



Pembrokeshire County Council

Local Development Plan

Annual Monitoring Report – year 12

1st April 2024 – 31st March 2025

This item is also available in Welsh / Mae'r eitem hon ar gael yn Gymraeg hefyd

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Summary

1. Pembrokeshire County Council adopted its Local Development Plan (LDP) in February 2013. The Authority is required to produce an Annual Monitoring Report (AMR) on its LDP each year, with Stakeholder input, and to submit this to the Welsh Government by 31st October. The AMR is based on the targets and triggers set out in Appendix 5 of the LDP – these assess how the Plan is working and whether there are any areas of concern which require further investigation.
2. LDP Review was delayed, initially because of the Covid-19 pandemic and subsequently to allow consideration of the implications of the guidance issued by Natural Resources Wales in January 2021, this guidance referring to phosphate pollution in the non-tidal parts of protected Welsh rivers, including the Teifi and Cleddau river catchments in Pembrokeshire. This guidance has subsequently been revised on various occasions to cover other nutrient pollution issues and to extend the spatial area of application, with significant implications for the Plan process, but ways are being found to address the identified issues in the emerging replacement Plan (LDP 2).
3. Although outside the year 12 monitoring period, in June 2025 NRW published new reports about the health of protected marine areas in and around Pembrokeshire. These designations are very important, as they protect wildlife and natural habitats of international importance. The focus of concern has broadened in scope and now addresses nutrient pollution in general, not just phosphate pollution, with concerns over levels of Dissolved Inorganic Nitrogen (DIN) and in relation to various biological indicators having emerged. It is the levels of DIN that are causing particular concern in parts of the Pembrokeshire Marine SAC. Progress with the PCC LDP review has been assisted by the review of Environmental Permits at Wastewater Treatment Works by NRW and by new investment proposals by Dwr Cymru Welsh Water, although longer-term solutions will still be needed. Regarding DIN, NRW now requires nutrient neutrality to be demonstrated for development proposals draining to the Milford Haven Inner Waterbody of the Pembrokeshire Marine SAC, which affects many parts of PCC's planning area and is likely to require different solutions to those being used to address the phosphate issue.
4. During the year 12 monitoring period, LDP 2, Deposit Plan 2 was approved at an Extraordinary Council meeting on the 13th September 2024 with full public consultation on its content from 21st October 2024 to 16th December 2024. The Council also approved a number of limited 'Focussed Changes' proposed for LDP 2, following on from the Deposit consultation. The Focussed Changes were subject to further public consultation between 4th August and 15th September 2025 (beyond the year 12 Monitoring Period). LDP2 has now been Submitted to Welsh Government and independent Examination has commenced.

5. The trends and monitoring information in the previous Annual Monitoring Reports have been considered by the Authority, and where appropriate are reflected in the LDP 2, Deposit Plan 2 document (and the subsequent Focussed Changes), with the further information in this Report potentially being available to inform discussions at Examination stage.
6. The Employment Survey was most recently carried out in 2022 – the processing of the results of the 2022 survey was completed during 2025 and the results have been published on the PCC website (and are used in this latest AMR). Full Housing Surveys, using Building Control records and site visits, were undertaken in 2022, 2023, 2024 and 2025 (with the results informing the corresponding AMRs). The last completed Retail Survey was conducted in Autumn 2023 and has been published on the PCC website. A further Retail Survey was commenced in Autumn 2025, the results from which will inform the next LDP AMR.
7. The Authority has undertaken work on one further item of Supplementary Planning Guidance during the year 12 monitoring period. This relates to the Caravans, Camping and Chalets Landscape Character Assessment to support LDP2. A full public consultation on this was undertaken in autumn 2024. Further work must now await the adoption of LDP 2.

Key Conclusions

- HOUSING

- Proportions of housing permissions granted are below the target percentages for approvals in Hub Towns. This has now met a 3-year trigger for review being 39% in 2022-2023, 38.2% in 2021-2022 and 25.6% in 2020-2021. This figure has recovered to 50% in the 2023-2024 AMR and 56.6% in the 2024-25 AMR but remains below the 60% threshold. There has also been a significant drop in the number of new residential units being granted planning permission overall since the 2020-2021 AMR. This means that a few sites can now have a big influence on the percentage of residential units being granted at different levels of the settlement hierarchy.
- 352 homes were built in 2024-2025, compared with 283 homes in 2023-2024, 367 homes in 2022-2023 and 338 in 2021-2022. These figures are higher than the 2019-2020 figure (267) but below the levels of 2018-2019 (419). The 10-year average build rate 2009-2019 (pre-Covid) was 379 per year, the most recent survey therefore suggesting that house building in 2024/25 is approaching but still below the pre-Covid average.
- The 2024-2025 AMR has identified some changes in relation to the strategic housing sites. As reported in the previous AMR, Slade Lane South and most of Slade Lane North have changed ownership, the new owners being Pobl and Welsh Government on the South site and Welsh Government alone on the North site (excepting the smaller area in the separate ownership of Hill West Ltd). Pobl is moving ahead with phases 1 and 2 of the housing development on the South side, with phase 1 having a Reserved Matters consent and construction having now commenced. A Reserved Matters planning application for phase 2 is expected soon. A small element of the Slade Lane North site has been completed by Hill West Ltd, but the remainder of the site awaits development. Welsh Government has appointed Lichfields consultancy to prepare a Masterplan for the later phases of the Slade Lane development.
- At Maesgwynne, the part of the site known as Parc Loktudi has been developed, but other parts of the site had until recently remained undeveloped. However, during AMR year 10 planning permission was granted for a 50-home development on land adjacent to Clos-y-Bigney, this being a 100% affordable housing proposal implemented by the Wales and West Housing Association. Development of this further element of the Maesgwynne site commenced in 2023-2024, with 14 dwellings completed and a further 36 under construction. By the end of the 2024-25 monitoring period, all 50 dwellings were completed. LDP 2, Deposit Plan 2 includes a large residential allocation at Maesgwynne, some elements of which are anticipated for completion during the LDP 2 Plan period (to 2033) with the residual expected to be built out after that date.
- The Shoals Hook Lane site in Haverfordwest is allocated for residential development by the current LDP but does not have a housing planning permission and is de-allocated by the emerging LDP 2 – due to a lack of progress towards delivery (although it has been proposed for retention within the Haverfordwest settlement boundary).

- The targets for affordable housing in terms of permissions granted and dwellings completed was met in the year. The 98 dwelling per annum target for the number of affordable dwellings granted planning permission was not met in 2023-2024, but was comfortably exceeded in 2024-2025, with a further 140 affordable dwellings receiving planning permission. 128 affordable dwellings were completed in the year 12 monitoring period, out of a total of 352 dwellings completed overall during that monitoring period, all by Registered Social Landlords.
- In the year 12 AMR (2024-25), 96.6% of permissions granted for housing were within Settlement Boundaries, which is slightly below the target of 98%. In the previous 4-year period, further investigation was triggered by these figures being recorded as 91.1% (2020/21), 93.0% (2021/22), 90.0% (2022/23) and 87.2% (2023/24). The 2024/25 monitoring result thus represents a noteworthy improvement.
- SECTION 106 LEGAL AGREEMENTS
 - Financial contributions towards affordable housing of £169,366.47 were secured through section 106 legal agreements during the year 12 AMR monitoring period (2024-25), with a full break down of this being presented on the Council’s website. <https://www.pembrokeshire.gov.uk/adopted-local-development-plan/section-106-agreements>
- GYPSY AND TRAVELLER ACCOMMODATION
 - The Authority has met the numerical targets identified for provision of Gypsy and Traveller Accommodation set out in the Plan. A new Gypsy and Traveller Accommodation Assessment was submitted to Welsh Government in autumn 2019, with amendments in 2020 and 2024 and was approved by the Cabinet Secretary for Culture and Social Justice on 24th May 2024. The results of this are informing the provisions of the emerging LDP 2.
- EMPLOYMENT
 - Triggers have been met in relation to all the Strategic Employment allocations, with no development at all to date on Key Sites at Blackbridge and Trecwn. Some progress has been made on the sites at Withybush Business Park and the Pembrokeshire Science and Technology Park, Pembroke Dock. An assessment of the need for Strategic Employment Sites for LDP Review is set out in the updated Two County Economic Study (2022) which amongst other things shows a continued long-term need for strategic sites. The processing of the results from the 2022 Employment Survey has been completed and published, with the outcomes incorporated into this latest AMR.
- TRANSPORT
 - The Welsh Government’s A40 Trunk Road Llanddewi Velfrey Bypass and Redstone Cross Improvement Scheme has been completed and has been opened, noting that this was just beyond the Year 12 monitoring period. This is bringing benefits to road traffic using Fishguard Port and the County Town of Haverfordwest and other settlements close to the A40 corridor, as well as taking strategic traffic away from Llanddewi Velfrey village.

- **FLOOD RISK**
 - The results for AMR year 12 in relation to flood risk indicate that all approved applications were compliant with the requirements of TAN 15 / LDP policy GN.1 (criterion 7). A new edition of TAN 15 was published in 2025, and this has been accompanied by Flood Map for Planning replacing the Development Advice Maps. Flood Map for Planning has a different categorisation of flood risk and also presents updated information on flood risk in comparison to the previous Development Advice Map. This has been considered in preparing this latest edition of the LDP AMR.
- **RETAIL**
 - The 2023 Retail Survey identified higher than UK average vacancy levels in all PCC Town Centres apart from Narberth and Milford Marina. Vacancies decreased from 30% to 21% in Milford Haven and from 5% to 3% in Narberth. Rates remained the same in Pembroke Dock (19%) and Fishguard (17%). There was an increase in vacancy rates in Haverfordwest (21% to 25%) and Pembroke (15% to 20%). Work funded by the Transforming Towns Programme to arrest decline of town centres is underway in Haverfordwest, Fishguard, Milford Haven, Pembroke and Pembroke Dock.
 - The 2023 Retail Survey also showed that percentage of primary retail frontage in A1 use fell below the target of 66% in Fishguard, Narberth and Pembroke. When vacancy rates are taken into account, all centres apart from Milford Haven and Milford Marina fall below the target. The Council is reconsidering the role and effectiveness of primary and secondary frontages as part of the LDP review. Town Centre boundaries are also being re-evaluated. The initial outcomes of that work were presented in LDP 2, Deposit Plan 2, published for consultation purposes in autumn 2024.
 - There was no Retail Survey undertaken during the AMR year 12 period, as priority was given to progressing LDP 2. However, a new survey commenced in autumn 2025, the results from which will inform the next AMR.
 - There were no proposals for major retail developments in the AMR year 12 monitoring period. There was one consented application for the expansion of an existing out of town centre store in the same monitoring period.
- **COUNTRYSIDE DEVELOPMENT**
 - The number of applications granted planning permission contrary to Policy SP 16 (Countryside) is monitored each year. In the past two monitoring periods a total of 15 such planning permissions have been recorded (8 in 2023/24 and a further 7 in 2024/25). A monitoring trigger has been activated because more than 4 such consents have been identified in a 4-year period. The reasons for the granting of consent are varied, but all those recorded are contrary to the Strategic policy on the countryside. Amongst these are some which relate to earlier permissions granted under a previous Development Plan and some that relate to regularisation of the planning position in relation to dwellings with occupancy conditions that have already been granted a Certificate of Lawfulness for unfettered occupancy.

- The consequence of continuing to grant applications in countryside locations that are contrary to the strategic policy on countryside development is a gradual erosion of the countryside and undermining of policies intended to prevent inappropriate development outside settlements. There will be a need to ensure careful monitoring of the similar policy incorporated into the emerging LDP 2 and further action may be needed if the trend continues.
- **SUSTAINABILITY APPRAISAL**
 - The Sustainability Appraisal Objectives have been assessed, this information being set out in Appendix 3 to this document. At this stage of the current Plan's life, the monitoring results predominantly highlight areas that can improved upon through the development of the replacement Plan.
 - This section of the report has also been updated to refer to the June 2025 publication by NRW of the updated Regulation 37 Conservation Advice and Condition Assessments for key Marine SACs affecting Pembrokeshire, these being the Pembrokeshire Marine SAC, the Carmarthen Bay and Estuaries SAC and the Cardigan Bay SAC. This took place in the year 13 monitoring period but is an issue of great significance in a land use planning context, hence its inclusion in this AMR.
- **HABITATS REGULATIONS ASSESSMENT**
 - Habitats Regulations Assessment Monitoring (Appendix 4) shows that the HRA screening, and subsequent Appropriate Assessment where required, has taken place on a number of project level proposals which have come forward in the AMR year 12 monitoring period. All planning applications are screened for their potential effects on protected European sites. The January 2021 publication by NRW of new guidance on phosphates in the non-tidal parts of riverine SACs has had a significant impact on the ability of developers to bring forward a range of new development proposals (mostly but not exclusively for housing) in the affected areas. The guidance has subsequently been updated on various occasions and is now broadened in scope to cover nutrient pollution in general and to cover emerging concerns in various Marine SACs (tidal), as well as the Riverine (non-tidal) ones.
 - Only three Wastewater Treatment Works (WwTW) in Pembrokeshire currently offer phosphate stripping. Additionally, Spittal WwTW is to have phosphate stripping installed under Dwr Cymru Welsh Water AMP 7 investment plan and the Letterston West and Wolfscastle WwTWs are to receive this under a separate funding stream not linked to the AMP programme. Further investment under AMP 8 is currently under consideration, with further details expected to be available for the year 13 AMR.
 - In Pembrokeshire, the areas affected by the NRW phosphates guidance was initially the Riverine (non-tidal) elements of the eastern and western Cleddau River catchments and the part of the Teifi catchment in the County. However, as an interim measure, the scope of the guidance has been broadened to cover other aspects of nutrient pollution and can be used in the Riverine (non-tidal) and Marine (tidal) parts of these river catchments.

- As a result of the 2021 NRW guidance and its subsequent updating and broadening in scope and geographical coverage, the number of applications requiring project level HRAs has increased significantly. In relation to phosphate pollution (and also in some cases for ammonia), NRW's programme of Environmental Permit reviews at WwTWs in affected areas in the Riverine SACs is completed and, in most cases, confirmed that there is still capacity to accept further development at WwTWs within the new permit limits. This relieves the constraint in the short to medium term in relation to phosphates and ammonia, but in the long-term other solutions will need to be found to allow development to continue once the new capacity limits are reached.
- For Dissolved Inorganic Nitrogen in its various forms (nitrates, nitrites and ammonia) in the Marine SACs (and in particular in the Milford Haven Inner Waterbody of the Pembrokeshire Marine SAC) the pathways to the SACs are often less related to water company Wastewater Treatment Works and thus upgrading of water company drainage infrastructure is likely to have a smaller role to play in resolving the DIN problem. Other solutions will therefore need to be found to mitigate this further aspect of river water pollution.

Appendix 1 – LDP Monitoring Framework

Source Data: Swift Monitoring of Planning Applications unless otherwise stated in footnotes.

Some types of Planning Application commonly determined by the Authority have not been included within the AMR, as they are inappropriate for the purposes of this report. They include:

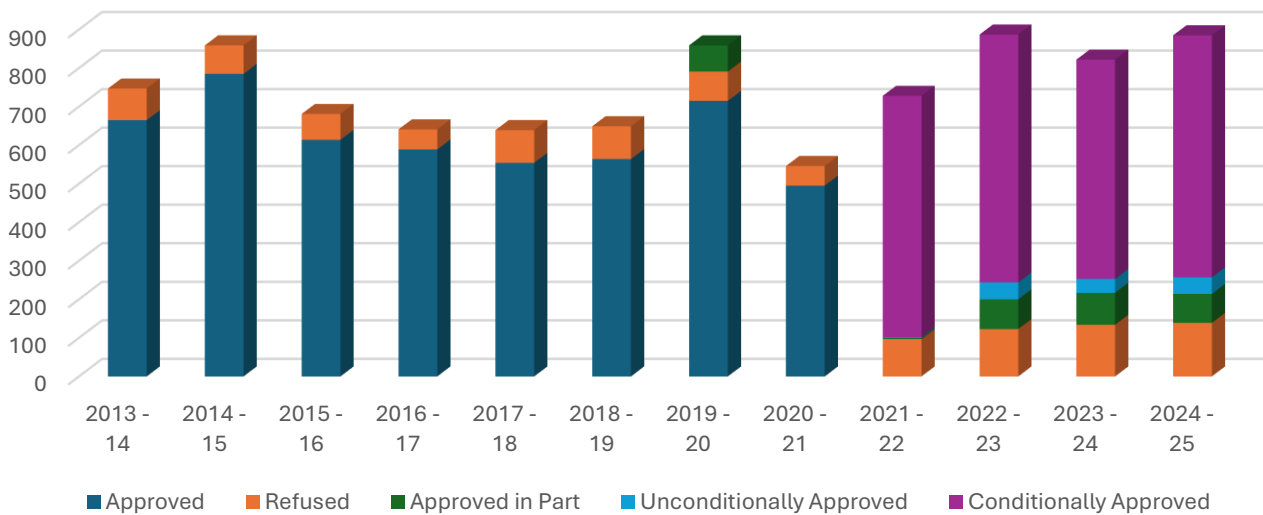
AG – Agricultural Notifications
TF – Tree Felling
HG – Hedgerows
LB – Listed Buildings
CA – Conservation Areas
AD – Advertisements
Pr Notf – Prior Notifications
OHL – Overhead Lines
CLOPUD – Certificates of Proposed Lawful Development
CLD – Certificates of Lawful Development
EIA – Environmental Impact Assessment
HS – Hazardous Substances
DC – Discharge of Conditions
NMA – Non-material amendments to applications
S73 – Section 73 amendment applications
Retrospective S73 – Retrospective Section 73 amendment applications

Number of Planning Applications Approved

Year	Approved	Refused	Approved in Part	Unconditionally Approved	Conditionally Approved	Total
2013 - 14	665	82				749
2014 - 15	785	74				859
2015 - 16	614	67				681
2016 - 17	589	52				641
2017 - 18	554	85				639
2018 - 19	564	85				649
2019 - 20	715	76	68			859
2020 - 21	495	51				546
2021 - 22		97	3	2	626	728
2022 - 23		123	77	44	643	887
2023 - 24		134	83	36	569	822
2024 - 25		139	75	43	628	885
Total						8945

*Excludes Tree Surgery, Agricultural Development, Section 73 and Listed Building Consent

Number of Planning Applications Approved



Strategic Objective: Mitigating and Responding to the Challenge of Climate Change (A)

<i>Indicator 1: Amount of Development Permitted in C1 and C2 Floodplain Areas not meeting all TAN 15 Tests</i>			
<i>Target: Development in zones C1 and C2 is in line with the provisions of TAN 15</i>			
<i>Trigger: More than 1 approval within 1 year contrary to the provisions of TAN 15</i>			
Year	No. of planning approvals	C1 (Ha)	C2 (Ha)
2013 - 14	5		
2014 - 15	0		
2015 - 16	0		
2016 - 17	0		
2017 - 18	0		
2018 - 19		0.29	0.48
2019 - 20		0.05	5.9*
2020 - 21	1		
2021 - 22	0		
2022 - 23	1		
2023 - 24	1		
2024 - 25	0		

*0.25 ha included in the Milford Haven Marina redevelopment proposals

Commentary

In years 1 to 5 all applications in flood zones met TAN15 requirements (Policy GN 1, Criterion 7). In AMR years 6 and 7 the method of reporting was varied to reflect SDI requirements, returning to its original form for AMR year 8. The results of AMR year 8 included one application in a flood plain which was considered by the Planning Committee as it was contrary to TAN 15/Policy GN 1, but greater weight was given to material considerations relating to Town Centre regeneration. In AMR year 10 one application for a residential property in a C2 zone was granted permission. It was for the conversion of the 3 upper floors of a town centre property into 3 apartments and was granted permission due to its positive contribution to Town Centre regeneration (Refs 21/1003/PA and 21/1024/LB). In AMR year 11 an application for a mixed-use proposal in a C2 flood zone was permitted following advice from NRW that the flood risk could be mitigated.

In year 12 all approved applications in flood zones met TAN15 requirements (Policy GN 1, Criterion 7).

Application 24/0286/PA (Refurbishment and extension of the Quayside Building to form multi-functional community spaces and extension to bar building to create first floor terrace) was granted permission following recommendations within an accompanying FCA for flood-proofing measures and a robust flood response plan with an evacuation procedure for the buildings during an event (secured by a suitably worded condition). Subject to receipt of acceptable details the proposal was deemed to accord with criterion (iv). Compliance with criteria (i), (iii) and (iv) of paragraph 6.2 of TAN 15 resulting in the proposal complying with criterion 7 of policy GN.1.

In Pembroke, application 23/0257/PA (Extension, Refurbishment and Demolition Works (including existing public toilets) to provide a Community Hub with Associated Infrastructure Works) accepted that part of the proposed development would be at risk of flooding over its lifetime. The Flood Consequence Assessment (FCA) proposed a number of mitigation measures including flood resilience features, flood warning and an emergency response plan and these are considered to be sufficient to ensure the safety of users of the buildings and can be secured by planning condition.

In 2025 the revised TAN15 was published by Welsh Government, with Flood Map for Planning replacing the Development Advice Maps and consequential changes to the flood risk zones.

Strategic Objective: Improving Access to Goods and Services (I)

Indicator 1: Number and proportion of houses granted planning permission in the Settlement Hierarchy

Target: 60% of permissions are in the Hub Towns

Trigger: Less than 50% in Hub Towns over 3-year period

Year	Hub Town	Rural Town	Service Centre	Service Village	Large Local Village	Small Local Village	Open Countryside	Total
2013 - 14	1,191 77%	55 3.5%	14 0.9%	165 11%	12 0.8%	15 1%	95 6%	1,533
2014 - 15	790 65.3%	31 2.6%	23 1.9%	303 25%	10 0.8%	15 1%	38 3.1%	1,210
2015 - 16	356 39%	43 5%	98 11%	329 36%	22 2%	10 1%	64 7%	922
2016 - 17	259 37%	27 4%	69 10%	279 40%	9 1%	0 0%	48 7%	691
2017 - 18	317 52%	110 18%	32 5%	117 19%	4 1%	1 0.5%	27 4.5%	608
2018 - 19	149 69.9%	1 0.5%	2 0.9%	24 11.3%	1 0.5%	4 1.9%	32 15%	213
2019 - 20	576 74.5%	1 0.1%	35 4.5%	120 15.4%	3 0.4%	2 0.3%	37 4.8%	774
2020 - 21	55 25.6%	14 6.5%	87 40.5%	38 17.7%	3 1.4%	1 0.4%	17 7.9%	215
2021 - 22	60 38.2%	5 3.2%	3 1.9%	73 46.5%	5 3.2%	0 0%	11 7%	157
2022 - 23	53 39%	1 0.7%	0 0%	68 50%	1 0.7%	1 0.7%	14 10%	138
2023 - 24	56 50.9%	0 0%	4 3.6%	26 23.6%	4 3.6%	0 0%	20 18.2%	110
2024 - 25	207 56.6%	7 2%	63 17.8%	57 16.1%	4 1.1%	3 0.8%	12 3.4%	353
Total	4069 58.77%	295 4.26%	430 6.21%	1599 23.09%	78 1.13%	52 0.75%	415 6.0%	6924

Commentary

Following a number of years during which the number of planning permissions for residential development in hub towns significantly increased, the later results, including these for this AMR, show that in this current AMR monitoring period the trend to over 50% of permissions being granted in Hub Towns has remained with an overall increase in the number of permission granted also increasing. Overall, the trigger was reached for 3 years of the 12 and the total proportion of development in hub towns since Plan adoption is only slightly lower than the target of 60%. The scale and location of future growth is being fully considered through preparation of LDP2.

Indicator 3: Net change in provision of community facilities as a consequence of planning permission (area and type)

Target: To maintain key facilities

Trigger: Loss of over 3 community facilities within any 3-year period

Year	Communi ty Halls ha	Public Houses ha	Health Facilities ha	Educational Facilities ha	Religious Facilities ha	Sports and Recreation ha	Local Shops ha	Open Space ha	Other ha
2013 - 14	0.39	1.35	1.3	3.91	0.00	0.00	0.00	2.52	0.15
2014 - 15	0.08	0.13	0.04	0.57	0.61	0.00	0.00	0.00	0.17
2015 - 16	0.00	-0.09	0.00	-0.24	-0.53	0.88	0.01	0.00	-0.02
2016 - 17	0.00	0.00	-0.49	1.11	-0.05	0.28	0.00	0.02	0.00
2017 - 18	-0.04	-0.03	0.005	-0.04	-0.03	0.00	0.00	0.00	0.00
2018 - 19	0.13	-0.09	0.00	0.00	-0.22	0.86	0.03	0.00	0.00
2019 - 20	0.13	-0.09	0.00	0.00	-0.22	0.86	0.00	0.00	0.97
2020 - 21	-0.04	-0.09	0.00	0.00	-0.29	0.00	0.00	0.00	0.00
2021 - 22	0.00	0.00	0.00	0.11	0.00	0.05	0.00	0.00	0.00
2022 - 23	0.00	0.04	0.14	0.00	0.00	0.18	0.00	0.00	0.00
2023 - 24	0.00	0.03	0.23	0.02	0.00	4.67	0.00	0.34	0.17
2024 - 25	0.18	0.01	0.00	0.29	0.13	0.00	0.11	0.00	0.00
Total (ha)	0.83	1.16	1.23	5.73	-0.60	7.78	0.15	2.88	1.44

Commentary

The table above shows the net additions to and loss of a range of community facilities across the Plan area. Overall, there has been an increase in all types of facilities, other than Religious Facilities which is likely to reflect churches and chapels losing their religious function, with some being re-utilised for other purposes, including residential uses in some instances. In the AMR year 12 monitoring period the overall area occupied by community facilities has increased by 0.72ha. There has been no significant reduction in area of any particular types of facilities, although analysis of applications approved show the loss of a local shop and a church. However, these are below the trigger point for this indicator.

<i>Indicator 4:</i>	<i>Target:</i>	<i>Trigger:</i>
<i>Level of services within rural settlements</i>	<i>Services in settlements within the settlement hierarchy are not significantly lower than in the 2008 Rural Facilities Survey</i>	<i>Monitor at Plan Review (2017) – 10% change in the number of settlements achieving Service Village level would require further investigation</i>

Commentary

Trigger has not been met. Please see LDP2 Background Paper – Rural Facilities Survey Report 2020 with corrections 2024.

<https://www.pembrokeshire.gov.uk/local-development-plan-review/ldp2-evidence-base>

<i>Indicator 5: The capacity (MW) of renewable energy developments permitted</i>	<i>Target: No target</i> <i>Trigger: No trigger</i>
Year	MW Permitted
2013-14	108.43
2014-15	68.60
2016-16	34.77
2016-17	6.11
2017-18	11.00
2018-19	0.89
2019-20	3.60
2020-21	0.40
2021-22	10.71
2022-23	5.39
2023-24	9.26
2024-25	13.62
Total (ha)	272.78

Commentary

The figures show that a small number of renewable energy developments continue to be permitted. During the year 12 monitoring period the largest consented project was for up to 3 wind turbines south of the LNG Terminal at Waterston (DNS ref CAS-0-1859-K1M7Y6). Since AMR 4 (2016 – 17), new capacity consented has been of a modest scale in comparison with the early years for the LDP.

Other linked energy developments approved during the year 12 AMR period are 3 applications for battery energy storage and a green hydrogen production facility on land adjacent to Pembroke Power Station. The hydrogen will be produced for industrial purposes, with a pipeline link to Valero Oil Refinery. All of these projects are on or close to existing major energy sites along the Haven Waterway.

Other renewable energy projects permitted are small-scale and mostly for small solar PV arrays.

LDP Indicator 2	Target	Trigger
<i>Area of land safeguarded for transport proposals lost to development</i>	<i>0%</i>	<i>Any loss will require investigation</i>
Commentary		
<p>There has been no loss of land safeguarded for transport proposals since the LDP was adopted in 2013, other than a minor impact resulting from planning permission granted to regenerate Milford Haven Marina (ref 14/0158/PA, approved November 2019) which slightly affects the Milford Haven bus/rail interchange proposal, but which will neither prevent nor compromise its implementation.</p> <p>Several of the safeguarded schemes have not been built or are partially implemented. Others have planning permission but await construction, with some of these being brought forward as elements of regeneration schemes involving a variety of land uses. The Welsh Government's A40 Trunk Road Llanddewi Velfrey bypass and Redstone Cross improvement has been completed and opened.</p>		

Indicator 6: Amount of open space (m²) permitted in relation to overall number of dwellings permitted

Target: Provision of public open space at a rate of more than 25% below the standard requirement (as set out in SPG)

Trigger: Provision of public open space at a rate of more than 35% below the standard requirement (set out in SPG)

Year	M² Open Space Provided
2013 - 14	
2014 - 15	
2015 - 16	
2016 - 17	
2017 - 18	
2018 - 19	60,904
2019 - 20	14,700
2020 - 21	10,220
2021 - 22	0
2022 - 23	4180
2023 - 24	0
2024 - 25	4,630
Total (ha)	94,634

Commentary

There are different standards of open space, based on type. For simplicity, the informal play space standards have been used which require 5.5m² per person to be provided. Based on an average occupancy of 2.2 persons per household (assumed in the Council's Planning Obligations Supplementary Planning Guidance, adopted 2013), this equates to a requirement of 12.1m² per dwellings of informal open space.

The SPG requires open space to be provided for sites of 33 dwellings or more. Financial contributions towards off-site provision are required for sites of 10 or more dwellings. The monitoring indicator does not break down differing types of open space and this is being considered in conjunction with Plan Review.

During the AMR year 12 monitoring period, permission was granted for 3 residential developments requiring open space provision, adding 4,630m² of provision.

In addition, a further site was required to provide a financial contribution of £92,976 for off-site provision of open space.

Since the adoption of the LDP 94,634 m² (9.46 ha) of open space has been provided.

Strategic Objective: Building on the County’s strategic location for energy and port-related development (E)

LDP Indicator 1	Target	Trigger
<i>Planning permission granted for employment development on allocated sites within the identified port areas of Blackbridge, former Dewhirst Factory Site and Goodwick Parrog</i>	<i>100% by end of Plan period</i>	<i>50% without planning permission at Plan Review (2017).</i>
<p>Commentary</p> <p>The trigger for further investigation has been met as no employment proposals have been granted planning permission on any of the sites.</p> <p><i>Blackbridge</i> – this site is owned by Egnedol who proposed a biomass facility and related projects for the allocated site and land beyond. The proposal reached application stage and was classified as a Development of National Significance but was refused by Welsh Ministers in June 2018.</p> <p><i>Dewhirst Factory site</i> – there have been no applications for employment development at this site to date. An application for specialist residential accommodation for older persons was granted planning permission in August 2022.</p> <p><i>Goodwick Parrog</i> – there have been no applications for employment development at this site to date. An application for a change of use to allow the site to be used for overnight stays for motorhomes and campervans has recently been approved (but during the AMR13 monitoring period).</p> <p>The Council will continue to monitor the uptake of strategic employment sites. Review of the allocations is taking place in conjunction with the preparation of LDP2.</p>		

<i>LDP Indicator 2:</i>	<i>Target:</i>	<i>Trigger:</i>
<i>Progress towards delivery of safeguarded transport schemes</i>	<i>All delivered by 2021</i>	<i>If finance has not been secured for a project by Plan Review (2017)</i>
Commentary		
The list of safeguarded transport schemes was comprehensively reviewed during preparation of the first Deposit version of LDP 2 in 2020 and was further reviewed for LDP 2, Deposit Plan 2 in 2024. The number of safeguarded schemes was significantly reduced for LDP 2, Deposit Plan 2 and now comprises just 4 schemes relating to a road and footpath improvement in Pembroke and 3 public transport interchange schemes at locations in Haverfordwest and Milford Haven.		

	Scheme	Update	Progress
1.	A40 Llanddewi Velfrey to Penblewin	Scheme has been completed and the road opened after the end date of AMR 12. (August 2025)	
2.	Improvement of A40 west of St Clears	Not implemented and not carried forward into LDP2.	
3.	Northern Distributor Network – Bulford Road link	Completed	
4.	Pembroke Community Regeneration Project Phases 1 and 2	Not implemented and not carried forward into LDP2.	
5.	Blackbridge access improvement and Waterston Bypass	Not implemented and not carried forward into LDP2.	
6.	Southern Strategic Route – A477 Nash Fingerpost to Energy Site corridor enhancement	Largely implemented. One unimplemented element carried forward to LDP2 (Well Hill Improvement)	
7.	Fishguard Bus Focal Point	Completed.	
8.	Goodwick Railway Station Bus/Rail Interchange	Completed	
9.	Milford Haven Bus/Rail Interchange	Not implemented. Carried forward to LDP2.	
10.	Pembroke Dock Bus/Rail Interchange	Partially implemented. Residual elements not carried forward into LDP2.	
11.	Clunderwen Railway station Improvement	Completed.	
12.	Tenby Park and Ride	Not implemented and not carried forward into LDP2.	
13.	B4318 Monkton Realignment	Partly implemented. Residual elements (car park and pedestrian links) not carried forward to LDP2.	
14.	B4320 Monkton Realignment	Not implemented and not carried forward into LDP2.	
15.	A40 High Street to A487 West Street ‘Chimneys’ Link, Fishguard	Completed.	

	Scheme	Update	Progress
16.	Haverfordwest to Narberth Shared User Path.	Partly implemented. Residual element not carried forward to LDP2.	
17.	Haverfordwest Sustainable Town Centre Project	This has been superseded by more recent schemes with two public transport interchange proposals included in LDP2. The multi-storey car park has been demolished and construction of a replacement car park and bus station started in the AMR 12 monitoring period.	

Strategic Objective: Supporting the development of the distinctive role of Pembrokeshire’s towns, especially within the Haven Hub (F) and regenerating town centres and sustaining and enhancing the rural and urban economy (G)

Indicator 1: Number of applications approved contrary to Policies SP 4, SP 14, GN 12, GN 14

Target: 0

Trigger: More than 4 applications approved contrary to a single policy over 4 years

Year	SP 4	SP 14	GN 12	GN 14	
2013 - 14	0	0	0	0	0
2014 - 15	0	0	0	0	0
2015 - 16	0	0	0	0	0
2016 - 17	0	0	0	2	0
2017 - 18	0	0	0	1	0
2018 - 19	0	0	0	0	0
2019 - 20	0	0	0	0	0
2020 - 21	0	0	0	0	0
2021 - 22	0	0	0	3	0
2022 - 23	0	0	0	2	0
2023 - 24	0	0	0	0	0
2024 - 25	0	0	0	1	0
Total (ha)	0	0	0	9	0

Indicator 5: Change of presence of A1 Uses in Primary Retail Frontages

Target: At least 66% of the linear frontage is A1 Use Class

Trigger: Less than Target

Year	Centres Less than the Target			
2013 - 14	Fishguard	Narberth	Pembroke	Pembroke Dock
2014 - 15	Fishguard	Haverfordwest	Narberth	Pembroke
2015 - 16	Fishguard	Narberth	Pembroke	
2016 - 17	Fishguard	Narberth	Pembroke	
2017 - 18	Fishguard	Narberth	Pembroke	
2018 - 19	Fishguard	Narberth	Pembroke	
2019 - 20	Fishguard	Narberth	Pembroke	
2020 - 21	Fishguard	Narberth	Pembroke	
2021 - 22	Fishguard	Narberth	Pembroke	
2022 - 23	Fishguard	Narberth	Pembroke	
2023 - 24	Fishguard	Narberth	Pembroke	
2024 - 25	No Survey			

<i>Indicator 6: Percentage of vacant ground floor units in each Town Centre</i>	<i>Target: Vacancy rates higher than UK average</i>	<i>Trigger: Vacancy levels 5% higher than UK target</i>						
	<i>UK Average</i>	Haverfordwest %	Pembroke Dock %	Milford Haven %	Pembroke %	Fishguard %	Narberth %	
Year								
2013 - 14	13.90%	9	10	14	9	10	4	
2014 - 15	13.20%	17	15	21	6	9	2	
2015 - 16	12.50%	18	19	18	7	16	2	
2016 - 17	12.70%	25	22	20	12	15	6	
2017 - 18	12.20%	17	26	23	10	20	6	
2018 - 19	12.40%	17	25	19	9	17	9	
2019 - 20	12.40%	21	24	22	15	19	11	
2020 - 21	13.70%	25	24	29	19	22	9	
2021 - 22	14.10%	25	24	29	19	22	9	
2022 - 23	13.80%	21	19	30	15	17	5	
2023 - 24	16.90%	25	19	21	20	17	3	
2024 - 25	13.80%	No survey	No survey	No survey	No survey	No survey	No survey	No survey

Commentary

Policies SP4 *Promoting Retail Development*, SP 14 *Hub Towns* and GN 14 *Major Out-of-Town Centre Development* have been performing well throughout the life of the LDP. Policy GN 12 *Town Centre Development* has breached the trigger for review on several occasions since 2013. The issue is linked to the definition of Primary Retail Frontage which require two-thirds of the frontage to be in A1 use. The results for Indicator X show that three of the Primary Frontages – Fishguard, Narberth and Pembroke were below the threshold requirements from the start of the Plan period, with no compliance to date. Whilst Haverfordwest and Pembroke Dock briefly fell below the threshold for a short period, they both recovered quickly.

The annual Retail Surveys show that, like many Town Centres throughout the UK, the majority in Pembrokeshire are struggling with high vacancy rates and dilution of the core A1 retail uses. To try to counter this a Transforming Towns Programme was launched in January 2020 to address the decline of the town centres. Eligible Centres include Fishguard, Haverfordwest, Milford Haven, Pembroke and Pembroke Dock. Significant work has been taken in each of the towns in conjunction with the programme. The vacancy rates for all towns, except Narberth remain much higher than the UK average. Definition of Town Centres and Primary and Secondary Retail Frontages is being fully considered through preparation of LDP2.

Welsh Government has identified a core indicator for LDPs which is the amount of major retail, office and leisure development permitted in Town Centres, expressed as a percentage of all major development permitted. The Council has interpreted this to cover proposals including A1, A2 and A3 Uses.

A retail survey was not undertaken during the AMR12 monitoring period as priority was given to progressing LDP2.

Indicator 2: (Core) Amount of major retail, office and leisure development permitted in town centres as a % of all major development permitted (TAN 4)

100% (figure to exclude schemes which are allocated outside town centres)

Trigger: 90% of target

Year	Permitted in town centres (M ²)	Permitted outside town centres (M ²)	Total (M ²)	% in town centre
2013 - 14	0	7052.6	7052.6	0
2014 - 15	1472	3652	5124	28.70%
2015 - 16	0	1254	1254	0
2016 - 17	0	2120	2120	0
2017 - 18	0	0	0	0
2018 - 19	0	0	0	0
2019 - 20	0	2805	2805	0
2020 - 21	2802	0	2802	100
2021 - 22	0	0	0	0
2022 - 23	0		0	0
2023 - 24	0	0	0	0
2024 - 25	0	0	0	0
Total	4274	16883.6	21157.6	

Commentary

There were no planning applications for major retail proposals submitted within the AMR year 12 monitoring period. One application, approved for a replacement Lidl store at Milford Haven fell slightly below the major development threshold and was to replace an existing store with one 745sm² larger. The site is outside the Town Centre of Milford Haven.

Indicator 3: Level of floorspace of retail development permitted outside town centres other than schemes falling under Policy GN 15 Small-Scale Retail or GN 10 Farm Shops

Target: 0%

Trigger: Narrative on any schemes not permitted under Policy GN15 or GN 10

Year	Floorspace (m²)	%	Commentary
2013 - 14	6,174	96	
2014 - 15	3,688	71	
2015 - 16	1,254	100	
2016 - 17	2,120	100	
2017 - 18	200		Expansion of existing store
2018 - 19	328		Expansion of existing service station
2019 - 20	0	0	
2020 - 21	421		Drive thru coffee shop and expansion of supermarket
2021 - 22	172		
2022 - 23	0	0	
2023 - 24	0	0	
2024 - 25	1955	100	Expansion of existing store
Total	16,312		

Strategic Objective: Developing a quality visitor economy founded on a distinct sense of place and an outstanding natural and built environment (H)

Indicator 1: Number of applications approved contrary to Policies SP 5, GN 16, GN 17, GN 18, GN 19

Target: 0

Trigger: More than 4 approvals in 4 years

Year	SP 5	GN 16	GN 17	GN 18	GN 19
2013 - 14	0	0	0	0	0
2014 - 15	0	0	0	0	0
2015 - 16	0	0	0	0	1
2016 - 17	0	0	0	0	1
2017 - 18	0	0	0	0	2
2018 - 19	0	0	0	0	0
2019 - 20	0	0	1	0	0
2020 - 21	0	0	0	0	0
2021 - 22	0	0	0	0	0
2022 - 23	0	0	0	0	0
2023 - 24	2	0	1	0	2
2024 - 25	1	0	1	0	0
Total (ha)	3	0	3	0	6

Commentary

These policies are working as intended and have not reached the trigger threshold for review.

Strategic Objective: Sustaining and Enhancing the Rural and Urban Economy (C)

Indicator 1a, 1b, 1c:(Core) new employment land developed for offices and industry and warehousing

Target: 100ha developed by 2021

Trigger: Less than 45ha developed by 2017

Year	Site Area (Ha)	Area Developed (HA)	Area in Use (Ha)	Vacant Land (Ha)	Office Use (Ha)	Industry and Warehousing (Ha)
2013 - 14	1,137	1,154		193	1,140	
2014 - 15		21.8				
2015 - 16	1,146		829	316	0.08	698.94
2016 - 17	1,195		976	219	0.04	698.94
2017 - 18	1,200		984	216	0.153	698.43
2018 - 19	1,204		922	212	0.119	698.32
2019 -						
2020	1,206		993	213	0.119	702.23
2024 - 25	1,236.19		1,037.35	182.64	0.10	716.39

Indicator 2:

Area of land permitted on non-allocated sites

Target: 10% of total employment land permitted

Trigger: 50% below target

Year	Area (Ha)	Percentage
2013 - 14	17.36	0.075
2014 - 15	152.82	87.7
2015 - 16	3.86	
2016 - 17	2.8	
2017 - 18	2.08	
2018 - 19	2.02	
2019 - 20	2.66	
2020 - 21	2.36	
2021 - 22	2.89	
2022 - 23	2.24	
2023 - 24	1.34	
2024 - 25	1	
Total (ha)	193.43	

Commentary

Please note that from 2015/16 the area permitted was calculated for windfall sites under 0.5ha.

The target for development of the strategic employment sites has breached as the required amount of development has not been delivered.

Indicator 3: Delivery of Strategic Employment Sites

Target: 75% delivered by 2021 (66% delivered by 2021 for the 3 x mixed use sites)

Trigger: Development not commenced by 2017 (Blackbridge 2018)

<i>Year</i>	<i>Blackbridge (Ha)</i>	<i>Pembrokeshire Science and Technology Park (Ha)</i>	<i>Withybush Business Park (Ha)</i>	<i>Trecwn (Ha)</i>	<i>Old Hakin Road (Ha)</i>	<i>Arnold's Yard, Johnston (Ha)</i>	<i>Dale Road, Hubbeston (Ha)</i>
2013 - 14	0	0	0	0	0	0	0
2014 - 15	0	2.1	0.46	0	0	0	0
2015 - 16	0	0	0	0	0	0	0
2016 - 17	0	0	0	0	0	0	0
2017 - 18	0	0	0	0	0	0	0
2018 - 19	0	0	11.1	0	0	0	0
2019 - 20	0	0	0	0	0	0	0
2020 - 21	0	0.5	5.3	0	0	0	0
2021 - 22	0	0.9	0.37	0	0	0	0
2022 - 23	0	1.05	0	0	0	0	0
2023 - 24	0	0.5	0	0	0	0	0
2024 - 25	0	0	0	0	0	0	0
Total (ha)	0	5.05	17.23	0	0	0	0

Indicator 5: (Core) The extent of primary land won aggregates permitted in accordance with the Regional Technical Statement for Aggregates expressed as a percentage of the total capacity required, as identified in the Regional Technical Statement

Target: Maintenance of the hard rock and sand and gravel landbanks for the duration of the Plan and for 10 years (hard rock) and 7 years (sand and gravel) beyond the Plan period

Trigger: Further investigation if the land bank drops to 12 years (hard rock) or 9 years (sand and gravel) to ensure sufficient provision at the end of the Plan period. Monitor tonnage permitted.

Commentary

The trigger for further investigation for sand and gravel was activated in the 2014/15 AMR monitoring period.

The landbank in south-west Wales for hard rock production sites outside the National Park is extensive, although a shortfall may emerge towards the end of the LDP2 Plan period. The eventual cessation of quarries in the National Park is, however, unlikely to be problematic as alternatives outside of the Park are available.

An extension to the Slade Hall Quarry in 2020/21 will help to offset any long-term shortfall in the hard rock landbank. The landbank for sand and gravel of less substantial and so Deposit LDP2 allocates a site for the extension of a sand and gravel quarry and also includes proposals for areas of search for future sand and gravel production. The Plan was submitted to Welsh Government in October 2025.

A Statement of Sub-Regional Collaboration for minerals in the West Wales sub-region is currently being prepared which will provide an opportunity to seek solutions to shortfall issues within the sub-region.

The following minerals applications were approved during the AMR 12 monitoring period:

Reference	Location	Details	Date Approved
23/0530/MN	Glogue Quarry	Variation of condition 1 (temporary consent) of planning permission 97/0817/PA (continuation of quarrying of slate waste)	06/06/2024
23/0531/MN	Glogue Quarry	Variation of condition 1 (temporary consent) of planning permission 07/1352/PA (removal of slate waste)	06/06/2024
23/1093/PA	Blaencilgoed Quarry	Variation of condition 64 (preventing the importation of materials to site for processing) – also relating to planning permissions 98/0004/MN, 98/0005/MN, and 98/0006/MN	24/06/2024
24/0247/PN	Tangiers Quarry	Mixer notification	25/06/2024
20/0229/DC	Land north of Bridge Lane, Keeston	Discharge of conditions 6 (traffic management plan) and 18 (CEMP) for planning permission 19/0710/MN (part retention and part proposed borrow pit, access and associated works)	26/06/2024

The economic mineral resource of the Plan area is safeguarded in accordance with Welsh policy guidance. Good practice guidance has been prepared to provide practical advice on the consideration of this matter during the evaluation of planning applications in the safeguarded area. Monitoring for AMR years 2 to 12 indicates that no applications have been approved contrary to the provisions of Policy GN 22 *Prior Extraction of the Mineral Resource*.

Revised Indicator: Number of applications approved contrary to Policy GN 22

Target: 0

Trigger: More than 4 approvals in 4 years

Year	Number
2013 - 14	
2014 - 15	0
2015 - 16	0
2016 - 17	0
2017 - 18	0
2018 - 19	0
2019 - 20	0
2020 - 21	0
2021 - 22	0
2022 - 23	0
2023 - 24	0
2024 - 25	0
Total (ha)	0

(Please note this is an amended indicator as proposed by AMR 1, paragraph 3.17).

Strategic Objective: Developing vibrant communities providing a range and mix of homes and local services (D)

See also indicators for sustaining and enhancing the rural and urban economy

<i>Indicator 3: (Core) Amount of housing development permitted & built on allocated housing sites as a percentage of the total housing allocation & as a percentage of the total housing development permitted.</i>	<i>Target: 80% of allocations should be completed by 2021. As a total of all housing development permitted, a minimum of 60% should be on allocated sites</i>	<i>Trigger: 30% of allocations should be permitted by March 2017. Investigation if permissions on allocated sites are below 60% of total.</i>
67% of allocations were permitted as a percentage of the total housing development permitted by March 2017. 59% of allocations were built as a percentage of the total housing completions.		
1466 units built since Plan adoption to 2024/25 were on allocated sites out of 4469 total completions (32.8%). Allocated sites are being re-assessed through Plan review.		

<i>Indicator 4: Progress towards delivery strategic housing sites</i>	<i>Target: All sites should deliver identified units by 2021</i>	<i>Trigger: Development not commenced by 2017 (2021 for Slade Lane North)</i>
Site	AMR Year	Commentary
Slade Lane South	2013 - 14	Outline planning permission granted for 729 dwellings, superstore and petrol-filling station.
	2016 – 17	Section 73 application approved to extend the time for submission of reserved matters on the residential site.
	2017 – 18	Variation of condition application approved.
	2019 – 20	Application approved to allow extension of time for submission of reserved matters for later phases of Slade Lane South and North. Onsite infrastructure works commenced.
	2021 – 22	Resolution to modify the S106 Agreement to allow only Phase 1 of the development to proceed without the affordable housing requirement.
	2022 -23	Site sold to Welsh Government and Pobl Housing Association.
	2024 – 25	Development of houses by Pobl Housing Association commenced on Phase 1 element of the site. Various non-material amendment applications have been approved, and the S106 Agreement has been modified in relation to open space provision. Welsh Government has appointed Lichfields consultancy to prepare a masterplan for the later phases of site development. 46 units complete at the end of the 2024/25 monitoring period, with a further 26 units under construction at that time.

Slade Lane North	2013 - 14	Outline planning permission granted for 729 dwellings, superstore and petrol-filling station.
	2016 – 17	Section 73 application approved to extend the time for submission of reserved matters on the residential site.
	2017 – 18	Variation of condition application approved with 24 dwellings approved on part of the site.
	2019 – 20	Construction commenced on part of the site in Hill West ownership. Various discharge of condition and non-material amendments applications approved.
	2020 – 21	12 houses completed and the remainder (12) under construction.
	2021 – 22	Application to remove condition 5, limiting occupation of more than 8 dwellings prior to a pedestrian link being provided approved.
	2022 – 23	Whole site sold to Welsh Government, except that part owned by Hill West Ltd.
	2024 – 25	Welsh Government has appointed Lichfields consultancy to prepare a masterplan for the later phases of site development.
	Maesgwynne	2013 – 14
2016 – 17		Section 73 application approved to allow an extension of time for outline permission.
2018 – 19		Discharge of conditions applications approved.
2019 – 20		Parc Lochtudi area of site is being built out. Several variation of condition applications approved.
2022 – 23		Application for the Clos-y-Bigney (land north of Maesgwyn Road) conditionally approved for 100% affordable housing (50 dwellings) by Wales and West Housing Association.
2023 – 24		Several variation of condition and non-material amendment applications approved. 14 dwellings completed and 36 under construction at the end of this monitoring period.
2024 – 25		Several variation of condition and non-material amendment applications approved. All 50 affordable housing units completed at Clos-y-Bigney by the end of the 2024/25 monitoring period (36 completed during the 2024/25 monitoring period).
Shoals Hook Lane	2013 – 2025	No permission.

<i>Indicator 5: Affordable housing percentage target in Policy GN 27 Residential Allocations</i>		<i>Target: Will reflect economic circumstances</i>	<i>Trigger: Should average house prices increase by 5% above the base price of 2012 levels sustained over 2 quarters then the Council will consider other triggers from the Affordable Housing SPG</i>
Year	Base Price	Commentary	
2013 - 18	Sept – Dec 2012	No increase	
2018 – 20	£155,000	No conclusive evidence to show a sufficient change in the Housing Market Indicators to require a reassessment of the development viability evidence that influenced the LDP targets for affordable housing.	
2020 – 21		A further review of the Affordability Index is underway.	
2021 – 22		Review of the Affordability Index is complete. Overall the evidence gathered does not conclusively indicate that there has been a sufficient change in Housing Market Indicators to require a re-assessment of the development viability evidence that influenced the LDP targets for affordable housing. For the time being, the policy GN.27 & GN.28 targets of the current plan will remain in force.	
2022 – 25		The most up to date version of the Affordability Index is that reported in the year 9 AMR. This covers the period to 31 st March 2021.	

Indicator 7a: Number of affordable houses granted planning permission

Target: 980 by 2021

Trigger: Less than 50% of target by 2017

Year	Number
2013 - 14	283
2014 - 15	128
2015 - 16	82
2016 - 17	199
Total	687
2017 - 18	302
2018 - 19	57
2019 - 20	133
2020 - 21	109
2021 - 22	48
2022 - 23	74
2023 - 24	18
2024 - 25	140
Total	1573

Indicator 7c: Number of affordable homes permitted on exception sites

Target: 40 by 2021

Trigger: Less than 20 by 2017

Year	No. of Houses
2013 - 14	24
2014 - 15	0
2015 - 16	0
2016 - 17	32
Total	56
2017 - 18	30
2018 - 19	0
2019 - 20	10
2020 - 21	0
2021 - 22	0
2022 - 23	0
2023 - 24	0
2024 - 25	0
Total	96

Indicator 7b: Number of affordable homes gaining planning permission through planning obligations

Target: 476 by 2021

Trigger: Less than 50% of target by 2017

Year	No. of Houses	Financial Contributions
2013 - 14	53	£395,207.25
2014 - 15	86	£2,244,805.20
2015 - 16	33	
2016 - 17	16	£714,793.85
Total	188	£3,354,806.30
2017 - 18	28	£1,576,307.00
2018 - 19	2	£699,530.75
2019 - 20	60	£1,940,707.90
2020 - 21	12	£408,181.25
2021 - 22	5	£160,256.00
2022 - 23	10	£114,468.75
2023 - 24	2	£345,950.00
2024 - 25	12	£169,366.47
Total	319	£5,414,768.12

Indicator 7d: Number of affordable homes permitted and delivered by Registered Social Landlords

Target: 401 by 2021

Trigger: Less than 200 by 2017

Year	Permitted
2013 - 14	206
2014 - 15	42
2015 - 16	49
2016 - 17	151
Total	448
2017 - 18	244
2018 - 19	55
2019 - 20	63
2020 - 21	97
2021 - 22	43
2022 - 23	64
2023 - 24	16
2024 - 25	128
Total	1158

Indicator 8a: Number of rural workers dwellings granted planning permission

Target: 40 by 2021

Trigger: 50% of target

Year	Number
2013 - 14	3
2014 - 15	6
2015 - 16	6
2016 - 17	2
2017 - 18	2
2018 - 19	0
2019 - 20	5
2020 - 21	0
Sub-Total	24
2021 - 22	1
2022 - 23	2
2023 - 24	2
2024 - 25	0
Total	29

Indicator 9a: Number of affordable houses with planning permission and number built as a percentage of all new housing with planning permission and built

Target: 98 affordable houses per annum consented; affordable housing to be at least 15% of overall permission and completion

Trigger: Less than 12% of overall permissions

Year	Total Houses Permitted	Affordable Houses Permitted	% Affordable	Total Houses Built	Affordable Houses Built	% Affordable
2013 - 14	1441	283	19.64	459	Not available	Not available
2014 - 15	701	128	18.26	588	Not available	Not available
2015 - 16	749	82	10.95	405	Not available	Not available
2016 - 17	653	199	30.47	365	Not available	Not available
2017 - 18	632	302	47.78	286	48	16.78
2018 - 19	357	57	15.97	419	141	33.65
2019 - 20	817	133	16.28	267	77	28.83
2020 - 21	373	109	29.22	340	102	30.00
2021 - 22	156	48	30.77	338	99	29.28
2022 - 23	244	74	30.33	367	85	23.16
2023 - 24	229	18	7.86	283	120	42.40
2024 - 25	387	140	36.18	352	128	36.36
Total	6739	1573	23.34	4469	800	
			Totals (2017-18 onwards)	2652	800	30.17

Indicator 9b: Proportion of housing development fulfilling affordable housing contributions sought by the Authority

Target: 75% of development to meet or exceed contribution rate; 95% of development to make some form of contribution to affordable housing

Trigger: 10% of each target

Year	Proportion (%)	Number of applications where contribution is made
2013 - 14	86.2	50/58
2014 - 15	89.1	57/64
2015 - 16	90	54/60
2016 - 17	89.4	42/27
2017 - 18	86.1	31/36
2018 - 19	87.8	41/46
2019 - 20	79	33/42
2020 - 21	78	26/32
2021 - 22	81	26/32
2022 - 23	31	9/29
2023 - 24	68	19/28
2024 - 25	69	22/32

Indicator 8b: Indication of general level of affordable housing need

Target: No significant increases annually

Trigger: Level of need varies by over 10% compared with 2012 Common Housing Register figure

Year	Level of Need
2013 – 2020	1,641 affordable homes per year
2020 – 2023	Local Housing Market Assessment (for 2021) shows need of 463 affordable homes in PCC planning area (564 including the National Park planning area) per year.
2023 – 25	Updated Local Housing Market Assessment (for 2023) published in 2025. A need for 461 affordable dwellings in PCC’s planning area (551 including the National Park planning area) per year is identified.

Indicator 10: (Core) Average density of housing permitted on Allocated and Windfall sites

Target: 30dph in Hub Towns and 25dph in Rural Settlements

Trigger: Less than 25 dph in Urban Areas and less than 20 dph in Rural Areas

Year	Allocated Hub Town (dph)	Allocated Rural Settlements (dph)	Windfall Hub Town (dph)	Windfall Rural Settlements (dph)
2013 - 14	29	27	92	20
2014 - 15	29	24	60	19
2015 - 16	37	26	40	24
2016 - 17	31	22	62	27
2017 - 18	31	24	38	21
2018 - 19	24	40	26.9	18
2019 - 20	35	24	37	20
2020 - 21	N/A	N/A	38	35.9
2021 - 22	N/A	23.3	25.92	3
2022 - 23	17	19	27	19
2023 - 24	N/A	25.4	43	18
2024 - 25	N/A	22.4	24.4	20.5
Average	29.125	25.19	42.85	20.45

Housing Commentary

The housing land availability figures shown in the AMR reflect the changes made by Welsh Government in March 2020 to remove the five-year land supply requirement and replace it with a housing trajectory as a basis for monitoring. Cumulative completions have been below the target requirement for LDP 1 and the issue is being taken into account through the preparation of the replacement Plan (LDP 2).

In this current monitoring period 352 new dwellings were built in total, which is slightly below the pre-Covid building 10-year average building rate of 379 per year. Of these, 128 were affordable dwellings (36.4%). Analysis undertaken for Plan Review indicates that the LDP targets were high in comparison with more recent projections, coupled with lower migration levels.

The target of 15% of affordable housing has been met for completions (36.36%) and permissions (36.18%) during the AMR 12 monitoring period.

The triggers for all of the strategic housing sites have been met. Planning permission has been granted for 729 houses at Slade Lane (North and South) and all pre-commencement conditions completed. All pre-commencement S106 agreements have been received by the Council and a Section 278 agreement completed and bond received. A Reserved Matters application for 115 dwellings was approved in 2019 and a modification to the S106 agreement permitted in 2022.

Slade Lane South has been sold to Welsh Government and Pobl Housing Association. 46 dwellings had been completed by the end of the 2024/25 monitoring period, with a further 26 dwellings under construction at that time. Slade Lane North has been sold to Welsh Government, except the Hill West land which remains in separate ownership. Welsh Government has commissioned Lichfields to prepare a comprehensive Masterplan for the development of the North and South sites. Development of phase 1 commenced during the current AMR monitoring period. It is expected that the detail of the development proposals for future phases of the site will evolve in conjunction with preparation of the Masterplan.

No planning applications have been received to develop the Shoals Hool Lane site in Haverfordwest.

Much of the Maesgwynne site has extant planning permission. An application for 50 affordable houses (100%) on the part of the site adjacent to Clos-y-Bigney was approved in March 2023 and has subsequently been developed by the Wales and West Housing Association. Further variation of condition and non-material amendment applications have been processed during the AMR 12 monitoring period, with all 50 units completed by the end of the 2024/25 monitoring period.

The Affordability Index has been updated to March 2021. Key conclusions are recorded in the table above and further detail is available on the Council's website.

The proportion of housing development fulfilling the expectations for affordable housing contributions sought by the authority was 69% in 2024/25 (contributions were received on 22 out of 32 applications). In total 136 affordable houses were granted planning permission and 128 affordable units were built during 2024/25. Planning permission was also granted for 4 on-site affordable dwellings during 2024/25, secured through section 106 legal agreements. Also, during 2024/25, section 106 agreements linked to residential permissions secured financial contributions towards affordable housing totalling £169,366.47.

Whilst affordable housing need remains high throughout the Plan area, the Council has been successful in continuing to facilitate delivery of reasonable numbers of affordable dwellings year-on-year. An updated Local Housing Market Assessment was prepared during 2023 and approved by Welsh Government and subsequently published in 2025. This is helping to inform the ongoing review of the LDP.

The density figures remain within the parameters of acceptability, and no further investigation is needed at present. Appropriate residential densities is also a matter being reviewed in conjunction with preparation of the replacement LDP.

Indicator 12a: Number of sites and pitches permitted and completed for gypsies and travellers accommodation

Target: 40 by end of 2015

Trigger: Less than 40 by 2015

Year	Pitches permitted since 2010 (cumulative)
2013 - 14	15
2014 - 15	19
2015 - 16	26
2016 - 17	35
2017 - 18	38
2018 - 19	52
2019 - 20	54
2020 - 21	58
2021 - 22	58
2022 - 23	58
2023 - 24	70
2024 - 25	70

Indicator 12b: Progress towards uptake of allocated sites for gypsy and traveller accommodation

Target: 40 additional pitches provided by end of 2015

Trigger: Less than 40 pitches provided by end of 2015

Year	Commentary
2013 – 14	Permission granted for 3 pitches at Castle Quarry
2014 – 15	3 pitches delivered at Castle Quarry
2015 – 17	Successful de-registration of Common at Kilgetty
2017 – 18	Planning application at Kilgetty being considered
2018 – 19	Permission granted for 12 pitches at Kilgetty
2019 – 20	Funding for 12 pitches at Kilgetty in place
2020 – 21	Allocated extension to Kingsmoor site under construction
2021 – 22	Kingsmoor extension site due to be completed following retender process
2022 – 23	Kingsmoor pitches completed February 2022
2023 – 2025	No change

Indicator 13a: Meeting newly arising need (post 2014) by the end of 2019 (level of need identified with Gypsy Traveller Accommodation Needs Assessment (GTAA) (2014)

Target: Need identified in 2014 survey met by end of 2019

Trigger: Identified need not met by 2019

Year	Commentary
2016 – 2020	Identified need not met by 2019. Survey superseded by 2015 GTAA. The Council has produced a draft GTAA which remains with Welsh Government for Authorisation. The level of need within the 2019 draft is reduced in line with longer-term trends.
2020 – 2025	The 2019 GTAA was updated in response to Welsh Government feedback in 2020 and 2024 and approved by Welsh Government in May 2024. It identified an immediate need for 9 new residential pitches by the end of 2024 and estimates need for a further 30 pitches from 2025 to 2033. Planning permission granted for 14 pitches (January 2024) and so the immediate need has been met. The GTAA concluded that there is no need for a specific site for a transit site at present. The emerging LDP2 allocates land to help meet longer-term need. The next GTAA is expected to commence in 2026 and conclude in 2027.

Indicator 13b: Meeting newly arising need (2016) by the end of 2021 (level of need identified with Gypsy Traveller Accommodation Needs Assessment (GTAA) (2016)

Target: Need identified in 2016 survey met by end of 2021

Trigger: No trigger

Year	Commentary
2015 – 2016	Draft GTAA produced but not finalised
2016 – 2017	GTAA approved by Welsh Government
2017 – 2018	GTAA identified a need for 32 pitches plus 2 Traveller/Showpeoples' yards. Nineteen pitches permitted since the GTAA
2018 – 2019	A rolling total of 31 pitches and 1 Traveller/Showpeoples' yard permitted
2019 – 2020	A rolling total of 33 pitches and 1 Traveller/Showpeoples' yard permitted. A further established yard is outside enforcement for elements of the development. Need has been met
2020 – 2022	The 2019 GTAA remains draft.
2022 – 2023	The 2019 GTAA awaits approval from Welsh Government. It identified a need for 11 pitches by the end of 2024. Planning permission has since been granted for 6 pitches, with an immediate outstanding need for 5 pitches by the end of 2024
2023 – 2024	The GTAA was amended in 2020 and again in 2024. Final version approved in May 2024 with an immediate need for 9 new residential pitches by the end of 2024. Longer term need identified for 30 new residential pitches 2025 – 2033. Immediate need has been met
2024 – 2025	The emerging LDP2 will help to meet the remaining identified need. In recent years there has also been delivery of new pitches on private sites which is anticipated will continue to happen alongside provision on Council-owned sites. Work on a new GTAA will commence in 2026 for completion by early 2027.

Indicator 14: Number of applications approved contrary to the protective aim of Policy GN 33 Community Facilities

Target: 0

Trigger: 3 over 3 years

Year	Number
2013 – 2015	0
2015 – 2016	2
2016 – 2025	0
Total	2

Strategic Objective: Delivering design excellence and environmental quality (B) and protecting and enhancing the natural and built environment (J)

Indicator 1: Number of planning permissions granted contrary to Policy GN. 1, the protective aim of criterion 3

Target: 0

Trigger:

More than 4 permissions in 4 years

Year	Number
2013 - 14	6
2014 - 15	12
2015 - 16	1
2016 - 17	0
2017 - 18	0
2018 - 19	0
2019 - 20	0
2020 - 21	0
2021 - 22	7
2022 - 23	0
2023 - 24	2
2024 - 25	0
Total	31

Indicator 2: Number of housing permissions within Settlement Boundaries as a percentage of all housing permissions

Target: 98%

Trigger: 5% a year outside boundaries over 4 years

Year	%
2013 - 14	94
2014 - 15	96.9
2015 - 16	93
2016 - 17	93
2017 - 18	95.5
2018 - 19	95.7
2019 - 20	95.2
2020 - 21	91.1
2021 - 22	93
2022 - 23	90
2023 - 24	87.2
2024 - 25	96.6

Commentary

Policy GN 1 *General Development* criterion 3 protects landscape character, quality and diversity (including the special qualities of the Pembrokeshire Coast National Park, which borders the Pembrokeshire County Council planning area). The table shows that the trigger for this policy has been met for 7 out of the 12 years since adoption of the LDP, although there was no breach during the AMR year 12 monitoring period, when taken in isolation.

The trigger for the proportion of houses granted planning permission within Settlement Boundaries has not been activated in the year 12 monitoring period. However, the trigger had been activated in the four previous monitoring periods 2020-21 to 2023-24. Preparation of LDP 2 has now advanced to Examination stage and once adopted LDP 2 will provide an up-to-date policy context for provision of new residential development, with the majority being directed towards the more urbanised areas in accordance with the revised Settlement Hierarchy.

Indicator 3: Number of permissions approved contrary to Policy SP16 (The Countryside)

Target: 0

Trigger: More than 4 in 4 Years

Year	Number
2013 - 14	0
2014 - 15	0
2015 - 16	0
2016 - 17	0
2017 - 18	4
2018 - 19	0
2019 - 20	0
2020 - 21	0
2021 - 22	0
2022 - 23	0
2023 - 24	8
2024 - 25	7
Total	19

Conclusion

The number and varied reasons for applications being approved contrary to this policy is a matter of concern which will need to be monitored against similar policies to protect the countryside from inappropriate development in LDP2.

Commentary

Policy SP16 is a strategic policy setting out the types of development that may be considered in the countryside, including rural enterprises and necessary rural enterprise dwellings and the re-use of appropriate existing buildings. The table shows that the trigger was met in the AMR11 monitoring period which carries over to the current AMR12 monitoring period. The high number of permissions granted contrary to this policy in 2023-24 were for a range of development types. Three were granted for reasons of economic benefit; one was following the grant of a Certificate of Lawfulness; one was due to an existing permission on the site; one to meet unmet need for Traveller accommodation; and one was partially in the countryside. The trend has continued in the 2024/25 period with a further 7 applications determined contrary to Policy SP 16. Two of the 7 were for removal of agricultural occupancy conditions where successful Certificate of Lawfulness had previously been granted; two related to permissions granted under the previous Development Plan and where settlement boundaries had subsequently changed; one was regarded to have limited conflict with SP 16, outweighed by compliance with other strategic policies; one was for a variation of conditions of a partially completed development; and one was approved contrary to officer recommendation for economic benefit.

Commentary

Policy GN 38 *Protection and Enhancement of the Historic Environment* allows development only where it can be demonstrated that it would protect or enhance the character and integrity of sites and landscapes or architectural or historic merit. The table shows that a considerable number of applications have been approved contrary to this policy since 2013, but the number has been below the trigger figure since 2020.

Indicator 7: Number of planning permissions, Listed Building Consents and Scheduled Ancient Monument Consents granted contrary to Policy GN 38
Target: None

Trigger: More than 4 in 4 years

Year

2013 - 14	3
2014 - 15	12
2015 - 16	2
2016 - 17	0
2017 - 18	1
2018 - 19	0
2019 - 20	11
2020 - 21	0
2021 - 22	2
2022 - 23	0
2023 - 24	0
2024 - 25	1
Total	32

Indicator 5: Loss of Open Space as result of development (ha) which is not allocated in the Plan

Target: No target

Trigger: No target

Year Area (Ha)

2013 - 14	0
2014 - 15	0.15
2015 - 16	0
2016 - 17	0
2017 - 18	0
2018 - 19	0
2019 - 20	0
2020 - 21	0
2021 - 22	0
2022 - 23	0
2023 - 24	0
2024 - 25	0
Total	0.15

Open Space Commentary

The third table shows that only a small amount of land, designated as Open Space in the Plan, has been lost to development, with none lost since 2015 which indicates that the policy is performing as expected.

Indicator 4a: (Core) Amount of greenfield land lost to development (ha) not allocated in the Plan

Target: No target

Trigger: No target

Year	Area (Ha)
2013 - 14	365.07
2014 - 15	299.8
2015 - 16	41.14
2016 - 17	62.52
2017 - 18	46.34
2018 - 19	15.18
2019 - 20	17.63
2020 - 21	15.6
2021 - 22	15.4
2022 - 23	29.86
2023 - 24	51.57
2024 - 25	53.46
Total	960.11

Indicator 4b: Amount of Greenfield land lost to development outside Settlement Boundaries

Target: No target

Trigger: No target

Year	Area (Ha)
2013 - 14	338.98
2014 - 15	280.64
2015 - 16	32.02
2016 - 17	50.22
2017 - 18	28.49
2018 - 19	17.43
2019 - 20	16.5
2020 - 21	19.88
2021 - 22	54.57
2022 - 23	28.28
2023 - 24	32
2024 - 25	49.28
Total	899.01

Commentary

The first two tables show the amount of greenfield land lost to development. It can be concluded that most of the development within Settlement Boundaries, other than on allocated sites, is taking place on brownfield sites, with the majority of greenfield development taking place in countryside locations. The Countryside figure is inflated by proposals for renewable energy, slurry stores and agricultural buildings, along with some equestrian, sporting and tourism facilities.

The proportion of development on brownfield land demonstrates a generally increasing trend.

Indicator 8: (Core) Amount of new development (ha) permitted on previously developed (brownfield, redevelopment and conversions) expressed as a percentage of all development permitted

Target: No target

Trigger: No target

Year	Area (Ha)	%
2013 - 14	80.75	18
2014 - 15	46.87	11.3
2015 - 16	291.05	85
2016 - 17	115.5	63
2017 - 18	57.51	50.6
2018 - 19	59.87	82
2019 - 20	124.77	73
2020 - 21	61.97	82
2021 - 22	116.37	86.62
2022 - 23	138.3	79
2023 - 24	59.34	81.2
2024 - 25	86.6	62.1
Total	1238.9	

Indicator 9a: (Core) Amount of waste management capacity permitted

Target: No target

Trigger: No target

Year	Area (Ha)
2013 - 14	3.65
2014 - 15	4.2
2015 - 16	3.32
2016 - 17	1.11
2017 - 18	1
2018 - 19	1.2
2019 - 20	5.05
2020 - 21	0.56
2021 - 22	3.64
2022 - 23	9.48
2023 - 24	2.47
2024 - 25	9.13
Total	44.81

Waste Commentary

The new waste management capacity of 9.13ha permitted during the AMR12 monitoring period was on a single site (Amoco Road, Milford Haven). However, this was a non-material amendment linked to an earlier permission granted in the AMR10 monitoring period.

<i>Indicator 9b: Progress towards finding a new Civic Amenity Site to serve South-East Pembrokeshire</i>	Indicator met 2014 - 15
<i>Indicator 9c: Winsel – Provision of extension to Civic Amenity Site</i>	Indicator met 2014 - 15

Appendix 2: Cumulative Housing Completions and Housing Trajectory

The Development Plans Manual Edition 3 was published in March 2020 changing the way in which cumulative completions are monitored against the anticipated cumulative completion rate. The Manual notes that for Plans published prior to the publication of DPM Edition 3, cumulative completions will be measures against the cumulative average annual housing requirement set out in the Plan. This should be presented in AMRs, and the information should be prepared with the involvement of a Housing Stakeholder Group. The involvement of a such a group has been delayed regarding preparation of the housing trajectory for the AMR year 12 monitoring period, due to the need to give LDP 2 priority. However, the results of the Housing Delivery Assessment for 2024/25 were shared with the appropriate Study Group on 18/11/2025 with feedback requested by the 10th December 2025.



LDP Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Year	2012-13	AMR year 1 2013-14	AMR year 2 2014-15	AMR year 3 2015-16	AMR year 4 2016-17	AMR year 5 2017-18	AMR year 6 2018-19	AMR year 7 2019-20	AMR year 8 2020-21	AMR year 9 2021-22	AMR year 10 2022-23	AMR year 11 2023-24	AMR year 12 2024-25	AMR year 13 2025-26	AMR year 14 2026-27	AMR year 15 2027-28	AMR year 16 2028-29	AMR year 17 2029-30	AMR year 18 2030-31	AMR year 19 2031-32	AMR year 20 2032-33	AMR year 21 2033
Remaining Years	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Total Housing Provision	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300	7300
Total LDP Housing Requirement	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700	5700
Actual Completions Large	288	314	410	224	280	231	299	226	286	261	283	232	310									

LDP Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Year	2012-13	AMR year 1 2013-14	AMR year 2 2014-15	AMR year 3 2015-16	AMR year 4 2016-17	AMR year 5 2017-18	AMR year 6 2018-19	AMR year 7 2019-20	AMR year 8 2020-21	AMR year 9 2021-22	AMR year 10 2022-23	AMR year 11 2023-24	AMR year 12 2024-25	AMR year 13 2025-26	AMR year 14 2026-27	AMR year 15 2027-28	AMR year 16 2028-29	AMR year 17 2029-30	AMR year 18 2030-31	AMR year 19 2031-32	AMR year 20 2032-33	AMR year 21 2033
Remaining Years	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Actual Completions Small	109	145	178	181	85	55	120	41	54	77	84	51	42									
Anticipated Allocated Site Completions														162	277	266	226	141	152	117	96	62
Anticipated Landbank Completions														135	118	91	70	23	27	0	0	0
Anticipated Completions Large Windfall*														0	0	40	40	40	40	40	40	40

LDP Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Year	2012-13	AMR year 1 2013-14	AMR year 2 2014-15	AMR year 3 2015-16	AMR year 4 2016-17	AMR year 5 2017-18	AMR year 6 2018-19	AMR year 7 2019-20	AMR year 8 2020-21	AMR year 9 2021-22	AMR year 10 2022-23	AMR year 11 2023-24	AMR year 12 2024-25	AMR year 13 2025-26	AMR year 14 2026-27	AMR year 15 2027-28	AMR year 16 2028-29	AMR year 17 2029-30	AMR year 18 2030-31	AMR year 19 2031-32	AMR year 20 2032-33	AMR year 21 2033
Remaining Years	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Anticipated Completions Small Windfall*														66	66	66	66	66	66	66	66	66
Total Completions	397	459	588	405	365	286	419	267	340	338	367	283	352	363	461	463	402	270	285	223	202	168

LDP Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Year	2012-13	AMR year 1 2013-14	AMR year 2 2014-15	AMR year 3 2015-16	AMR year 4 2016-17	AMR year 5 2017-18	AMR year 6 2018-19	AMR year 7 2019-20	AMR year 8 2020-21	AMR year 9 2021-22	AMR year 10 2022-23	AMR year 11 2023-24	AMR year 12 2024-25	AMR year 13 2025-26	AMR year 14 2026-27	AMR year 15 2027-28	AMR year 16 2028-29	AMR year 17 2029-30	AMR year 18 2030-31	AMR year 19 2031-32	AMR year 20 2032-33	AMR year 21 2033
Remaining Years	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Average Annual Requirement	572	572	572	572	572	572	572	572	572	572	572	572	572	572	572	572	572	572	572	572	572	572
Total Projected Cumulative Completions	397	856	1444	1849	2214	2500	2919	3186	3526	3864	4231	4514	4866	5229	5690	6153	6555	6825	7110	7333	7535	7703

Settlement Tier	LDP Allocation / Monitoring Reference	Site name	Settlement	Total site capacity	Units completed to date	Remaining units to be delivered in the Plan period	Time lag to construction start			Phasing of development (2023 to end of 2033)																												
							Time period for pre-application discussions / PAC consultation	Time period for submission of planning application and determination	Time period for discharge of relevant conditions to enable site construction	Number of units completed since last study	Number of units under construction	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033	Units beyond the Plan period																	
Hub Town	HSG/040 /00273	Slade Lane North	Haverfordwest	459	18	0	2025	2027	2028	0	0																									441		
Hub Town	HSG/040 /00274	Slade Lane South	Haverfordwest	512	46	282	Phase 1 (115units) pre-construction complete			46	26	26	40	50	53	11	30	30	30	12	184																	

Hub Town	HSG/040 /00275	Between Shoals Hook Lane and the (A40) bypass	Haverfordwest	150	0	0	N/A	N/A	N/A	0	0										150	
Hub Town	HSG/086 /00129	Beaconing Fields, Steynton	Mitford Haven	95	53	42	Site majority (81units) pre-construction completed			2	28	28	5	5	4							
Hub Town	HSG/086 /00222	Land SW of The Meads	Mitford Haven	93	0	93	2025	2026	2026	0	0		10	20	20	20	23					
Hub Town	HSG/086 /00095	West of Silverstream, Hubberston	Mitford Haven	50	0	0	N/A	N/A	N/A	0	0											50
Hub Town	HSG/086 /00223	Thornton Road, Steynton	Mitford Haven	224	117	0	N/A	N/A	N/A	0	0											107
Hub Town	HSG/086 /00318	Castle Pill	Mitford Haven	72	0	0	N/A	N/A	N/A	0	0											72
Hub Town	HSG/096 /00238	North of Pembroke Road	Pembroke Dock	98	0	38	2025	2026	2026	0	0		8	8	8	8	6					60
Hub Town	HSG/096 /00233	East of Hill Farm, Imble Lane	Pembroke Dock	63	0	0				0	0											63

Hub Town	HSG/095 /00144	North of Gibbas Way	Pembroke	70	0	43	Complete 2023	2025	2025	0	0		5	6	6	6	5	5	5	5	27
Hub Town	HSG/095 /00147	Land adjacent to Long Mains and Monkton Priory	Pembroke	238	30	70	Complete	Complete	2026	0	1		10	15	15	15	15				138
Hub Town	HSG/095 /00153	Adjacent to Monkton Swifts	Pembroke	118	0	38	2025	2025	2026	0	0		18	20							80
Hub Town	HSG/034 /00215	Maesgwynne Farm	Fishguard	399	50	192	2025	2025	2026	36	0	0	0	21	21	30	30	30	30	30	157
Hub Town	HSG/034 /00165	East of Maesgwynne	Fishguard	24	14	0	Parc Loktudi, Parc Y Chwarel and Maesgwynne Farm pre-construct-ion complete			0	0										10
Hub Town	HSG/093 /00066	East of Poppy Drive	Neyland	101	0	101	2024	2024	2025	0	0	10	22	20	20	20	9				
Rural Town	HSG/088 /00078	West of Bloomfield Gardens	Narberth	91	0	91	Complete	Submitted 2024	2025	0	0		50	30	11						

Rural Town	HSG/088 /00077	West of Rushacree	Narberth	54	0	27	Pre-construction complete			0	0		7	10	10					27
Service Centre	HSG/030 /00043	Between the school and Station Road	Crymych	56	41	15	Pre-construction complete			20	15	15								
Service Centre	HSG/030 /LDP/01	East of Waunaeron	Crymych	35	0	28	2027	2028	2028	0	0				8	10	10			7
Service Centre	HSG/048 /00038	North of Hayston View	Johnston	130	14	50	2025	2026	2026	0	0		15	15	15	5				66
Service Centre	HSG/050 /00042	Extension to James Park and Cotswold Gardens	Kilgetty	75	55	0	N/A	N/A	N/A	0	0									20
Service Centre	HSG/050 /00043	Land to the rear of Newton Hall	Kilgetty	19	0	19	Pre-construction complete			0	6	9	10							
Service Centre	HSG/052 /00011	South of Cleggars Park	Lamphey	55	0	55	Complete	Complete 2024	2024	0	0	15	15	15	10					
Service Centre	HSG/053 /00009	Court Meadow (Phase 2&3)	Letterston	97	5	22	Phase 2 pre-construction complete			2	2	6	6	6	4					70

Service Village	HSG/003 /00024 (003/000 40)	North of New Road	Begelly	70	0	35	Pre-construction complete			0	0							5	10	10	10	35	
Service Village	HSG/006 /00003	Adjacent to Hafod	Blaenffos	10	0	8	2025	2025	2025	0	0		3	3	2							2	
Service Village	HSG/008 /LDP/01	Northwest of Lyndhurst Avenue	Broadmoor	12	0	0	N/A	N/A	N/A	0	0											12	
Service Village	HSG/015 /00022 (015/000 33)	South of the Plough Inn (South of Ashleigh House)	Carew / Sageston	31	0	10	Complete (10 units) 2024	Complete (10 units) 2024	2025	0	0		2	5	3								21
Service Village	HSG/022 /00012	West of Ash Grove	Clarbeston Road	21	12	0	N/A	N/A	N/A	0	0											9	
Service Village	HSG/152 /LDP/01	Clunderwen Depot site	Clunderwen	28	0	0	N/A	N/A	N/A	0	0											28	
Service Village	HSG/025 /00028	South of Tinker's Fold	Cosheston	6	4	2	Pre-construction complete			2	1	2											
Service Village	HSG/028 /00012	North of the Forge	Croesgoch	22	0	22	Pre-construction complete			0	0		6	8	8								

Service Village	HSG/029 /00014	Opposite Woodholm Close	Crundale	13	0	0	N/A	N/A	N/A	0	0										13	
Service Village	HSG/041 /LDP/01	Land opposite Barrowgate	Hayscastle Cross	6	0	0	N/A	N/A	N/A	0	0										6	
Service Village	HSG/044 /00050	Leven Close (Rear of Pill Road)	Hook	13	12	1	Pre-construction complete			0	0	1										
Service Village	HSG/046 /00015	Bowett Close	Hundleton	29	24	5	Pre-construction complete			0	0	5										
Service Village	HSG/047 /LDP/01	Rear of Beggars Roost & Sunny Side	Jeffreyston	14	0	0	N/A	N/A	N/A	0	0										14	
Service Village	HSG/057 /LDP/01	North of the Village Hall	Llanddewi Velfrey	12	0	0	N/A	N/A	N/A	0	0										12	
Service Village	HSG/060 /LDP/01	Pwll Quarry Cross	Llandissilio	25	0	0	N/A	N/A	N/A	0	0										25	
Service Village	HSG/063 /00024	North of The Kilns	Llangwm	75	0	67	2024	2024 / 25	2025	0	22	35	32								8	

Service Village	HSG/081 /LDP/01	North west of the Globe inn	Maenclochog	58	11	24	2026	2027	2027	0	0	4	5					5	5	5	23
Service Village	HSG/085 /LDP/01	South of the Woodturner's	Mathry	6	0	0	N/A	N/A	N/A	0	0										6
Service Village	HSG/097 /LDP/02	Penally Heights	Penally	11	3	0	N/A	N/A	N/A	0	0										8
Service Village	HSG/099 /LDP/01	Land adjacent to Coppins Lodge	Pentlepoir	51	38	0	N/A	N/A	N/A	0	0										13
Service Village	HSG/108 /LDP/01	Opposite Bro Dewi	Puncheston	6	0	0	N/A	N/A	N/A	0	0										6
Service Village	HSG/108 /LDP/02	West of Awelfa	Puncheston	12	0	0	N/A	N/A	N/A	0	0										12
Service Village	HSG/113 /LDP/01	South of Robeston Court	Robeston Wathen	14	0	5	Complete (2 units) 2024		2025	0	0	2	3								9
						2025	2025	2026													

Service Village	HSG/114 /LDP/01	East of Pilgrim's Way	Roch	52	0	52	Complete	Complete 2024	2025	0	0		6	8	8	8	8	8	6			
Service Village	HSG/116 /LDP/01	Opposite The Glades	Rosemarket	13	0	0	N/A	N/A	N/A	0	0										13	
Service Village	HSG/119 /LDP/01	East of Hill Lane	Simpson Cross	15	7	8	Pre-construction complete			7	5	5	3									
Service Village	HSG/120 /00018	NW of Wesley Way	Spittal	22	0	10	2025	2026	2026	0	0		2	2	2	2	2				12	
Service Village	HSG/122 /00035	Awel y Mor extension	St. Dogmaels	16	0	8	Complete 2024	Submitted 2024	2025	0	0								8		8	
Service Village	HSG/123 /LDP/01	North of Parsons Green	St. Florence	26	7	19	2025	2025	2026	0	0		4	4	4	4	3					
Service Village	HSG/135 /00004	North of (old) Bulford Road	Tiers Cross	23	0	0	N/A	N/A	N/A	0	0										23	
Service Village	HSG/149 /LDP/01	Opposite Haul y Bryn	Wolfscastle	30	0	14	2027	2028	2028	0	0					4	4	4	2		16	

Totals				4120	561	1496					115	106	163	277	266	224	141	150	117	96	62	2063
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Settlement Tier	Development Monitoring Reference	Site Name	Settlement	Total Units	Number of units completed to date	Number of units completed since last study	Units to be delivered in Plan period	Number of units under construction	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033	Units beyond plan period
Hub Town	040/00397	141, Portfield	Haverfordwest	21	3	3	18	9	10	8								
Hub Town	040/00077	Kensington Gardens	Haverfordwest	133	84	1	5	2	2	3								44
Hub Town	040/00373	Calvary Church	Haverfordwest	8	0	0	8	0	4	4								
Hub Town	040/00430	Snooker Club	Haverfordwest	16	0	0	0	0										16
Hub Town	040/00106	Brooklands Park	Haverfordwest	21	3	0	18	4	5	5	4	4						
Hub Town	040/00445	7, Dew Street	Haverfordwest	5	0	0	5	0	5									
Hub Town	040/00456	Pink Cat Shop, 24 High Street	Haverfordwest	6	0	0	6	0	6									
Hub Town	040/00464	Borough House, 10 High Street	Haverfordwest	5	5	5	0	0										
Hub Town	086/00377	Land at Milford Marina	Milford Haven	190	0	0	45	0			10	10	10	15				145
Hub Town	086/00378	132 Robert Street	Milford Haven	8	0	0	0	0										8
Hub Town	086/00381	70A-80A Charles Street	Milford Haven	24	0	0	24	0	7	8	9							

Hub Town	086/00282	Woodlands View	Milford Haven	7	6	3	1	1	1									
Hub Town	086/00399	16 Hamilton Terrace	Milford Haven	5	0	0	5	0		5								
Hub Town	086/00403	Elizabeth Venmore Court, 25 Yorke Street	Milford Haven	31	31	31	0	0										
Hub Town	096/00274	Land N of Cleddau Bridge Hotel	Pembroke Dock	5	0	0	3	1	1	1	1							2
Hub Town	096/00375	Land N of Cleddau Bridge Hotel	Pembroke Dock	14	0	0	7	0		2	3	2						7
Hub Town	096/00230	Hampshire Drive	Pembroke Dock	17	15	6	2	2	2									
Hub Town	096/00413	Stranraer Road, Pennar	Pembroke Dock	7	7	7	0											
Hub Town	095/00180	Green Haven, Monkton	Pembroke	30	7	0	0	0										23
Hub Town	095/00240	Springfield	Pembroke	5	3	0	1	0		1								1
Hub Town	095/00119	Land to the rear of 100, South Road	Pembroke	5	0	0	0	0										5
Hub Town	095/00238	27, Main Street	Pembroke	5	0	0	5	0		5								
Hub Town	034F/00348	Former Ship and Anchor	Fishguard	12	0	0	12	12	12									
Hub Town	034/00099	Delfryn, Heol Penlan, Stop and Call	Goodwick	9	0	0	5	2	3	2								4
Hub Town	034/00292	Main Street	Goodwick	26	0	0	26	2	5	11	10							
Hub Town	034G/00350	Former Garden Centre, Dyffryn	Goodwick	6	6	6	0	0										
Hub Town	034/00257	The Old Frenchman's Motel	Goodwick	10	6	6	4	4	4									

Rural Town	088/00360	Old Narberth CP School	Narberth	11	11	6	0	0										
Rural Town	088/00352	Eastgate House, Jesse Road	Narberth	7	0	0	0	0										7
Service Centre	030/00019	Crug yr Efydd	Crymych	27	22	0	5	0	2	3								
Service Centre	048/00017	Pond Bridge Farm	Johnston	123	84	4	39	0	8	8	8	15						
Service Centre	053/00034	Parc Maen Hir	Letterston	26	26	26	0	0										
Service Centre	053/00052	Former Go Cart Track	Letterston	23	8	5	15	0	4	3	2	2	2	2				
Service Village	001/00008	Penrhiw	Abercych	16	0	0	0	0										16
Service Village	007/00047	Old Station Yard	Boncath	30	0	0	15	0			7	8						15
Service Village	015/00006	Between Runway Lodge and Sageston bypass	Carew / Sageston	8	5	0	3	3	3									
Service Village	015/00022	Sageston Fields	Carew / Sageston	44	35	4	9	0	5	4								
Service Village	015/00033	West of Ashleigh House	Carew / Sageston	3	0	0	3	0		3								
Service Village	029/00013	Dingle Lane	Crundale	40	39	0	0	0										1
Service Village	029/00026	Woodholm Farm	Crundale	5	0	0	3	1					1	2				2
Service Village	042/00013	North of Cartref	Hermon	15	0	0	8	0	2	3	3							7
Service Village	044/00063	Cyffin Barn Farm	Hook	11	8	1	3	0	1	2								
Service Village	044/00015	Harcourt Close	Hook	40	31	11	9	9	9									

Service Village	081/00043	Maes Roslyn	Maenclochog	6	0	0	6	0				6						
Service Village	085/00022	Parc yr Odyn	Mathry	7	3	1	4	2	3	1								
Service Village	099/00064	Evening Star Farm	Pentlepoir	20	0	0	20	0		7	8	5						
Service Village	099/00033	Laubobagne, Hill Lane	Pentlepoir	5	2	0	3	0		3								
Service Village	116/00029	South of 3, The Beacon	Rosemarket	10	9	9	1	1	1									
Service Village	119/00030	Pembrokeshire Motor Museum	Simpson Cross	26	0	0	13	1	4	4	5							13
Service Village	119/LDP/01	East of Hill Lane	Simpson Cross	5	5	5	0	0										
Service Village	122/00035	Awel y Mor extension	St. Dogmaels	20	0	0	20	0		4	8	8						
Service Village	123/00045	Ash Grove Gardens	St. Florence	9	9	0												
Service Village	131/00021	Land adjoining Blaenffynnon Farm	Tegryn	30	4	0	13	1	2	5	6							13
Large Local Village	011/00011	Hawn Lake	Burton	12	12	0	0	0										
Large Local Village	035/00021	Poplar Meadow	Freystrop	7	6	0	1	1	1									
Small Local Village	110/00015	Maes Elwyn John	Reynalton	7	6	0	1	1	1									
Small Local Village	125/00009	St. Twynells Farm	St. Twynells	5	1	1	1	1	1									3
Small Local Village	000/01202	Bluebell Lane	Wolfsdale	7	4	0	1	0	1									2
Countryside	096/00373	Adjacent to the Cricket Club	Adjacent to Pembroke Dock	100	100	40	0	0										
Countryside	088/00074	Dingle Farm	Adjacent to Narberth	33	0	0	16	0				5	5	6				17
Countryside	154/00001	Barnlake Point	Adjacent to Barnlake	22	0	0	22	0		5	5	5	5	2				

Countryside	003/00025	Barley Park Close	Adjacent to Begelly	21	16	7	5	5	5									
Countryside	012/00004	Kiln Park	Adjacent to Burton Ferry	7	3	2	4	2	2	2								
Countryside	035/00030	Will Meadows	Adjacent to Freystrop	28	20	1	8	2	2	2	2	2						
Countryside	113/00013	Robeston Court	Adjacent to Robeston Wathen	5	4	0	0	0										1
Countryside	000/00768	Park House Court	Near New Hedges	160	28	0	0	0										132
Countryside	000/01122	Fforest Farm	Near Cilgerran	6	1	0	0	0										5
Countryside	000/01231	Plas Whitchurch	Between Blaenffos and Eglwysrwr	6	0	0	6	4	4	2								
Countryside	000/01287	Brynawelon Hotel	Near Letterston	20	4	4	20	7	7	9								
Totals				1644	682	195	477	80	135	125	91	72	23	27	0	0	0	489

Appendix 3: Sustainability Appraisal Monitoring Framework

Methodology

In order to assess the sustainability performance of the plan, Sustainability Appraisal (SA) Objectives and Indicators are categorised according to their progress towards the SA Objectives and the relevant data is reviewed. The LDP AMR monitors policies identified in Appendix 5 of the LDP. These policies are key considerations to realising the strategy and delivering the strategic objectives. The information provided on the plan policies as part of the plans monitoring regime, have shown which areas of the plan need to be reviewed, and support and inform the separate plan review process.

The tables in this Appendix expand the assessment of the performance of the Plan against the SA Objectives. As in the previous AMR, qualitative and quantitative data for the SA Objectives have been used with a commentary describing progress where this data are available. The table also identifies whether any actions for the SA monitoring are proposed. A traffic light system has been used to illustrate the overall performance of the SA Objectives below too. The traffic light system is a mechanism to highlight the specific areas of the SA which should be reviewed. As the LDP is currently under review, any potential issues will be thoroughly reviewed for the replacement LDP. Some SA Objectives are in the red category, and in terms of the other SA Objectives, there are no major areas of concern, however where objectives are amber these are generally where the SA Objective should be kept under review.

Green (G) - positive progress made, objectives being achieved

Amber (A) - objectives not being achieved, no concerns

Red (R) - Objectives not achieved, concerns about objectives/policy

SA Objectives	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20* estimate	2020- 2021	2021- 2022	2022-23	2023- 2024	2024- 2025
1. Develop and maintain a balanced population structure	A	A	A	A	A	A	A	A	A	A	A	A
2. Promote human health and wellbeing through a healthy lifestyle and	G	G	G	G	G	G	G	G	G	G	A	A

access to healthcare and recreation opportunities and a clean and healthy environment													
3. Improve education opportunities to enhance the skills and knowledge base	G	G	G	G	G	G	G	G	G	G	G	A	A
4. Minimise the need to travel and encourage sustainable modes of transport	G	G	G	G	G	G	G	G	G	G	G	A	A
5. Provide a range of high quality housing including affordable housing to meet local needs.													
6. Build safe, vibrant and cohesive communities which have improved access to key services and facilities.	G	A	A	A	A	A	A	A	A	R	A	A	A
7. Protect and enhance the role of the Welsh language and culture													
8. Provide a range of good quality employment	A	A	A	A	A	A	A	A	A	A	A	R	R

opportunities accessible to all sections of the population. 9. Support a sustainable and diverse local economy													
10. Prepare for and reduce the impact of Pembrokeshire's contribution to climate change	G	G	G	G	G	G	G	G	A	A	A	A	
11. Maintain and improve air quality	A	A	A	A	A	A	A	A	A	A	A	A	
12. Minimise the generation of waste and pollution 13. Encourage the efficient production, use, re-use and recycling of resources	G	G	G	G	G	G	G	G	G	G	A	A	
14. Maintain and protect the quality of inland and coastal water 15. Reduce the impacts of flooding and sea level rises	A	A	A	A	A	A	A	R	R	R	R	R	

16. Use land efficiently and minimise contamination	G	G	G	G	G	G	G	G	G	G	G	G
17. Safeguard soil quality and quantity	G	G	G	G	G	G	G	G	G	G	G	G
18. Protect and enhance biodiversity	G	A	A?	A?	A	A	A	A	R	R	R	R
19. Protect and enhance the landscape and geological heritage	G	G	G	G	G	G	G	G	G	G	A	A
20. Encourage quality locally distinct design that complements the built heritage	G	G	G	G	G	G	G	G	G	G	A	A
21. Protect and enhance the built heritage and historic environment	G	G	G	G	G	G	G	G	G	G	A	A

SA Objectives	Potential SA indicators	Data	Commentary
1. Develop and maintain a balanced population structure	<ul style="list-style-type: none"> • % of population aged 65+ 	<p>2021 census data: % of Pembrokeshire population 65 and over = 26.1% (21.8% in 2011, compared to 18.4% and 21.3% in Wales in 2011 and 2021 respectively (ONS, 2021)</p>	<p>The 2021 Census has revealed that the percentage of the population over the age of 65 has increased substantially in 10 years. Overall population of Pembrokeshire has increased from 122,439 in 2011 to 123,400 in 2021 (Census, 2021). The following population changes were recorded in Pembrokeshire, 2011 - 2021 Census:</p> <ul style="list-style-type: none"> • an increase of 20.6% in people aged 65 years and over, • a decrease of 4.9% in people aged 15 to 64 years, and • a decrease of 5.5% in children aged under 15 years <p>The LDP does not have a direct influence on population structure. The LDP provides for housing and access to good quality employment which could balance Pembrokeshire's ageing population.</p> <p>Without an up-to-date development plan, housing supply would become constrained which would raise house prices and younger people would struggle to gain access to housing.</p> <p>Action: Continue to monitor SA Objective. The review of the Local Development Plan considers how to respond to this objective in light of the new evidence now available.</p>
2. Promote human health and wellbeing through a healthy lifestyle and access to healthcare and recreation opportunities and a clean and healthy environment	<ul style="list-style-type: none"> • Access to key services • Total number of people Killed or Seriously Injured (KSI) per year • Long term sickness • Accessibility of semi-natural greenspace 	<p>Pembrokeshire has the 3rd greatest percentage of Lower Super Output Areas (LSOAs) in the most deprived 10% of areas for the Access domain, based on access to key services by bus and/or on foot (Pembrokeshire Single Needs Assessment, 2012). Number of people killed or seriously injured in road traffic incidents in Pembrokeshire in 2022 = 61, 2021 = 52 (2020 = 32, 2018 = 63 (54 in 2013, 60 in 2014, 61 in 2015, 62 in 2016, 65 in 2017, 63 in 2018, 77 in 2019), compared to</p>	<p>Pembrokeshire has the 3rd greatest percentage of Lower Super Output Areas (LSOAs) in the most deprived 10% of areas for the Access domain, based on access to key services by bus and/or on foot (Single Needs Assessment, 2012). The number of people killed or seriously injured in road traffic incidents in Pembrokeshire in 2022 has increased by 20% since the last AMR (WG Statistics, 2022). Sixteen percent of people in Pembrokeshire state that they are limited a lot by a health problem/disability (15% in Wales) (Welsh Health Survey, 2015). The percentage of people who report their general health as fair/poor is 20% in Pembrokeshire and 19% in Wales (Welsh Health Survey, 2015). The Welsh Health Survey ceased in 2015, health and related lifestyles are reported using the National Survey for Wales. Data for general health are now only available by health board and are not comparable to the Welsh Health Survey. Future updates will look at Illnesses and Child Health (2019). Data are available by health board (Hywel Dda Local Health Board in Pembrokeshire), but not comparable over this period to previous data SA reporting. In the current AMR period, 53.46 ha of Greenfield land has been lost to development which is not allocated in the Plan. The Authority will continue to monitor this area.</p>

		<p>865 (1,144 in 2013, 1,263 in 2014, 1,186 in 2015, 975 in 2016, 930 in 2017, 992 in 2018, 1,057 in 2019, 729 in 2020) in Wales for the same period (WG Statistics, 2022).</p> <p>Limited a lot by a health problem/disability = 16% in Pembrokeshire (15% in 2011/12, 16% in Wales in 2012 and 15% in 2014+15) (WHS, 2014+15).</p> <p>General health fair/poor 20% in Pembrokeshire (up from 19% in 11/12), 19% in Wales (Welsh Health Survey 2014/15).</p>	<p>The LDP directs development towards settlements with an appropriate range of community facilities and services. Policy GN.3, together with the Planning Obligations SPG provides for infrastructure funding for open space where appropriate.</p> <p>Action: Continue to monitor SA Objective. The goal of sustainable development, which includes all the facets of this objective, is driven by international and national policy agendas. Under the LDP1, it can be expected that the Planning System will continue to support this SA Objective. However, access to housing and quality employment will likely to be more constrained as the Plan becomes more out of date. Open space would still be protected. Planning obligations for open space provision, playing facilities, sustainable transport would continue but opportunities are likely to decrease as housing opportunities decline. The review of the Local Development Plan considers how to respond to this objective in light of the new evidence now available.</p>
<p>3. Improve education opportunities to enhance the skills and knowledge base</p>	<ul style="list-style-type: none"> • Proportion of 15/16 year olds with Level 2 threshold (5+ GCSEs at A*-C) • % of working age adults with no qualifications 	<p>62.4% of 15/16-year-olds with Level 2 Threshold in Pembrokeshire in 2017/18, compared with 67% in Wales (78.1% in Pembrokeshire, 77.8% in Wales in 2012/13, and 83% in Pems, 84.1% in Wales in 2014/2015, 84.5% in Pembrokeshire, 84% in Wales in 2015/16), 66% in Pems, 67% in Wales in 2016/17 (StatsWales, 2018).</p> <p>8.7% of adults (16-64) with no qualifications in Pembrokeshire in 2022 (13.8% in Dec 2013, 11% in 2014 and 2015, 11.7% in 2016, 9% in 2017, 8.8% in 2018, 9.3% in 2019, 5.7% in 2020, 7.5% in 2021), this has decreased since 2004 when the proportion was 15.9%.</p> <p>8.3% in Wales in 2022 (8.3% in</p>	<p>The number of 15/16 year olds with Level 2 Threshold qualifications is lower than the Welsh figure (StatsWales, 2018) and the proportion of adults with no qualifications has increased since 2018, although overall it has fallen since 2004 (Stats Wales, 2022). The percentage of adults with no qualifications is higher than the Welsh average.</p> <p>This SA Objective is not directly related to land-use policy, however the LDP contributes by focussing development in settlements where services and facilities already exist, including education facilities and access to good quality employment. The LDP also identifies land use allocations for community facilities, including education.</p> <p>The LDP also identifies land for educational facilities as allocations (GN.33 Community Facilities). NRW phosphates guidance could impact delivery of new schools.</p> <p>The lack of significant higher education provision in the County is likely to impact these figures.</p> <p>The planning system can facilitate this objective through allocating land, but it cannot directly induce these improvements, whether through LDP 1 or national policy.</p> <p>Action: Continue to monitor SA Objective.</p>

		2021, 8.6% in 2018, 8.7% in 2017, 9.6% in 2016, 10.5% in 2015, 10.0% in 2014, 10.6% in 2013) (Stats Wales, 2022).	
4. Minimise the need to travel and encourage sustainable modes of transport	<ul style="list-style-type: none"> • Mode of travel to work, % travel to work by car • Journeys made by public transport • Public transport accessibility • Link to monitoring measures of the Regional Transport Plan 	<p>Percentage of people travelling to work by car in Pembrokeshire has increased:</p> <ul style="list-style-type: none"> - 57.45% in 2001 • 60.96% in 2011 • 65.6% in 2021 (which includes driving or being a passenger in a car). <p>Percentage of people travelling to work by Train has decreased</p> <ul style="list-style-type: none"> • 0.47% in 2011 • 0.3% in 2021 <p>Percentage of people travelling to work by Bus has decreased</p> <ul style="list-style-type: none"> • 2.88% in 2011, • 1% in 2021, <p>Percentage of people travelling to work on foot has decreased</p> <ul style="list-style-type: none"> - 9.38% in 2011). - 7.6% (2021, <p>The proportion of people working at home has increased substantially. In 2001 in Pembrokeshire = 16.43% (9.72% in Wales), compared to 17.72% in 2011 (10.64% in Wales) (Census, 2011). The 2021 Census recorded 23.1%</p>	<p>The number of people travelling to work by car in Pembrokeshire has increased from 57.45% in 2001 to 60.96% in 2011 and 65.6% in 2021 (Census, 2021). In Wales this has increased from 61.23% in 2001 to 63.77% in 2011.</p> <p>Proportion of people who work at or mainly from home increased significantly to 23.1%.</p> <p>Travel patterns were surveyed in 2014 for the Joint Transport Plan (JTP) for South and West Wales (SWW) (2015). The vast majority of trips by those sampled were for work or commuting. Many trips under 5km are for traveling to work, therefore actions to encourage active travel to work, or using public transport are proposed as part of the JTP for SWW (2015), the joint local transport plan 2015-2020 included medium- and long-term aspirations for transport in the county to 2030.</p> <p>Station users at Kilgetty and Johnston and Fishguard/Goodwick have seen decreases since 2017/18, with significantly lower number in 2020/21 due to the Covid-19 pandemic. The statistics for 2021-22 show a large increase across all train stations in Pembrokeshire (ORR, 2022).</p> <p>The LDP focuses development in settlements where services and facilities already exist. Though due to the rural nature of the County it is accepted there will be a high number of people using cars to travel to work.</p> <p>As employment sites are developed out this may lead to increased travel to employment sites outside the County. As allocated sites in the Plan area are developed there may be more speculative developments in less sustainable locations. Permissions less than 50% in Hub Towns over a period of 3 years is being addressed through Plan review.</p> <p>Action: continue to monitor SA Objective.</p>

		<p>of adults as working mainly at or from home.</p> <p>Travel patterns (2015) indicate that travel to work makes up most of car journeys (JTP for S&W Wales, 2015).</p> <p>Johnston, Kilgetty and Fishguard / Goodwick Stations have seen significant decreases in passengers in 20/21. The statistics for 2021-22 show a large increase across all train stations (ORR, 2022)</p>	
<p>5. Provide a range of high-quality housing including affordable housing to meet local needs.</p> <p>6. Build safe, vibrant and cohesive communities which have improved access to key services and facilities.</p> <p>7. Protect and enhance the role of the Welsh language and culture</p>	<ul style="list-style-type: none"> • Housing land supply. • Amount of affordable housing provided • Access to key services • Offences per 1,000 of population • % of people who are Welsh speakers 	<p>4.5 years housing land supply (16-17).</p> <p>Affordable homes granted planning permission 85 (100 in March 2020-April 2021).</p> <p>Total number of dwellings built 2024/2025 = 352</p> <p>136 affordable homes provided.</p> <p>110 crimes per 1,000 people in 2022</p> <p>86 offences per 1,000 population to year ending March 2022. This was 67.9 in 2020, 54.6 in 2018, 46.22 offences per 1,000 population in 2018 (43.76 in 2017, 40.68 in 2016, 38 in 2014/15, 64.07 in 2003/04 in Pembrokeshire). 57.35 in Wales in 2012/13 and 98.97 in 2003/04 (Police.uk, 2019; ONS, 2022).</p> <p>17.2%% of population speak Welsh in 2021 compared with</p>	<p>The housing supply trigger level is no longer relevant. Housing trajectory is now the basis for monitoring. The LDP had a 3.5-year housing land supply (2018-2019, JHLAS), this was 4.5 in 2017-18, 5.1 in 2016-17 and 2015-16, 5.3 in 2013-14, 4.9 in 2012-13 (JHLAS, 2013-14).</p> <p>352 dwellings completed between April 2024 and end of March 2025. 459 in 2013-2014, 588 in 2014-15, 405 in 2015-16, 365 in 2016-17, 286 in 2017-18, 419 in 2018-19, 267 in 2019-20, 340 in 2020-21, 338 in 2021-22, 367 in 2022-23 and 283 in 2023-24.</p> <p>136 affordable homes have been granted planning permission in the current AMR period, compared with 323 in 2013-14, 265 in 2014-15, 125 in 2015-16, 190 in 2016-17, 133 in 2017-18, 170 in 2018-2019, 70 in 2019-20, 100 in 2020-21, 29 in 2021-22, 85 in 2022-23, and 20 in 2023-24. 4 were through planning obligations, compared with 232 in 2013-14, 220 in 14-15, 74 in 15-16, 141 in 16-17, 59 in 2017-18, 7 in 2018-2019, 62 in 2019-20, 7 in 2020-21, 5 in 2021-22, 66 in 2022-23 and 6 in 2023-24. 128 affordable dwellings were built in the AMR 12 period.</p> <p>Gypsy and Travellers' accommodation: 68 pitches and 2 travelling show person's yard permitted since GTANA 2010. The allocated extension to the Kilgetty, Kingsmoor site is largely completed. The GTAA 2019, as amended in 2020 and 2024, was approved by Welsh Government in May 2024. The immediate, unmet need in the period to the end of 2024 has been numerically met – and in fact slightly exceeded. Further, longer-term, need is also identified in the period 2025-2033 and a start has been made on meeting that further element of pitch provision.</p> <p>The crime rate for Pembrokeshire was 110 (offences per thousand residents, not including fraud) at the end of March 2023. The number of headline offences per 1,000 population</p>

		<p>19.2% in 2011 and 21.8% in 2001 (Census 2021, 2011 and 2001).</p>	<p>was 86 in March 2022, 67.9 in Dec 2020, 64.6 in Dec 2018, 46.22 in 2017, 40.68 in 2016, 38 in 2014-15 compared with 36.98 in 2012/13 in Pembrokeshire (64.07 in 2003/04) which compares with 84.9 in Wales in 2021/22 57.35 in Wales in 2012/13 and 98.97 in 2003/04 (Police.uk, 2021, ONS, 2022). 17.2% of the population speak Welsh in 2021, compared with 19.2% in 2011 21.8% in 2001 (Census). This reduction follows the national trend, however, is lower than the Welsh average of 22.3%.</p> <p>The LDP cannot directly influence crime rates; however, it seeks to improve community safety through design. This aspect is difficult to monitor.</p> <p>The number and proportion of housing planning permissions at the different levels of the settlement hierarchy is monitored for the AMR, and the level of services will be monitored at Plan review. The LDP focuses development in settlements where services and facilities already exist. The NRW Nutrient Guidance has started to impact and will impact future housing development (including affordable housing) and will be reported in later AMRs. The LDP provides for housing (including affordable housing) in local communities where the Welsh language has a significant role. This can be assessed in more detail at Plan review. The LDP has considered Welsh language in terms of phasing development and Policy SP 9 allows further consideration for Welsh language.</p> <p>Action: continue to monitor the SA Objectives and assess at Plan review. Housing site availability would decline in due course. NRW Nutrient targets are affecting and will affect housing development. This is an issue being addressed by LDP 2. This is a critical issue for this and other SA Objectives (economy, water quality and ecology), however, the overall level of housing being provided has not been significantly affected to date.</p>
<p>8. Provide a range of good quality employment opportunities accessible to all sections of the population.</p> <p>9. Support a sustainable and diverse local economy</p>	<ul style="list-style-type: none"> • Claimant count amongst working age population (%) • % of economic activity by sector • Number or % of vacant floorspace within Town Centres • Planning permissions for tourism developments/e 	<p>Economic activity rate in those aged 16-64 in Pembrokeshire (figures for Wales in parentheses):</p> <p>72.6% in 04/05 (72.8%) 75.2% in 13/14 (75.3%) 77.6% in 14/15 (74.4%) 75.6% in 15/16 (75.3%) 76.2% in Jan 16-Dec 16 (74.8%) 75.8% in Jan 17-Dec 17 76.0% in 18/19 (76.7%) 79.4% in 19/20 (76.6%) 76.3% in 20-21 (75.2%) 78.7% in 21-22 (76.5%) 77% in 2022 (75.6%)</p>	<p>The economic activity rate in those aged 16-64 in Pembrokeshire (figures for Wales in parentheses) was 77% in 2022 (75.6% in Wales) (Nomis, 2022).</p> <p>The GVA per head in Pembrokeshire (South West Wales area) was £25,754 (provisional) in 2021, £19,400 per head in 2020, £20,768 (revised) in 2019, £18,856 in 2018, £19,878 in 2017, £19,093 per head in 2016, £19,277 in 2015, £15,683 in 2014 and £15,862 in 2013 (£22,380 per head in Wales, provisional) (StatsWales, 2020).</p> <p>Welsh Ministers refused a proposal for a major biomass facility a Development of National Significance (DNS) at Blackbridge (a Strategic Employment site) in AMR period 6. Continue to monitor.</p> <p>The amount of major retail, office and leisure development permitted in town centres was 0% in the current AMR period. One major retail development was permitted outside the town centres as a redevelopment of an existing site.</p> <p>The change of presence of A1 uses (unit numbers & floorspace) in primary retail frontages less than the target (<66% of the linear frontage is A1 use class) in Fishguard, Narberth and Pembroke town centres.</p>

employment developments per year.

GVA per head Pembrokeshire = £19,400 in 2020, compared to £20,392 per head in Wales (recorded)
 GVA per head in Pembrokeshire £25,754 (provisional) and £22,380 (provisional) in Wales in 2021
 Town centre development = No major development permitted within or outside town centres.
 Change of presence of A1 uses
 Less than target in the following Town Centres:
 Fishguard
 Narberth
 Pembroke
 Percentage of ground floor vacant units in each Town Centre (within identified LDP boundary).
 Haverfordwest = 25%
 Pembroke Dock = 19%
 Milford Haven = 21%
 Pembroke = 20%
 Fishguard = 17%
 Narberth = 3%
 Applications relating to tourism permitted = 12 in 2023/24, 12 in 2022/23, 25 in 2021/22, 20 in 20/21, 11 in 19/20, 10 in 17/18, 25 in 16/17, 30 in 2015/16, 16 in 2014-15)

Vacancy Rates in Town Centres 2013/14 to 2022/23 (No survey conducted in 2024-25)

	Fish-guard	Haverford-west	Milford Haven	Narberth	Pembroke	Pembroke Dock
2013/14	10%	9%	14%	4%	9%	10%
2014/15	9%	17%	21%	2%	6%	15%
2015/16	16%	18%	18%	2%	7%	19%
2016/17	15%	25%	20%	6%	12%	22%
2017/18	20%	17%	23%	6%%	10%	26%
2018/19	17%	17%	19%	9%	9%	25%
2019/20	19%	21%	22%	11%	5%	24%
2020/21	22%	23%	25%	9%	19.5%	26%
2021/22	22%	25%	29%	9%	19%	24%
2022/23	17%	21%	30%	5%	15%	19%
2023/24	17%	25%	21%	3%	20%	19%
2024/25	No survey					

Vacancy levels are above those nationally (16.9% for 2023) in Haverfordwest, Pembroke Dock & Milford Haven, Pembroke and Fishguard.

Vacant land 2013: 193 ha (1,925,000 sq.).

Vacant land 2015: 316 ha (3,167,205 sq.).

Vacant land 2016: 219 ha (1,925,000 sq.).

Vacant land 2017: 216 ha (2,161,648 sq.)

Vacant land 2018: 212 ha

Vacant land 2019: 213 ha.

Vacant land 2022: 183 ha (plus 16 ha if buildings not in use are also included)

2022 employment survey results were processed and published in 2025. Take up for the strategic sites has been slow. The ongoing need for strategic sites has been demonstrated by the emerging LDP 2's evidence base and provision of sites has been comprehensively reviewed for LDP 2, Deposit Plan 2.

No applications have been approved contrary to the tourism policies (GN.19).

In total, 12 applications relating to tourism were approved during the monitoring period.

The range of tourism permissions granted alongside the evidence of compliance with policies (see main AMR report) suggests that the policies of the Plan are allowing for a range of appropriate tourism developments to take place under the strategy of the LDP.

			<p>The control and influence of the LDP has extremely limited influence on the broader economic context within which the Plan operates. The recent NRW phosphate targets have impacted economic development in terms of development in those catchments affected by the targets.</p> <p>Action: continue to monitor SA Objectives and also monitor tourism development permissions, town centre retail development and strategic employment sites, and the NRW phosphates targets. The review of Local Development Plan 1 includes a review of the approach to retail in town centres, the approach to tourism developments and how to plan in response to the new phosphate guidance from NRW.</p>
10. Prepare for and reduce the impact of Pembrokeshire's contribution to climate change	<ul style="list-style-type: none"> CO₂ emissions non domestic public stock Ecological footprint 	<p>Total CO₂ emissions in 2020 = 1305.3 kt (naei.defra.gov.uk, 2023). This has increased significantly as it now includes output from agriculture and is not directly comparable to previous years and overall CO₂ across all sectors has been decreasing year on year.</p> <p>CO₂ emissions from all sectors in 2019 = 756.3kt and in 2017 763 kt (naei.beis.gov.uk, 2019)</p> <p>Ecological footprint 4.5 gha / person (2006), Wales = 4.4 gha / person (2006) (StatsWales, 2014), 3.28 gha per capital in 2011 (www.gov.wales, WG, 2015) no updates</p>	<p>The total CO₂ emissions in Pembrokeshire were 756.3 kt in 2019 (1,036kt in 2014, 1,146 kt in 2013, 1,166 kt in 2011 in Pembrokeshire, Wales = 29,096kt) (Assemblywales.org). However, CO₂ emissions from all sectors in 2015 = 974 kt , 2016 = 827.03 kt, 2017 = 763 kt (naei.beis.gov.uk, 2022).</p> <p>Ecological footprint 4.5 gha per person in Pembrokeshire (2006), Wales = 4.4 gha per person in 2006 (StatsWales, 2014). Welsh ecological footprint in 2011 was 3.28 global hectares per capita (Ecological and Carbon Footprints of Wales, update to 2011, 2015). This figure has not been updated.</p> <p>Emissions of CO₂ have been falling since 2005 across all sectors.</p> <p>The ecological footprint in Pembrokeshire is higher than the figure for Wales for 2006. The figures have fallen since 2003 (5.3 gha / person in Pembrokeshire and 4.7 gha / person in Wales). Ecological footprint is influenced by the consumption of goods and services. Car use is high in Pembrokeshire which is reflected in the ecological footprint. The updated figure for Wales 2011 is not directly comparable to previous estimates due to changes in the methodology. The Authority has declared a climate emergency therefore this SA Objective is now Amber.</p> <p>Targets for locating development in Hub areas have not been met and this matter is therefore being addressed through the review of the current LDP.</p> <p>Action: continue to monitor SA Objective.</p>
11. Maintain and improve air quality	<ul style="list-style-type: none"> Days when air pollution is moderate or higher at Narberth AURN 	<p>Narberth AURN data: 7 days in 2012 19 days in 2013 (revised) 3 days in 2014 8 days in 2015 11 days in 2016 8 days in 2017 28 days in 2018</p>	<p>The number of days of moderate to high air pollution in Narberth Automated Urban Rural Network (AURN) were 11 days in 2021 (gov.uk, 2022). There has been no exceedance of NO₂ at Narberth or Pennar (monitoring at Pennar ceased 2016).</p> <p>Sampled pollutants at County level include the following – benzene, nitrogen dioxide (NO₂), sulphur dioxide (SO₂), particulate matter (PM₁₀) and ozone. Exceedance of nitrogen dioxide in specific areas required two Air Quality Management Areas (AQMAs) declared in July 2012 in Haverfordwest and Pembroke town centres. Exceedances of NO₂ have been</p>

	<ul style="list-style-type: none"> Achievement of emission limit values 	<p>10 days in 2019 21 days in 2020 11 days in 2021 No data for 2022</p> <p>(gov.uk, 2021) Two Air Quality Management Areas (AQMAs) as a result of previous nitrogen dioxide exceedance (PCC monitoring information, 2018) LAQM Annual Progress Report 2024</p>	<p>reducing, however monitoring is still ongoing for at least three years to ensure confidence in the results.</p> <p>Planning applications are assessed in relation to their potential to impact upon local air quality objectives. A guidance document for developers was produced in conjunction with Carmarthenshire, Ceredigion and Powys County Council's. Planning conditions, section 106 agreements or unilateral undertakings can also be used to secure monitoring and also mitigation for local pollutant emissions.</p> <p>Pembrokeshire County Council has examined the results from monitoring in the county, concentrations are all below the relevant objectives, therefore no further action is required. Page 5 Pembrokeshire County Council 2023 Air Quality Progress Report September 2024. Preparation of LDP 2 is providing an opportunity to revisit the Settlement Hierarchy and distribution of growth across the Plan area.</p> <p>Action: continue to monitor SA Objective and refer to Air Quality Action Plans in subsequent AMRs.</p>
<p>12. Minimise the generation of waste and pollution</p> <p>13. Encourage the efficient production, use, re-use and recycling of resources</p>	<ul style="list-style-type: none"> Total and percentage of municipal waste and municipal waste recycled, composted, used to recover heat, power and other energy sources, and land filled Electricity produced from renewable sources Access to recycling facilities 	<p>Biodegradable Municipal Waste (BMW) landfilled in:</p> <p>2009/2010 = 23,786 tonnes 2010/2011 = 20,325 tonnes 2012/2013 = 17,971 tonnes 2013/2014 = 13,543 tonnes 2015/2016 = 10,386 tonnes 2016/2017 = 8,125 tonnes 2017/2018 = 25,926 tonnes 2018/2019 = 13,041 tonnes 2019/2020 = 5,054 tonnes 2020/2021 = 3,667 tonnes 2021/2022 = 4,275 tonnes 2022-2023 = 3,290 tonnes 2023-2024 = data not available</p> <p>Waste reuse/ recycling/composting rates</p> <p>50% in 2011/2012 53.1% in 2012/2013 60.3% in 2013/2014 65.4% in 2014/2015 64.9% in 2015/16 65.3% in 2016/17 57.0% in 2017/18</p>	<p>The waste reuse/recycling/composting rate in Pembrokeshire for a rolling 12 months to end of Dec 2022 was 73% (StatsWales, 2022). The target for 2019/20 was 64%, and actual rate was 71.7% and 70% for 2024/25 (Pembrokeshire.gov.uk, 2022).</p> <p>The WG target is 58% for 2016/17, (70% by 2024/2025). The WG target for recycling is likely to be achieved with Pembrokeshire contributing positively towards this.</p> <p>The capacity of renewable energy developments permitted was 13.62 MW during the AMR monitoring period from April 2024 to March 2025. Earlier figures were 9.26 MW April 2023 to March 2024, 5.39 MW April 2022 to March 2024, 10.71 MW April 2021 to March 2022, 0.40 MW to April 2020 to March 2021, 3.60 MW to April 2019 to March 2020, 0.89 MW April 2018 to March 2019. These comparatively modest figures compare with 11.00 MW April 2017 to March 2018, 6.11 MW April 2016 to March 2017 and 34.77MW April 2015 to March 2016. Before this, much higher figures were recorded - 68.60 MW April 2014 to March 2015 and 108.43 MW 28th February 2013 to March 2014 (including allowed appeals on applications initially determined in the period to 31 03 14).</p> <p>Action: continue to monitor SA Objectives. Waste management monitoring of the LDP 1 flags that there is a need to ensure that adequate provision for waste management is made in the Plan area, either through criteria-based policies, allocations or a mixture of both. Certain types of waste management and treatment facility may be procured on a regional basis in the future. (Ref 5.13.1 Review Report)</p>

		<p>55.6% in 2018/19 71.7% in 2019/20 73.2 in 2020-2021 73.2 in 2021-2022 71.5 in 2022-2023 72.0 in 2023-2024 Data not available 2024-2025 (StatsWales, 2025)</p> <p>Renewable energy: 13.62 MW to March 2025 9.26 MW to March 2024 5.39 MW to March 2023 10.71 MW to March 2022 0.40 MW to March 2021 3.6 MW to March 2020 0.89 MW to March 2019 11.00 MW to March 2018 6.11 MW to March 2017 34.77 MW to March 2016 68.60 MW to March 2015 108.427 MW capacity permitted 28 02 13 to 31 03 14 (including allowed appeals on applications initially determined in the period to 31 03 14).</p>	
<p>14. Maintain and protect the quality of inland and coastal water</p> <p>15. Reduce the impacts of flooding and sea level rises</p>	<ul style="list-style-type: none"> • % of total classified rivers complying with water quality objective • % new developments with SUDS • Per capita consumption of water 	<p>Status of water bodies in Pembrokeshire (Cleddau and Pembrokeshire Coastal Rivers Management Catchment Summary) in 2015: 42% good 51% moderate 5% poor 2% bad (Natural Resources Wales, 2015, and website viewed in 2021)</p>	<p>The General Quality Assessment of surface and groundwater quality has been superseded by Water Framework Directive (WFD) objectives. All water bodies must achieve good status by 2027. NRW has published a report titled the 'Cleddau and Pembrokeshire Rivers Management Catchment Summary', updated to 2016, and intended also to update the WFD classification in 2021, although at that date NRW advised that data was not available (NRW, 2021). Although outside the year 12 monitoring period, in June 2025 NRW published new reports about the health of protected marine areas around Pembrokeshire – the SACs and SPAs. These designations are very important, as they protect wildlife and natural habitats of international importance. To elaborate, in June 2025 NRW issued updated Regulation 37 Conservation Advice and Condition Assessments for key Marine SACs affecting Pembrokeshire, these being the Pembrokeshire Marine SAC, the Carmarthen Bay and Estuaries SAC and the Cardigan Bay SAC. NRW also issued interim</p>

<ul style="list-style-type: none"> Amount of development permitted in C1 and C2 floodplain. 	<p>All applications compliant with TAN 15 / GN.1 (7) between April 2024 and March 2025.</p>	<p>advice in July 2025. Amongst other things, this requires nutrient neutrality to be demonstrated for development proposals draining to the Milford Haven Inner Waterbody within the Pembrokeshire Marine SAC. The problem that has prompted this action is that nutrient sensitive features in this area are in unfavourable condition due to high levels of Dissolved Inorganic Nitrogen (DIN) and in relation to various biological indicators (phytoplankton and opportunistic microalgae), this too being related to nutrient enrichment. The Milford Haven Inner Waterbody has features in unfavourable condition due to current evidence of both chemical and biological failure. The area draining into the Milford Haven Inner Waterbody is extensive and hence many areas within PCC's planning jurisdiction are affected.</p> <p>Welsh Government is committed to reducing water pollution caused or induced by nitrogen from agricultural sources. An important element of this has been a review of Nitrate Vulnerable Zones. Various options were put forward in the consultation document, including an all-Wales NVZ designation or bespoke designations relating to specific parts of Wales, including the Cleddau catchment area. This could have had significant impacts on the area in terms of water quality and planning applications for slurry lagoons. The Minister issued a written statement in 2018 referring to regulations being applied from 1 Jan 2020; taking on board comments received to the NVZ consultation. New regulations (The Water Resources (Control of Agricultural Pollution) Wales Regulations 2021) were announced in 2020 and came into force in April 2021 which introduce an all-Wales regulatory baseline.</p> <p>New requirements were introduced from January 2021 to address issues with phosphates and other nutrients in SAC rivers. Development has been impacted significantly by this. This SA Objective is now rated Red as the objective is not being achieved (see also linked SA Objectives for Biodiversity and Ecology, and socio-economic objectives). The review of the LDP is actively responding to these issues.</p> <p>The Dŵr Cymru Welsh Water AMP 6 and AMP 7 programmes are now completed and the provisions of AMP 8 (2025-30) are emerging and will include proposals to improve sewerage assets and to invest at various Wastewater Treatment Works.</p> <p>A Good Practice Guidance document on Slurry Stores was produced in 2013, which will help to improve water quality in the county.</p> <p>No applications were permitted in the monitored flood risk areas in 2024-25. One application was permitted in 2023-24 after NRW advised the flood risk could be mitigated. One application in a flood risk zone was permitted in 2022/23 (referencing town centre regeneration benefits), 0 applications were permitted in 2021/22, 1 application for town centre regeneration in 2020/21, 0.3 ha in 2019/20 for a marina development, 0 in 2018/19, 0 in 2017/18, 0 in 2016/17, 2015/16, 2014/15 and 5 in 2013/14). This does not reach the trigger for further action. The LDP ensures that in the vast majority of cases no highly</p>
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			<p>vulnerable development is permitted in flood zones and SUDS are incorporated into development schemes.</p> <p>Action: continue to monitor SA Objectives, particularly development in C1/C2 floodplain areas. New TAN 15 on planning for flooding and coastal erosion was approved by Welsh Government in 2025. This change also saw the introduction of the new Flood Map for Planning, which contains updated information and modifies the flood risk categories. Continue to progress solutions and options to mitigate the phosphate, nitrogen and other river water quality issues.</p>
<p>16. Use land efficiently and minimise contamination</p> <p>17. Safeguard soil quality and quantity</p>	<ul style="list-style-type: none"> • Area of contaminated land and contaminated land remediated • Area of development of brownfield/ contaminated land/ previously developed land 	<p>86.6ha (62%) in March 2025 of new development on previously developed land (138.3ha) in March 2023</p> <p>86.62%, 116.37ha in March 2022, 82%, 61.97 ha to March 2020, 73% (124.77 ha) to March 2019 (57.51 ha to Mar 18 (50.6%); 115.50 ha to Mar 17 (63%); 291.05 ha (85%) Apr 15-Mar 16; 46.87 ha (11.3%) Apr 14-Mar 15; 80.75 ha (18%) Apr 13-Mar 14.</p>	<p>83 permissions granted have specific conditions relating to contaminated land where a range of actions are required by the applicant/developer via planning conditions, for example investigation and risk assessment of contamination on the site, detailed remediation schemes (2022-2023 figures).</p> <p>The Development Sites SPG identifies where land contamination is present and what needs to happen to remediate contamination issues.</p> <p>Action: continue to monitor SA Objectives.</p>
<p>18. Protect and enhance biodiversity</p>	<ul style="list-style-type: none"> • % of designated sites in unfavourable condition • Number of biodiversity sites affected by development 	<p>Up to date assessment of all European sites awaited from NRW. Marine sites now have indicative site condition assessments, with the majority of features in an unfavourable condition.</p> <p>2 planning permissions granted contrary to the aim of Policy GN.37 in the period.</p> <p>472 permissions incorporated ecological mitigation (2024/2025).</p>	<p>Eleven applications required an Appropriate Assessment in 2024-25. A recent Court of Justice of the European Union ruling has meant that this number has in general increased in recent years. The NRW phosphates targets have also meant that the number of sites requiring Appropriate Assessment has increased significantly.</p> <p>For the year 11 AMR, it was reported that the percentage of European sites (SACs and SPAs) in unfavourable condition in Pembrokeshire was not known, with data awaited from NRW. It was also reported that three of the marine protected sites were generally in unfavourable condition. Although outside the year 12 AMR monitoring period, in June 2025 NRW published new reports about the health of protected marine areas around Pembrokeshire – the SACs and SPAs. These designations are very important, as they protect wildlife and natural habitats of international importance. To elaborate, in June 2025 NRW issued updated Regulation 37 Conservation Advice and Condition Assessments for key Marine SACs affecting Pembrokeshire, these being the Pembrokeshire Marine SAC, the Carmarthen Bay and Estuaries SAC and the Cardigan Bay SAC. This new information provided the awaited update on the condition of the Marine SACs in and around Pembrokeshire and confirmed that there are significant problems in that regard. To follow this up, NRW also issued interim advice in July 2025. Amongst other things, this requires</p>

			<p>nutrient neutrality to be demonstrated for development proposals draining to the Milford Haven Inner Waterbody within the Pembrokeshire Marine SAC. The problem that has prompted this action is that nutrient sensitive features in this area are in unfavourable condition due to high levels of Dissolved Inorganic Nitrogen (DIN) and in relation to various biological indicators (phytoplankton and opportunistic microalgae), this too being related to nutrient enrichment. The Milford Haven Inner Waterbody has features in unfavourable condition due to current evidence of both chemical and biological failure. The area draining into the Milford Haven Inner Waterbody is extensive and hence many areas within PCC's planning jurisdiction are affected.</p> <p>NRW guidance on phosphate levels in the non-tidal parts of SAC rivers has now been extended to cover a wider range of nutrients, including DIN, and its provisions are being applied in the tidal (Marine) as well as non-tidal (Riverine) parts of the various SACs, including those for the Cleddau and Teifi catchments in Pembrokeshire. However, with regard to Marine SACs, the most severe problems are in the Cleddau catchment, specifically the Milford Haven Inner Waterbody, which is a part of the Pembrokeshire Marine SAC. A consequence of the above is that an increasing number of Tests of Likely Significant Effects and Appropriate Assessments are now required to meet HRA requirements.</p> <p>472 permissions incorporated ecological mitigation in the year 2024/25. The LDP was prepared to ensure the highest level of protection for European designated sites. LDP SPG on Biodiversity adopted May 2021. Development Sites SPG states that nature conservation issues be considered for all development sites. NRW Nutrient Guidance introduced in 2021 means that the SAC river sites within Pembrokeshire are at risk, and sections of both the River Cleddau and the River Teifi are failing to meet phosphate and ammonia targets.</p> <p>All planning applications are screened for their potential effect on protected sites. In the year 12 AMR period, 2 applications which should have included biodiversity enhancement to accord with GN.37, but did not do so, were consented, but subject to conditions requiring biodiversity enhancement to be provided.</p> <p>A planning tool has been developed to highlight and understand the importance and extent of ecological connectivity in the county.</p> <p>Action: continue to monitor SA Objective, the need for up-to-date assessments of European sites continues to provide uncertainty, as does the phosphate targets for SAC rivers. Continue to progress solutions and options to mitigate the phosphate and nitrogen issues.</p>
19. Protect and enhance the landscape	<ul style="list-style-type: none"> • Number of permissions granted 	No planning permissions, listed building consents or SAM	No planning permissions, listed building consents or SAM consents were granted contrary to Policy GN.38 (in 2024/2025). Consideration is being given to re-examining the policy

<p>and geological heritage</p> <p>20. Encourage quality locally distinct design that complements the built heritage</p> <p>21. Protect and enhance the built heritage and historic environment</p>	<p>contrary to GN.38.</p> <ul style="list-style-type: none"> • Number of permissions granted contrary to GN.2. • Number / % of buildings on buildings at risk register 	<p>consents were granted contrary to Policy GN.38 (2024/2025).</p> <p>No permissions granted contrary to Policy GN.1, criterion 3.</p> <p>No permissions granted contrary to GN.2.</p>	<p>wording in conjunction with Plan Review, to ensure that only those proposals with a significant adverse effect are deemed contrary to policy.</p> <p>No permissions were granted contrary to GN.1 criterion 3.</p> <p>No permissions have been granted as contrary to GN.2.</p> <p>SPG on Renewable Energy was approved and came into force on 31 October 2016. SPG on the Cumulative Impact of Wind Turbines on Landscape and Visual Amenity was adopted on 7 November 2022.</p> <p>The Haverfordwest Conservation Area Character Appraisal (CACA) and Management Plan was adopted in August 2014. New CACAs, for Fishguard, Goodwick and Lower Town, Fishguard, were adopted in November 2016, and Pembroke and Pembroke Dock appraisals have also been adopted (January 2018 and September 2017 respectively).</p> <p>Action: continue to monitor the SA Objectives.</p>
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Appendix 4: Allocations requiring project level Habitats Regulations Assessment

All planning applications that required an Appropriate Assessment are listed, and not just those relating to LDP Allocations are subject to screening by the PCC Planning Ecologist. As stated previously in this AMR report, new requirements in relation to phosphates have impacted development, and this has increased the number of TLSE and AA in this period. Nitrogen is emerging as a significant pollution issue in parts of the Pembrokeshire Marine SAC.

TLSE Test for likely significant effects

HRA Habitats Regulations Assessment

AA Appropriate Assessment

NLSE No likely significant effect

IROPI Imperative reasons of overriding public interest

Site name	LDP Site Reference	Application details	AA	Outcome
7, Northgate Street, Pembroke, Pembrokeshire, SA71 4NR	Not allocated	23/0257/PA Erection of up to 4-storey building, Extension, Refurbishment and Demolition Works (including existing public toilets) to provide a Community Hub with Associated Infrastructure Works.	AA	NLSE with conditions
Agricultural field, Land East of the Greenlink Converter Station,, Off Goldborough Road,, Pembroke	Not allocated	23/0857/PA Installation of a Battery Energy Storage System (BESS), associated infrastructure including a 132kv substation and engineering works to create earth bunds	AA	NLSE with conditions
Inner Ward, Haverfordwest Castle, Haverfordwest, SA61 2EF	Not allocated	24/0036/PA Creation of a multi-purpose entertainment and events venue within the Inner Ward area and associated works	AA	NLSE with conditions
Land South of Goldborough Road, Hundleton, Pembroke	Not allocated	24/0133/PA Battery Energy Storage System with associated infrastructure and works (including underground cabling to the Pembroke Substation).	AA	NLSE with conditions

28, Hayston Avenue, HAKIN, Milford Haven, Pembrokeshire, SA73 3EB	Not allocated	24/0299/PA Alterations and extensions and a detached garage	AA	NLSE with conditions
Land adjacent to Pembroke Power Station and linear site to west, Pwllcrochan, Pembroke, SA71 5SS	Not allocated	24/0372/PA Construction of a green Hydrogen production facility with Electrolysers, Hydrogen Gas storage, HV transformer and Electrolyser control building, and Hydrogen Gas pipeline off-take; together with associated infrastructure, including water supply pipeline to the Pembroke Power Station and electrical supply connection to the National Grid Substation, lighting, security fencing, hard and soft landscaping, drainage, vehicle circulation, and construction laydown areas	AA	NLSE with conditions
Cresborough, SLEBECH, Haverfordwest, Pembrokeshire, SA62 4AX	Not allocated	24/0457/PA Alterations and extensions to dwelling, restoration of existing cottage and outbuildings, new access gates and creation of drainage ponds.	AA	NLSE with conditions
Ty Dwr, Brynllechog, Rhos Fach, Clunderwen, SA66 7JS	Not allocated	24/0520/PA Construction of a Timber lodge / Cabin dwelling (caravan specification) in the vicinity of the abandoned croft Ty Dwr. The erection of a wooden barn; large polytunnel; PV array; 2 x small polytunnels in retrospect; small greenhouse in retrospect; shed in retrospect, as part of the One Planet Development Management Plan.	TL SE	NLSE
Land at Entrance To Pembroke Power Station, Pwllcrochan, Pembroke, SA71 5SS	Not allocated	24/0600/PA Construction of a Battery Energy Storage System (BESS) including Battery Containers and Power Conversion Systems; lighting, security fencing, hard and soft landscaping, drainage, vehicle access/circulation, temporary construction laydown areas, ancillary equipment and other associated infrastructure; and an underground electrical cable connection to the National Grid Substation	AA	NLSE with conditions
Plot 2, Kiln Park, Burton, Milford Haven, SA73 1NY	Not allocated	23/0769/PA Erection of a two-storey dwelling, garage and floating boat shed with associated parking and landscaping works	TL SE	NLSE

Plot 4, Kiln Park, Burton Ferry, Milford Haven, Pembrokeshire, SA73 1NY	Not allocated	24/0063/PA Erection of two storey dwelling.	AA	NLSE
Orielton Mountain Cottage, Maidenwells, Pembroke, Pembrokeshire, SA71 5EY	Not allocated	24/0268/PA Conversion of former cottage to dwelling	TL SE	NLSE
Former Hakin Infants School, Picton Road, Hakin, Milford Haven, SA73 3EW	Not allocated	24/0796/PA Demolition of former school and construction of bat house and ecological enhancement area.	AA	NLSE with conditions
Hook Farm Cottage, RUDBAXTON, Haverfordwest, Pembrokeshire, SA62 4DA	Not allocated	24/0878/PA Ground Mounted Solar PV Installation	TL SE	NLSE
Goodwick Moor Car Park, The Parrog, Goodwick, Fishguard, Pembrokeshire, SA64 0DE	EMP/034/LDP/0 2	24/0950/PA Change of use to allow for overnight motorhome/campervan stays.	AA	NLSE

Appendix 5: Breakdown of Housing Completions 2013 – 2025 by Location

Settlement Name	Number of Units Completed											
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25

Hub Towns												
Haverfordwest / Merlins Bridge	25	67	44	9	11	87	17	121	51	100	19	53
Fishguard / Goodwick	8	6	4	9	21	29	9	26	12	6	20	51
Milford Haven	184	100	48	71	28	64	64	38	15	47	11	39
Neyland	1	11	0	0	0	6	0	5	32	0	2	7
Pembroke	10	37	88	78	39	27	6	24	9	6	2	4
Pembroke Dock	44	73	39	30	20	9	21	9	10	1	7	53
Sub totals	272	294	223	197	119	222	117	223	129	160	61	207

Rural Town												
Narberth	14	7	4	7	21	50	84	8	2	10	2	7
Sub totals	14	7	4	7	21	50	84	8	2	10	2	7

Service Centres												
Crymych	2	6	6	5	3	5	2	3	6	5	23	20
Johnston	37	1	0	7	13	15	2	1	30	7	11	5
Kilgetty	1	2	2	43	15	0	0	13	21	7	1	0
Letterston	10	3	2	1	2	0	0	1	1	0	5	34
Sub totals	50	12	10	56	33	20	4	18	58	19	40	59

Service Villages												
Abercych	1	0	0	0	2	0	0	0	0	0	0	0
Begelly	0	0	0	2	8	14	8	4	6	8	1	7
Boncath	0	0	2	2	0	0	0	2	13	8	0	1
Blaenffos	0	0	0	2	2	2	0	0	0	0	0	0
Broadmoor	0	0	0	0	0	0	0	0	2	2	0	0
Bwlchgyroes	0	1	0	0	0	0	0	0	0	0	0	0
Carew / Sageston	2	2	18	3	1	2	1	2	43	33	35	0
Cilgerran	1	0	1	0	1	21	9	0	0	0	0	0
Clarbeston Road	1	2	3	7	4	0	0	0	0	5	0	0
Clunderwen	0	1	0	0	0	2	1	1	1	4	1	1
Cosheston	1	3	0	1	1	2	0	1	0	1	2	2
Crundale	7	3	37	3	26	2	0	1	1	1	0	0
Eglwysrwr	0	0	0	0	0	1	1	1	0	0	13	1
Hayscastle Cross	0	0	1	0	0	0	0	0	0	0	0	0
Hermon	1	1	0	0	0	0	0	0	1	1	0	0
Hook	1	3	6	2	9	0	5	3	2	2	8	13
Houghton	0	0	2	0	0	0	1	14	4	10	1	0
Hundleton	0	1	0	4	5	5	3	4	4	1	0	0
Jeffreyston	1	0	0	2	0	0	0	0	0	0	0	0
Lamphey	0	40	0	1	0	0	1	1	0	0	0	0
Llanddewi Velfrey	0	0	0	0	0	0	0	1	0	0	0	0
Llangwm	1	0	0	0	0	0	0	0	0	0	0	1
Llandissilio	0	0	0	0	0	0	0	0	5	21	0	0
Maenclochog	1	1	0	0	0	0	0	1	6	5	0	0
Mathry	2	0	0	1	0	1	1	0	1	0	1	1
Milton	0	2	0	0	0	0	0	0	0	0	0	0
New Hedges	0	3	1	0	0	0	1	0	0	0	0	0
Penally	3	2	3	3	0	1	0	1	6	3	0	0
Pentlepoir	2	41	9	5	0	0	1	0	0	6	4	1
Puncheston	0	0	0	0	0	0	0	2	0	0	1	0
Robeston Wathen	0	0	0	0	0	1	0	0	0	0	0	0

Roch	4	19	1	1	2	1	0	0	0	0	0	1
Rosemarket	1	0	1	1	0	0	1	0	0	0	0	9
Simpson Cross	0	0	0	0	0	0	0	0	0	0	0	12
Spittal	5	1	0	0	1	0	0	0	0	0	0	0
St Dogmaels	2	4	3	0	1	2	0	0	1	3	0	2
St Florence	0	18	16	10	0	0	0	1	8	5	4	2
Sutton	0	0	0	0	0	0	0	0	0	1	0	1
Tavernspite	2	1	0	0		0	0	0	1	0	1	0
Tegryn	0	2	1	0	0	0	0	0	0	1	0	0
Templeton	0	22	12	1	5	8	5	20	8	1	1	0
Tiers Cross	0	0	0	0	0	0	0	0	0	6	5	0
Wolfscastle	0	0	0	0	0	0	0	0	0	1	0	1
Sub totals	39	173	117	51	68	65	39	60	113	129	78	56

Large Local Villages												
Burton	1	2	1	1	0	1	0	0	0	0	0	0
Burton Ferry	0	0	1	1	0	0	0	0	0	0	1	2
Camrose	5	4	3	5	3	1	0	1	0	0	1	0
East Williamston	0	1	1	0	0	0	0	0	1	1	0	0
Freystrop	2	1	1	0	1	0	2	0	0	15	0	1
Hill Mountain	0	2	1	1	0	0	0	0	1	0	0	0
Keeston	4	1	1	1	5	5	6	6	4	4	0	0
Llanstadwell	1	1	0	0	0	0	0	1	0	0	1	0
Mascle Bridge	0	0	0	0	0	0	0	0	0	0	1	0
Pen-y-bryn	1	0	0	0	0	0	0	0	0	0	0	0
Scleddau	1	27	0	0	0	0	0	0	0	0	0	1
Stepaside	0	0	2	0	1	2	1	0	0	1	0	0
Waterston	0	0	0	0	0	0	0	0	0	0	1	0
Sub totals	15	39	11	9	10	9	9	8	6	21	5	4

Small Local Villages												
Ambleston	2	1	0	0	0	0	1	0	1	0	0	0
Cold Blow	0	2	1	0	0	0	0	0	0	1	0	0
Glandwr	0	0	1	0	0	0	0	0	0	1	0	0
Little Honeyborough	0	1	0	0	0	0	0	0	0	0	0	0
Llanteglos	0	3	0	0	0	0	0	0	0	0	0	0
Llawhaden	1	0	0	0	0	0	0	0	0	0	0	0
Llwyncelyn	0	0	1	0	0	0	0	0	0	0	0	0
Maddox Moor	1	0	0	0	0	0	0	0	0	0	0	0
Martletwy	1	1	1	0	0	0	0	0	0	0	0	0
New Moat	0	0	0	1	0	0	0	0	0	0	0	0
Penffordd	1	0	0	0	0	0	0	0	0	0	0	0
Redberth	0	1	1	0	0	0	0	0	0	0	0	0
Reynalton	0	0	0	0	0	1	0	2	1	1	1	0
Sardis	0	0	0	0	0	1	0	1	0	0	0	0
Square & Compass	0	0	0	0	0	0	0	1	0	0	0	0
St Nicholas	1	0	0	0	0	0	0	0	0	0	0	0
St Twynells	0	0	0	0	0	0	1	0	0	0	0	1
Thornton	0	0	0	1	0	1	1	2	3	4	0	0
Treffgarne	2	0	0	0	0	0	0	0	0	0	0	0
Walton East	0	3	2	1	1	0	0	0	2	0	0	0
Wiston	0	0	0	0	0	0	0	0	0	0	0	1
Sub totals	9	12	7	3	1	3	3	6	7	7	1	2

Open Countryside												
Outside settlement boundary	60	51	32	42	34	50	11	17	23	24	96	18
Sub totals	60	51	32	42	34	50	11	17	23	24	96	18

Adjustment for 2022 miscounts												
Shipping Cottages, Begelly											-3	
Sub totals											-3	

Adjustment for 2024 miscounts												
Hawn Lake, Burton Ferry												-1
Sub totals												-1

Report total	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
	459	588	405	365	286	419	267	340	338	367	283	352

Appendix 6: Feedback from Stakeholders

Normally, the outcomes from the previous AMR are discussed with the Pembrokeshire Planning Agents' Forum. For the 2021/22 and 2022/23 AMRs, that discussion did not take place, although there was a presentation and debate at a Forum meeting regarding the NRW phosphates guidance and its implications in the affected areas for the determination of planning applications, for delivery of the current LDP and for the identification of land for future development by the emerging replacement plan, LDP 2.

During 2023/24 and 2024/25, the focus has been on keeping the Forum updated with regard to Plan review, reflecting the importance of continuing to work towards replacement of the current LDP with a new Plan. Wider stakeholder engagement is taking place in conjunction with the preparation of LDP 2.