

Where do we need more small and medium-sized sites?



More sites of 20-100 and 100-250 homes are needed in most regions and types of location to increase housing delivery

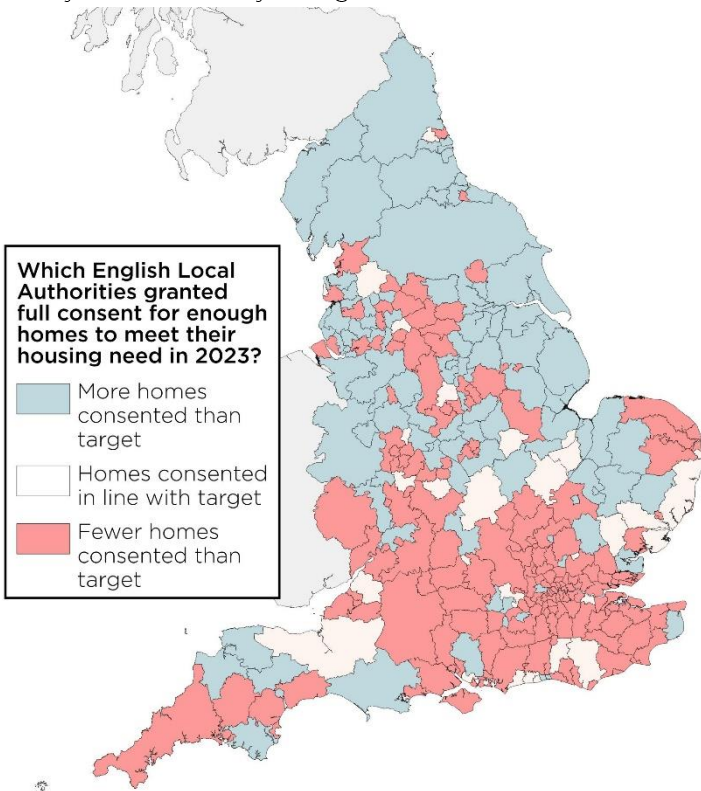
- There are not enough sites with planning permission in England to build the homes we need. In particular, there are too few small and medium-sized sites gaining consent. The number of sites of under 100 homes granted consent has more than halved between 2017 and 2023 with sites of 100-250 homes falling by 43% in the same period (see our previous [Land Matters](#) report for details).
- Overall, more sites of up to 250 homes are needed in all types of location. This additional land supply will enable faster delivery of homes (smaller sites are typically less complex and don't require as much additional infrastructure as larger ones) and allow a greater range of housebuilders to access land and expand their capacity including SME housebuilders (see [What size of builders do we need to deliver more homes?](#)).

Where do we need more sites?

In the last three years, there have not been enough homes gaining consent to provide enough land for residential development to meet housing need. Within England (as shown in Figure 1), this is especially the case in the South and near larger urban centres, although there are parts of the North that are also short of consented sites.

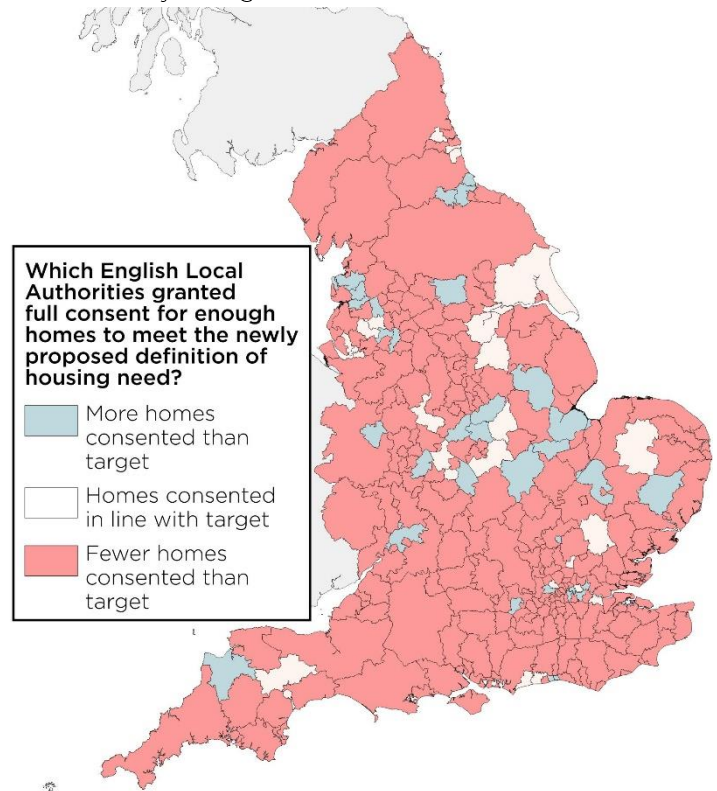
The Government is currently considering increasing housing targets further, using a new method for calculating housing need. If the proposed targets for around 370,000 homes are adopted, even more land will need to be made available for housing delivery. As shown in Figure 2, fewer homes have been consented in the last three years than set out in these targets in almost all local authorities in England.

Figure 1 Comparison of the average annual number of homes granted planning consent over the last three years relative to the 2023 definition of Standard Method housing need by Local Authority in England



Source Savills using Glenigan (20+ units only) and Standard Method Housing Need

Figure 2 Comparison of the average annual number of homes granted planning consent over the last three years relative to the 2024 proposed definition of housing need by Local Authority in England



Source Savills using Glenigan (20+ units only)

Where do we need more small and medium-sized sites?

More small and medium-sized sites are needed across the country. However, there are some regions where small and medium-sized sites are in shorter supply than others.

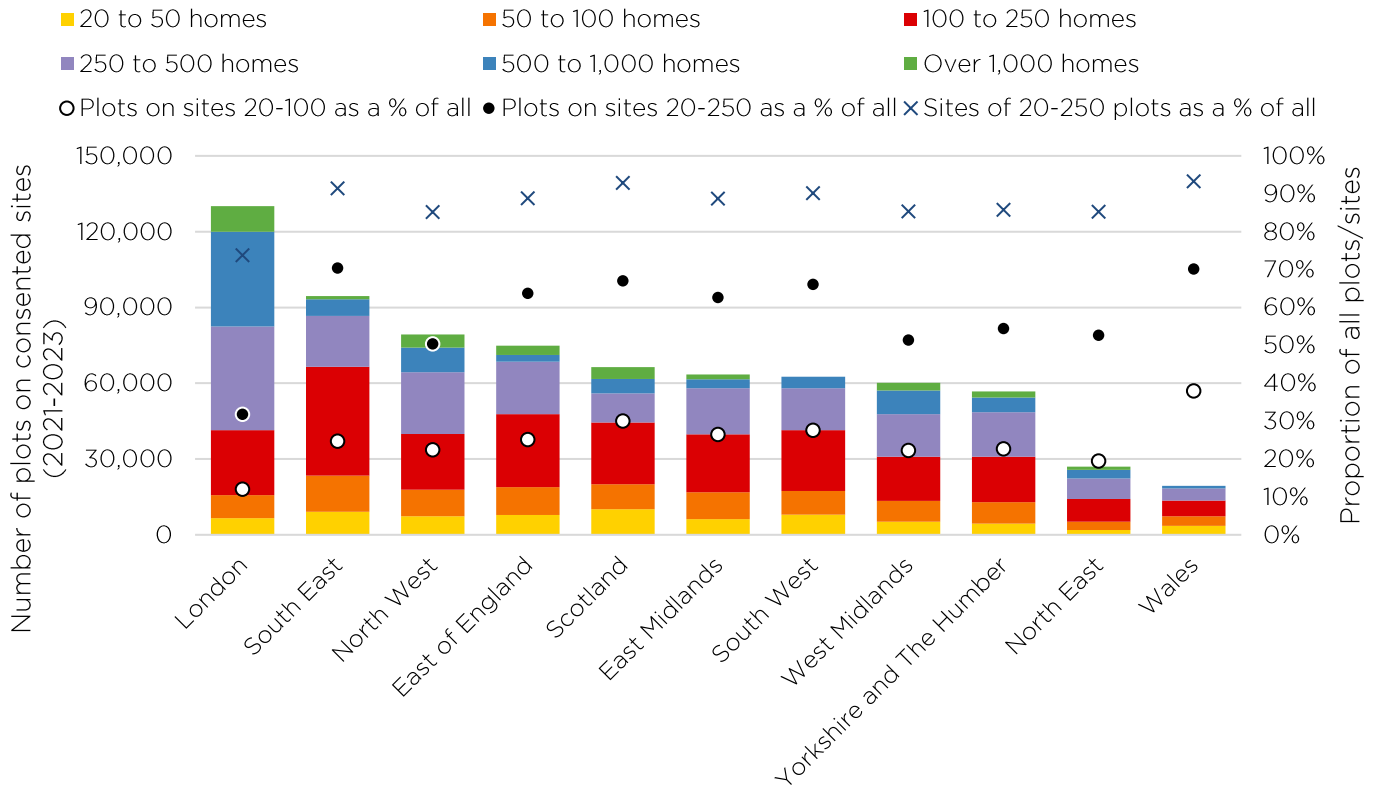
In London, only 12% of plots consented in the last three years have been for sites of 20-100 plots and only 32% of plots consented were on sites of 20-250 homes. In the North West, West Midlands, Yorkshire and The Humber and North East, there are also lower proportions of plots on sites of 20-250 homes. By contrast, in the South East and Wales there are higher proportions of plots consented on sites for 20-

250 homes (70%). However, still only 25% and 38% of plots consented are on sites of 20-100 homes.

Typically, across Great Britain sites of 20-250 plots make up between 74% and 93% of all sites consented. Given how popular this size of site is, suiting the broadest range of housebuilders, housing associations and developers (see our previous [Land Matters](#) report), more are needed.

In summary, more small and medium-sized sites (up to 250 homes) are needed everywhere, particularly in London.

Figure 3 Consented plots and sites by size and region in the last three years



Source Savills using Glenigan

What type of locations need more small and medium-sized sites?

All types of location need more small and medium-sized sites. Over half of plots granted consent in built up areas and around a third of sites in other types of location are for sites of over 250 homes which are only suitable for a small number of housebuilders and developers to take on.

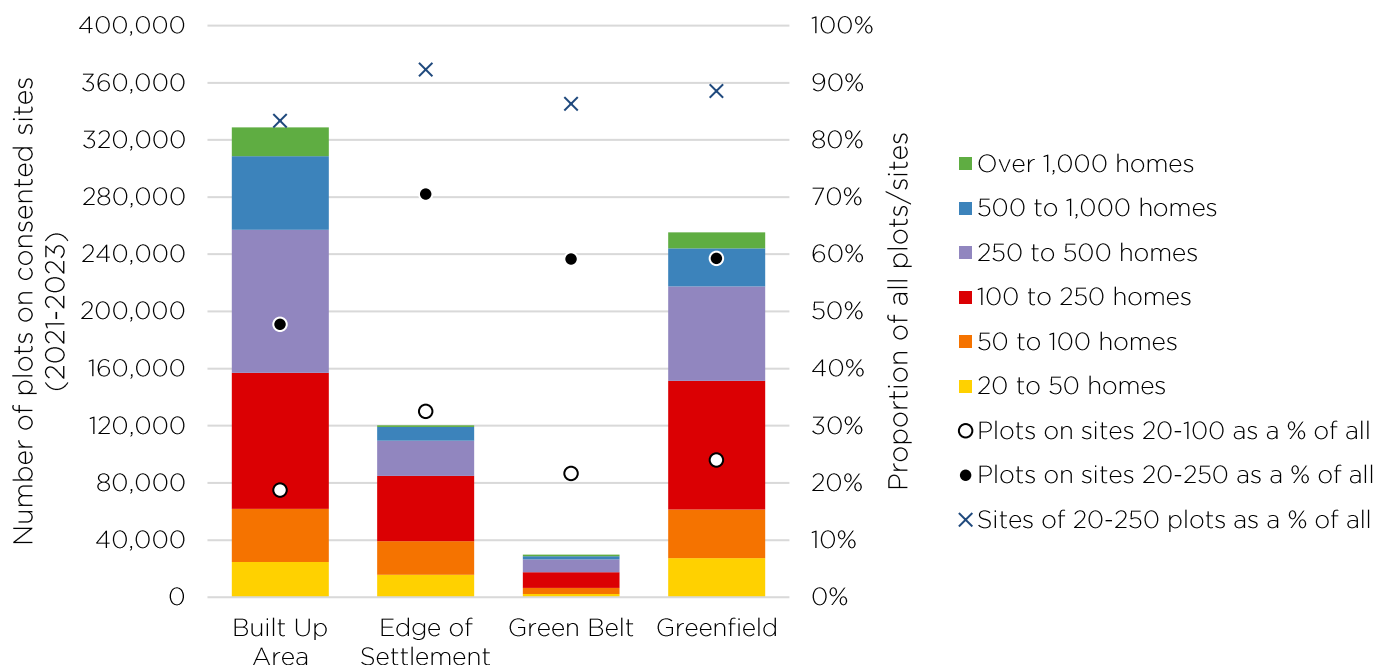
In all types of location there are relatively few plots gaining consent on small and medium-sized sites, despite making up a relatively high proportion of sites consented. Across built up areas, edge of settlement, Green Belt and greenfield locations, between 19% and 32% of plots gaining consent are on sites for 20-100 homes. However, this is on 55% and 68% of sites gaining consent. Considering medium-sized sites as well, between 48% and 71% of plots gaining consent are on sites of 20-250 homes across these types of location. However, these are on 83-92% of sites gaining consent.

Overall, the vast majority of consented sites are in built up areas and greenfield locations (rural areas). Typically sites gaining consent in built up areas have more plots per site (48% of plots consented are on sites of 20-250 homes) than those in greenfield locations.

There are relatively few sites gaining consent on the edge of settlements, even though these locations can be the most sustainable in terms of being able to connect into existing infrastructure and amenities. Those that are consented tend to be larger sites (71% of plots consented are on sites of 20-250 homes). And there are very few sites gaining consent in the Green Belt, where often there is significant housing need due to affordability and undersupply of housing in the urban areas they enclose.

Despite the fact that there are a lots of small and medium-sized sites gaining consent, this size of site only contributes a limited number of plots. Therefore, disproportionately more of these small and medium-sized sites are needed. This is the size of site which suits the broadest range of housebuilders, housing associations and developers, and they tend to be less complex and require less additional infrastructure as larger sites. As a result, a significant increase in this size of site would enable greater housing delivery.

Figure 4 Consented plots and sites by size and type of location in the last three years



Source Savills using Glenigan

The role of small and medium-sized sites alongside larger ones

Ensuring a sufficient supply of sites of all sizes is key for meeting the country’s housing need. Yet the planning system is currently delivering too few of them, especially within certain regions and in areas with considerable constraints on development, such as the Green Belt.

Greater availability of sites up to 250 homes would benefit housing delivery overall, especially by small and medium-sized housebuilders, for whom smaller sites are essential as they are less complex, risky and expensive to deliver. Assisting smaller and medium-sized builders through making more small sites available could help meet some of the country’s housing need, as discussed in our accompanying note, What size of housebuilder do we need to deliver more homes?

Some regions, such as the North East, can meet their housing need, but could still benefit from a more balanced variety of site sizes. Other areas, such as London, struggle to meet their housing need and deliver a lower proportion of their consented land supply in smaller sites, especially those sites below 250 homes.

Because London and the South East also face significant land constraints, such as existing development and the Green Belt (which limits the ability of the planning system to unlock larger sites), many more small sites will be needed to alleviate their housing shortfall, especially if housing need is raised further as currently being proposed.



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