Greater Norwich Housing Land Supply Assessment 1st April 2026 to 31st March 2031

1. Summary

1.1 This note sets out the housing land supply assessment for the Greater Norwich area for the period 1st April 2026 to 31st March 2031. It is a note that responds to the Government's changes in the August 2026 National Planning Policy Framework (NPPF).

1.2 This statement sets out that for the 5-year period 1st April 2026 to 31st March 2031 the housing land supply position is 4.37 years. Built into this calculation is a 20% buffer as required by NPPF paragraph 9 of Annex D, because the housing requirement adopted in 2024 by the Greater Norwich Local Plan (GNLP) is less than 80% of the figure calculated using the Government's most up-to-date standard method.

1.3 Since the adoption of the GNLP in March 2024 the supply of new housing sites has continued to be challenging, with a contributory factor being the availability of measures to address Nutrient Neutrality. The supply of homes between 1st April 2026 to 31st March 2031 is now forecast at 10,370 a reduction of 2,222 homes from the 12,592 homes that the GNLP projected over 1st April 2023 to 31st March 2028 (ref. GNLP Appendices Housing Trajectory).

1.4 The introduction of the section 'Delivering a sufficient supply of homes' in the August 2026 NPPF sets the context of 'support[ing] the delivery of a substantial increase in the supply of homes', with the Greater Norwich area being no exception. Due to the update of the NPPF in 2026, in accordance with Annex D, paragraph 9, the buffer has risen from 5% to 20% as of 1 July 2026. Additionally, under the Government's new local housing need methodology, the Greater Norwich requirement has risen to 2,590 homes per annum.

2. Introduction

2.1 Changes made in the National Planning Policy Framework (August 2026) requires local planning authorities to annually identify and update a supply of specific deliverable sites sufficient to provide a minimum of five years' worth of housing. This requirement is set out in Annex D, paragraph 8 of the Framework. This note responds to that requirement and, upon publication, will be a material consideration in the determination of planning applications.

2.2 The Greater Norwich authorities have an excellent record in plan-making, and adopting the Greater Norwich Local Plan (GNLP) in March 2024 represented an important new step in providing a plan-led approach to meeting the area's local

housing needs. Notably, the GNLP set a local housing requirement for 40,541 homes between 2018 and 2038.

2.3 To address the shortfall in housing supply, the Greater Norwich authorities are working on their third joint local plan. The new plan, which is entitled GNLP 2045, is being prepared under the new plan-making regulations, and as of August 2026 had reached the Regulation 20 Scoping Consultation.

3. Calculating the Local Housing Need (LHN)

3.1 The Greater Norwich authorities are basing their LHN on the GNLP housing requirement of 40,541 homes over the period 2018 to 2038 (ref GNLP Table 6). NPPF Annex D, paragraph 8 allows this because the GNLP is less than 5 years old.

3.2 Based on the 20-year lifespan of the GNLP, the local housing requirement of 40,541 homes, equals 2,027 homes per year. However, since the base-date of the plan completions have exceeded the annual average requirement, and between 1st April 2018 and 31st March 2026 a total of 16,823 homes have been completed. Table 1 shows annual completions since the base-date of the GNLP.

Table 1: Annual Greater Norwich Housing Completions since 1st April 2018

Year	**18/19**	**19/20**	**20/21**	**21/22**	**22/23**	**23/24**	**24/25**	**25/26**	**Total**
Housing Delivery	2,936	2,304	1,602	1,886	2,358	2,338	1,892	1,507	16,823

3.3 The delivery of 16,823 homes since 1st April 2018 means there are now 23,718 homes to deliver by 31st March 2038. Divided by the remaining 12 years of the plan period this equals an average of 1,977 homes per year.

3.4 With an annual requirement of 1,977 homes per year, the five-year requirement from 1st April 2026 to 31st March 2031 is 9,883 homes. Then, based on NPPF Annex D, paragraph 9, a 20% buffer is added to ensure choice and competition in the market for land. This gives an overall 5-year requirement of 11,859 homes.

3.5 The 20% buffer is appropriate because Greater Norwich has a housing requirement which is 80% or less of the most up to date local housing need figure.

4. Calculating the Supply of Homes Site-by-Site

4.1 To produce this housing land supply assessment the Greater Norwich authorities spent time during April, May and June approaching landowners, agents, and developers for new data about when they intend to bring forward their allocated or

permitted sites. Furthermore, projections have been updated, using known completions and progress of planning applications.

4.2 Appendices A, B and C to this assessment forecasts 3,887 homes in Broadland, 2,143 homes in Norwich, and 4,340 homes in South Norfolk. Giving a total of 10,370 homes over the 5-year period 1st April 2026 to 31st March 2031.

4.3 The bulk of housing supply comes from large sites of 10 or more homes, and for these larger sites common practice is for the developer to provide a delivery forecast. Where delivery forecasts have not been provided then sites have been included based on reasonable assumptions of what could be expected on the site in question. These assumptions are based on past delivery on site, professional judgement and widely used industry-standard assumptions found in Lichfields Start to Finish 3.

4.4 Appendices A, B and C to this land supply assessment forecast 10,335 homes from large sites: 3,887 homes in Broadland, 2,143 homes in Norwich, and 4,340 homes in South Norfolk.

4.5 Small sites of fewer than 10 homes are also an important source of housing supply. New homes on smaller sites typically come from sources such as garden plots, barn conversions and other agricultural buildings, conversions of shops, offices and schools, brownfield redevelopment sites, and affordable housing exception sites. Other possibilities, although rarer, include where a new dwelling is created from a certificate of lawfulness, removal of an occupancy restriction, or the sub-division of a dwelling.

4.6 To accurately forecast supply from small windfall sites of fewer than 10 homes the Greater Norwich authorities conducted a piece of research to track such permissions through the planning system to completion. The evidence base for the supply of homes from small sites has been reported in previous Annual Monitoring Reports, and for reference purposes is reproduced here at Appendix D.

4.7 Although the supply of windfall sites is considered reliable, the Greater Norwich authorities take a prudent approach for forecasting purposes.

Existing sites of 9 dwellings or fewer

4.8 Although the definition of ‘Deliverable’ in the NPPF Glossary would suggest all small sites with existing permission should be considered deliverable unless there is clear evidence that the homes will not be delivered within 5 years, the Greater Norwich authorities make an adjustment to apply a blanket 27% discount to ensure no over-estimation of supply from existing permissions of 9 dwellings or fewer.

Future windfall

4.9 Adjustments are made for currently unknown windfall sites. This uses an analysis of past windfall permissions, and larger sites in South Norfolk and Broadland have been removed, because the continued supply of such sites is less certain.

4.10 The overall level of windfall is then discounted by a similar precautionary 33% as the existing small sites. Lastly, to avoid double-counting of delivery from individual small sites that already have permission windfall supply is applied in a stepped approach across the 5-year land supply. This means windfall is set at 0% in years 1 and 2, 33% in year 3, 66% and in year 4. The discounted windfall rate is applied fully in year 5 on the basis that such schemes have then had sufficient time to gain permission, start on site, and to complete.

Student Accommodation, older peoples housing and residential institutions

4.11 Whilst general needs housing forms the vast majority of the 5-year supply, schemes for specialist housing and purpose-built student accommodation are included, because they are legitimate sources of housing supply that have the effect of making available general housing that would otherwise be occupied. However, such units are not directly equivalent to a single dwelling on a 1:1 basis, and so they are counted with a reduced ratio.

4.12 Residential institutions are counted at a ratio of 1 home to each 1.9 bedspaces, and for communal student accommodation these are counted at a ratio of 1 home to each 2.85 student bedrooms (unless the student accommodation is provided as studio flats, when it is counted on a 1:1 basis). Details about these calculations are included in Appendix D; but, in summary, the ratio for older peoples housing and residential institutions is in accordance with national guidance and is based on the average number of adults living in households across the Greater Norwich area; and, the ratio for student accommodation is calculated by the average number of students living in student only households in Norwich and represents the amount of accommodation expected to be released into the wider housing market.

5. Housing Land Supply Calculation

5.1 Table 1 sets out the Housing Land Supply Calculation as per the requirements of NPPF Appendix D, paragraph 9 (c). Underneath Table 1 are notes referencing source information.

Table 2: Greater Norwich 5-Year Housing Land Supply Assessment

Row ID	**Greater Norwich 5-Year Housing Land Supply Assessment**	
a	GNLP housing requirement 2018 to 2038	40,541

b	Total delivery 2018/19 to 2025/26 Completions	16,823
c	Residual housing requirement over plan period to 2038 (12 years)	23,718
d	Average residual annual housing requirement (c/12)	1,977
e	Total 5-year requirement 2026/27 to 2030/31 (d*5)	9,883
f	Annual housing requirement with NPPF 20% buffer due to the housing requirement adopted in the last five years being examined against a version of the Framework published prior to December 2024 (d*1.2)	2,372
g	Total 5-year requirement 2026/27 to 2030/31 (f*5)	11,859
h	Housing forecast 2026/27 to 2030/31	10,370
i	Shortfall / surplus of housing (h-g)	-1,489
j	Supply in years (h/f)	**4.37**

- Row a: The housing requirement as at Table 6 of the GNLP 5. The Strategy (including policies) | GNLP. The GNLP provides the adopted strategic policies, and basis for calculating the housing requirement.
- Row b: Total housing completions over the eight years from 2018/19 to 2025/26.
- Row c: The residual housing requirement is calculated by deducting 16,823 from 40,541.
- Row d: The residual requirement of 23,718 is divided against the remaining 12 years of plan period (1st April 2026 to 31st March 2038).
- Row e: The residual annual requirement of 1,977 homes is multiplied by 5 to give the 5-year requirement.
- Row f: Applying a 20% buffer as required by NPPF paragraph 9 of Annex D.
- Row g: The residual annual requirement with the 20% buffer is multiplied by 5 years.
- Row h: Appendices to this note give a site-by-site forecast of housing delivery. For the 5-year period 2026/27 to 2030/31, the homes forecast are Broadland 3,887, Norwich City 2,143, and South Norfolk 4,340, totalling 10,370.
- Row i: The negative number of -1,489 homes indicates a shortfall between the forecast delivery and the 5-year requirement. This means that the Greater Norwich area is unable to demonstrate a 5-year housing supply for the period 2026/27 to 2030/31.
- Row j: The number of years supply is calculated by dividing the housing forecast 2026/27 to 2030/31 by the annual housing requirement.

6. Nutrient Neutrality

6.1 The Greater Norwich Authorities are continuing to act on Nutrient Neutrality so that new development can progress, and this includes setting up the not-for-profit company Norfolk Environmental Credits (NEC). Progress is being made, but the forecast 5-year housing land supply has decreased partly because of this.

6.2 Appendix 4 of the GNLP forecasted 12,592 homes between 1st April 2023 to 31st March 2028, but this has declined to 10,370 homes between 1st April 2026 to 31st March 2031. This statement therefore shows a drop in housing land supply of 2,222 homes, or 18% as existing permissions and sites outside the Nutrient Neutrality area have continued to be developed, but likely development on some new allocations and permissions has been delayed.

7. The National Planning Policy Framework (August 2026)

7.1 The Government's changes to the NPPF mean that Local Planning Authorities (LPAs) across the country must plan for higher levels of home building. Under the August 2026 NPPF, the housing need figure for Greater Norwich rises by 34%. Using the previous standard methodology set by Government the annual housing need was 1,929 homes, but this rises to 2,590 homes per annum for Greater Norwich.

7.2 To address the higher housing requirements, work has begun on a review of the GNLP so that it is updated by March 2029. The Government's Planning Practice Guidance being clear that LPAs must review local plans at least once every 5 years so that they remain relevant and effectively address the needs of the local community (Plan-making - GOV.UK 062 Reference ID: 61-062-20190315).

8. Monitoring in 2026/27

8.1 Following this housing land supply assessment, work will re-commence from April 2027 on producing a new annual update of the 5-year housing land supply position. This will take advantage of completions data from 2026/27 and will consider the 5-year forecast for the period 1st April 2027 to 31st March 2032.

8.2 The Greater Norwich authorities will contact landowners, agents and developers from spring 2027 to seek updated housing delivery forecasts. Following the successful introduction of a Microsoft Forms-based approach, future monitoring will continue to use this method in place of individual Joint Delivery Statements. This provides a more efficient means of collecting information and enables responses from developers, landowners and agents to be readily collated and reviewed in spreadsheet format alongside the supporting evidence. The Greater Norwich authorities appreciate the continued cooperation of stakeholders in forecasting future housing delivery.

9. Conclusion

9.1 Based on the above the Greater Norwich Authorities are currently unable to demonstrate a 5-year housing land supply with an appropriate buffer to ensure choice and competition in the market for land. As such for determining planning applications in the Greater Norwich area the presumption in favour of sustainable

development will apply, as set out under national decision-making policy S3 in the NPPF.

Appendices

Appendix A Broadland Site Forecast

Appendix B Norwich Site Forecast

Appendix C South Norfolk Site Forecast

Appendix D Background Methodology to the 5-year Land Supply Forecast