valley Strategic Regeneration Programme. Some employment development has taken place on the site and the allocation relates to the remaining undeveloped land. Site was put forward under the Candidate Site process.
Four Crosses	Four Crosses	Local	0.75Ha.	COMMITTED SITE Existing UDP employment allocation that has experienced a good take-up rate during the UDP Plan period.
Machynlleth				
Site Name	**Location**	**Category**	**Allocation Ha.**	**Justification**
Treowain Enterprise Park	Machynlleth	High Quality	1.3Ha.	Existing UDP Allocation partially developed. Proposed allocation would represent an expansion of the existing industrial estate. Local Highway Authority has indicated that mixed residential & industrial traffic on existing estate road would be resisted. Alternative use of site for residential is therefore not considered an option.

Appendix F: Settlement Allocations Table

Towns and Large Villages - by settlement size	Population estimate	Settlement Hierarchy Position	Household (hh) estimate	% of existing hhs in settlement (Towns, Large Villages and Small Villages only)	Pro-rata growth target (dwellings) for settlement - column E (%) applied to 4000 hhs	Housing Land Bank - derived from monitoring work - 1.1.11 to 31.12.13 (includes HC sites)	Difference between Col F & Col G; Shortfall = starting point of planned new housing growth	Planned Growth - Existing Commitments on large sites - HC sites (Dwellings)	Planned Growth on new Housing Land Allocations - HA sites (Dwellings)	Mixed Use - MUA Site (Dwellings)	Mixed Use - MUA site (Employment - ha)	Planned New Employment Land - EA sites	Committed Employment Land - EC sites	Retail Centre Designation	Powys LHMA Area
Newtown	10944	Town	4815	15.27	610	477	133	425	127	88	4.00	2.00		Area Centre	LHM 3
Ystradgynlais Area	7041	Town	3180	10.09	403	90	313	18	219			2.31		District Centre	LHM 8
Welshpool & Buttington	5910	Town	2635	8.36	334	125	209	79	178				1.50	Area Centre	LHM 1
Llandrindod Wells	5196	Town	2518	7.99	319	116	203	48	350			4.30		Area Centre	LHM 5
Llanidloes	2780	Town	1362	4.32	173	107	66	85	67			2.08		Area Centre	LHM 3
Knighton	2760	Town	1273	4.04	161	35	126	21	112			0.00		District Centre	LHM 4
Builth Wells & Llanelwedd	2709	Town	1182	3.75	150	39	111	18	113			1.20		District Centre	LHM 6
Machynlleth	2139	Town	1000	3.17	127	15	112	0	57			1.30		Area Centre	LHM 2
Rhayader	1829	Town	869	2.76	110	46	64	28	85			3.70		District Centre	LHM 5
Presteigne	1856	Town	845	2.68	107	16	91	0	42	50	0.4 (Retail)	2.40		District Centre	LHM 4
Llanfyllin	1081	Town	477	1.51	60	22	38	14	157			0.00		Local Centre	LHM 1
Montgomery	1002	Town	470	1.49	60	23	37	18	50			0.00		Local Centre	LHM 1
Llanfair Caereinion	1004	Town	413	1.31	52	5	47	0	50			0.00		Local Centre	LHM 1
Llanwrtyd Wells	598	Town	268	0.85	34	84	-50	73	0			0.00		Local Centre	LHM 6
Hay-on-Wye (cross-border)					0	0	0	0	0	45	2.40	0.00		(BBNP)	LHM 7
Totals - Towns					**2700**	**1200**	**1500**	**827**	**1607**	**183**	**6.40**	**19.29**	**1.50**		
Guilsfield	1210	Large Village	509	1.62	65	53	12	46	39						LHM 1
Caersws	817	Large Village	368	1.17	47	5	42	0	40						LHM 3
Four Crosses	853	Large Village	366	1.16	46	19	27	0	30				0.75		LHM 1
Llansantffraid-ym-Mechain	816	Large Village	350	1.11	44	27	17	12	33						LHM 1
Kerry	813	Large Village	331	1.05	42	3	39	0	62						LHM 3
Howey	585	Large Village	287	0.91	36	14	22	11	30						LHM 5
Abercrave	603	Large Village	275	0.87	35	8	27	0	13						LHM 8
Newbridge on Wye	591	Large Village	263	0.83	33	32	1	5	0						LHM 5
Abermule	632	Large Village	261	0.83	33	0	33	0	40				2.60		LHM 3
Churchstoke	641	Large Village	259	0.82	33	52	-19	45	0			1.54			LHM 3
Carno	545	Large Village	246	0.78	31	3	28	0	38						LHM 3
Coelbren	560	Large Village	238	0.76	30	5	25	0	22						LHM 8
Llanymynech (cross-border)	544	Large Village	233	0.74	30	10	20	10	25						LHM 1
Llanrhaeadr-ym-Mochnant	508	Large Village	223	0.71	28	7	21	0	19						LHM 1
Tregynon	525	Large Village	215	0.68	27	5	22	0	22						LHM 3
Crossgates	478	Large Village	209	0.66	26	24	2	15	15						LHM 5
Trewern	491	Large Village	188	0.60	24	0	24	0	24						LHM 1
Kingswood (adjoins Forden)	444	Large Village	187	0.59	24	0	24	0	see Forden						LHM 1
Crewgreen	437	Large Village	176	0.56	22	1	21	0	21						LHM 1
Bronllys	402	Large Village	174	0.55	22	41	-19	38	51						LHM 7
Glasbury	404	Large Village	169	0.54	21	7	14	0	9						LHM 7
Boughrood & Llyswen	379	Large Village	165	0.52	21	59	-38	17	59						LHM 7

Towns and Large Villages - by settlement size	Population estimate	Settlement Hierarchy Position	Household (hh) estimate	% of existing hhs in settlement (Towns, Large Villages and Small Villages only)	Pro-rata growth target (dwellings) for settlement - column E (%) applied to 4000 hhs	Housing Land Bank - derived from monitoring work - 1.1.11 to 31.12.13 (includes HC sites)	Difference between Col F & Col G; Shortfall = starting point of planned new housing growth	Planned Growth - Existing Commitments on large sites - HC sites (Dwellings)	Planned Growth on new Housing Land Allocations - HA sites (Dwellings)	Mixed Use - MUA Site (Dwellings)	Mixed Use - MUA site (Employment - ha)	Planned New Employment Land - EA sites	Committed Employment Land - EC sites	Retail Centre Designation	Powys LHMA Area
Meifod	397	Large Village	161	0.51	20	10	10	0	13						LHM 1
Arddleen	398	Large Village	160	0.51	20	4	16	0	16						LHM 1
Llandrinio	368	Large Village	148	0.47	19	5	14	0	20						LHM 1
Clyro	335	Large Village	147	0.47	19	24	-5	15	13						LHM 7
Middletown	378	Large Village	145	0.46	18	0	18	0	18						LHM 1
Llanfechain	323	Large Village	138	0.44	18	2	16	0	25						LHM 1
Berriew	300	Large Village	135	0.43	17	0	17	0	0						LHM 1
Llanyre	295	Large Village	131	0.42	17	5	12	0	12						LHM 5
Three Cocks	315	Large Village	127	0.40	16	1	15	0	0	15	3.40				LHM 7
Penybontfawr	250	Large Village	110	0.35	14	9	5	0	10						LHM 1
New Radnor	251	Large Village	110	0.35	14	21	-7	14	0						LHM 4
Llandinam	254	Large Village	106	0.34	13	2	11	0	8						LHM 3
Knucklas	244	Large Village	106	0.34	13	7	6	0	17						LHM 4
Bettws Cedewain	242	Large Village	100	0.32	13	15	-2	10	0						LHM 3
Llansilin	227	Large Village	93	0.29	12	28	-16	23	0						LHM 1
Castle Caereinion	219	Large Village	92	0.29	12	25	-13	25	0						LHM 1
Llanbrynmair	211	Large Village	89	0.28	11	8	3	5	17						LHM 1
Trefeglwys	212	Large Village	88	0.28	11	20	-9	17	0						LHM 3
Llangynog	194	Large Village	85	0.27	11	3	8	0	8						LHM 1
Pontrobert	177	Large Village	72	0.23	9	3	6	0	6						LHM 1
Llangurig	166	Large Village	69	0.22	9	9	0	9	18						LHM 3
Forden (adjoins Kingswood)	125	Large Village	52	0.17	7	4	3	0	25						LHM 1
Totals - Large Villages					**1034**	**580**	**453**	**317**	**818**	**15**	**3.40**	**1.54**	**3.35**		
Total Dwellings in Towns and Large Villages (HC and HA and MUA)								**1144**	**2425**	**198**					
									Dwellings	**3767**					
Employment Sites outside of Settlement															
(serving Welshpool)															
Buttington Brickworks												6.00			
Offas Dyke Business Park													7.30		
Totals - Employment Land (Ha)											**9.80**	**26.83**	**12.15**		
MUA, EA and EC excluding Retail									**Employment (Ha)**				**48.78**		

Towns and Large Villages - by settlement size	Population estimate	Settlement Hierarchy Position	Household (hh) estimate	% of existing hhs in settlement (Towns, Large Villages and Small Villages only)	Pro-rata growth target (dwellings) for settlement - column E (%) applied to 4000 hhs	Housing Land Bank - derived from monitoring work - 1.1.11 to 31.12.13 (includes HC sites)	Difference between Col F & Col G; Shortfall = starting point of planned new housing growth	Planned Growth - Existing Commitments on large sites - HC sites (Dwellings)	Planned Growth on new Housing Land Allocations - HA sites (Dwellings)	Mixed Use - MUA Site (Dwellings)	Mixed Use - MUA site (Employment - ha)	Planned New Employment Land - EA sites	Committed Employment Land - EC sites	Retail Centre Designation	Powys LHMA Area
Small Villages - A-Z															
Abbeycwmhir	25	Village	11	0.03	1	4									
Aberedw	94	Village	39	0.13	5	3									
Abertridwr	89	Village	39	0.12	5	0									
Adfa	144	Village	59	0.19	7	7									
Beulah	104	Village	46	0.15	6	32									
Builth Road	116	Village	49	0.16	6	10									
Bwlch Y Cilbau					2	6									
Caehopkin	211	Village	90	0.28	11	0									
Cemmaes	124	Village	54	0.17	7	0									
Cilmery	178	Village	79	0.25	10	5									
Cwm Linau	79	Village	34	0.11	4	2									
Derwenlas	65	Village	28	0.09	4	0									
Erwood	126	Village	54	0.17	7	2									
Esgairgeiliog Ceinws	108	Village	48	0.15	6	0									
Felinfach	94	Village	38	0.12	5	0									
Foel	77	Village	33	0.10	4	2									
Garth	92	Village	41	0.13	5	18									
Gladestry	71	Village	31	0.10	4	3									
Glantwmyn	73	Village	32	0.10	4	3									
Groes-lwyd	61	Village	26	0.08	3	3									
Leighton	94	Village	39	0.12	5	5									
Llanbadarn Fynydd	42	Village	18	0.06	2	1									
Llanbister	67	Village	29	0.09	4	6									
Llanddew	152	Village	62	0.20	8	10									
Llandewi Ystradenni	81	Village	36	0.11	5	21									
Llandyssil			85	0.27	11	0									
Llanerfyl	142	Village	60	0.19	8	0									
Llanfihangel Tal-y-llyn	223	Village	92	0.29	12	13									
Llangadfan	122	Village	51	0.16	7	0									
Llangammarch Wells			85	0.27	11	2									
Llangedwyn	79	Village	32	0.10	4	0									
Llangunllo	71	Village	31	0.10	4	1									
Llanigon (cross border)					2	5									
Llanwddyn	48	Village	21	0.07	3	0									
Llanwrthwl	57	Village	25	0.08	3	5									
Nantmel	19	Village	8	0.03	1	1									
Norton	292	Village	141	0.45	18	10									

Towns and Large Villages - by settlement size	Population estimate	Settlement Hierarchy Position	Household (hh) estimate	% of existing hhs in settlement (Towns, Large Villages and Small Villages only)	Pro-rata growth target (dwellings) for settlement - column E (%) applied to 4000 hhs	Housing Land Bank - derived from monitoring work - 1.1.11 to 31.12.13 (includes HC sites)	Difference between Col F & Col G; Shortfall = starting point of planned new housing growth	Planned Growth - Existing Commitments on large sites - HC sites (Dwellings)	Planned Growth on new Housing Land Allocations - HA sites (Dwellings)	Mixed Use - MUA Site (Dwellings)	Mixed Use - MUA site (Employment - ha)	Planned New Employment Land - EA sites	Committed Employment Land - EC sites	Retail Centre Designation	Powys LHMA Area
Pant y dwr	88	Village	38	0.12	5	8									
Penegoes	181	Village	80	0.25	10	9									
Penybont	170	Village	74	0.24	9	19									
Refail	92	Village	41	0.13	5	2									
Sarn	168	Village	69	0.22	9	1									
St Harmon	123	Village	53	0.17	7	4									
Velindre (Brecknock) (cross border)					2	4									
Y Fan	134	Village	56	0.18	7	2									
Totals Small Villages					267	229									
Totals	70382		31522	100.00											