

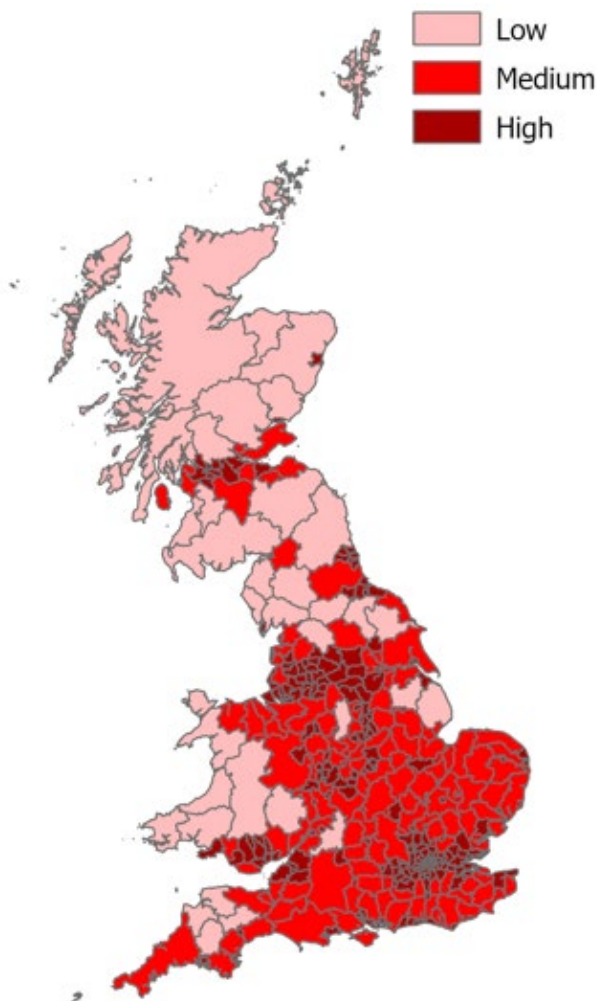
## Appendix D: Distribution of the top 11 housebuilders land banks

- D.1 This appendix provides a series of graphs that show:
- (a) The population density: the number of persons per square kilometre at the LA area level for GB;
  - (b) The distribution of the top 11 housebuilders' short-term land banks by each nation in GB; and
  - (c) The distribution of the top 11 housebuilders' long-term land banks by each nation in GB.
- D.2 Figure D.1 shows the population density at LA area level which provides context for where most people live in Great Britain. Figures D.2 to D.9 present maps at the LA/LPA area level (and for England also identifies Government Office Regions (GORs)). Figures D.2 to D.5 show the number of plots in short-term land holdings, which provides an indication of current/ forthcoming housebuilding activity. Figures D.6 to D.9 present the number of plots in long-term land holdings, which indicate (more tentatively) where longer-term housebuilding may occur.
- D.3 The data suggest the following:
- (a) **The top 11 housebuilders have a broad geographic presence:** The 11 housebuilders are present to some degree in most LA areas across GB. Their collective presence is strongest in central England, but there are few areas with no land held in land banks at all.
  - (b) **Short-term land banks centre around densely populated areas.** Short-term land holdings appear to map on to population density across GB:
    - (i) In England: Short-term land banks are large in several London boroughs as well as in London's vicinity, particularly to the north-west between London and Birmingham.
    - (ii) In Scotland: The largest land holdings are in and around parts of the Central Belt and southwest of Scotland.
    - (iii) In Wales: Short-term land holdings are concentrated in the more populous southern region.
  - (c) **Long-term land banks look to be less closely related to population density, being spread across more of GB.** The 11 housebuilders are present in LA areas with medium and high population density, but they are

also present in LA areas that are further away from major cities and where the current population density is low:

- (i) In England, housebuilders hold long-term land in land banks in most LA areas of the South of England, the Midlands, and the North of England. More areas in the North East, South East and South West have a higher number of plots in long-term land compared to the short-term land banks.
- (ii) In Scotland and Wales, the long-term land held in land banks is distributed in areas beyond the major cities where local populations are smaller. In Wales, there are long-term plots but no short-term plots in the mid-Wales region.

**Figure D.1: Population density: number of persons per square kilometre at LA area level**



Source: CMA analysis of ONS's mid-year population estimates data and ONS's standard area measurement data using ArcGIS Pro.

Notes:

[1] Population density per square kilometre thresholds:

[a] Low population density: Fewer than 100 persons per square kilometre.

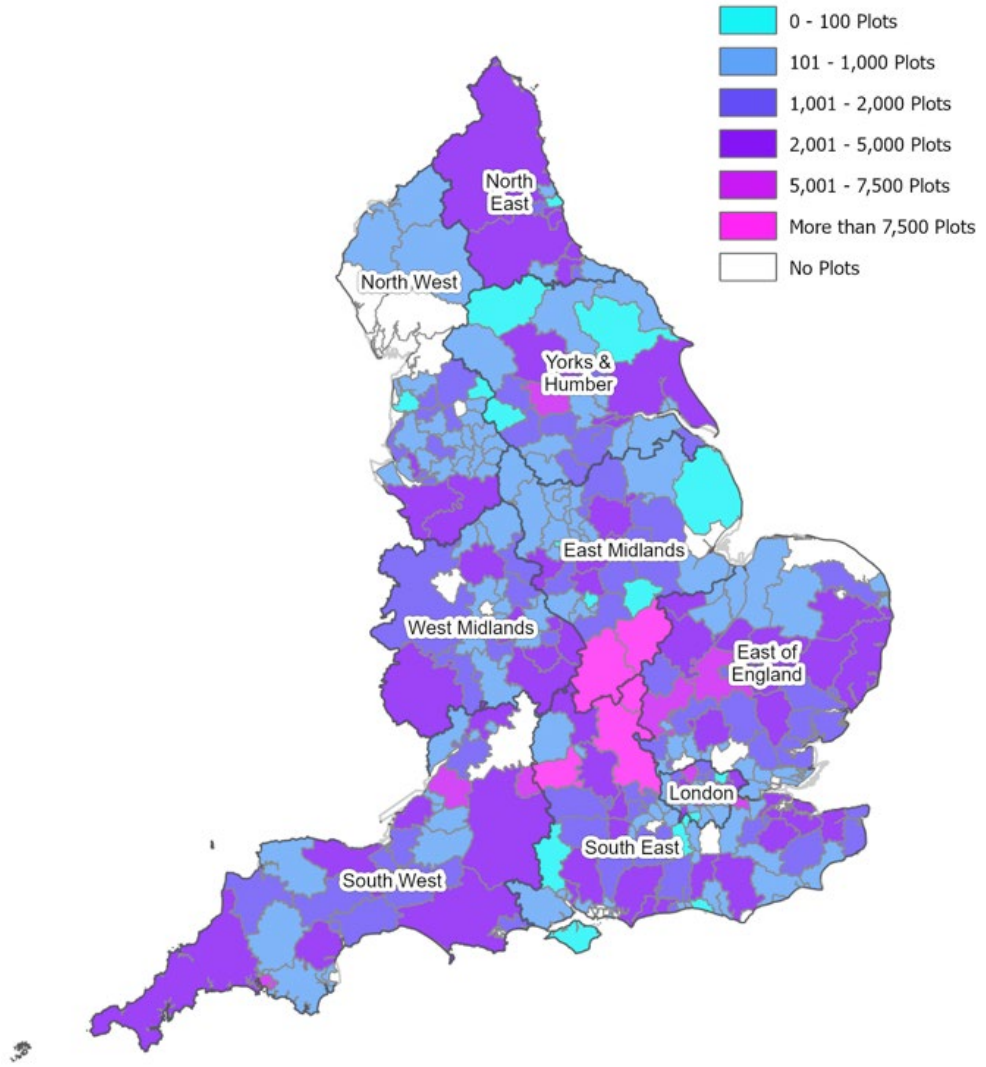
[b] Medium population density: 100 or more persons and up to and including 500 persons per square kilometre.

[c] High population density: more than 500 persons per square kilometre.

[2] Standard area measurement used to calculate population density: Area to mean high water excluding area of inland water.

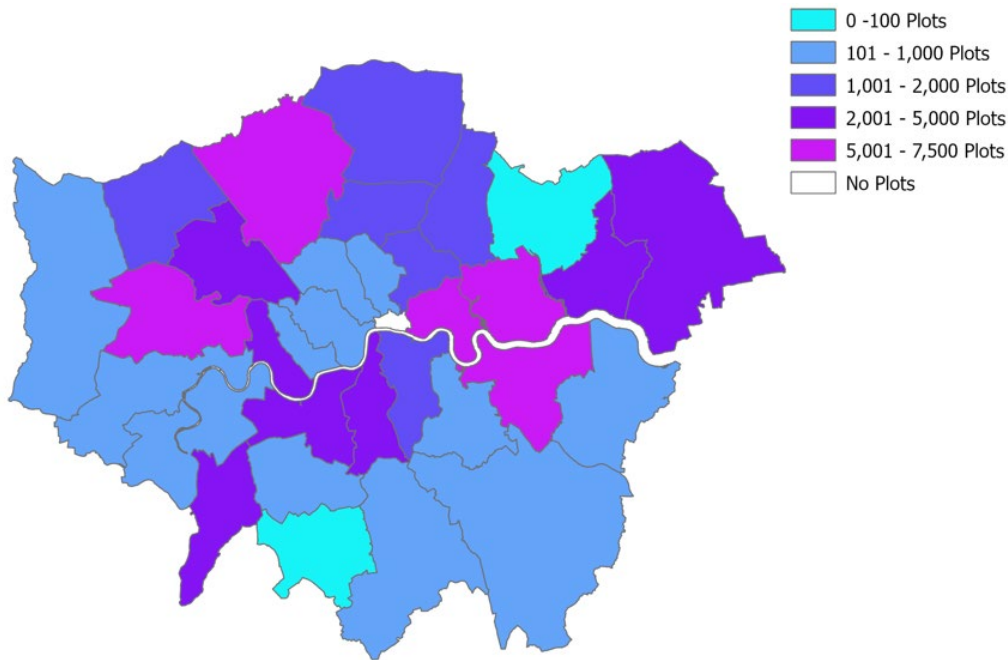
[3] All areas in Greater London are classed as high population density.

Figure D.2: Number of short-term plots in England at LA area level



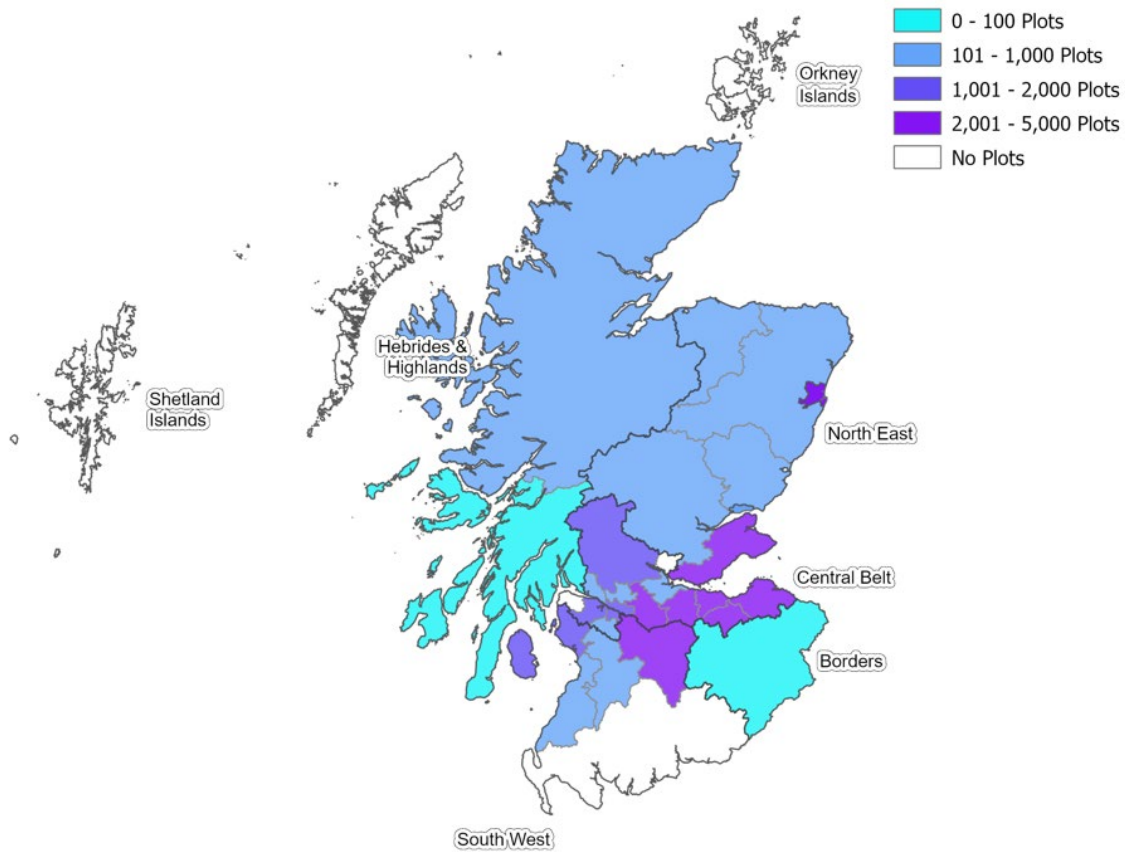
Source: CMA analysis of the top 11 housebuilders' land banks data using ArcGIS Pro.

**Figure D.3: Number of short-term plots in Greater London at LA area level**



Source: CMA analysis of the top 11 housebuilders' land banks data using ArcGIS Pro.

**Figure D.4: Number of short-term plots in Scotland at LA area level**

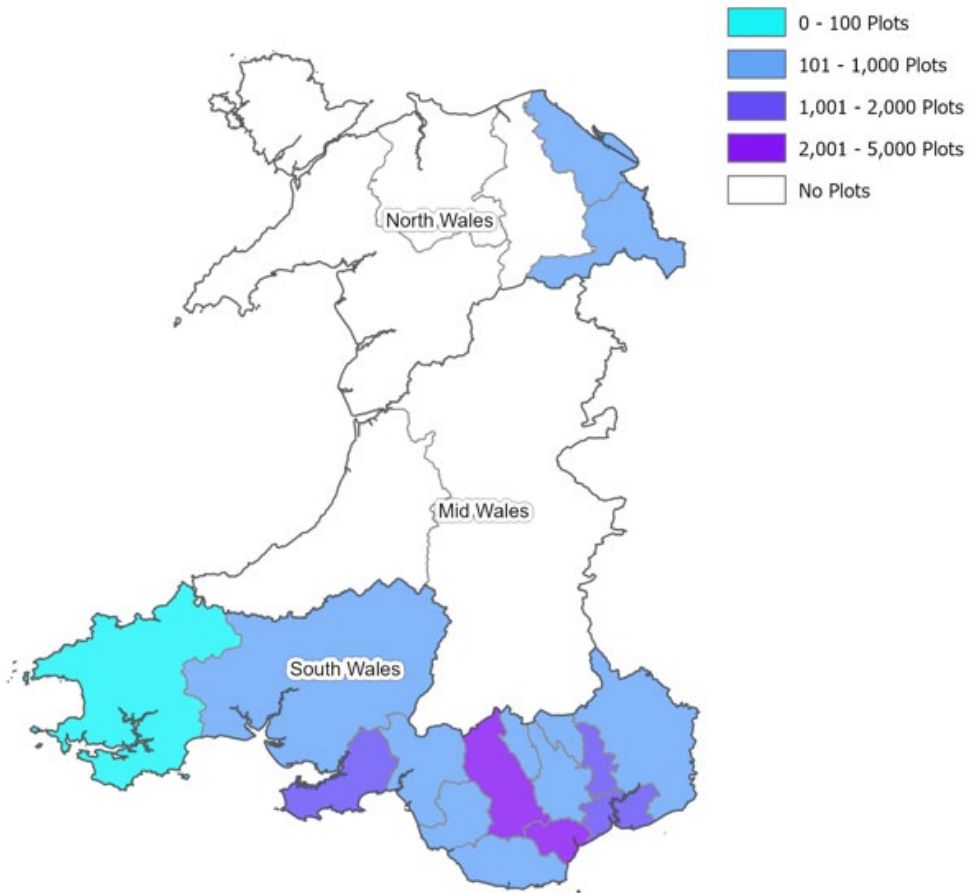


Source: CMA analysis of the top 11 housebuilders' land banks data using ArcGIS Pro.

Notes:

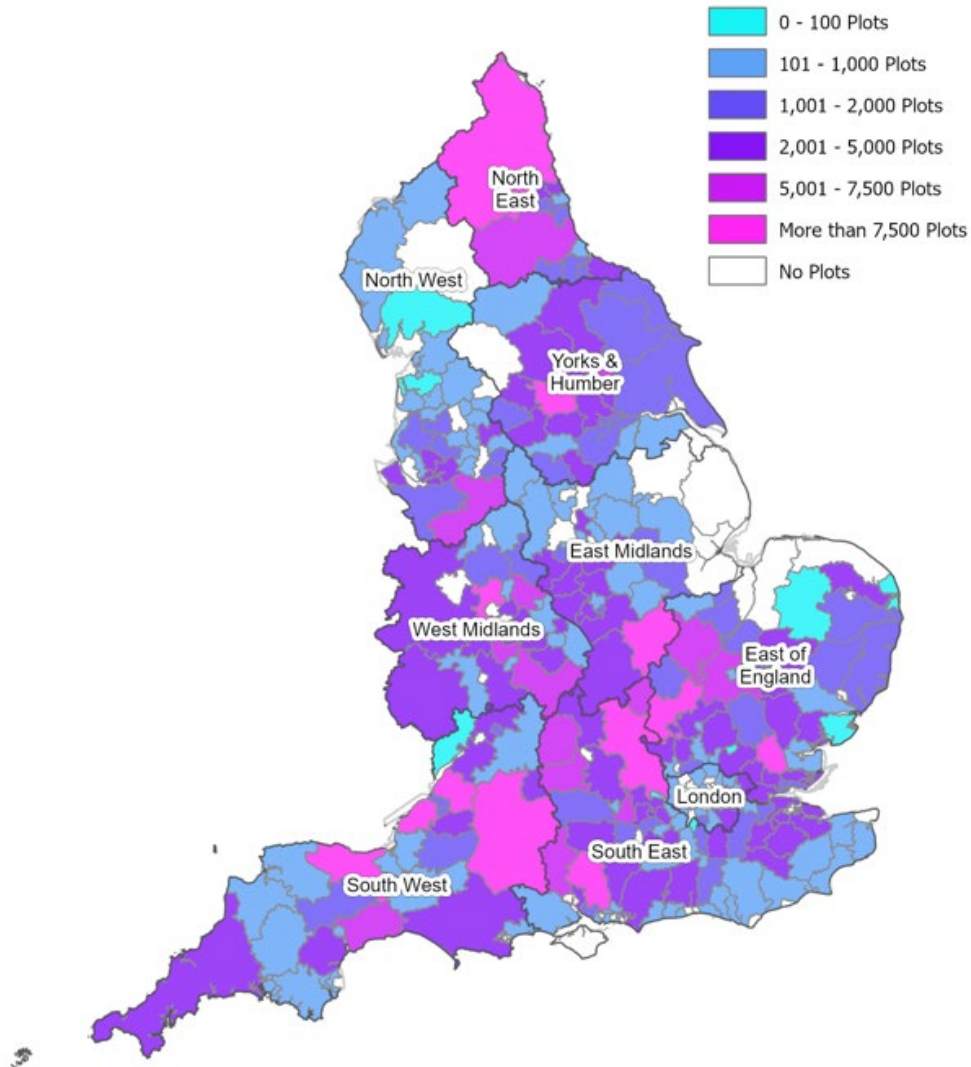
[1] The Shetland Islands have been placed to the left of the Hebrides & Highlands region to allow all regions to fit onto a single map frame.

Figure D.5: Number of short-term plots in Wales at LA area level



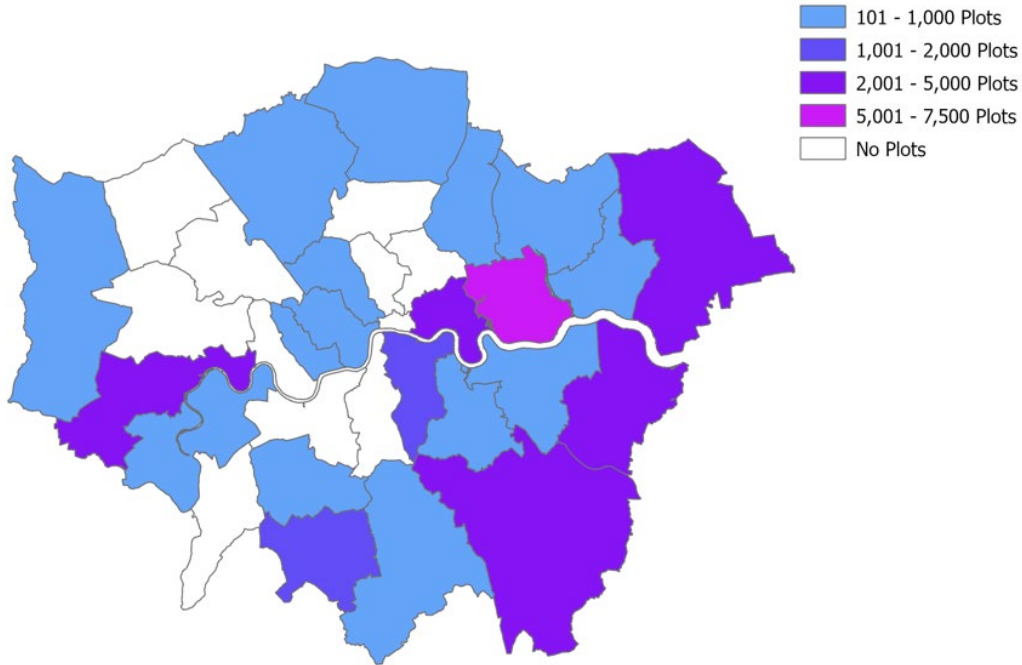
Source: CMA analysis of the top 11 housebuilders' land banks data using ArcGIS Pro.

Figure D.6: Number of long-term plots in England at LA area level



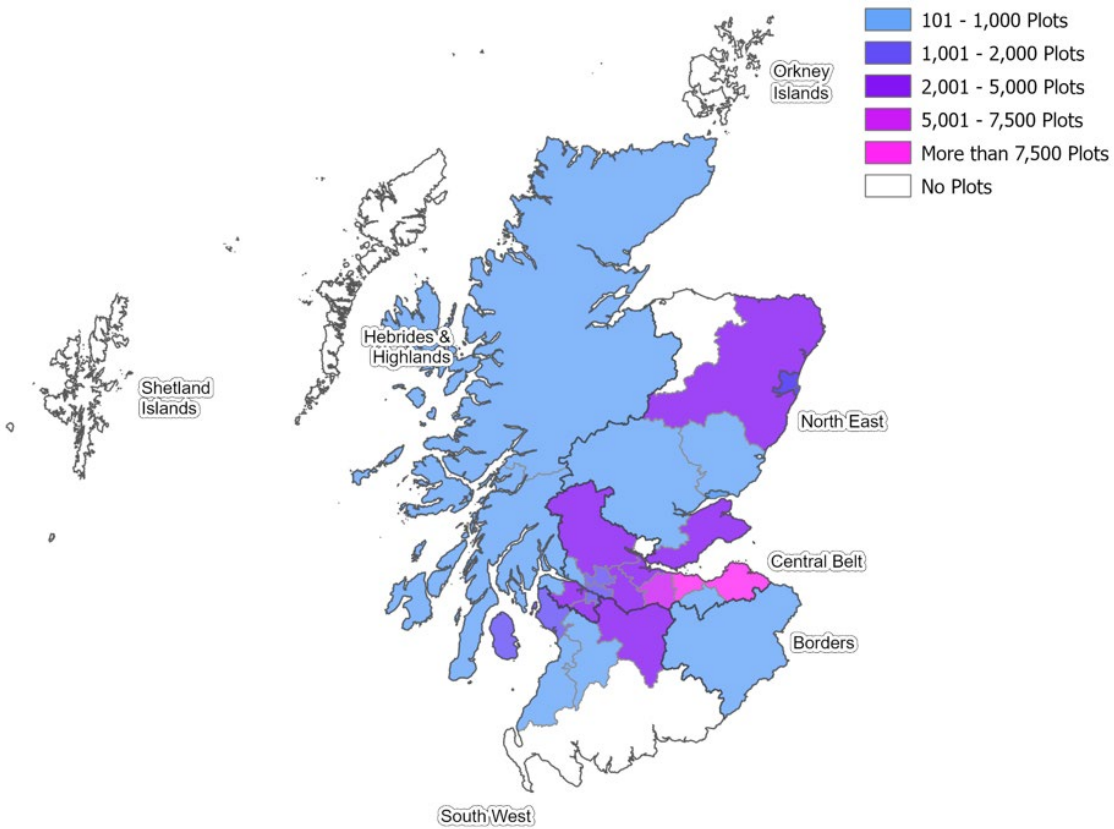
Source: CMA analysis of the top 11 housebuilders' land banks data using ArcGIS Pro.

**Figure D.7: Number of plots in long-term land holdings in Greater London at LA area level**



Source: CMA analysis of the top 11 housebuilders' land banks data using ArcGIS Pro.

**Figure D.8: Number of long-term plots in Scotland at LA area level**

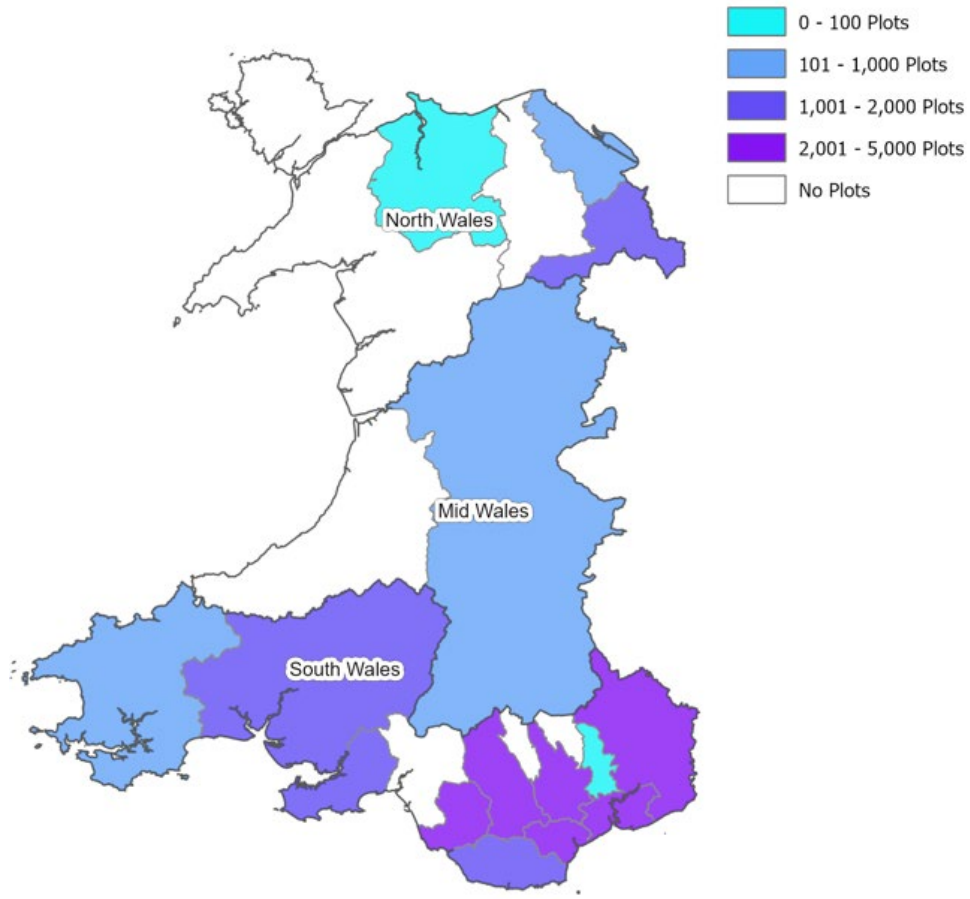


Source: CMA analysis of the top 11 housebuilders' land banks data using ArcGIS Pro.

Notes:

[1] The Shetland Islands have been placed to the left of the Hebrides & Highlands region to allow all regions to fit onto a single map frame.

Figure D.9: Number of long-term plots in Wales at LA area level



Source: CMA analysis of the top 11 housebuilders' land banks data using ArcGIS Pro.