

RADYR & MORGANSTOWN LOCAL DEVELOPMENT GROUP REPRESENTATIVE NUMBER 8

SUPPLEMENTARY SUBMISSION TO CARDIFF RLDP EXAMINATION HEARING SESSION 1

HOUSING NUMBERS

1. These brief notes should be read in conjunction with our comments on the Deposit Plan dated April 2025.

2. We feel it is important to confirm the principle of town planning which is to allocate land for development according to need, no more than needed, no less. This critical function is also important as such allocations create, or reduce value for land, sometimes by considerable amounts. Such a principle should operate both within a particular urban area as well as for the sub region.

3. The basis on which such need is determined is a projection of population and households. Clearly such projections are forecasts, with all the disadvantages of any attempted assessment of the future, but we must proceed with the best data available. Since the request for comments on Cardiff's RLDP closed, Welsh Government has issued new such projections for Wales and for each local authority, based upon 2022 baseline.¹ These forecast the population of Cardiff by 2036 to have increased to 416,816 over the 2022 figure of 369,851 - an increase of 12.7% or circa 3,200 per annum. Using household formation rates this population increase will form itself into an additional 21,022 households (173,088 from 152,086 in 2022), an increase of 13.8%, or 1,400 households per annum. It is important to note that this compares with an increase of 900 households per annum over the previous decade (2011-21). In other words, it represents more than a 50% higher growth rate per annum, which is optimistic.

4. Two thirds of this increase (13,533) is forecast to come from 1 and 2 person households. The projected increase in the number of one person households is 7,597. These specific figures support the type and location of future housing in Cardiff i.e. an emphasis on brownfield sites and we suggest should be taken into account in the context of some of the questions on the suitability of some of the proposed housing sites for example Policy H2.6 Hadfield Road, which is of course adjacent to a small but vibrant housing site: City Gardens. Perhaps the comments that there is too much emphasis on brown field sites which are, by definition more difficult to develop, do not take these specific projections into account.

5. However, further analysis of these projections shows that the whole of this population increase over the 14 year period is forecast to come from net external

¹ 2022 based Local Authority Population Projections issued 25 November 2025. Gov.wales.

inward migration, i.e. migration from overseas. In fact, it is suggested that this will increase by 65,383 against outmigration to other parts of the UK of 33,851. It is worth pointing out here that the only Counties in Wales where there is expected to be a natural increase in population are Cardiff and the Vale of Glamorgan.

6 Taking into account the policies of a number of major UK political parties against future external immigration, perhaps this large increase in inward migration is too high. Oxford Economics, for example, state that “we would expect UK net inward migration to dip below 100,000 this year (2026)...and the political climate suggests that net inflows will stay low for at least the remainder of the current parliament that ends in 2029).”²

7 The forecasts of population and households include a number of different variants: zero migration, 10-year average migration and 15-year average migration. The forecast population for 2036 for Cardiff based upon zero net in-migration is 385,503, and the number of households only 163,058.

The 10-year average migration variant estimate suggest the number of households increase by 14,711 from 152,086 to 166,797.³

All the above would indicate that the RLDP provision for 24,000 plus 10% is sufficient and could well be an over provision. There is certainly no need for any further allocations in this RLDP.

8 Further comments on household and population projections include:

- When the 2021 Census data was released, it showed that the projections for population and households in Cardiff had been overestimated by over 18,000 (Census figure 147,300 compared to projection of 165,523);
- The Stats Wales projections for population in Cardiff to 2036 show an annual in migration figure of 4,052 for each year from 2024, hardly a scientific basis for going forward;
- It is possible that such projections of in migration from overseas are based upon Cardiff’s past popularity as a destination for overseas students. However, since the Government prevented foreign students bringing

² *Oxford Economics “Lower Immigration will hit growth and raise borrowing” Research Briefing February 2026*
oxfordeconomics.com

³ *2022-based projected private household population by local authority, year and variant; stats.gov.wales January*

partners and children in 2024 applications for student visas dropped by 14% across the whole of the UK and whilst universities continue to try to attract overseas students, government policy makes it increasingly difficult for such students to obtain visas.

9 In terms of housing completions, the highest annual figure in Cardiff since 2009-10 is 1,681. The annual average over this period is 1,056. The figure for 2024/25 was 1,480. Total completions over the period 2006/7 to 2024/5 are 24,200 versus a target of 39,300 over the same period. In other words, actual completions are 15,000 short - only 61% of the target has been achieved. This is a significant shortfall.

10 Based upon this historical performance it is difficult to take seriously the projections of average build rates from 2025-6 to 2035-36 of over 2,200 with a peak of 2,751 in 2028-29. This will mean land already allocated in the current 2011-2026 LDP will remain undeveloped by 2036.

11 Indeed, to take Strategic Site C in North West Cardiff as an example, total completions to date (2024/5) are only 1,130 versus a target of 5,000. Strategic Site C is only 23% complete after 9 years - there are still 3,870 yet to be built. At current rates of build (taking the last 5-year average to take account of a slow start to the site), it will take 25 years to complete the site. This is well beyond the horizon of the RLDP, and shows why additional greenfield sites in North West Cardiff are not required. It is critical that Strategic Sites are completed before further greenfield sites are allocated.

12 Our comments last year indicated that a total of 40,725 homes were proposed in surrounding Counties RLDP. A more updated analysis of the RLDPs for Bridgend (now agreed), Vale of Glamorgan, RCT, Caerphilly and Newport (the latter in various stages of completions) show that they propose an additional 44,269 houses until 2036/37. Added to Cardiff's 24,000 this totals 68,269, well in line with Future Wales' target of 66,000 by 2041 without considering the proposals in Merthyr Tydfil, Blaenau Gwent, Monmouthshire and Torfaen. If housing proposals from these four Counties were also included, the total would be far in excess of the Future Wales target.

13 Welsh Government comments that the Cardiff RLDP is in "general conformity with Future Wales." Welsh Government has however, indicated that "there is limited evidence to support the view of the Cardiff RLDP that it has "no negative effect on neighbouring authorities."

14 Some commentators suggest the figure of housing provision is too low given Cardiff's status as a Capital City. Future Wales reminds us that "Cardiff must generate and support regional growth whilst enhancing its status as a vibrant capital city.... The potential to reach central Cardiff quickly and conveniently

using the Metro generates opportunities for development in settlements outside the city”⁴

15 It could fairly be argued that Cardiff should reduce the total number of proposed dwellings to ensure that it:

- Does not impact disproportionately on surrounding Counties,
- is more in line with the likely household population forecast;
- and is more realistic in terms of likely housing completion rates.

***Radyr and Morganstown Local Development Group
April 2026***

⁴ *Future Wales page 164*