



Local Plan Viability Update 2026 Further Update Note

April 2026

Important Notice

HDH Planning & Development Ltd (HDH) has prepared this 2026 Update Note to the *Chelmsford City Council Local Plan Viability Update* (HDH, August 2023) for the sole use of Chelmsford City Council in accordance with the instructions under which the services were performed. No other warranty, expressed or implied, is made as to the professional advice included in this report or any other services provided. This Update Note may not be relied upon by any other party without the prior and express written agreement of HDH Planning & Development Ltd.

HDH shall have no duty, responsibility and/or liability to any party in connection with this Update Note howsoever arising other than that arising to the Client under the Appointment. Save as provided in the Appointment, no warranty, expressed or implied, is made as to the professional advice included in this Update Note or any other services provided by HDH.

This Update Note should not be reproduced in whole or in part or disclosed to any third parties for any use whatsoever without the express written authority of HDH or the Council. To the extent this Update Note is reproduced in whole or in part or disclosed to any third parties for any use whatsoever, and whether such disclosure occurs with or without the express written authority of HDH, HDH does not accept that the third party is entitled to rely upon this Update Note and does not accept any responsibility or liability to the third party.

Where any conclusions and recommendations contained in this Update Note are based upon information provided by the Client and/or third parties, it has been assumed that all relevant information has been provided by the Client and/or third parties and that such information is accurate. Any such information obtained by HDH has not been independently verified by HDH, unless otherwise stated in this Update Note. HDH accepts no liability for any inaccurate conclusions, assumptions or actions taken resulting from any inaccurate information supplied by the Client and/or third parties.

HDH Planning & Development Ltd
Clapham Woods Farm
Keasden, Nr. Clapham
Lancaster. LA2 8ET
info@hdhplanning.co.uk
015242 51831

Registered in England
Company Number 08555548

Issued	By	Signed
29 th April 2026	RS Drummond-Hay MRICS ACIH Director	

THIS DOCUMENT HAS BEEN FORMATTED FOR DOUBLE SIDED PRINTING

COPYRIGHT

© This report is the copyright of HDH Planning & Development Ltd. Any unauthorised reproduction or usage by any person other than the addressee is strictly prohibited.



Table of Contents

1. Introduction	5
2. Changes in National Policy	6
Updated NPPF	6
The Golden Rules	7
Planning Practice Guidance	8
Viability and plan making	8
Viability and decision taking	10
Standardised inputs to viability assessment	10
Community Infrastructure Levy Regulations and Guidance	12
Wider Changes Impacting on Viability	12
Accessible and Adaptable Standards	12
Environmental Standards	13
Biodiversity Net Gain	16
Fire Safety Standards	17
Levelling-up and Regeneration Act	17
Planning Application Fees	17
Building Safety Levy	17
Viability Guidance	17
Affordable Housing	18
3. Changes in House Prices	19
Market Housing	19
Affordable Housing Values	24
The Wider Housing Market	25
4. Changes in Development Costs	29
5. Changes in Land Value	30
6. Changing Policy Requirements	31
Local Plan Polices	31
Zero Carbon	31
Water Usage	33
Affordable Housing	33
The Golden Rules	33
Chelmsford Planning Obligations	33
Essex Coast Recreational Disturbance Avoidance & Mitigation Strategy (RAMS)	34
Community Infrastructure Levy	34
7. Regulation 19 Responses	36
DWD for Ptarmigan Chelmsford A Ltd., Countryside L&Q (North East Chelmsford) LLP and Halley Developments Ltd, with regard to North East Chelmsford for Chelmsford Garden Community (CGC)	36
Sphere 25 for the Dominvs Group with regard to land in Chelmsford, including the Meadows Shopping Centre, and specifically concerning the Meadows Shopping Centre	38

Gladman re several sites (Land East of Plantation Road, Boreham; Land East of Main Road, Bicknacre; Land at Maldon Road, Danbury; Land at Southend Road, Rettendon; Land at Southern Road, Howe Green; and Land South of East Hanningfield).....	38
Home Builders Federation	39
Strutt and Parker for Hopkins Homes, in relation to Strategic Growth Site 3a.....	40
Turner Morum for Vistry Homes, with regard to Strategic Site allocation 3 North of South Woodham Ferrers	41
DWD for Vistry Group, with regard to Zone 2 of Chelmsford Garden Community in North East Chelmsford (3,500 homes of CGC (SGS6) (ref:23/01751/OUT)); the approved Beaulieu development (3,600 homes to the south of CGC (ref:09/01314/EIA)); Land north of South Woodham Ferrers (SGS10) (1,020 homes (Ref: 21/01961/OUT).	41
Planning Issues for Churchill Living and McCarthy Stone	41
8. Strategic Sites	43
9. Findings and Conclusions	45
Updated Policy-on Appraisals	45
Appendix 1 – Newbuild Price Paid Data by Ward	50
Appendix 2 – Newbuild Asking Prices, April 2026.....	56
Appendix 3 – Derivation of Affordable Housing Value Assumptions – April 2026.....	59
Appendix 4 Sensitivity Testing Based on Full Policy Requirements.....	62
Wider Chelmsford.....	62
South Woodham Ferrers	63

1. Introduction

- 1.1 HDH Planning & Development Ltd, produced the *Chelmsford City Council Local Plan Viability Update* (HDH, August 2023) and the *Chelmsford City Council Regulation 19 Viability Note* (HDH, November 2024). The 2023 LPVU built on (and replaced) the Council's existing viability work, specifically the *Chelmsford City Council Local Plan Viability Study, including CIL Viability Review* (HDH, January 2018). The November 2024 Note considered how the changes to national policy and in the main inputs to the 2023 LPVU impacted on viability.
- 1.2 This further 2026 Update Note considered how changes in national policy, in the emerging Local Plan, and changes to and in the main inputs (costs and values) may impact on viability and whether it is necessary for the Council to fully update the viability evidence before submitting the Local Plan for examination.
- 1.3 Firstly, changes to national policy are considered, then changes in house prices and build costs, before the emerging Local Plan is reviewed. This Note should be read as an annex to the *Chelmsford City Council Local Plan Viability Update* (HDH, August 2023) and the *Chelmsford City Council Regulation 19 Viability Note* (HDH, November 2024), and is written as an update to those papers.

2. Changes in National Policy

- 2.1 Since 2023, numerous changes and potential changes to national policy have been announced. Some changes are as a result of the change in Government following the 2024 General Election, and others are carried forward from the wider development and updating of policy.

Updated NPPF

- 2.2 The 2023 LPVU was carried out in line with the then current NPPF. Since then, the NPPF has been updated several times.
- 2.3 The extant NPPF was published in December 2024 and was further updated in February 2025¹. This NPPF made some significant changes to the planning system, particularly to the way the overall requirement for housing is assessed (the Standard Method), however, it did not change the place of viability testing in the plan-making process, and the detail beyond that is largely unchanged.
- 2.4 In December 2025, the Government published a Draft NPPF² for consultation. The Draft NPPF is fundamental re-write of the national planning policy, making a number of significant changes to the planning system, however it stresses the importance of the system being 'genuinely plan-led'. The draft includes new national decision-making policies. It is proposed that these national decision-making policies are '*read alongside the policies in the development plan*' and are a material consideration when determining planning applications.
- 2.5 For the purpose of this note, the Draft NPPF carries forward the requirements to carry out a plan-wide viability assessment, and to ensure that the new Local Plan will deliver, making it clear that allocations for development must be viable:

2. *For plans that allocate specific sites for development the assessment should be undertaken with reference to national guidance and include:*
 - a. *A thorough site identification process to identify a sufficient range and quantity of potential sites;*
 - b. *An assessment of the availability, suitability and achievability (including likely viability) of those sites;*
 - c. *An assessment of the amount of development those sites have the potential to accommodate and the potential timescales over which development could be delivered¹⁶; and*
 - d. *The identification of the most appropriate sites for development taking into account the emerging vision and spatial strategy of the plan and the information above.*

- 2.6 The Draft NPPF also includes proposals to move or duplicate some of the text currently in the PPG, that relates to viability, into the body of the NPPF, thus giving it more weight. Annex B

¹ The December 2024 version of the National Planning Policy Framework was amended in February 2025 to correct cross-references from footnotes 7 and 8, and amend to the end of the first sentence of paragraph 155 to make its intent clear.

² [National Planning Policy Framework: proposed reforms and other changes to the planning system - GOV.UK](https://www.gov.uk/government/consultations/national-planning-policy-framework-proposed-reforms-and-other-changes-to-the-planning-system)

of the explanatory document sets out the reasoning behind the proposed changes in the Draft NPPF, headed '*Viability: Standardised inputs in viability assessment*' says:

Standardised inputs to viability assessments provide a consistent framework for evaluating development proposals and ensure both authorities and developers have greater certainty in the viability assessment process.

The government is therefore proposing moving the current Planning Practice Guidance subsection on 'Standardised inputs to viability assessment' into an annex to the draft Framework, and updating where needed, to support the proposed policies PM12, DM5 and GB8 above, subject to views received. The remainder of the existing viability PPG would remain in guidance. The proposed updates seek to support greater consistency, upfront clarity for all interested parties, and reduce the need for negotiation at the decision-making stage. At the same time, the proposals seek to ensure the system remains sufficiently responsive to different development types and risk profiles, to ensure development can proceed.

- 2.7 The consultation also sought views on changes in relation to growth testing, developer's returns and benchmark land values. The methodology used in this report is consistent with the extant December 2024 NPPF, however appropriate regard is had to the Draft NPPF.
- 2.8 Paragraph 35 of the NPPF says that plans should set out what development is expected to provide, and that the requirement should not be so high as to undermine the delivery of the plan. This requirement is unchanged.

The Golden Rules

- 2.9 The extant NPPF includes various sections (Paragraphs 67, 68, 155, 156 and 157) concerning releasing land from the Green Belt. Such releases are subject to the Golden Rules which require that the affordable housing contribution on such releases to be 15% above the highest existing affordable housing requirement which would otherwise apply to the development, subject to a cap of 50%. The CCC area does include areas of Green Belt, so these rules apply here.

As part of the 'Golden Rules' for Green Belt development set out in paragraphs 156- 157 of this Framework, a specific affordable housing requirement (or requirements) should be set for major development involving the provision of housing, either on land which is proposed to be released from the Green Belt or which may be permitted on land within the Green Belt. This requirement should:

- a) *be set at a higher level than that which would otherwise apply to land which is not within or proposed to be released from the Green Belt; and*
- b) *require at least 50% of the housing to be affordable, unless this would make the development of these sites unviable (when tested in accordance with national planning practice guidance on viability).*

NPPF Paragraph 67

Once Green Belts have been defined, local planning authorities should plan positively to enhance their beneficial use, such as looking for opportunities to provide access; to provide opportunities for outdoor sport and recreation; to retain and enhance landscapes, visual amenity and biodiversity; or to improve damaged and derelict land. Where Green Belt land is released for development through plan preparation or review, the 'Golden Rules' in paragraph 156 below should apply.

NPPF Paragraph 151

Where major development involving the provision of housing is proposed on land released from the Green Belt through plan preparation or review⁵⁸, or on sites in the Green Belt subject to a planning application⁵⁹, the following contributions ('Golden Rules') should be made:

- a. affordable housing which reflects either: (i) development plan policies produced in accordance with paragraphs 67-68 of this Framework; or (ii) until such policies are in place, the policy set out in paragraph 157 below;
- b. necessary improvements to local or national infrastructure; and
- c. the provision of new, or improvements to existing, green spaces that are accessible to the public. New residents should be able to access good quality green spaces within a short walk of their home, whether through onsite provision or through access to offsite spaces.

NPPF Paragraph 156

157. Before development plan policies for affordable housing are updated in line with paragraphs 67-68 of this Framework, the affordable housing contribution required to satisfy the Golden Rules is 15 percentage points above the highest existing affordable housing requirement which would otherwise apply to the development, subject to a cap of 50%⁶⁰. In the absence of a pre-existing requirement for affordable housing, a 50% affordable housing contribution should apply by default. The use of site-specific viability assessment for land within or released from the Green Belt should be subject to the approach set out in national planning practice guidance on viability.

NPPF Paragraph 157

- 2.10 The application of the Golden Rules is conditioned by footnotes 58, 59 and 60 of the NPPF:

⁵⁸ The Golden Rules do not apply to: (i) developments brought forward on land released from the Green Belt through plans that were adopted prior to the publication of this Framework; and (ii) developments that were granted planning permission on Green Belt land prior to the publication of this Framework.

⁵⁹ Including where there are variations made to existing permissions (where the existing permission involved development that was subject to the Golden Rules).

⁶⁰ The 50% cap does not apply to rural exception sites or community-led development exception sites, or if the local planning authority has a relevant existing policy which would apply to the development which is above 50%.

- 2.11 It is clearly envisaged that development on unallocated land within the Green Belt should be subject to the Golden Rules, in addition to the policy requirements set out elsewhere.

Planning Practice Guidance

- 2.12 The December 2025 consultation on the Draft NPPF asks a number of questions in relation to viability, including views on changes in relation to growth testing, developer's returns and benchmark land values. It does not propose new wording. It will be necessary to keep these under review.

Viability and plan making

- 2.13 The viability sections of the PPG (Chapter 10) were rewritten in 2018, and subsequently further updated. The changes provide clarity and confirm best practice, rather than prescribe a new approach or methodology. Having said this, the underlying emphasis of viability testing was unchanged.

- 2.14 The overall requirement was updated in December 2025:

How should plan makers set policy requirements for contributions from development?

Plans should set out the contributions expected from development. This should include setting out the levels and types of affordable housing provision required, along with other infrastructure (such as that needed for education, health, transport, flood and water management, green and digital infrastructure). This should include the minimum proportion of Social Rent homes required.

These policy requirements should be informed by evidence of infrastructure and affordable housing need, including the need for those who require Social Rent, and a proportionate assessment of viability that takes into account all relevant policies, and local and national standards, including the cost implications of the Community Infrastructure Levy (CIL) and section 106. Policy requirements should be clear so that they can be accurately accounted for in the price paid for land. To provide this certainty, Social Rent and other types of affordable housing requirements should be expressed as a single figure rather than a range. Different requirements may be set for different types or location of site or types of development.

PPG 10-001-20251216

- 2.15 The 2023 study took a proportionate approach, building on the Council's existing evidence, and considers all the local and national policies that will apply to new development.

The role for viability assessment is primarily at the plan making stage. Viability assessment should not compromise sustainable development but should be used to ensure that policies are realistic, and that the total cumulative cost of all relevant policies will not undermine deliverability of the plan. ... Policy requirements, particularly for affordable housing, should be set at a level that takes account of affordable housing and infrastructure needs and allows for the planned types of sites and development to be deliverable, without the need for further viability assessment at the decision making stage.

PPG 10-002-20251216

- 2.16 Whilst the wording was updated, the overall requirement remains similar. The emerging policy options that were under consideration by the Council were to be tested individually and cumulatively, to ensure that when taken together, that they are set at an appropriate level.

It is the responsibility of land owners, site promoters and developers to engage in plan making, take into account any costs including their own profit expectations and risks, and ensure that proposals for development are policy compliant. Policy compliant means development which fully complies with up to date plan policies. A decision maker can give appropriate weight to emerging policies. The price paid for land is not a relevant justification for failing to accord with relevant policies in the plan. Landowners and site purchasers should consider this when agreeing land transactions.

PPG 10-002-20251216

- 2.17 The Council will continue to engage with the promoters of the key sites in the Plan.

Assessing the viability of plans does not require individual testing of every site or assurance that individual sites are viable. Plan makers can use site typologies to determine viability at the plan making stage. Assessment of samples of sites may be helpful to support evidence. In some circumstances more detailed assessment may be necessary for particular areas or key sites on which the delivery of the plan relies.

PPG 10-003-20180724

- 2.18 The 2023 LPVU was based on typologies³ that were developed by having regard to the potential sites that are most likely to be included in the emerging Plan. Several potential strategic sites were also modelled, on an anonymised basis, so as to inform a decision as to whether or not they are to be included in the final iteration of the Local Plan. These potential strategic sites were then modelled based on information provided by the Council in the 2024 Viability Note, and are now retested, based on the latest information in this Note.

Plan makers should engage with landowners, developers, and infrastructure and affordable housing providers to secure evidence on costs and values to inform viability assessment at the plan making stage.

It is the responsibility of site promoters to engage in plan making, take into account any costs including their own profit expectations and risks, and ensure that proposals for development are policy compliant. Policy compliant means development which fully complies with up to date plan policies. A decision maker can give appropriate weight to emerging policies. It is important for developers and other parties buying (or interested in buying) land to have regard to the total cumulative cost of all relevant policies when agreeing a price for the land. Under no circumstances will the price paid for land be a relevant justification for failing to accord with relevant policies in the plan.

PPG 10-006-20190509

- 2.19 Consultation formed part of the preparation of the 2023 LPVU, and the comments made through the Regulation 18 consultation were reviewed and addressed in the 2024 Viability Note. The further technical comments relating viability made the Regulation 19 consultation are reviewed below.

Viability and decision taking

- 2.20 The December 2025 consultation on the Draft NPPF includes proposals to move or duplicate sections of the text currently in the PPG that relate to viability, into the body of the NPPF, thus giving it more weight.

Standardised inputs to viability assessment

- 2.21 Several sections have been updated, although the 2023 LPVU remains consistent with the changes. The PPG then sets out how land values should be considered, confirming the use of the Existing Use Value Plus (EUV+) approach.

To define land value for any viability assessment, a benchmark land value should be established on the basis of the [existing use value \(EUV\)](#) of the land, plus a premium for the landowner. The premium for the landowner should reflect the minimum return at which it is considered a reasonable landowner would be willing to sell their land. The premium should provide a reasonable incentive, in comparison with other options available, for the landowner to sell land for development while allowing a sufficient contribution to comply with policy

³ The PPG provides further detail at 10-004-20190509:

A typology approach is a process plan makers can follow to ensure that they are creating realistic, [deliverable policies](#) based on the type of sites that are likely to come forward for development over the plan period.

In following this process plan makers can first group sites by shared characteristics such as location, whether brownfield or greenfield, size of site and current and proposed use or type of development. The characteristics used to group sites should reflect the nature of typical sites that may be developed within the plan area and the type of development proposed for allocation in the plan.

requirements. Landowners and site purchasers should consider policy requirements when agreeing land transactions. This approach is often called ‘existing use value plus’ (EUV+).

PPG 10-014-20190509

2.22 The PPG goes on to set out:

Benchmark land value should:

- *be based upon existing use value*
- *allow for a premium to landowners (including equity resulting from those building their own homes)*
- *reflect the implications of abnormal costs; site-specific infrastructure costs; and professional site fees*

Viability assessments should be undertaken using benchmark land values derived in accordance with this guidance. Existing use value should be informed by market evidence of current uses, costs and values. Market evidence can also be used as a cross-check of benchmark land value but should not be used in place of benchmark land value. There may be a divergence between benchmark land values and market evidence; and plan makers should be aware that this could be due to different assumptions and methodologies used by individual developers, site promoters and landowners.

This evidence should be based on developments which are fully compliant with emerging or up to date plan policies, including affordable housing requirements at the relevant levels set out in the plan. Where this evidence is not available plan makers and applicants should identify and evidence any adjustments to reflect the cost of policy compliance. This is so that historic benchmark land values of non-policy compliant developments are not used to inflate values over time.

In plan making, the landowner premium should be tested and balanced against emerging policies. In decision making, the cost implications of all relevant policy requirements, including planning obligations and, where relevant, any Community Infrastructure Levy (CIL) charge should be taken into account.

PPG 10-015-20190509

2.23 The December 2025 consultation on the Draft NPPF asks a number of questions in relation to deriving the BLV. The approach adopted in this Update Note is to start with the EUV. The ‘plus’ element is informed by the price paid for policy compliant schemes to ensure an appropriate landowners’ premium.

Existing use value (EUV) is the first component of calculating benchmark land value. EUV is the value of the land in its existing use. Existing use value is not the price paid and should disregard hope value. Existing use values will vary depending on the type of site and development types. EUV can be established in collaboration between plan makers, developers and landowners by assessing the value of the specific site or type of site using published sources of information such as agricultural or industrial land values, or if appropriate capitalised rental levels at an appropriate yield (excluding any hope value for development).

Sources of data can include (but are not limited to): land registry records of transactions; real estate licensed software packages; real estate market reports; real estate research; estate agent websites; property auction results; valuation office agency data; public sector estate/property teams’ locally held evidence.

PPG 10-016-20190509

2.24 The methodology used in the 2023 LPVU followed this approach to establish the EUV. This approach was carried into the 2024 Viability Note and this further update.

Community Infrastructure Levy Regulations and Guidance

2.25 The Council has adopted CIL. The CIL Regulations are broad, so in any event it is necessary to have regard to them and the CIL Guidance (which is contained within the PPG) when considering appropriate rates of CIL. The CIL Regulations have not been updated since 2020 so CIL Regulation 122 remains as being of particular importance. This sets out that payments requested under the s106 regime must be:

- necessary to make the development acceptable in planning terms;
- directly related to the development; and
- fairly and reasonably related in scale and kind to the development.

Wider Changes Impacting on Viability

2.26 The Draft NPPF includes proposals to move or duplicate some of the text currently in the PPG, that relates to viability, into the body of the NPPF, thus giving it more weight. The consultation then seeks views on changes in relation to growth testing, developer's returns and benchmark land values. It will be necessary to keep this under review.

2.27 There have been several changes at a national level over the last few years that are timely to mention.

Accessible and Adaptable Standards

2.28 In July 2022, the Government announced the outcome of the 2020 consultation on raising accessibility standards of new homes⁴ saying that it intended to mandate M4(2) (Category 2: Accessible and Adaptable dwellings) requirement in Building Regulations as a minimum standard for all new homes. This was reflected in the 2023 LPVU and the further appraisals in the 2024 Viability Note.

2.29 In the Draft NPPF, under policy *HO5: Meeting the needs of different groups*, the Government proposed the following text:

In relation to accessible housing, setting out the proportion of new housing that should be delivered to requirement M4(2) and M4(3) of the Building Regulations. M4(2) requirements should reflect local levels of need, and should ensure that at least 40% of new housing delivered over the course of the plan is delivered to M4(2) or M4(3) standards.

2.30 The requirement tested in the 2023 LPVU and the further appraisals in the 2024 Viability Note was for more than 40% M4(2) housing, so is consistent in this regard. The Local Plan draft policy seeks, on sites of 10 or more dwellings, 50% to be to Part M4(2) (Accessible and adaptable dwellings) and on sites of 30 or more dwellings, 5% of affordable homes to be to M4(3)b (Wheelchair user dwellings).

⁴ [Raising accessibility standards for new homes: summary of consultation responses and government response - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/raising-accessibility-standards-for-new-homes)

- 2.31 The cost of a wheelchair accessible dwelling, based on the Wheelchair Housing Design Guide for a 3 bed house, is taken to be £25,136 per dwelling⁵. The cost of a wheelchair adaptable dwelling, based on the Wheelchair Housing Design Guide for a 3 bed house, is taken to be £10,111 per dwelling⁶. The cost of Category 2 is taken to be £521⁷. These costs have been indexed to £37,700 per dwelling, £15,170 per dwelling and £780 per dwelling respectively and are applied in the appraisals set out at the end of this note.

Environmental Standards

- 2.32 In the spring of 2024, the Government carried out a consultation on how national standards may be changed as part of the move to Zero Carbon. The Department of Levelling up, Communities and Housing published revisions to Conservation of Fuel and Power, Approved Document L of the Building Regulations as a ‘stepping stone’ on the pathway to Zero Carbon homes that sets the target of an interim 31% reduction in CO₂ emissions over 2013 standards for dwellings. This is assumed to apply to all new homes in this assessment.
- 2.33 At the same time the then Housing Minister made a Written Parliamentary Statement⁸ which set out the Government’s position in this regard as follows:

... Any planning policies that propose local energy efficiency standards for buildings that go beyond current or planned buildings regulation should be rejected at examination if they do not have a well-reasoned and robustly costed rationale that ensures:

- *That development remains viable, and the impact on housing supply and affordability is considered in accordance with the National Planning Policy Framework.*
- *The additional requirement is expressed as a percentage uplift of a dwelling’s Target Emissions Rate (TER) calculated using a specified version of the Standard Assessment Procedure (SAP).*

Where plan policies go beyond current or planned building regulations, those policies should be applied flexibly to decisions on planning applications and appeals where the applicant can demonstrate that meeting the higher standards is not technically feasible

- 2.34 Whilst this direction does not preclude the introduction of policies that go beyond national standards, this does suggest that such policies will need to be well justified and subject to greater scrutiny.
- 2.35 Under the Draft NPPF, the Government consulted on the following text:

Plan-making policies

CC1: Planning for climate change

- 1 *Development plans should take a proactive approach to mitigating climate change and supporting the transition to net zero³⁰. They should also take a proactive approach to adapting to climate change, taking into account the implications of extreme weather*

⁵ Paragraph 152 Housing Standards Review – Final Implementation Impact Assessment (DCLG, March 2015).

⁶ Paragraph 153 Housing Standards Review – Final Implementation Impact Assessment (DCLG, March 2015).

⁷ Paragraph 157 Housing Standards Review – Final Implementation Impact Assessment (DCLG, March 2015).

⁸ [Written statements - Written questions, answers and statements - UK Parliament](#)

and long-term climate trends including overheating, wildfires, drought, flood risk, coastal change, water supply, biodiversity and landscapes. They should do this by:

- a. *Proposing development patterns through their spatial strategy and allocations which:

 - i. *can help contribute to radical reductions in greenhouse gas emissions (which can be informed by an assessment of baseline carbon emissions and the potential effect of development options on future emissions and their mitigation); and*
 - ii. *avoid increased vulnerability and improve resilience to the effects of climate change (including through providing for necessary infrastructure improvements and the future relocation of homes and other uses where public safety would be at risk, for example as a consequence of coastal change);**
- b. *Addressing any specific risks from climate change in their proposed allocations for development, and necessary adaptations, both of which should be considered for the anticipated lifetime of the development;*
- c. *Setting local water efficiency standards for new development where these are justified in accordance with policy PM13; and*
- d. *Identifying opportunities for green infrastructure provision and nature-based solutions which can safeguard and improve carbon storage, support nature recovery and resilience, and which take account of Local Nature Recovery Strategies in accordance with policy N1.*

National decision-making policies

CC2: Mitigation of climate change

1. *In order to contribute to climate change mitigation and the transition to net zero, development proposals should, where relevant to the proposal:

 - a. *Be located where a genuine choice of sustainable transport modes exists, and improve opportunities for walking, wheeling, cycling and public transport, in accordance with policies TR3 and TR4;*
 - b. *Support good access to facilities to limit the need to travel, whether through the development's location, through development densities which improve catchment populations for local services, or by incorporating community facilities and premises to support local employment opportunities;*
 - c. *Use design approaches which conserve energy and other resources in accordance with policy DP3(1)(c);*
 - d. *Take advantage of opportunities to re-use existing structures and materials, including by re-using non-contaminated excavated soil and hardcore within the site;*
 - e. *Take advantage of opportunities to draw low carbon energy from decentralised networks (such as district heat networks), where these are available, and to co-locate energy and heat generators and users, especially to take advantage of suppliers of surplus heat and energy;*
 - f. *Contribute to the creation or restoration of habitats which can act as carbon stores, such as through woodland planting and peatland restoration, while avoiding harm to habitats which can act as important carbon stores, including peatland and salt marsh; and*
 - g. *Not increase the extraction of fossil fuels unless it is in accordance with policy M5.**
2. *Substantial weight should be given to the benefits of improving the energy efficiency of existing buildings and/or drawing energy from district heat networks, renewable and*

low carbon sources (including through the installation of heat pumps and solar panels where these do not already benefit from permitted development rights).

2.36 The Draft NPPF consultation also says (on page 16):

6 Streamlining local standards. *We want to promote certainty for applicants and speed up local plan production by limiting quantitative standards in development plans to only those specific issues where local variation is justified. We also want to limit duplication of matters which are covered by the Building Regulations – other than where there is the existing ability to use ‘optional technical standards’.*

2.37 The Draft NPPF consultation, in Policy *PM13: Setting standards* says:

1. *Quantitative standards set through development plan policies should be limited to infrastructure provision, affordable housing requirements, parking and design and placemaking, and where this will provide clarity and a high degree of certainty about the requirements that relevant development proposals are expected to meet. Such standards should:*
 - a. *Be justified, drawing upon relevant evidence of local characteristics and needs, while utilising or adapting relevant national standards where it is appropriate to do so (such as in relation to green infrastructure). Evidence in support of standards should be proportionate, in accordance with policy PM8, especially where relevant national standards already exist;*
 - b. *Not cover matters which are already addressed by Building Regulations, other than in relation to:*
 - i. *accessibility standards, for which local standards in relation to requirement M4(2) (accessible and adaptable dwellings) and/or M4(3) (wheelchair user dwellings) of the Building Regulations should be set in line with policy HO5; or*
 - ii. *water efficiency, for which it may be appropriate to apply the tighter Building Regulations optional requirement where justified, or exceptionally a more stringent local standard in areas of serious water stress.*
 - c. *Not cover matters relating to the construction or internal layout of buildings unless they are to implement the nationally described space standard.*

2.38 The Draft NPPF consultation, in Policy *PM13: Setting standards*, says:

*In addition, the policy proposes preventing standards which cover matters already addressed by building regulations, with the exception of the established national technical standards for accessibility and water efficiency. In relation to water efficiency, the policy recognises that some areas may need to set a tighter standard than the existing optional requirement, due to the pressure on water supplies. This reflects relevant parts of the Written Ministerial Statement made on 19 December 2023 titled *The Next Stage in Our Long-Term Plan for Housing Update*. The Department for Environment, Food and Rural Affairs ongoing consultation on revising water efficiency standards will not affect this policy.*

Beyond these areas, the policy identifies specific areas where local standards should not be set. This includes matters relating to the construction or internal layout of buildings (other than the nationally described space standard), which the government considers are matters best left to the market to determine.

The policy as drafted would limit local standards for energy efficiency, as we are concerned that varying standards across local plans make it difficult for the construction sector to adapt and deploy energy efficiency technologies at scale. If this specific restriction were to be taken forward following consultation, we intend to use secondary legislation to commence section 43 of the Deregulation Act 2015 to amend the Planning & Energy Act 2008 to make clear that local plans should not set higher energy efficiency standards for residential development. The draft

Framework policy would also replace the policy contained in the 2023 Written Ministerial Statement titled Planning – Local Energy Efficiency Standards Update.

- 2.39 The Government announced in March 2026 that it will be implementing the Future Homes Standard and Future Building Standard through Building Regulations in 2027⁹.
- 2.40 The draft Local Plan policy exceeds current national standards and the Future Homes Standard.

Biodiversity Net Gain

- 2.41 The Environment Act received Royal Assent in November 2021 and mandates that new developments must deliver an overall increase in biodiversity. The PPG was updated in 2024¹⁰ in this regard. The requirement is that developers ensure habitats for wildlife are enhanced relative to pre-development state. Developers must assess the type of habitat and its condition before submitting plans and then demonstrate how they are improving biodiversity.
- 2.42 Green improvements on-site are preferred (and expected), but in the circumstances where they are not possible, developers will need to pay a levy for habitat creation or improvement elsewhere. The mandatory BNG requirement was introduced for most major developments from February 2024, and for small sites/minor development from April 2024.

The definition of a minor development for the purposes of BNG is development that is not major development and includes:

- *residential development where the number of dwellings is between 1 and 9 on a site of an area 1 hectare or less, or if the number of dwellings is unknown, the site area is less than 0.5 hectares.*
- *commercial development where floor space created is less than 1,000 square metres or total site area is less than 1 hectare.*
- *development that is not the winning and working of minerals or the use of land for mineral-working deposits.*
- *development that is not waste development.*

- 2.43 In May 2025 the Government undertook a consultation¹¹ on the implementation of BNG. This would introduce a ‘*new medium development threshold for sites between 10 and 49 homes, up to 1.0 ha in size*’. Alternatively, consideration was given to exempting all minor developments. Bearing in mind that this was a consultation, the outcome of which is not yet known, it is assumed the BNG requirements remain as per the extant NPPF and PPG.
- 2.44 The Draft NPPF consultation in Policy *N1: Identifying environmental opportunities and safeguards*, says:

Development plans should only set local standards for biodiversity net gain which are in excess of the statutory net gain requirement where this is for specific site allocations, and is fully

⁹ [FHBS_Circular.pdf](#)

¹⁰ [Biodiversity net gain - GOV.UK \(www.gov.uk\)](#)

¹¹ [Improving the implementation of biodiversity net gain for minor, medium and brownfield development - GOV.UK](#)

justified and deliverable. Any such requirements should not extend to categories of development which are exempt from statutory biodiversity net gain.

- 2.45 Pending publication of revised standards, the national requirements are unchanged.

Fire Safety Standards

- 2.46 The Government published the outcome in March 2024 in the updated Building Regulations¹². The guidance makes second staircases mandatory in all new residential buildings over 18m (about 6 storeys) in England from September 2026. The modelling in the further appraisals set out at the end of this note reflect this.

Levelling-up and Regeneration Act

- 2.47 The *Levelling-up and Regeneration Act* become law in October 2023. Many of the measures in the Act will be implemented, in due course, through secondary legislation and / or regulations. The provisions within the Act will have a significant impact on the overall plan-making process, but they do not alter the place of viability in the current Local Plan process.
- 2.48 The *Levelling-up and Regeneration Act* includes reference to a new national Infrastructure Levy. The Government has announced that this will not be taken forward.

Planning Application Fees

- 2.49 Planning fees increase each year. The updated amounts are applied¹³ in the appraisals set out at the end of this note.

Building Safety Levy

- 2.50 The Building Safety Levy (BSL) was announced in February 2021 to pay for the remediation of building safety defects as part of the response to the Grenfell Tower fire. In March 2025, the Government announced that the Levy will be introduced in Autumn 2026. In Chelmsford City Council area, the Levy, if introduced as per the consultation, would be £18.16 per sqm for brownfield land and £36.32 per sqm for greenfield land¹⁴ and would apply to major development.
- 2.51 The BSL is included in the appraisals included at the end of this note.

Viability Guidance

- 2.52 Neither the NPPF nor the PPG set out step-by-step technical guidance, although the updated PPG includes guidance in a number of specific areas. The earlier viability work drew on the *Viability Testing in Local Plans – Advice for planning practitioners* (LGA/HBF – Sir John

¹² [Amendments to the Approved Documents - Approved Document B: Fire safety volumes 1 and 2 \(publishing.service.gov.uk\)](https://www.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/131444/amendments-to-the-approved-documents-approved-document-b-fire-safety-volumes-1-and-2.pdf)

¹³ [Planning fees: annual indexation from 1 April 2026](https://www.gov.uk/government/news/planning-fees-annual-indexation-from-1-april-2026)

¹⁴ [Building Safety Levy: Technical consultation response - GOV.UK](https://www.gov.uk/government/consultations/building-safety-levy-technical-consultation-response)

Harman) June 2012¹⁵ (known as the Harman Guidance¹⁶), and followed the relevant RICS guidance being the *Financial viability in planning: conduct and reporting RICS professional statement, England* (1st Edition, May 2019) and *Assessing viability in planning under the National Planning Policy Framework 2019 for England, GUIDANCE NOTE* (RICS, 1st edition, March 2021).

- 2.53 No further relevant guidance has been published.

Affordable Housing

- 2.54 Paragraph 65 of the extant NPPF sets out national thresholds for the provision of affordable housing. These are unchanged since 2023:

Provision of affordable housing should not be sought for residential developments that are not major developments, other than in designated rural areas (where policies may set out a lower threshold of 5 units or fewer). To support the re-use of brownfield land, where vacant buildings are being reused or redeveloped, any affordable housing contribution due should be reduced by a proportionate amount.

- 2.55 Two requirements of earlier national policy have been dropped. Under Footnote 31 of the NPPF, the requirements for 25% for the affordable housing to be First Home no longer applies. The requirement for 10% of all homes to be Affordable Home Ownership (as per paragraph 66 of the 2023 NPPF¹⁷) no longer applies.
- 2.56 The Council has updated its draft policy in this regard, to seek a tenure mix that aligns more closely with its identified need. This also takes into account the greater emphasis for Social Rent as per paragraphs 64 and 71 of the NPPF. This change is reflected in the appraisals set out at the end of this Note.

¹⁵ Viability Testing in Local Plans has been endorsed by the Local Government Association and forms the basis of advice given by the, MHCLG funded, Planning Advisory Service (PAS).

¹⁶ [viability-testing-local-p-42b.pdf](#)

¹⁷ [\[ARCHIVED CONTENT\]](#)

3. Changes in House Prices

Market Housing

- 3.1 The residential value assumptions in the 2023 LPVU were researched gathered in March 2023. There are a range of data sources that can be referenced; however the Land Registry is the most complete.

Table 3.1 Change in Average House Prices

	Chelmsford CC	Essex	England & Wales
2023-03	£375,186	£363,325	£274,238
2026-01	£378,998	£361,744	£285,111
Change	£3,812 1.02%	−£1,581 −0.44%	£10,873 3.96%

Source: Land Registry (April 2026)

- 3.2 This data shows that average prices have increased marginally in Chelmsford, however, they have decreased by a little across wider Essex. This data can be disaggregated and newbuild sales separated out.

Table 3.2 Change in Average Newbuild House Prices – Chelmsford

	Newbuild	Existing
2023-03	£297,073	£379,203
2025-11	£321,404	£387,793
	£24,331 8.19%	£8,590 2.27%

Source: Land Registry (April 2026)

- 3.3 The Land Registry’s latest data suggests that the average newbuild sale price has increased by about 8% over the last 3 years in the Council area.
- 3.4 The 2023 LPVU included data on newbuild price paid data sourced from Landmark (Table 4.4 Table 4.5 and Table 4.6, and Figures 4.6 and 4.7). In this note, similar data from Landstack is analysed, the price paid data from the Land Registry is married with the floor areas sourced from the EPC Register, for newbuild sales since the start of 2023. As set out in Table 4.4 of the 2023 LPVU, there was little data available from 2021 or 2022, when that report was being prepared. The updated data has limited data from 2025 and 2026.

Table 3.3 Newbuild Price Paid Data by Year – Chelmsford CC 2023 - 2026

	Detached	Flats	Semi-detached	Terraced	All
Count					
2023	120	180	82	14	396
2024	107	142	47	16	312
2025	25	31	12	5	73
2026	0	0	0	0	0
All	252	353	141	35	781
Average of Price Paid £					
2023	£675,569	£274,198	£498,528	£466,285	£449,069
2024	£664,037	£262,159	£503,094	£401,906	£443,444
2025	£640,225	£313,759	£492,373	£469,500	£465,591
2026					
All	£667,166	£272,829	£499,526	£437,314	£448,366
Average of £ per sqm					
2023	£4,603	£4,337	£4,794	£4,746	£4,529
2024	£4,794	£4,960	£4,879	£4,873	£4,888
2025	£5,105	£4,642	£5,309	£4,363	£4,896
2026					
All	£4,729	£4,616	£4,866	£4,749	£4,704

Source: Land Registry and EPC Register (April 2026)

- 3.5 The data compares with that presented in Appendix 5 of the 2023 LPVU. At that time the average price of a newbuild flat was £293,489 (£4,723 per sqm) and the average price of a house was £525,582 (£4,271 per sqm). Now (April 2026) the average price of a newbuild flat is £272,829 (£4,616 per sqm) and the average price of a house is £594,557 (£4,782 per sqm). The Land Registry data presented at the start of this chapter suggested that newbuild house prices have increased by just over 8%. This price paid data suggests that the price of newbuild flats have fallen by about 7%, and by about 2.3% on a £ per sqm basis, whilst the price of houses has increased by about 13.1%, and by about 12% when considered on a £ per sqm basis.
- 3.6 The above data can be disaggregated and is presented in **Appendix 1**. The data compares with that presented in Appendix 5 of the 2023 LPVU.
- 3.7 A survey of newbuild asking prices was carried out in March 2023, the results of which were presented in Tables 4.9 and 4.10 of the 2023 LPVU. This was refreshed in September 2024. There were about 100 newbuild homes being advertised in 2023, and 127 in 2024, although this included 6 specialist older people's homes.

Table 3.4a Survey of Newbuild Asking Prices – September 2024. Average £

	Detached	Flat	FOG	Semi-detached	Terraced	All
Bicknacre	£708,750			£500,000		£692,692
Hawthorn Close	£708,750			£500,000		£692,692
Broomfield	£875,000					£875,000
Paglesham Place	£875,000					£875,000
Chelmsford	£784,187	£505,913	£298,500	£496,831	£546,163	£583,584
Banters Lane	£795,000					£795,000
Beaulieu Gate	£560,000	£258,138		£510,500		£354,406
Beaulieu Grange	£630,995	£311,663	£252,000	£510,995	£718,995	£486,206
Beaulieu Heath	£731,665		£345,000	£481,665	£284,995	£506,109
Cathedral View		£673,125				£673,125
Dorset & Victoria House		£293,333				£293,333
Hanningfield Park	£786,667			£447,500	£550,000	£634,167
Larks Lane	£725,000					£725,000
Oakwood Terrace	£970,000					£970,000
Rochester Mews	£800,000					£800,000
Springfield Road		£280,000				£280,000
The Lakes Channels		£778,889				£778,889
Waltham Grange Close	£875,000					£875,000
Wimbush Waters	£787,500	£475,000		£515,000		£703,929
Chignal St James	£1,350,000			£1,850,000		£1,516,667
Kilnfield Barns	£1,350,000			£1,850,000		£1,516,667
Danbury	£1,175,000					£1,175,000
Penny Royal Road	£1,175,000					£1,175,000
Great Baddow	£750,000					£750,000
Longmead Avenue	£750,000					£750,000
Margretting	£1,000,000					£1,000,000
Larcombe Mews	£1,000,000					£1,000,000
Runwell	£705,828					£705,828
St Luke's Park	£705,828					£705,828
Stock	£1,346,667					£1,346,667
Common Road	£1,595,000					£1,595,000
Farrows Farm	£1,222,500					£1,222,500
West Hanningfield	£1,200,000					£1,200,000
Lower Stock Road	£1,200,000					£1,200,000
ALL	£832,701	£505,913	£298,500	£576,616	£546,163	£666,820

Source: Market Survey (September 2024)

Table 3.4b Survey of Newbuild Asking Prices – September 2024. Average £ per sqm

	Detached	Flat	FOG	Semi-detached	Terraced	All
Bicknacre	£4,850			£4,545		£4,826
Hawthorn Close	£4,850			£4,545		£4,826
Broomfield						
Paglesham Place						
Chelmsford	£5,247	£5,828	£4,496	£5,290	£5,609	£5,525
Banters Lane	£5,064					£5,064
Beaulieu Gate	£5,138	£5,268		£5,097		£5,210
Beaulieu Grange	£5,172	£4,641	£4,200	£5,836		£5,161
Beaulieu Heath	£4,899		£4,792	£4,828	£6,064	£5,122
Cathedral View		£6,501				£6,501
Dorset & Victoria House		£5,112				£5,112
Hanningfield Park				£4,566	£4,701	£4,611
Larks Lane						
Oakwood Terrace	£6,292					£6,292
Rochester Mews	£5,049					£5,049
Springfield Road	£0	£5,490				£5,490
The Lakes Channels	£0	£6,705				£6,705
Waltham Grange Close	£4,187					£4,187
Wimbush Waters	£4,959	£6,090		£5,421	£0	£5,224
Chignal St James	£7,511			£5,911	£0	£6,977
Kilnfield Barns	£7,511			£5,911	£0	£6,977
Danbury	£4,519					£4,519
Penny Royal Road	£4,519					£4,519
Great Baddow						
Longmead Avenue						
Margretting	£6,329					£6,329
Larcombe Mews	£6,329					£6,329
Runwell	£4,103					£4,103
St Luke's Park	£4,103					£4,103
Stock	£7,517					£7,517
Common Road	£0					
Farrows Farm	£7,517					£7,517
West Hanningfield	£4,301					£4,301
Lower Stock Road	£4,301					£4,301
ALL	£5,176	£5,828	£4,496	£5,282	£5,609	£5,419

Source: Market Survey (September 2024)

- 3.8 In 2023 the average newbuild asking price was £5,168 per sqm, the 2024 equivalent figure was about 5% higher at £5,419 per sqm.
- 3.9 The survey data was further refreshed in 2026, when there were 59 newbuild homes being advertised for sale, again this included 6 specialist older people's homes. The research is presented in **Appendix 2** and summarised below:

Table 3.5 Survey of Newbuild Asking Prices – April 2026.

		Detached	Flat	Semi-detached	Terraced	All
Chelmsford						
Banters Lane	£			£525,000		£525,000
	£/sqm			£4,200		£4,200
Beaulieu	£	£792,000				£792,000
	£/sqm	£4,791				£4,791
Beaulieu Grange	£	£624,995	£241,333	£630,995		£500,441
	£/sqm	£5,123	£4,827	£5,097		£4,966
Cathedral View	£		£350,000			£350,000
	£/sqm		£5,423			£5,423
Hall Street	£			£650,000		£650,000
	£/sqm			£4,305		£4,305
Hawthorn Close	£	£650,000				£650,000
	£/sqm	£4,063				£4,063
Lucks Lane	£	£525,000				£525,000
	£/sqm	£8,203				£8,203
Moulsham Green View	£	£1,150,000			£1,850,000	£1,383,333
	£/sqm	£7,002			£6,631	£6,878
Roxwell Row	£	£986,429				£986,429
	£/sqm	£5,428				£5,428
The Chapel	£				£437,500	£437,500
	£/sqm				£5,306	£5,306
Waterloo Chambers	£		£367,500			£367,500
	£/sqm		£5,177			£5,177
Wimbush Waters	£	£1,236,000	£425,000	£499,999		£1,015,000
	£/sqm	£5,979	£5,449	£5,263		£5,801
	£	£961,136	£333,385	£603,747	£908,333	£718,130
	£/sqm	£5,602	£5,249	£4,792	£5,747	£5,411
Great Baddow						
Galleywood Road	£	£562,500				£562,500
	£/sqm	£5,461				£5,461
	£	£562,500				£562,500
	£/sqm	£5,461				£5,461
Margaretting						
Larcombe Mews	£	£855,000				£855,000
	£/sqm	£5,344				£5,344
	£	£855,000				£855,000
	£/sqm	£5,344				£5,344
Rettondon Common						
Hanningfield Park	£	£605,000		£425,000		£569,000
	£/sqm	£4,205		£4,337		£4,231
	£	£605,000		£425,000		£569,000

	£/sqm	£4,205		£4,337		£4,231
Sandon						
East Hanningfield Road	£	£1,750,000				£1,750,000
	£/sqm	£5,037				£5,037
	£	£1,750,000				£1,750,000
	£/sqm	£5,037				£5,037
Woodham Ferrers						
Farmstead Manor	£	£833,333				£833,333
	£/sqm	£5,426				£5,426
	£	£833,333				£833,333
	£/sqm	£5,426				£5,426
Chelmsford Council	£	£927,794	£333,385	£583,886	£908,333	£743,372
	£/sqm	£5,371	£5,249	£4,716	£5,747	£5,291

Source: Market Survey (April 2026)

- 3.10 In 2023 the average newbuild asking price was £5,168 per sqm. In 2024 equivalent figure was about 5% higher at £5,419 per sqm. Now, in 2026, the average newbuild asking price is a little less at £5,291 per sqm. It is important to note that there are nuances within this, for example, in and around Chelmsford, average newbuild prices are a little higher.

Affordable Housing Values

- 3.11 The derivation of the value assumptions for affordable housing was set out from paragraph 4.61 of the 2023 LPVU.
- 3.12 In the 2023 LPVU, the assumptions were that Social Rent would have a value of 50% of market value (para 4.72), and Affordable Rent would have a value of 55% of market value (para 4.87). In 2023, this derived a value of about £2,570 per sqm or so on larger greenfield sites around Chelmsford (para 4.83). It was also assumed that Affordable Home Ownership units would have a value of 70% market value (para 4.88 and 4.93).
- 3.13 The assessment of values has been updated using the same method. The calculations are set out in **Appendix 3**.
- 3.14 In 2024, the Council engaged with Registered Providers to establish how the prices paid for affordable housing may have changed since 2023, and the RPs have commented as follows:
- Across tenures recent purchases have been at £3,100 per sqm to the north of Chelmsford.
 - Affordable Rent 55% to 60% of Market Value, being £2,426 to £2,776 per sqm, depending on the size of the units in question.
 - Payback period assumptions are based on 30 and 45 year timeframe. Values of Affordable Rent value is in the range of 45% – 55% of market value.

- 3.15 The 55% of market value assumption used in 2023 remains appropriate. This is somewhat less than the calculated value, based on the LHA cap (see **Appendix 3**) for Affordable Rent housing. The value assumption for Social Rent would now be reduced to 40% market value (however the Council does not seek Social Rent, except on sites subject to the Golden Rules).

The Wider Housing Market

- 3.16 The development identified in the new Local Plan will be built out over many years and across development cycles. It is useful to consider how values may change in the future. There is a degree of uncertainty in the housing market as reported by the RICS. The March 2026 RICS UK Residential Market Survey¹⁸ said:

Geopolitically driven macro pressures weigh on housing market activity and the near-term outlook

- *Rising borrowing costs knock buyer demand and sales volumes*
- *Aggregate house prices seen softening, with near-term expectations pointing to further modest declines in the months ahead*
- *Twelve-month outlook for activity and prices turns from positive to broadly flat*

The March 2026 RICS UK Residential Market Survey results show the macro-related fallout linked to the conflict in the Middle East is taking its toll on both current activity and forward-looking sentiment. With intensifying inflationary pressures pushing borrowing costs higher, buyer demand has weakened, while near-term expectations have turned significantly more cautious over the month.

At the headline level, the new buyer enquiries net balance slipped to -39%, down from -29% in February. This marks the weakest return for the survey's measure of buyer demand (in net balance terms) since August 2023, with most parts of the UK seeing a noticeable deterioration over the past couple of months.

On the back of this, the volume of agreed sales has also been adversely affected, with the aggregate net balance falling from -13% previously to -34% in March. Again, this represents the softest reading since the summer of 2023. Looking ahead, near-term sales expectations turned significantly more pessimistic, with the latest net balance dropping to -33% (compared to a neutral reading of -4% beforehand), indicating that respondents now anticipate a further contraction in sales activity over the coming months. With respect to the twelve-month outlook, a net balance of -1% was posted for the year-ahead sales expectations series, depicting a broadly stagnant assessment rather than the moderately positive view returned last month.

Turning to the supply picture, the new instructions indicator registered a net balance of -6%, implying a marginally slower flow of listings coming onto the market relative to recent reports. Alongside this, respondents note that market appraisal activity is running at a similar pace to the equivalent period last year, signalling that a generally flat trend in new instructions could be anticipated over the short term. That said, with activity weakening, the level of unsold stock on agents' books has risen to an average of 47 properties, up from closer to 45 at the start of the year.

For house prices, the aggregate net balance of -23% is down from readings of -14% and -10% in the previous two iterations of the survey. This points to some renewed downward pressure on prices coming through, albeit still relatively moderate for the time being. At a regional level,

London, East Anglia, as well as the South East and South West of England all exhibit more negative net balance readings for the house price gauge compared to the headline average. Conversely, respondents in Northern Ireland and Scotland continue to report rising prices.

¹⁸ [UK Residential Market Survey](#)

Going forward, the near-term house price expectations series recorded a net balance of -43% in March at the UK-wide level, down sharply from -19% last month, signalling that downward pressure on values is anticipated to build over the coming three months. On a twelve-month view, while sentiment has deteriorated of late, the latest price expectations net balance of +2% is consistent with a broadly flat trend, even though this stands in stark contrast to the more elevated readings of +43% and +33% posted in January and February respectively.

In the rental market, a net balance of +10% of survey participants reported a pick-up in tenant demand in March (part of the non-seasonally adjusted monthly lettings dataset). At the same time, the landlord instructions measure remains firmly negative at -25%. In terms of rental price expectations, a net balance of +29% of contributors foresee rents moving higher over the near term, up from +20% last time around.

3.17 HM Treasury brings together some of the forecasts in its regular *Forecasts for the UK economy: a comparison of independent forecasts* report.

Table 3.6 Consolidated House Price Forecasts

Table 2 - 2026: Growth in prices and monetary indicators (% change)										
Forecasters and dates of forecasts		CPI (Q4 on Q4 year ago, %)	RPI (Q4 on Q4 year ago, %)	Average earnings (Q4 on Q4 year ago, %)	Sterling index (Jan 2005=100)	Official Bank rate (level in Q4, %)	Oil price (Brent, \$/bbl)	Nominal GDP	House price inflation (Q4 on Q4 year ago, %)	
City forecasters										
Barclays Capital	March	*	2.1	3.3	-	-	3.50	67.0	-	-
Berenberg	March	*	2.5	-	2.8	-	3.00	-	-	-
Bloomberg Economics	Dec		2.1	-	-	-	3.50	-	-	-
Capital Economics	March	*	2.6	3.7	2.4	81.0	3.25	50.0	3.2	3.5
Deutsche Bank	Feb		-	-	-	-	-	-	-	-
HSBC	March	*	2.1	2.8	3.6	-	3.50	-	-	-
JP Morgan	March	*	2.6	-	-	-	3.25	-	4.1	-
KPMG	March	*	3.1	-	-	-	3.50	84.5	-	-
Natwest Markets	Feb		2.1	2.9	3.0	-	3.50	68.0	3.4	-
Nomura	March	*	2.5	3.1	3.0	-	3.25	-	-	-
Pantheon	Jan		2.7	2.9	4.0	-	3.50	-	-	2.0
UBS	March	*	2.2	2.3	3.1	-	3.25	-	3.1	-
Non-City forecasters										
British Chambers of Commerce	March	*	2.7	-	3.9	-	3.75	-	-	-
Beacon Economic Forecasting	March	*	2.8	3.1	3.7	84.2	3.50	72.8	4.3	0.7
CBI	Dec		2.4	2.6	2.8	-	3.50	63.6	3.9	-
CEBR	March	*	2.0	3.0	3.1	85.0	3.25	-	-	4.5
Experian Economics	March	*	2.7	3.5	3.0	-	3.50	75.0	-	3.0
Heteronomics	March	*	3.3	4.1	3.6	85.4	3.75	66.9	-	2.0
ICAEW	Jan		2.1	-	-	-	3.25	-	-	-
ITEM Club	Feb		2.3	-	-	-	3.5	-	-	2.8
Liverpool Macro Research	Jan		2.3	3.1	3.5	84.2	3.25	-	-	-
NIESR	Feb		2.2	3.3	3.7	-	3.25	-	-	-0.2
Oxford Economics	Feb		2.5	3.6	2.8	82.3	3.25	62.3	3.3	2.1
OECD	Dec		1.9	-	-	-	3.50	-	3.8	-
IMF	Oct		2.5	-	-	-	-	-	-	-
Average of forecasts received in the last 3 months (excludes OBR, IMF and OECD forecasts)										
Independent			2.5	3.2	3.3	83.7	3.4	68.3	3.6	2.3
Received this month (marked *)			2.6	3.2	3.2	83.9	3.4	69.4	3.7	2.7
City			2.5	3.0	3.1	81.0	3.4	67.4	3.5	2.8
Range of forecasts received in the last 3 months (excludes OBR, IMF and OECD forecasts)										
Highest			3.3	4.1	4.0	85.4	3.75	84.5	4.3	4.5
Lowest			2.0	2.3	2.4	81.0	3.00	50.0	3.1	-0.2
Median			2.5	3.1	3.1	84.2	3.38	67.5	3.3	2.1
OBR	Mar		1.9	2.9	3.1	84.6	3.31	63.1	3.3	2.7

Source: Forecasts for the UK economy: a comparison of independent forecasts No 464 (HM Treasury, March 2026).



3.18 Property agents Savills are forecasting the following changes in house prices, suggesting a continued growth:

Table 3.7 Savills Property Price Forecasts

	2026	2027	2028	2029	2030	5 Years to Sept 2030
Mainstream UK	2.0%	4.0%	5.0%	5.5%	4.0%	22.2%
Prime Regional	1.5%	3.0%	4.0%	4.5%	3.5%	17.6%
Prime Wider South	1.5%	3.0%	4.0%	4.5%	3.5%	17.6%
South East	1.0%	3.0%	4.0%	4.5%	3.5%	17.0%
UK Rents	2.0%	2.0%	2.8%	2.9%	2.5	12.0%
Mainstream UK Rents	2.6%	2.3%	2.1%	2.1%	2.0%	11.6%

Source: Savills ¹⁹

3.19 In this context is relevant to note that the Nationwide Building Society reported in March 2026²⁰:

UK house price growth picks up in March

- UK annual house price growth picked up to 2.2% in March, from 1.0% in February
- Northern Ireland best performing area in Q1 2026, with prices up 9.5% year-on-year
- Outer South East weakest performing region, with prices down 0.7% compared with Q1 2025

Headlines	Mar-26	Feb-26
Monthly Index*	552.6	547.7
Monthly Change*	0.9%	0.3%
Annual Change	2.2%	1.0%
Average Price (not seasonally adjusted)	£277,186	£273,176

* Seasonally adjusted figure (note that monthly % changes are revised when seasonal adjustment factors are re-estimated)





3.20 Nationwide produces regional figures on a quarterly basis. This data suggests, for the Outer South East, an annual -0.7% change in Q1 2026 and an annual 0.1% change from the previous quarter.

3.21 Halifax Building Society reported a slightly different situation in March 2026²¹:

¹⁹ [Savills UK | Residential Property Market Forecasts](#)

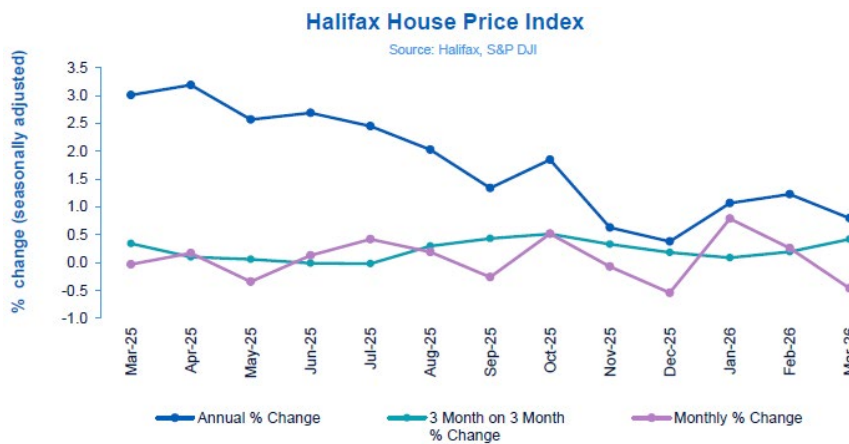
²⁰ [Nationwide HPI News - Reports](#)

²¹ [Halifax UK | House Price Index | Media Centre](#)

			
Average house price	Monthly change	Quarterly change	Annual change
£299,677	-0.5%	+0.4%	+0.8%

House prices dip in March

- House prices reduced by -0.5% in March, following a +0.3% rise in February
- Average property price now £299,677
- Annual growth of +0.8% has also slowed, down from +1.2% in February
- Northern Ireland remains the region with the highest annual percentage growth
- The North East has demonstrated notable annual percentage growth, surpassing Scotland, at 5%



3.22 Whilst there is clearly uncertainty in the market, a degree of house price growth is anticipated.

3.23 The final section of this note includes a further set of appraisals based on the updated policy requirements, price and cost information. Sensitivity testing to changes in values has been carried out.

4. Changes in Development Costs

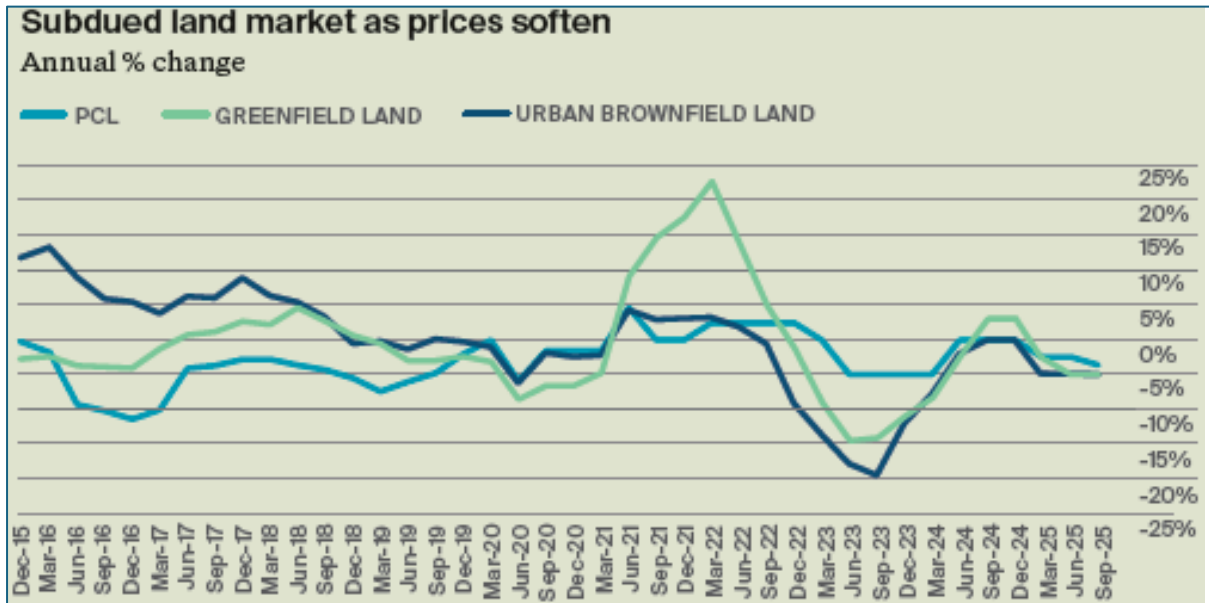
- 4.1 The build costs in the 2023 LPVU, as suggested in the PPG, were derived from the BCIS data. The cost figure for Chelmsford for 'Estate Housing – Generally' was £1,402 per sqm at that time (March 2023). The equivalent figure now (April 2026) has increased to £1,555 per sqm. This data shows that the cost of construction has increased by about 11% since the 2023 LPVU was undertaken²².
- 4.2 There has been much coverage in the press around build cost inflation. The BCIS is predicting that going forward, the General Build Cost Index will increase by about 2.4% over the next year (from April 2026 – 493.3 to April 2026 – 505.1) and by about 7.9% over the next three years. (from April 2026 – 493.3 to April 2029 – 532.3).
- 4.3 The final section of this Note includes a further set of appraisals based on the updated policy requirements, price and cost information. Sensitivity testing to changes in (BCIS based) build costs has been carried out.

²² The equivalent figure in September 2024 had increased to £1,456 per sqm being about 3.8% since the 2023 Update was undertaken.

5. Changes in Land Value

5.1 It is timely to review how the value of development land has changed over the last few years. There are several sources of relevant information. *Development Land Index* (Knight Frank Q3 2025 – being the most recently published) suggests that land prices may have fallen over the last few years.

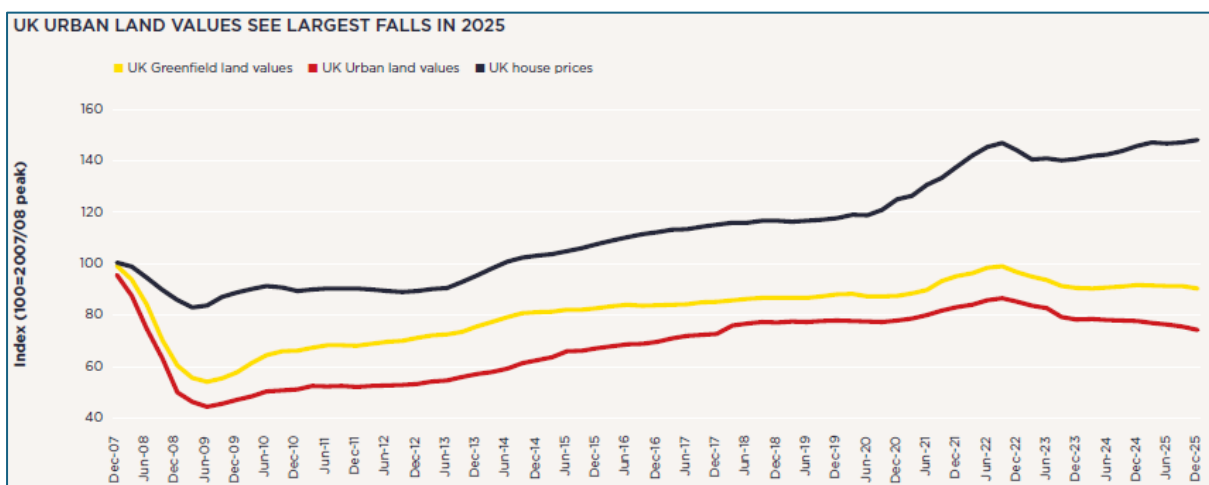
Knight Frank Development Land Index



Source: *Development Land Index* (Knight Frank Q3 2025)

5.2 A similar picture is given by Savills in its *Market in Minutes, Residential Development Land* (Savills Q4 2025).

Savills Indexed Residential Development Land Index (Index to 100 at 2007/2008 peak)



Source: *Market in Minutes, Residential Development Land* (Savills Q4 2025)

5.3 The above data suggests that the value of development land is broadly unchanged.

6. Changing Policy Requirements

6.1 In discussion with the Council, the following policy obligations were suggested in the 2023 LPVU – although it was stressed that the plan-making process was ongoing, so this needed to be kept under review, and in any event there was to be the normal political balance when prioritising and setting Local Plan policies.

- a. Affordable Housing 35%, with 70% Affordable Rent, 25% First Homes and the balance as Shared Ownership.
- b. Design 98% Accessible and Adaptable (M4(2)), 2% (being 5% of the affordable element) Wheelchair Accessible (M4(3)).
Water efficiency standard and rainwater harvesting. Additional steps towards Zero Carbon.
10% Biodiversity Net Gain.

6.2 This was caveated as follows (paragraph 12.95):

If the Council were to follow this advice it would be necessary to be cautious in assuming flatted development or flatted Build to Rent development would come forward, as these are not likely to be delivered. This is likely to influence the selection of sites for allocation. It is assumed that this suggestion is taken forward – although that should not be taken as read (as that is a decision to be taken through the wider plan-making process).

6.3 The 2023 LPVU included a review of national policy requirements, including anticipated changes. Changes in Chelmsford's policies were considered in Section 4 of the 2024 Viability Note, and are consistent with the policies set out in the Pre-Submission (Regulation 19) Document (February 2025). The Council undertook a further consultation later in 2025 on the Focused Consultation Additional Sites (Regulation 19) Document (November 2025). This concerned further sites, rather than policy requirements.

Local Plan Polices

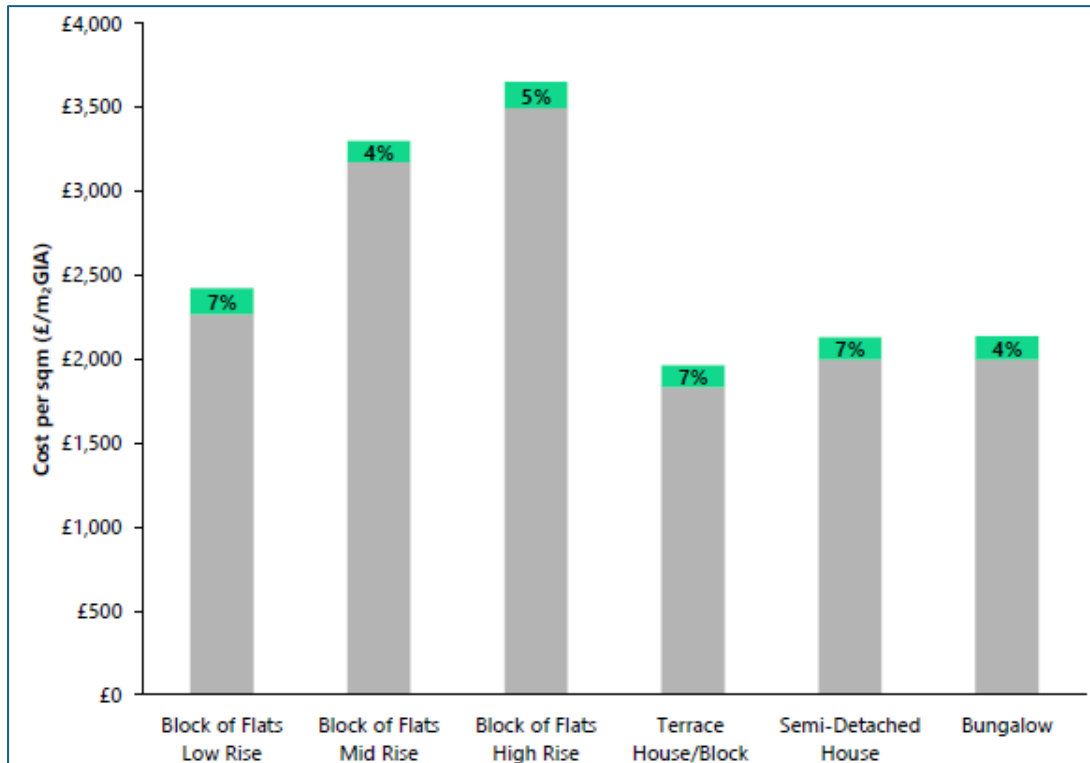
6.4 Several refinements / clarifications have been made.

Zero Carbon

6.5 The Council has updated the policy wording, however it is understood that the overall policy requirements remain much the same – seeking Zero Carbon development, in line with the Essex County Council approach.

6.6 Essex County Council has updated its evidence in this regard. The 2024 Note made reference to the July 2023 report by Introba Consulting Ltd produced *Essex Net Zero Policy – Technical Evidence Base*, with Currie & Brown and Etude. This has now been updated, and the most recent iteration is *Essex Net Zero Policy – Technical Evidence Base* (July 2023, updated September 2025). The report includes a section headed *Cost evidence base to inform viability testing*. This suggests the following additional costs:

Figure 6.1 Cost Uplifts of Net Zero policy energy use intensity and space heating demand limits, the total capital cost uplift over Part L 2021 Building Regulations



Graph 11.1: Domestic typologies capital cost per square meter and cost uplift % of Net Zero policy over Building Regulations Part L 2021 Notional Building.

- 6.7 The above costs are the costs over the 2021 Part L, and not the costs over the current BCIS costs. It would now be appropriate to assume that the additional costs of the increase in standards, set out in 2021 Part L, add 1% to the current BCIS costs. The above costs include an allowance for EV Charging, however, to be consistent with the earlier work, the allowance (£600 per unit) is still included in the updated appraisals.
- 6.8 The 2023 Written Parliamentary Statement²³ concerning climate changes policies said that where additional requirements are introduced that it should be '*expressed as a percentage uplift of a dwelling's Target Emissions Rate (TER) calculated using a specified version of the Standard Assessment Procedure (SAP)*'. The Council is using the metric in the draft ECC policy, so the professional fees assumption has been increased from 8% to 9% to reflect the additional requirements in this regard.
- 6.9 As in the 2024 Update Note, the final section of this note includes a further set of appraisals. The costs have been updated in line with ECC's updated costs.

²³ [Written statements - Written questions, answers and statements - UK Parliament](#)

Water Usage

- 6.10 The requirement of 90LPPPD has been confirmed. As in the 2024 Update Note, an additional cost of £2,000 per unit is assumed (based on *Water Ready – A report to inform HM Government’s roadmap for water efficient new homes* (Future Homes Hub, April 2024)).
- 6.11 The Council now proposes to extend this to include rainwater harvesting. This was considered in the 2023 LPVU (paragraph 8.93) which said:

The Council is considering seeking rainwater harvesting and greywater recycling, so we have considered the costs. There are few published costs, although figures of £2,000 to £3,000 are frequently quoted. The provision of rainwater harvesting requires the capture of rainfall. This is normally done through an underground tank. A second cold water system is then installed. As this is not at ‘mains’ pressure, this normally utilises a pump and pressure cylinder.

- 6.12 As in the 2024 Update Note, the final section of this note includes a further set of appraisals that include the 90LPPPD standard, at a cost of £2,000 per unit. In this Note a further £2,500 per unit is added in relation to rainwater harvesting.

Affordable Housing

- 6.13 The general affordable housing requirement is for 35% affordable housing that is provided as 70% Affordable Rent and 30% Affordable Home Ownership – so without First Homes.
- 6.14 The policy has been updated to seek, on unallocated sites where the Golden Rules apply, 50% affordable housing, where the tenure split is 30% Social Rent, 49% Affordable Rent and 21% Affordable Home Ownership.

The Golden Rules

- 6.15 As set out in above, the NPPF includes various sections (Paragraphs 67, 68, 155, 156 and 157) concerning realising land from the Green Belt. Such releases are subject to the Golden Rules which require that the affordable housing contribution on such releases to be 15% above the highest existing affordable housing requirement which would otherwise apply to the development, subject to a cap of 50%. The CCC area includes areas of Green Belt so these rules will apply here.

Chelmsford Planning Obligations

- 6.16 Separately from the Local Plan, the Council published the *Consultation Draft Planning Obligations Supplementary Planning Document* (January 2026) at the start of 2026. This includes some specific financial contributions that will be sought:

Table 6.1 Payments under the *Draft Planning Obligations SPD* (January 2026)

		Payment
Local Open Space	Payment in Lieu	£1,397 per unit where not on-site
Strategic Open Space	Payment in Lieu	£2,051 per unit where not on-site
	TOTAL	£3,448 per unit where not on-site
Local Open Space	Ongoing maintenance	£254 per unit where on-site or not on-site.
Strategic Open Space	Ongoing maintenance	1,054 per unit where on-site or not on-site.
	TOTAL	£1,308 per unit where on-site or not on-site
Tree Planting		£300 per unit where not on-site
Monitoring	£350 per obligation per phase. £100 per affordable dwelling. £750 per highways Obligation	Say 6 obligations = £2,100 per unit. As calculated Say 4 obligations = £3,000 per scheme
S106 Agreement	Legal	£1,000 per scheme

Source: *Consultation Draft Planning Obligations Supplementary Planning Document* (January 2026)

- 6.17 The Council has undertaken a comprehensive update of the IDP, that has assessed the infrastructure requirements for the allocations. In discussion with the Council, a typical figure of £20,000 per unit has been applied to all the typologies in this Update Note. As set out in Chapter 8 below, the costs for the Strategic Sites have also been updated. This is an ‘all in’ cost including RAMS/SSSI, education contributions based on current need etc.
- 6.18 This £20,000 per unit assumption is in addition to CIL and is considered to be a cautious approach, as bearing in mind the restrictions in CIL Regulation 122, under which payments requested under the s106 regime must be: necessary to make the development acceptable in planning terms; directly related to the development; and fairly and reasonably related in scale and kind to the development.
- 6.19 These amounts are applied to the appraisals run towards the end of this report.

Essex Coast Recreational Disturbance Avoidance & Mitigation Strategy (RAMS)

- 6.20 The updated tariff for 2026-27 is £175.55 per net new dwelling. Allowance is made in the developer contribution / s106 cost set out above²⁴.

Community Infrastructure Levy

- 6.21 CCC has adopted CIL and CIL remains a key source of funding for infrastructure. The rates of CIL have been increased through indexation:

²⁴ The IDP allows for a higher allowance of £472 per unit.

Table 6.2 Indexed Rates of CIL

Type of Development	Adopted Rate	Indexed Rate 2023	Indexed Rate 2026
Residential (Use Class C3 including sheltered or specialist housing)	£125	£186.45	£210.08
Retail – Convenience (Use Class A1 [food])	£150	£223.74	£252.10
Retail – All other retail (Use Class A1 [non-food] and Use Classes A2-A5 and sui generis uses akin to non-food retail)	£87	£129.77	£146.22
All other uses (including Use Classes B, C1, C2, and D and any other sui generis uses)	£0	£0	£0

Source: Chelmsford City Council Community Infrastructure Levy - Charging Schedule (April 2026)²⁵

- 6.22 The final section of this Update Note includes a further set of appraisals that include these updated rates of CIL.

²⁵ [Check if CIL applies and how to pay](#)

7. Regulation 19 Responses

7.1 The comments made through the formal Regulation 18 consultation were reviewed and addressed as appropriate in section 6 of the 2024 Viability Note. The further representations made through the Regulation 19 consultation are reviewed below.

DWD for Ptarmigan Chelmsford A Ltd., Countryside L&Q (North East Chelmsford) LLP and Halley Developments Ltd, with regard to North East Chelmsford for Chelmsford Garden Community (CGC)

7.2 Concern was expressed about several matters:

- a) The requirement for 20% BNG not being justified. It is beyond the scope of this Note to consider whether policies are justified.

Since the 2024 Viability Update was published, the more recent *Viability Assessment of Biodiversity Net Gain in Essex Final Report Essex County Council and Essex Local Nature Partnership* (SQW, Temple, August 2024) has been completed which sets out the following costs:

Table 7.1 Essex Delivery Costs for 10% and 20% Net Gain

Typology	Site size (Ha)	Total Costs 10% BNG			Total Costs 20% BNG onsite (where possible)			Total Costs 20% BNG offsite		
		Site	Per ha	Per Unit	Site	Per ha	Per Unit	Site	Per ha	Per Unit
5000 Unit Greenfield	285.71	£2,470,000	£8,645	£494	£2,856,500	£9,998	£571	£3,627,403	£12,696	£725
500 Unit Greenfield	20.41	£478,873	£23,463	£958	£614,376	£30,102	£1,229	£614,378	£30,102	£1,229
100 Unit Greenfield	2.94	£74,150	£25,221	£742	£90,050	£30,629	£901	£90,050	£30,629	£901
25 Unit Greenfield	1.39	£44,835	£32,255	£1,793	£52,535	£37,795	£2,101	£52,535	£37,795	£2,101
500 Unit Brownfield	13.89	£38,256	£2,754	£77	£51,756	£3,726	£104	£66,640	£4,798	£133
100 Unit Brownfield	1.91	£675	£353	£7	£1,575	£825	£16	£1,225	£641	£12
25 Unit Brownfield	0.26	£11,545	£44,404	£462	£24,145	£92,865	£966	£11,595	£44,596	£464
Large Industrial	2.85	£18,810	£6,600		£19,800	£6,947		£32,310	£11,337	
Small Industrial	0.125	£248	£1,984		£248	£1,984		£448	£3,584	
Offices	0.25	£150	£600		£1,095	£4,380		£250	£1,000	

Source: Table 6-2: Delivery costs for 10% and 20% net gain. *Viability Assessment of Biodiversity Net Gain in Essex Final Report Essex County Council and Essex Local Nature Partnership* (SQW, Temple, August 2024). Where BNG targets cannot be delivered onsite within the baseline site parameters, the costs were estimated through purchase of required additional biodiversity units at £25,000 per unit.

The report concludes:

The key headline findings for BNG policy in Essex are as follows:

- *A shift from 10% to 20% BNG will not materially affect viability in the majority of instances when delivered onsite or offsite.*
- *The biggest cost in most cases is to get to the mandatory, minimum 10% BNG. The cost increase to 20% BNG is, in most cases, much less and is generally small or negligible. Based on our scenario testing we estimate that:*
- *the additional cost of achieving 20% BNG ranges from £2 -£27 per residential unit on brownfield sites and from £77 to £308 per residential unit on greenfield sites.*
- *this additional cost would impact residual land values by <0.1% for brownfield development land and <1.4% for greenfield development land.*

Because BNG costs are low when compared to other policy and development costs, in very few cases are they likely to be what renders development unviable for BNG policy of up to 20%.

As in the 2024 Update Note, the final section of this note includes a further set of appraisals that include this requirement, on the basis that providing 20% BNG costs 150% of the cost of providing 10% BNG. It is assumed that where 20% is sought, that it can be achieved on-site.

- b) There is a lack of clarity about water efficiency standards. This is covered in Chapter 6 above. As in the 2024 Update Note, the final section of this note includes a further set of appraisals that include the 90LPPPD standard, at a cost of £2,000 per unit.
- c) It was suggested that provision of EV charging points was not considered in the viability evidence.

As set out in the 2023 LPVU (para 8.91), since 2023, Part S of Building Regulations has mandated EV charging points for new homes and non-residential buildings with associated parking. As such these costs are covered by the updated BCIS costs. At that stage was assumed that all new homes have EV charging points. A cost of £600 per unit was modelled. This cost is applied to flatted development, whilst such development is unlikely to have 100% parking provision, it is assumed that shared charging facilities will be provided.

This is considered with the climate change policies above.

- d) The lack of justification for seeking standards over and above national standards in relation to energy efficient was raised. It is beyond the scope of this note to consider whether policies are justified.
- e) This is considered in the Zero Carbon section under Local Plan Policies above.
- f) Concerns were raised in connection to abnormal costs:

Viability / Abnormal Costs – A Viability Technical Note has been prepared by Turner Morum and is submitted in support of this representation at Appendix 2. In summary, Turner Morum note there is a differential between the HDD assessment and application of viability of c. £19k per dwelling (£67k vs. £86k per dwelling) and that this amounts to an additional cost across the whole allocation of £118.750m, which is not accurately reflected in the 2024 Regulation 19 Viability Note. Further testing of the viability is continuing to take place through the planning application process.

- g) As noted above, viability continues to be considered through the development management process – as is normal for schemes of the scale and complexity of the Chelmsford Garden Community. The on-going viability discussions between Turner Morum (for Chelmsford Garden Community) and Gerald Eve / Newmark (for the Council) has drawn on the various plan-wide viability assessments (since 2018) undertaken by HDH. Several specific points are raised (some of which have been raised previously).
 - i. Biodiversity Net Gain – See above.
 - ii. Strategic Site Infrastructure and Mitigation Costs – it is acknowledged that whilst there is much agreement, there is a difference concerning how site costs, abnormal costs, strategic infrastructure and mitigation costs all relate to the Benchmark Land Value. The PPG is clear (at paragraph 10-013-20240214) that

these (and other) costs should be *'taken into account when defining benchmark land value'*. However, it is not simply a matter of deducting these cost from the BLV – they need to be considered in the round.

The BLV on the Strategic Sites is taken to be the EUV x10 which is less than the assumption on the greenfield typologies of EUV + £500,000 per ha.

Sphere 25 for the Dominvs Group with regard to land in Chelmsford, including the Meadows Shopping Centre, and specifically concerning the Meadows Shopping Centre

7.3 Two separate representations were made, however many of the comments were similar so these are responded to together. A range of matters were commented on:

- a) Clarification was sought with regard to the requirements for moving towards Zero Carbon.
- b) Refinements to the tree planting policy were suggested.
- c) The levels of development in central Chelmsford should be maximised.
- d) The increased levels of housing are welcomed.
- e) The housing mix policy may not be appropriate for the City Centre, and the Plan should include polices with regard to Build to Rent.
- f) The density policies are not appropriate for the City Centre and are a poor indicator of good design. Space should be optimised.
- g) Policies concerning contributions towards primary education and in connection to EV charging should be included in the viability assessment.

7.4 None of the comments relate to the viability evidence, however this opportunity is taken to note that EV Charging is addressed above.

Gladman re several sites (Land East of Plantation Road, Boreham; Land East of Main Road, Bicknacre; Land at Maldon Road, Danbury; Land at Southend Road, Rettendon; Land at Southern Road, Howe Green; and Land South of East Hanningfield)

7.5 Numerous comments were made about the relative merits of various sites. Whilst these cover the deliverability of sites, reference is not made to viability. They go on to say *'Gladman recommend that the Viability Assessment is updated to reflect the NPPF 2024'*.

7.6 The impact of the 2024 NPPF is considered at the start of this Note. Whilst the 2024 NPPF did make a number of significant changes to the planning system, particularly to the way the overall requirement for housing is assessed (the Standard Method), it does not change the place of viability testing in the plan-making process, and the detail beyond that is largely unchanged. The 2023 LPVU is consistent with the requirements of the 2024 NPPF (and is consistent with the December 2025 consultation on the Draft NPPF as well).

- 7.7 The only aspect of the 2024 NPPF that is not addressed directly in the 2023 LPVU was the Golden Rules. These are considered in this Update Note, as are the wider changes to the planning system (e.g. the Future Homes Standard, the Building Safety Levy etc).
- 7.8 Several specific points were also raised:
- a) It was questioned whether the requirement for 90LPPPD water usage was justified. It is beyond the scope of this note to consider whether the policy is justified, however the final section of this note includes a further set of appraisals that include the 90LPPPD standard.
 - b) In relation to Zero Carbon development, it was questioned whether the requirement to exceed building regulations is justified. It is beyond the scope of this note to consider whether the policy is justified, however, as set above, the final section of this note includes a further set of appraisals in which the costs have been updated in line with ECC's updated costs.

Home Builders Federation

- 7.9 The HBF raised a range of points, most of which did not relate to viability. Several points that relate to viability are raised.
- a) In relation to affordable housing, they say:

This policy requires developments of 10 or more dwellings to provide 35% of the total number of residential units as affordable housing. In considering the viability of this policy, and indeed the deliverability of the plan as whole, the council must provide evidence to show that the cumulative impact of the policies in this plan will not make development unviable and render the plan undeliverable.

They then go on to question which viability assessment should be referred to, and why the results differ. The 2023 LPVU is a comprehensive, plan-wide viability assessment. The 2024 Viability Note and this further 2026 Update Note, both further update the Council's viability evidence – in a proportionate way, that builds on the existing available evidence. It is inevitable that the results will vary as the analysis and viability testing is updated. The final section of this Note includes a further set of appraisals in which the costs have been updated to current costs and values and to align with the Council's refined policies and the evolving national policies.
 - b) Details of the differences between the viability evidence were sought. The changes made in the 2024 Viability Note were set out, item by item from paragraph 7.6. The changes made in this note are set out, item by item, in Chapter 9 below.
 - c) It was suggested that the value of affordable rented housing, at 55% of market value, was too high, although no alternative suggestion was made. As set out in Chapter 3 above, these have been reviewed.
 - d) It was suggested that the costs '*of delivering BNG may be underestimated given that the viability study is continuing to base its costs on those set out in the DEFRA Impact Assessment (IA) from 2019*'. As set out above, reference is also had to recent Viability

Assessment of Biodiversity Net Gain in Essex Final Report Essex County Council and Essex Local Nature Partnership (SQW, Temple, August 2024).

- e) It was questioned whether the requirement for 90LPPPD water usage was justified. It is beyond the scope of this note to consider whether the policy is justified, however the final section of this note includes a further set of appraisals that include the 90LPPPD standard, at a cost of £2,000 per unit.
- f) It was suggested that it was not necessary to include a policy that relates to the provision of EV charging points as this is covered by Building Regulations.

As set out in the 2023 LPVU (8.91), since 2023, Part S of Building Regulations has mandated EV charging infrastructure for new homes and non-residential buildings with associated parking. As such these costs are covered by the updated BCIS costs. At that stage was assumed that all new homes have EV charging points. A cost of £600 per unit was modelled. This cost is applied to flatted development, whilst such development is unlikely to have 100% parking provision, it is assumed that shared charging facilities will be provided.

This is further considered with the climate change policies above.

- g) In relation to Zero Carbon development, it was questioned whether the requirement for to exceed building regulations is justified. Further, the wording of the policy was questioned. It is beyond the scope of this note to consider whether the policy is justified, however, as set out above, the final section of this note includes a further set of appraisals in which the costs have been updated in line with ECC's updated costs.

Strutt and Parker for Hopkins Homes, in relation to Strategic Growth Site 3a

7.10 Several points were raised:

7.11 In relation to Zero Carbon development, it was questioned whether the requirement to exceed building regulations is justified. Further, the wording of the policy was questioned. It is beyond the scope of this note to consider whether the policy is justified, however, as set above, the final section of this note includes a further set of appraisals in which the costs have been updated in line with ECC's updated costs.

7.12 In relation to SANGS they say:

The Regulation 19 Viability Note (November 2024) ascribes broad values across the plan area but does not address site specific matters insofar as they relate to Strategic Growth Site 3a. Para. 5.30 suggests that the requirement for SANGs "...is only likely to apply to the Hammond's Farm strategic site". However, Natural England's Reg. 18 consultation response has asked that SSSI mitigation be included as a requirement for Strategic Site 3a and there is no indication that it has been considered as part of the Council's viability assessment.

7.13 It is understood that this requirement is considered within the IDP.

Turner Morum for Vistry Homes, with regard to Strategic Site allocation 3 North of South Woodham Ferrers

- 7.14 In addition to making representation on North East Chelmsford for Chelmsford Garden Community (CGC), as set out above, Turner Morum has made representation for Strategic Site allocation 3 North of South Woodham Ferrers. Several points are raised:
- 7.15 Concern is raised over the allowances for s106 costs, sitewide infrastructure and abnormal costs:

We note in the 2024 RVN, HDH have updated their approach in relation to considering specific strategic sites as opposed to generic typologies and now consider the viability of the SWF allocation as a whole as per Table 5.3. Within this schedule they have confirmed the assumed cost of strategic infrastructure and mitigation (S106) is at £35k per dwelling (£35.700m).

The concern we would highlight is not in relation to this allowance, but the overall cost allowance of combined S106 costs and site wide infrastructure/abnormal costs. We do not consider that this allowance is sufficient to service the site as required in order to achieve the Local Plan policy objectives and more generally to provide strategic infrastructure to deliver the allocation.

HDH produced a Local Plan Viability Update (LPVU) in August 2023 which confirmed the approach to site wide infrastructure/abnormal costs is to allow 13% on BCIS for services and external works; this position remains unchanged in the 2024 RVN. Based on the latest TM appraisal at the time of writing this letter the 13% externals allowance equates to a further cost of c. £19.2m. Therefore, based on the HDH assessment for SWF you have total S106/infrastructure/abnormal costs of £54.977m (£53k per dwelling) - this is the combined total of the £35k per dwelling S106 and the 13% addition to BCIS. In contrast the allowance in the latest iteration of the TM viability is significantly higher than this equating to c. £95k per dwelling. These figures do not even account for the inclusion of CIL as a development cost.

- 7.16 As noted above, viability continues to be considered through the development management process – as is normal for schemes of the scale and complexity of the Strategic Site allocation 3 North of South Woodham Ferrers.

DWD for Vistry Group, with regard to Zone 2 of Chelmsford Garden Community in North East Chelmsford (3,500 homes of CGC (SGS6) (ref:23/01751/OUT)); the approved Beaulieu development (3,600 homes to the south of CGC (ref:09/01314/EIA)); Land north of South Woodham Ferrers (SGS10) (1,020 homes (Ref: 21/01961/OUT)).

- 7.17 This does not raise any further points to those raised by DWD and Turner Morum above.

Planning Issues for Churchill Living and McCarthy Stone

- 7.18 It was questioned whether the requirement for affordable housing in relation to specialist older peoples housing was justified. It is beyond the scope of this note to consider whether the policy is justified.
- 7.19 A range of comments than relate to viability were then raised.

- 7.20 It was questioned why the 2024 Viability Note did not update the viability evidence in relation to specialist older peoples housing, making specific reference to the PPG, quoting the PPG (10-002-20251216):

The role for viability assessment is primarily at the plan making stage. Viability assessment should not compromise sustainable development but should be used to ensure that policies are realistic, and that the total cumulative cost of all relevant policies will not undermine deliverability of the plan.

- 7.21 It is the Council's view that it is not necessary or proportionate to set a separate affordable housing target for each and every type of development. In particular, it is anticipated that viability will be considered at the development stage (with added emphasis) for older people's housing:

Should viability be assessed in decision taking?

Where up-to-date policies have set out the contributions expected from development, planning applications that fully comply with them should be assumed to be viable. It is up to the applicant to demonstrate whether particular circumstances justify the need for a viability assessment at the application stage. Policy compliant in decision making means that the development fully complies with up to date plan policies. A decision maker can give appropriate weight to emerging policies.

Such circumstances could include, for example where development is proposed on unallocated sites of a wholly different type to those used in viability assessment that informed the plan; where further information on infrastructure or site costs is required; where particular types of development are proposed which may significantly vary from standard models of development for sale (for example build to rent or housing for older people); or where a recession or similar significant economic changes have occurred since the plan was brought into force.

Paragraph: 008 Reference ID: 10-008-20190509

- 7.22 For many years, it has been the Council's practice to accept commuted sums / payments in lieu of affordable housing provision in specialist older persons scheme. The challenges around mixed tenure schemes are well understood, as are the practicalities around service charges and the like. Such commuted sums are best calculated, being the value of a scheme with affordable housing and without affordable housing.
- 7.23 It remains the Council's position that there is no need update this aspect of the 2023 viability assessment, as to calculate the commuted sums / payments in lieu, it will be necessary to carry out a site-specific development appraisal.

8. Strategic Sites

8.1 At the time of the 2023 LPVU, the Council had not formally identified the Strategic Sites. 7 large greenfield typologies were tested, to help with the site selection process. In the 2024 Viability Update, the following sites were tested:

Table 8.1 2024 Strategic Sites – Updated Strategic Infrastructure and Mitigation Costs (s106 costs)

	Number of Dwellings	EUV	S106 per unit	Net developable area (Ha)	DPH
Chelmsford Garden Community Location 6	6,250	Strategic Greenfield	£50,000	50%	40
Hammonds Farm Location 16a	4,500	Strategic Greenfield	£51,000	50%	40
North of South Woodham Ferrers Location 10	1,200	Strategic Greenfield	£35,000	50%	35
West Chelmsford Location 2	900	Greenfield	£35,000	65%	35
Great Leighs Land at Moulsham Hall Location 7a	750	Greenfield	45,000	65%	35
North of Broomfield Location 8	500	Greenfield	£26,000	50%	35
The Meadows Site 1w in Location 1 Chelmsford Urban Area	760	Brownfield	£40,000	80%	160

Source: CCC (October 2024)

8.2 The sites have progressed through the development management process and in this further update the following sites are tested:

Table 8.2 2026 Strategic Sites – Updated Strategic Infrastructure and Mitigation Costs (s106 costs)

	Number of Dwellings	EUV	S106 per unit	Net developable area (Ha)	DPH
Hammonds Farm	4,500	Strategic Greenfield	£47,000	50%	40
North of South Woodham Ferrers	1,200	Strategic Greenfield	£36,542	50%	35
West Chelmsford	900	Greenfield	£31,313	65%	35
Great Leighs Land at Moulsham Hall	750	Greenfield	£36,339	65%	35
North of Broomfield	500	Greenfield	£28,772	50%	35

Source: CCC (April 2026)

- 8.3 The cost of strategic infrastructure and mitigation is an ‘all in’ cost including RAMS/SSSI, education contributions based on current need etc, and is in addition to CIL.

9. Findings and Conclusions

- 9.1 HDH Planning & Development Ltd produced the 2023 LPVU. The study was commissioned to support the development of the Local Plan. The report was undertaken in line with the requirements set out in the National Planning Policy Framework (NPPF) and National Planning Practice Guidance (PPG). Since the 2023 LPVU was completed, HDH prepared an update note in 2024, the 2024 Viability Note.
- 9.2 Since the earlier evidence was collected, the costs and the values, being the main inputs into a viability assessment, have changed and several changes have been made to national policy. The Council has also refined some of the policies in the draft Local Plan. This note considers how these changes may impact on viability and whether it is necessary for the Council to fully update the viability evidence before proceeding.
- 9.3 The value of newbuild housing and the costs of construction have both increased since the 2023 LPVU was undertaken. The Land Registry's latest data suggests that the average newbuild sale price has increased by about 8% over the last 3 years in the Council area. The price paid data suggests that the price of newbuild flats have fallen by about 7%, and by about 2.3% on a £ per sqm basis, whilst the price of houses has increased by about 13.1%, and by about 12% when considered on a £ per sqm basis.
- 9.4 In 2023, the average newbuild asking price was £5,168 per sqm. Now, in 2026, the average newbuild asking price is about 2.3% higher, at £5,291 per sqm. It is important to note that there are nuances within this, for example, in and around Chelmsford, average newbuild prices are a little higher.
- 9.5 The BCIS suggests that build costs have increased by 11% since 2023, being more than the increase in values, suggesting, all other things being equal, that viability has worsened since 2023.
- 9.6 House price forecasts and build costs forecasts suggest that house prices are likely to continue to increase at a broadly similar rate to that of build costs.

Updated Policy-on Appraisals

- 9.7 Paragraphs 10.42 to 10.44 of the 2023 Viability Update considered the impact of changes in costs and values on the preferred set of policies, based on further appraisals that were summarised in Appendix 17 of the report. This analysis was repeated in the 2024 Viability Note, the results being set out in Appendix 1, and the analysis is further repeated now.
- 9.8 There have been a number of changes to national policy and to the draft Local Plan since the 2023 LPVU was completed. Some of these were addressed in the 2024 Viability Note. The following adjustments were made in the 2024 Viability Note:

Table 9.1 Changes Made to the Development Appraisals in the 2024 Viability Note

A	The values are increased by 5% and the construction costs to the latest BCIS costs.
B	Biodiversity Net Gain is assumed at 10%, other on the two garden communities (Hammonds Farm and Chelmsford Garden Community) where 20% is sought.
C	Allowance for a commuted sum for tree planting of £300 per dwelling is made on the brownfield sites.
D	The Net Zero cost assumption has been updated to plus 8% to the costs of construction of houses and plus 6% to the costs of construction of flats.
E	The cost of tightened water usage requirements has been adjusted to £2,000 per unit.
F	The indexed rates of CIL are updated.
G	The modelling of the Strategic Sites has been updated as per Table 5.3 above, including the updated estimates of IDP costs to the developer.
H	Additional allowance is made for RAMS (£163.86 per unit).
I	No change is made with regard to the reduction in the requirements for M4(2) Accessible and Adaptable standards from 100% to 50% of new homes, as it is anticipated that Building Regulations will mandate M4(2) Accessible and Adaptable in the medium term.
J	On schemes of more than 100 dwellings, an additional allowance is made of £457.50 per unit in lieu of on-site provision of specialist older people's housing. It assumed that the Strategic Sites (with the exception of The Meadows, Chelmsford) make the relevant provision on-site.
K	The modelling is updated to reflect the updated Open Space Standards set out above.

Source: Paragraph 7.6 of the 2024 Viability Note

9.9 A further set of appraisals has now been run subject to the following changes:

Table 9.2 Changes Made to the Development Appraisals (relative to the 2023 assumptions)

A	The value of housing is increased by 8%, in the wider Chelmsford area (the Council area excluding the South Woodham Ferrers area which is unchanged). The value of flats is unchanged.
B	The construction costs are increased to the latest BCIS costs.
C	The affordable housing mix has been updated to 70% Affordable Rent and 30% Affordable Home Ownership (without First Homes).
D	The common areas in flatted development have been increased to allow for second staircases.
E	Biodiversity Net Gain is assumed at 10%, other than on the Hammonds Farm site, where 20% is sought. This is applied to all sites, regardless of their size.
F	Allowance for a commuted sum for tree planting of £300 per dwelling is made on the brownfield sites.
G	The Net Zero cost assumption has been updated to plus 8% to the costs of construction of houses and plus 6% to the costs of construction of flats. The professional fees are increased to 9% to allow for the use of the non-standard reporting metric.
H	The cost of the 90 LPPPD water usage requirements has been assumed as £2,000 per unit. In addition, an allowance of £2,500 per unit is made for rainwater harvesting.
I	The rates of CIL are indexed and updated.
J	The modelling of the Strategic Sites has been updated as per Table 8.2 above, including the updated estimates of IDP costs to the developer. This is in addition to CIL.
K	For the typologies, an all-inclusive s106 cost for strategic infrastructure and mitigation of £20,000 per unit is assumed. This is in addition to CIL.
L	The appraisals have been updated to reflect the requirement for 50% of new homes to be M4(2) Accessible and Adaptable standard, and on sites of 30 or more dwellings, 5% of affordable homes to be to M4(3)b (Wheelchair user dwellings).
M	On schemes of more than 100 dwellings, an additional allowance is made of £457.50 per unit in lieu of on-site provision of specialist older people's housing. It assumed that the Strategic Sites make the relevant provision on-site.
N	The modelling is updated to reflect the updated Open Space Standards
O	The Building Safety Levy has been added at £18.16 per sqm for brownfield land and £36.32 per sqm for greenfield land and would apply to major development.
P	The updated national planning application fees are applied.

Source: HDH (2026)

- 9.10 The updated appraisal results are summarised in **Appendix 4** below. These results are directly comparable with those included in Appendix 17 of the 2023 LPVU.
- 9.11 This analysis shows that viability has worsened since 2023 and 2024, with the Residual Values being less. In terms of costs, the main changes are the BCIS based build cost increase, the increase in circulation space assumptions for flatted development, and the application of the Building Safety Levy. It is only for housing development in the wider Chelmsford area where this has been offset, in part, by increases in sales prices. Whilst the Residual values are less, the pattern of the results is broadly similar, with the greenfield sites mostly being viable and the brownfield sites not being viable.

- 9.12 In the South Woodham Ferrers area, only the smallest sites, below the affordable housing threshold, derive a Residual Value that is greater than the Benchmark Land Value. Having said this, beyond the North of SWF Strategic Site, relatively little development is anticipated within or adjacent to the town. It will be necessary to be cautious in making assumptions around the delivery of sites in and adjacent to South Woodham Ferrers.
- 9.13 Across the wider Council area, including in and adjacent to Chelmsford, the results are less good than in 2023 and 2024. In particular, the brownfield typologies are no longer shown as viable.
- 9.14 The Hammonds Farm Strategic Site and the North of SWF Strategic Site both derive a Residual Value that is less than the BLV. In the case of Hammonds Farm, the Residual Value is well above the Existing Use Value, and only a little less than the BLV. In the case of the North of SWF site, the Residual Value is less than the EUV.
- 9.15 The Strategic Sites are modelled in this viability Update Note (and previously), on the basis that they are purchased as a whole site at the start of the development, and that the whole project comes forward as a single phase. Further, it is assumed that the CIL due from the sites is not used in connection with the development. These assumptions are appropriate in high-level testing, but do not reflect the reality of the delivery of large sites. Typically, such sites are brought forward in multiple phases, under an umbrella outline planning application, where the land is bought in tranches, the CIL is paid as the phases come forward, rather than being front loaded as per the CIL Instalment Policy, and it is possible that CIL will be used to facilitate the delivery of development.
- 9.16 The delivery of any large site is challenging, so it is recommended that the Council continues to engage with the owners and promoters, in line with the advice set out in the Harman Guidance (page 23):

Landowners and site promoters should be prepared to provide sufficient and good quality information at an early stage, rather than waiting until the development management stage. This will allow an informed judgement by the planning authority regarding the inclusion or otherwise of sites based on their potential viability.

- 9.17 In this context, paragraph 10-006-20190509 of the PPG is particularly highlighted:

... It is the responsibility of site promoters to engage in plan making, take into account any costs including their own profit expectations and risks, and ensure that proposals for development are policy compliant. It is important for developers and other parties buying (or interested in buying) land to have regard to the total cumulative cost of all relevant policies when agreeing a price for the land. Under no circumstances will the price paid for land be a relevant justification for failing to accord with relevant policies in the plan....

PPG 10-006-20190509

- 9.18 It is important to note that some of the Strategic Sites are subject to planning applications, some of which have been approved, and are expected to have decision notices issued shortly.
- 9.19 The 2023 LPVU concluded (at para 12.95), in relation to the suggested policy requirements:

..... it would be necessary to be cautious in assuming flatted development or flatted Build to Rent development would come forward, as these are not likely to be delivered. This is likely to influence the selection of sites for allocation. It is assumed that this suggestion is taken forward – although that should not be taken as read (as that is a decision to be taken through the wider plan-making process).

- 9.20 This advice stands, however it is necessary to extend it a little and for the Council to be cautious in assuming brownfield sites, in particular flatted development or development in or adjacent to South Woodham Ferrers would come forward, as these are not likely to be delivered.
- 9.21 This Note provides a broad and proportionate update to the Council's earlier viability work, bearing in mind the changes in the market, the changes in national policy and the updating to the draft Local Plan. The results are broadly similar to those presented in the 2023 LPVU and 2024 Viability Note. Having made the adjustments set out, and updated the full policy-on appraisals, the Council can continue to rely on the existing viability evidence.

Appendix 1 – Newbuild Price Paid Data by Ward

2023 to 2026

Count of Price £	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		55	55
Boreham and The Leighs	51	86	137
Broomfield and The Walthams	25	140	165
Chelmsford Rural West		6	6
Great Baddow East		6	6
Little Baddow, Danbury and Sandon		1	1
Marconi	23		23
Moulsham and Central	252		252
Rettendon and Runwell		32	32
South Hanningfield, Stock and Margaretting	1		1
Springfield North		103	103
Trinity	1		1
Grand Total	353	429	782

Average of Price £	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		£546,933	£546,933
Boreham and The Leighs	£306,393	£629,116	£508,978
Broomfield and The Walthams	£337,581	£620,148	£577,335
Chelmsford Rural West		£1,161,667	£1,161,667
Great Baddow East		£526,667	£526,667
Little Baddow, Danbury and Sandon		£1,250,000	£1,250,000
Marconi	£357,392		£357,392
Moulsham and Central	£248,406		£248,406
Rettendon and Runwell		£641,518	£641,518
South Hanningfield, Stock and Margaretting	£1,050,000		£1,050,000
Springfield North		£506,314	£506,314
Trinity	£375,000		£375,000
Grand Total	£272,829	£594,557	£449,327

Average of Price £/sqm	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		£4,692	£4,692
Boreham and The Leighs	£4,563	£5,078	£4,880
Broomfield and The Walthams	£4,748	£4,672	£4,683
Chelmsford Rural West		£5,512	£5,512
Great Baddow East		£4,751	£4,751
Little Baddow, Danbury and Sandon		£4,754	£4,754
Marconi	£5,475		£5,475
Moulsham and Central	£4,522		£4,522
Rettendon and Runwell		£4,139	£4,139
South Hanningfield, Stock and Margaretting	£7,194		£7,194
Springfield North		£4,923	£4,923
Trinity			
Grand Total	£4,616	£4,782	£4,707

2023

Count of Price £	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		11	11
Boreham and The Leighs	9	26	35
Broomfield and The Walthams	10	102	112
Chelmsford Rural West		4	4
Little Baddow, Danbury and Sandon		1	1
Marconi	18		18
Moulsham and Central	142		142
Rettendon and Runwell		27	27
South Hanningfield, Stock and Margaretting	1		1
Springfield North		46	46
Grand Total	180	217	397

Average of Price £	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		£460,500	£460,500
Boreham and The Leighs	£341,044	£625,733	£552,528
Broomfield and The Walthams	£245,265	£610,491	£577,882
Chelmsford Rural West		£1,030,000	£1,030,000
Little Baddow, Danbury and Sandon		£1,250,000	£1,250,000
Marconi	£362,271		£362,271
Moulsham and Central	£255,371		£255,371
Rettendon and Runwell		£639,736	£639,736
South Hanningfield, Stock and Margaretting	£1,050,000		£1,050,000
Springfield North		£509,304	£509,304
Grand Total	£274,198	£597,583	£450,960

Average of Price £/sqm	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		£4,740	£4,740
Boreham and The Leighs	£4,443	£4,934	£4,842
Broomfield and The Walthams	£3,806	£4,658	£4,582
Chelmsford Rural West		£5,573	£5,573
Little Baddow, Danbury and Sandon		£4,754	£4,754
Marconi	£5,423		£5,423
Moulsham and Central	£4,210		£4,210
Rettendon and Runwell		£4,160	£4,160
South Hanningfield, Stock and Margaretting	£7,194		£7,194
Springfield North		£4,870	£4,870
Grand Total	£4,337	£4,695	£4,535

2024

Count of Price £	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		34	34
Boreham and The Leighs	29	34	63
Broomfield and The Walthams	15	35	50
Chelmsford Rural West		2	2
Great Baddow East		6	6
Marconi	3		3
Moulsham and Central	94		94
Rettendon and Runwell		5	5
Springfield North		54	54
Trinity	1		1
Grand Total	142	170	312

Average of Price £	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		£586,765	£586,765
Boreham and The Leighs	£291,853	£634,666	£476,863
Broomfield and The Walthams	£399,125	£654,676	£578,010
Chelmsford Rural West		£1,425,000	£1,425,000
Great Baddow East		£526,667	£526,667
Marconi	£354,500		£354,500
Moulsham and Central	£226,994		£226,994
Rettendon and Runwell		£651,142	£651,142
Springfield North		£507,776	£507,776
Trinity	£375,000		£375,000
Grand Total	£262,159	£594,870	£443,444

Average of Price £/sqm	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		£4,682	£4,682
Boreham and The Leighs	£4,554	£5,094	£4,809
Broomfield and The Walthams	£5,375	£4,688	£4,894
Chelmsford Rural West		£5,389	£5,389
Great Baddow East		£4,751	£4,751
Marconi	£6,044		£6,044
Moulsham and Central	£4,980		£4,980
Rettendon and Runwell		£4,024	£4,024
Springfield North		£4,943	£4,943
Trinity			
Grand Total	£4,960	£4,826	£4,888

2025

Count of Price £	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		10	10
Boreham and The Leighs	13	26	39
Broomfield and The Walthams		3	3
Marconi	2		2
Moulsham and Central	16		16
Springfield North		3	3
Grand Total	31	42	73

Average of Price £	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		£506,583	£506,583
Boreham and The Leighs	£314,838	£625,241	£521,773
Broomfield and The Walthams		£545,667	£545,667
Marconi	£317,818		£317,818
Moulsham and Central	£312,375		£312,375
Springfield North		£434,165	£434,165
Grand Total	£313,759	£577,657	£465,591

Average of Price £/sqm	Column Labels		
Row Labels	Flat	House	Grand Total
Bicknacre and East and West Hanningfield		£4,677	£4,677
Boreham and The Leighs	£4,637	£5,217	£5,013
Broomfield and The Walthams		£4,949	£4,949
Marconi	£5,088		£5,088
Moulsham and Central	£4,578		£4,578
Springfield North		£5,373	£5,373
Grand Total	£4,642	£5,074	£4,896

2026

NO DATA FOR 2026

Appendix 2 – Newbuild Asking Prices, April 2026

Developer	Development	Address	Address	Postcode	Name	Beds	Type	sqm	Asking price £	Asking Price £/sqm
Bellway	Beaulieu Grange	Smith Crescent	Chelmsford	CM1 6LF	Scrivener	4	Detached	122	£624,995	£5,123
Bellway	Beaulieu Grange	Smith Crescent	Chelmsford	CM1 6LF	Shipwright	3	Semi-detached	103	£524,995	£5,097
Bellway	Beaulieu Grange	Smith Crescent	Chelmsford	CM1 6LF	Shipwright	3	Semi-detached	103	£524,995	£5,097
Bellway	Beaulieu Grange	Smith Crescent	Chelmsford	CM1 6LF	Cedar	3	Semi-detached		£674,995	
Bellway	Beaulieu Grange	Smith Crescent	Chelmsford	CM1 6LF	Cedar	3	Semi-detached		£699,995	
Bellway	Beaulieu Grange	Smith Crescent	Chelmsford	CM1 6LF	Cedar	3	Semi-detached		£729,995	
Sage Homes	Beaulieu Grange	George Wicks Way	Chelmsford	CM1 6AU		1	Flat	50	£245,000	£4,900
Sage Homes	Beaulieu Grange	George Wicks Way	Chelmsford	CM1 6AU		1	Flat	50	£239,500	£4,790
Sage Homes	Beaulieu Grange	George Wicks Way	Chelmsford	CM1 6AU		1	Flat	50	£239,500	£4,790
Northwood	Cathedral View	Duke Street	Chelmsford	CM1 1.		1	Flat	55	£250,000	£4,545
Northwood	Cathedral View	Duke Street	Chelmsford	CM1 1.		1	Flat	55	£275,000	£5,000
Northwood	Cathedral View	Duke Street	Chelmsford	CM1 1.		1	Flat	51	£300,000	£5,882
Northwood	Cathedral View	Duke Street	Chelmsford	CM1 1.		2	Flat	66	£350,000	£5,303
Northwood	Cathedral View	Duke Street	Chelmsford	CM1 1.		2	Flat	64	£400,000	£6,250
Northwood	Cathedral View	Duke Street	Chelmsford	CM1 1.		2	Flat	84	£425,000	£5,060
Northwood	Cathedral View	Duke Street	Chelmsford	CM1 1.		2	Flat	76	£450,000	£5,921
Marden Homes	Wimbush Waters		Chelmsford	CM3 3HA	Tay	3	Detached	107	£575,000	£5,374
Marden Homes	Wimbush Waters		Chelmsford	CM3 3HA	Eden	3	Semi-detached	95	£499,999	£5,263
Marden Homes	Wimbush Waters		Chelmsford	CM3 3HA	plot 68	2	Flat	78	£425,000	£5,449
Marden Homes	Wimbush Waters		Chelmsford	CM3 3HA		5	Detached	265	£1,600,000	£6,038
Marden Homes	Wimbush Waters		Chelmsford	CM3 3HA		5	Detached	265	£1,700,000	£6,415
Marden Homes	Wimbush Waters		Chelmsford	CM3 3HA		5	Detached	265	£1,700,000	£6,415
Marden Homes	Wimbush Waters		Chelmsford	CM3 3HA	Tay	3	Detached	107	£605,000	£5,654
Savills	Waterloo Chambers	Waterloo Lane	Chelmsford	CM1		2	Flat	70	£365,000	£5,214

Savills	Waterloo Chambers	Waterloo Lane	Chelmsford	CM1		2	Flat	72	£370,000	£5,139
McCartney	The Chapel	Hall Street	Chelmsford	CM2 0HG		2	Terraced	75	£400,000	£5,333
McCartney	The Chapel	Hall Street	Chelmsford	CM2 0HG		2	Terraced	90	£475,000	£5,278
Savills	Hall Street	Hall Street	Chelmsford	CM2		4	Semi-detached	151	£650,000	£4,305
Roxwell	Roxwell Row		Chelmsford	CM1 2NE		5	Detached	178	£975,000	£5,478
Roxwell	Roxwell Row		Chelmsford	CM1 2NE		5	Detached	187	£975,000	£5,214
Roxwell	Roxwell Row		Chelmsford	CM1 2NE		5	Detached	187	£985,000	£5,267
Roxwell	Roxwell Row		Chelmsford	CM1 2NE		5	Detached	178	£985,000	£5,534
Roxwell	Roxwell Row		Chelmsford	CM1 2NE		5	Detached	178	£995,000	£5,590
Roxwell	Roxwell Row		Chelmsford	CM1 2NE		5	Detached	178	£995,000	£5,590
Roxwell	Roxwell Row		Chelmsford	CM1 2NE		5	Detached	187	£995,000	£5,321
Palmer	Galleywood Road	Galleywood Road	Great Baddow	CM2		3	Detached	114	£525,000	£4,605
Palmer	Galleywood Road	Galleywood Road	Great Baddow	CM2		3	Detached	95	£600,000	£6,316
Savills	Moulsham Green View		Chelmsford			4	Terraced	279	£1,850,000	£6,631
Savills	Moulsham Green View		Chelmsford			3	Detached	158	£1,150,000	£7,278
Savills	Moulsham Green View		Chelmsford			4	Detached	171	£1,150,000	£6,725
Hopkins Homes	Beaulieu	Remembrance Avenue	Chelmsford	CM1 6FU	Barnston	4	Detached	178	£890,000	£5,000
Hopkins Homes	Beaulieu	Remembrance Avenue	Chelmsford	CM1 6FU	Alvington	5	Detached	185	£890,000	£4,811
Hopkins Homes	Beaulieu	Remembrance Avenue	Chelmsford	CM1 6FU	Thurne	5	Detached	194	£880,000	£4,536
Hopkins Homes	Beaulieu	Remembrance Avenue	Chelmsford	CM1 6FU	Alston	4	Detached	145	£680,000	£4,690
Hopkins Homes	Beaulieu	Remembrance Avenue	Chelmsford	CM1 6FU	Elsenham	4	Detached	126	£620,000	£4,921
Savills	East Hanningfield Road	East Hanningfield Road	Sandon	CM2	Catkins	5	Detached	334	£1,750,000	£5,240
Savills	East Hanningfield Road	East Hanningfield Road	Sandon	CM2		6	Detached	362	£1,750,000	£4,834
Walkers	Farmstead Manor	Main Road	Woodham Ferrers			4	Detached	182	£1,000,000	£5,495

Walkers	Farmstead Manor	Main Road	Woodham Ferrers			4	Detached	168	£900,000	£5,357
Walkers	Farmstead Manor	Main Road	Woodham Ferrers			3	Detached		£600,000	
Savills	Larcombe Mews		Margaretting	CM4		4	Detached	160	£855,000	£5,344
Beresfords	Hanningfield Park		Rettendon Common	CM3 3HA	Harlequin	5	Detached	192	£800,000	£4,167
Beresfords	Hanningfield Park		Rettendon Common	CM3 3HA		4	Detached	150	£635,000	£4,233
Beresfords	Hanningfield Park		Rettendon Common	CM3 3HA		3	Detached	117	£495,000	£4,231
Beresfords	Hanningfield Park		Rettendon Common	CM3 3HA	Mallard	3	Detached	117	£490,000	£4,188
Beresfords	Hanningfield Park		Rettendon Common	CM3 3HA	Aylesbury	2	Semi-detached	98	£425,000	£4,337
William H Brown	Hawthorn Close	Bicknacre	Chelmsford			4	Detached	160	£650,000	£4,063
Jackson Stops	Lucks Lane	Howe Street	Chelmsford	CM3	Foxgloves	2	Detached	64	£525,000	£8,203
Keith Ashton	Banters Lane	Great Leighs	Chelmsford			3	Semi-detached	125	£525,000	£4,200

Appendix 3 – Derivation of Affordable Housing Value Assumptions – April 2026

Social Rent

General needs (social rent)					
Average weekly rent (£ per week) and unit counts by unit size for Chelmsford - large PRPs					
Unit Size	£ per week				Unit count
	Net rent	Formula rent	Service charge [^]	Gross rent [^]	
Non-self-contained	-	-	-	-	-
Bedsit	£93.52	£91.63	£14.39	£102.18	128
1 Bedroom	£111.06	£110.21	£18.70	£123.89	2,939
2 Bedroom	£125.69	£126.56	£12.42	£132.48	2,687
3 Bedroom	£141.19	£144.17	£5.31	£142.14	2,746
4 Bedroom	£169.19	£174.55	£4.77	£170.98	146
5 Bedroom	£147.73	£168.65	-	£147.73	2
6+ Bedroom					
All self-contained	£125.91	£126.93	£14.59	£132.83	8,648
All stock sizes	£125.91	£126.93	£14.59	£132.83	8,648
Owned stock. Large PRPs only - unweighted. Excludes Affordable Rent and intermediate rent, but includes other units with an exception under the Rent Policy Statement. Stock outside England is excluded.					
Source: SDR 2025					

Source: Table 9, SDR 2025 – Data Tool²⁶

Affordable Rent

Affordable Rent general needs		
Average weekly gross rent (£ per week) and unit counts by unit size for Chelmsford		
Unit Size	£ per week	
	Gross rent	Unit count
Non-self-contained	-	-
Bedsit	£150.68	6
1 Bedroom	£156.18	457
2 Bedroom	£186.40	657
3 Bedroom	£231.01	239
4 Bedroom	£277.23	47
5 Bedroom	£324.56	1
6+ Bedroom	-	-
All self-contained	£187.14	1,407
All stock sizes	£187.14	1,407
Owned stock. All PRPs owning Affordable Rent units - unweighted. Stock outside England is excluded.		
Source: SDR 2025		

Source: Table 1, SDR 2025 – Data Tool²⁷

²⁶ [Private registered provider social housing stock and rents in England 2024 to 2025 - GOV.UK](https://www.gov.uk/government/statistics/private-registered-provider-social-housing-stock-and-rents-in-england-2024-to-2025)

²⁷ [Private registered provider social housing stock and rents in England 2024 to 2025 - GOV.UK](https://www.gov.uk/government/statistics/private-registered-provider-social-housing-stock-and-rents-in-england-2024-to-2025)

BRMA LHA Caps

	Chelmsford BRMA		South West Essex BRMA	
	£98	£425	£110	£475
Shared	£183	£793	£178	£773
One Bedroom	£219	£947	£219	£947
Two Bedrooms	£276	£1,197	£276	£1,197
Three Bedrooms	£334	£1,446	£345	£1,496
Four Bedrooms				

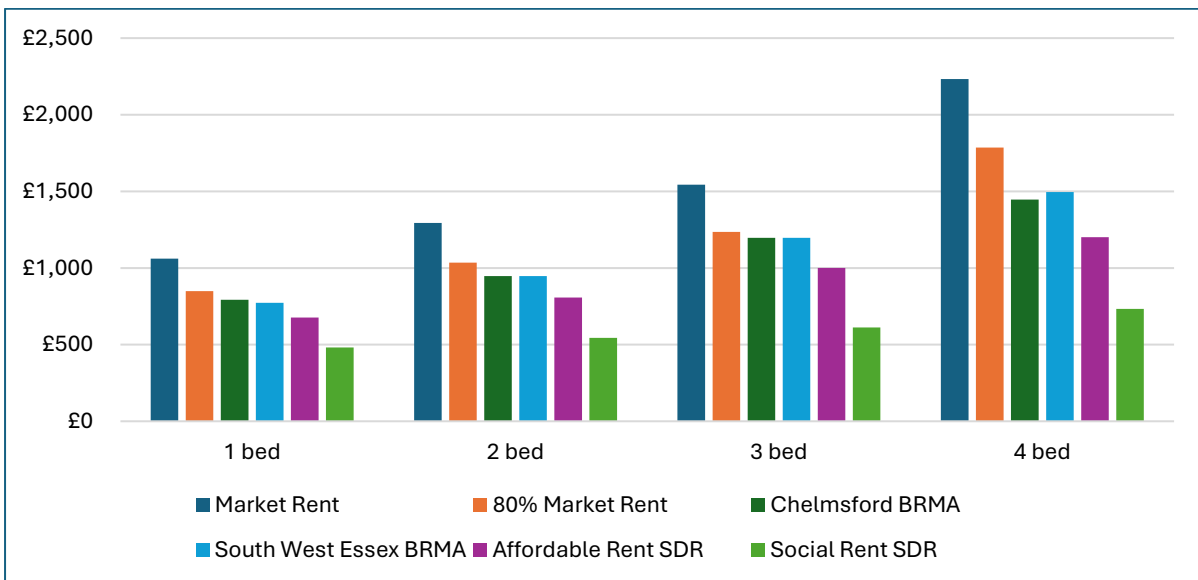
Source: VOA (April 2026)

Average Rents - Feb-2026

1 Bed	£1,061
2 Bed	£1,294
3 Bed	£1,544
4 Bed	£2,233
Detached	£2,000
Semidetached	£1,523
Terraced	£1,372
Flat maisonette	£1,213

Source: ONS (April 2026) [Price Index of Private Rents, UK: monthly price statistics - Office for National Statistics](#)

Rents by Tenure – £/Month



Source: Market Survey, SDR and VOA (April 2026)

Capitalisation of Social Rents

	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms
Rent (£/month)	£481	£545	£612	£733
Rent (£/annum)	£5,775	£6,536	£7,342	£8,798
Net Rent	£4,620	£5,229	£5,874	£7,038
Value	£102,669	£116,193	£130,522	£156,407
sqm	50	70	84	97
£ per sqm	£2,053	£1,660	£1,554	£1,612

Source: HDH (April 2026)

Capitalisation of Affordable Rents

	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms
Rent (£/month)	£793	£947	£1,197	£1,446
Rent (£/annum)	£9,514	£11,369	£14,360	£17,352
Net Rent	£7,611	£9,095	£11,488	£13,882
Value	£169,136	£202,111	£255,295	£308,487
sqm	50	70	84	97
£ per sqm	£3,383	£2,887	£3,039	£3,180

Source: HDH (April 2026)

Appendix 4 Sensitivity Testing Based on Full Policy Requirements

Wider Chelmsford

			EUV	BLV	Residual Value (£ per gross ha)															
					Value Change		-10%	-5%	0%	+5%	+10%	+15%	+20%	-10%	-5%	0%	+5%	+10%	+15%	+20%
					BCIS Change															
Site 1	Large GF 300 Urban Edge	Wider Chelmsford	25,000	525,000	519,326	816,962	1,114,598	1,408,802	1,700,868	1,992,934	2,285,000	1,506,138	1,311,437	1,114,598	914,975	715,351	515,727	316,103		
Site 2	Large GF 100 Urban Edge	Wider Chelmsford	25,000	525,000	360,163	677,044	993,926	1,310,808	1,627,689	1,944,571	2,261,452	1,435,518	1,214,722	993,926	773,130	552,334	331,538	110,741		
Site 3	Medium GF - 40 urban edge	Wider Chelmsford	25,000	525,000	773,193	1,168,542	1,563,892	1,959,242	2,354,592	2,749,942	3,145,291	2,090,183	1,827,037	1,563,892	1,300,747	1,037,602	774,457	511,312		
Site 4	Medium GF - 20 urban edge	Wider Chelmsford	25,000	525,000	709,618	1,045,537	1,381,455	1,717,374	2,053,293	2,389,212	2,725,130	1,825,710	1,603,582	1,381,455	1,159,328	937,201	715,074	492,947		
Site 5	Medium GF - 12 urban edge	Wider Chelmsford	25,000	525,000	927,377	1,314,759	1,702,140	2,089,522	2,476,903	2,864,285	3,251,667	2,206,949	1,954,545	1,702,140	1,449,736	1,197,331	944,926	692,522		
Site 6	Brownfield - 125 Urban Area	Wider Chelmsford	1,000,000	1,200,000	626,743	1,167,882	1,709,022	2,250,161	2,791,300	3,332,439	3,873,578	2,463,003	2,086,012	1,709,022	1,332,031	955,040	578,049	201,058		
Site 7	Brownfield - 50 Urban Area	Wider Chelmsford	1,000,000	1,200,000	719,685	1,363,609	2,007,532	2,651,455	3,295,378	3,939,302	4,583,225	2,909,675	2,458,603	2,007,532	1,556,460	1,105,389	654,318	201,601		
Site 8	Brownfield - 25 Urban Area	Wider Chelmsford	1,000,000	1,200,000	1,010,442	1,672,265	2,334,087	2,995,910	3,657,732	4,319,555	4,981,377	3,242,719	2,788,403	2,334,087	1,879,772	1,425,456	971,140	516,732		
Site 9	Brownfield - 12 Urban Area	Wider Chelmsford	1,000,000	1,200,000	1,269,380	2,037,408	2,805,436	3,573,465	4,341,493	5,109,521	5,877,549	3,858,468	3,331,952	2,805,436	2,278,921	1,752,405	1,225,890	685,550		
Site 10	Flatted BF 250	Wider Chelmsford	1,000,000	1,200,000	-1,122,866	-559,716	-13,708	506,280	1,023,416	1,540,552	2,057,688	843,486	416,315	-13,708	-461,921	-925,288	-1,391,842	-1,863,978		
Site 11	Flatted BF 250 HD	Wider Chelmsford	1,000,000	1,200,000	-8,087,633	-6,714,236	-5,340,839	-3,987,491	-2,648,058	-1,324,750	-48,811	-2,586,405	-3,958,719	-5,340,839	-6,739,558	-8,138,277	-9,542,465	#####		
Site 12	Flatted BF 155	Wider Chelmsford	1,000,000	1,200,000	-1,701,887	-869,871	-63,307	706,543	1,468,333	2,230,122	2,991,912	1,208,220	576,487	-63,307	-727,073	-1,413,846	-2,106,694	-2,805,047		
Site 13	Flatted BF 155 HD	Wider Chelmsford	1,000,000	1,200,000	-8,311,672	-6,908,322	-5,513,835	-4,136,313	-2,770,029	-1,417,860	-110,990	-2,699,591	-4,103,274	-5,513,835	-6,937,222	-8,369,472	-9,801,723	#####		
Site 14	Flats BF 75	Wider Chelmsford	1,000,000	1,200,000	-1,492,025	-759,654	-47,390	636,305	1,308,836	1,981,367	2,653,898	1,081,590	522,682	-47,390	-634,929	-1,242,574	-1,850,220	-2,457,906		
Site 15	Flats BF 35	Wider Chelmsford	1,000,000	1,200,000	-2,971,449	-2,166,567	-1,362,570	-563,468	211,206	962,130	1,700,434	55,503	-641,319	-1,362,570	-2,084,601	-2,806,632	-3,532,874	-4,266,063		
Site 16	Flats BF 12	Wider Chelmsford	1,000,000	1,200,000	-2,706,564	-1,944,791	-1,183,019	-429,651	304,338	1,036,380	1,750,731	153,219	-505,211	-1,183,019	-1,865,269	-2,547,519	-3,229,768	-3,919,591		
Site 17	Small GF -9	Wider Chelmsford	50,000	550,000	2,567,117	3,182,280	3,797,444	4,412,608	5,027,772	5,642,935	6,258,099	4,501,348	4,149,396	3,797,444	3,445,492	3,093,540	2,741,589	2,389,637		
Site 18	Small GF - 4	Wider Chelmsford	50,000	550,000	2,495,548	3,144,538	3,793,528	4,442,518	5,091,507	5,740,497	6,389,487	4,562,088	4,177,808	3,793,528	3,409,248	3,024,968	2,640,688	2,256,408		
Site 19	Green Plot	Wider Chelmsford	50,000	550,000	2,260,176	3,077,903	3,895,630	4,709,234	5,511,159	6,313,085	7,115,010	4,938,374	4,421,321	3,895,630	3,369,938	2,844,247	2,318,556	1,792,864		
Site 20	Small Brown - 9	Wider Chelmsford	1,000,000	1,200,000	2,371,897	3,025,236	3,678,575	4,331,914	4,985,254	5,638,593	6,291,932	4,440,499	4,059,537	3,678,575	3,297,613	2,916,651	2,535,689	2,154,726		
Site 21	Small Brown - 6	Wider Chelmsford	1,000,000	1,200,000	2,993,367	3,681,320	4,369,273	5,057,226	5,745,179	6,433,133	7,121,086	5,131,477	4,750,375	4,369,273	3,988,171	3,607,069	3,225,967	2,844,865		
Site 22	Brown Plot	Wider Chelmsford	1,000,000	1,200,000	2,322,768	2,903,072	3,483,376	4,063,680	4,641,202	5,210,293	5,779,383	4,153,941	3,818,659	3,483,376	3,148,094	2,812,811	2,477,529	2,142,247		
Site 36	Hammonds Farm	Wider Chelmsford	25,000	250,000	-122,726	34,896	181,643	325,255	467,121	607,379	746,939	377,349	280,058	181,643	81,565	-22,019	-133,074	-248,746		
Site 38	West Chelmsford	Wider Chelmsford	25,000	250,000	269,293	523,445	773,826	1,022,057	1,270,289	1,518,520	1,766,751	1,102,766	938,296	773,826	608,410	439,223	270,036	100,850		
Site 39	Great Leighs - Moulsham	Wider Chelmsford	25,000	250,000	241,396	508,495	772,012	1,035,529	1,299,046	1,559,425	1,818,495	1,119,564	945,788	772,012	598,236	424,461	245,323	65,825		
Site 40	North of Broomfield	Chelmsford	25,000	250,000	279,820	487,808	694,655	898,116	1,101,577	1,305,039	1,508,500	962,650	828,652	694,655	558,079	420,364	282,648	144,932		



South Woodham Ferrers

			EUV	BLV	Residual Value (£ per gross ha)															
					Value Change		-10%	-5%	0%	+5%	+10%	+15%	+20%	-10%	-5%	0%	+5%	+10%	+15%	+20%
					BCIS Change															
Site 1	Large GF 300 Urban Edge	SWF	25,000	525,000	-303,902	-26,142	234,790	488,436	742,081	995,727	1,248,988	634,037	434,414	234,790	31,220	-185,318	-409,437	-657,466		
Site 2	Large GF 100 Urban Edge	SWF	25,000	525,000	-519,550	-225,837	57,111	327,275	597,322	867,368	1,137,415	498,820	278,024	57,111	-174,160	-411,464	-651,496	-894,931		
Site 3	Medium GF - 40 urban edg	SWF	25,000	525,000	-607,688	-258,578	78,488	402,944	724,185	1,045,425	1,366,666	607,994	344,849	78,488	-197,620	-480,212	-766,298	-1,053,643		
Site 4	Medium GF - 20 urban edg	SWF	25,000	525,000	-465,698	-170,719	115,677	395,027	667,977	940,927	1,213,877	566,332	344,204	115,677	-117,392	-354,221	-595,719	-837,217		
Site 5	Medium GF - 12 urban edg	SWF	25,000	525,000	-425,105	-88,829	241,442	564,591	879,357	1,194,123	1,508,889	754,634	502,230	241,442	-23,396	-288,391	-562,806	-837,222		
Site 6	Brownfield - 125 Urban Area	SWF	1,000,000	1,200,000	-893,442	-392,902	89,236	549,438	1,009,590	1,469,742	1,929,895	843,267	466,276	89,236	-305,644	-710,898	-1,120,721	-1,537,034		
Site 7	Brownfield - 50 Urban Area	SWF	1,000,000	1,200,000	-1,098,446	-502,172	73,332	627,696	1,175,250	1,722,804	2,270,358	982,285	531,214	73,332	-399,960	-886,699	-1,377,100	-1,867,500		
Site 8	Brownfield - 25 Urban Area	SWF	1,000,000	1,200,000	-845,437	-241,497	348,285	915,896	1,478,671	2,041,445	2,604,219	1,261,754	807,438	348,285	-127,696	-607,596	-1,101,524	-1,595,451		
Site 9	Brownfield - 12 Urban Area	SWF	1,000,000	1,200,000	-900,230	-202,001	483,256	1,159,459	1,812,747	2,465,832	3,118,917	1,559,608	1,029,221	483,256	-69,197	-622,701	-1,195,131	-1,767,562		
Site 10	Flatted BF 250	SWF	1,000,000	1,200,000	-2,702,423	-2,203,775	-1,707,531	-1,220,273	-740,349	-269,656	184,290	-767,919	-1,235,247	-1,707,531	-2,187,228	-2,666,925	-3,151,723	-3,638,523		
Site 11	Flatted BF 250 HD	SWF	1,000,000	1,200,000	#####	#####	-9,510,575	-8,322,619	-7,154,760	-5,988,668	-4,826,887	-6,689,506	-8,091,998	-9,510,575	#####	#####	#####	#####		
Site 12	Flatted BF 155	SWF	1,000,000	1,200,000	-4,024,099	-3,293,085	-2,562,959	-1,845,399	-1,135,960	-440,343	232,221	-1,171,120	-1,864,606	-2,562,959	-3,271,528	-3,980,986	-4,690,443	-5,406,927		
Site 13	Flatted BF 155 HD	SWF	1,000,000	1,200,000	#####	#####	-9,741,501	-8,549,977	-7,358,453	-6,166,929	-4,994,016	-6,877,000	-8,309,250	-9,741,501	#####	#####	#####	#####		
Site 14	Flats BF 75	SWF	1,000,000	1,200,000	-3,507,948	-2,874,464	-2,240,981	-1,616,390	-994,565	-380,248	217,296	-1,022,923	-1,630,568	-2,240,981	-2,858,309	-3,475,636	-4,092,964	-4,710,292		
Site 15	Flats BF 35	SWF	1,000,000	1,200,000	-4,174,983	-3,422,774	-2,675,218	-1,936,853	-1,198,489	-468,610	242,826	-1,231,155	-1,953,187	-2,675,218	-3,403,755	-4,136,944	-4,870,133	-5,603,323		
Site 16	Flats BF 12	SWF	1,000,000	1,200,000	-3,841,627	-3,128,922	-2,426,729	-1,727,142	-1,027,555	-339,775	334,297	-1,062,229	-1,744,479	-2,426,729	-3,108,979	-3,801,419	-4,494,020	-5,186,621		
Site 17	Small GF -9	SWF	50,000	550,000	1,746,898	2,316,494	2,886,090	3,455,686	4,025,283	4,594,879	5,164,475	3,589,994	3,238,042	2,886,090	2,534,139	2,182,187	1,830,235	1,478,283		
Site 18	Small GF - 4	SWF	50,000	550,000	1,623,134	2,231,145	2,832,061	3,432,978	4,033,894	4,634,811	5,235,727	3,600,621	3,216,341	2,832,061	2,447,782	2,063,502	1,673,547	1,278,128		
Site 19	Green Plot	SWF	50,000	550,000	1,169,873	1,927,028	2,684,182	3,441,337	4,198,491	4,946,841	5,689,365	3,735,565	3,209,873	2,684,182	2,158,491	1,632,800	1,107,108	581,417		
Site 20	Small Brown - 9	SWF	1,000,000	1,200,000	590,299	1,165,048	1,723,002	2,278,562	2,834,123	3,389,684	3,945,244	2,484,926	2,103,964	1,723,002	1,342,040	952,703	556,968	157,240		
Site 21	Small Brown - 6	SWF	1,000,000	1,200,000	1,118,681	1,720,754	2,310,093	2,895,088	3,480,082	4,065,076	4,650,070	3,072,297	2,691,195	2,310,093	1,928,991	1,538,408	1,146,259	746,802		
Site 22	Brown Plot	SWF	1,000,000	1,200,000	759,499	1,252,955	1,746,411	2,239,867	2,733,323	3,226,779	3,720,235	2,416,976	2,081,694	1,746,411	1,411,129	1,075,846	740,564	405,282		
Site 37	North of South Woodham	South Woodham Fe	25,000	250,000	-431,189	-235,438	-63,212	103,521	262,780	421,331	579,882	193,897	68,322	-63,212	-197,961	-337,644	-502,193	-682,625		



HDH Planning and Development Ltd is a specialist planning consultancy providing evidence to support planning authorities, landowners and developers. The firm is regulated by the RICS.

The main areas of expertise are:

- Community Infrastructure Levy (CIL)
- District wide and site specific Viability Analysis
- Local and Strategic Housing Market Assessments and Housing Needs Assessments

HDH Planning and Development have clients throughout England and Wales.

HDH Planning and Development Ltd

Registered in England Company Number 08555548

Clapham Woods Farm, Keasden, Nr Clapham, Lancaster. LA2 8ET

info@hdhplanning.co.uk, 015242 51831

