

Submission Draft Camden Local Plan Housing Trajectory 2026-2040 and Five Year Housing Land Supply 2026-2030

(30 September 2025)

1. Introduction

- 1.1 The housing trajectory shows how sites are expected to come forward to meet the housing target proposed by the Submission Draft Camden Local Plan. For this purpose, the housing trajectory includes all self-contained and non-self-contained homes and covers the fifteen years of the Local Plan period – starting with 2026/27 and concluding with 2040/41.
- 1.2 The three figures included below collectively set out the different elements of the housing trajectory.
 - Figure 1 provides a list of identified sites that are expected to deliver housing between 1 April 2026 and 31 March 2041, and indicates when we expect the housing to be delivered by each site. Figure 1 is divided into four lists of major development sites¹ expected to deliver self-contained housing (one for each sub-area of the borough), and four lists of all sites expected to deliver non-self-contained housing (one for each sub-area of the borough).
 - Figure 2 provides the total amount of housing we expect to be delivered each year from 2026/27 to 2040/41 by the sites in Figure 1, adds the anticipated housing delivery each year from smaller (non-major) developments of self-contained housing, then compares this with the Local Plan housing target to provide the data in the housing trajectory chart. For information, Figure 2 also includes a column at the start providing the anticipated position on 31 March 2026 in terms of the borough's progress towards meeting the borough housing target for 2019/20 to 2028/29 set by the London Plan 2021.
 - Figure 3 presents the housing trajectory as a chart, comparing the housing we expect to be delivered each year with the annualised London Plan housing target (up to 2028/29), the remaining annualised Local Plan housing target (from 2029/30), and the cumulative backlog or surplus arising each year.
- 1.3 A fourth figure (Figure 4) individually lists the major development sites¹ forming part of Camden's five-year housing land supply from 1 April 2026 to 31 March 2031, together with the number of additional homes we expect each site to deliver. Figure 4 also compares the total number of additional homes we expect to deliver from 2026/27-2030/31 with the total housing target spanning the same five years. To keep Figure 4 compact, we have:
 - included all major sites/ developments expected to deliver self-contained or non-self-contained housing in a single combined list; and
 - combined smaller (non-major) developments to provide a single figure for self-contained housing and a single figure for non-self-contained housing.

¹ Major development in the context of the London Borough of Camden is development involving 10 homes or more, or the provision of building(s) with a floor area of 1,000 sqm or more.

2. Self-contained and non-self-contained housing

- 2.1 Figures 1, 2 and 4 distinguish between self-contained and non-self-contained housing.
- 2.2 Self-contained homes are those where all the rooms, including the kitchen, bathroom and toilet, are behind a door that only one household can use (Use Class C3). Figures for self-contained homes also include properties in Use Class C4 as changing the use in either direction between C3 and C4 is permitted by the relevant General Permitted Development Order (Use Class C4 refers to small houses in multiple occupation – these are houses or flats occupied by three to six residents comprising two or more households and sharing facilities such as kitchens, bathrooms or living rooms).
- 2.3 Non-self-contained-housing (abbreviated as NSC in Figure 2, and also known as communal accommodation) refers to student accommodation, care homes, hostels for long-term residents, and larger houses in multiple occupation (houses or flats occupied by more than six residents comprising two or more households and sharing facilities such as kitchens etc). For the purposes of this housing trajectory and five-year housing land supply, projected additions and losses of bedrooms in non-self-contained housing are converted into an equivalent number of self-contained homes (C3) by applying the factors set out in London Plan paragraph 4.1.9².
- 2.4 A number of the Camden sites with permission for student accommodation include 'cluster-flats' (groups of student bedrooms typically sharing a kitchen-diner) and/ or micro-studios (which contain all the facilities required for daily household life, but have access to communal areas, and are significantly below the space standards applied to dwellings in use class C3). Similarly, the new hostels for homeless people under construction in the borough contain micro-studios. The factors set out in the London Plan have been applied to all non-self-contained housing regardless of its layout. This approach achieves consistency across the trajectory, and reflects the absence of information about the layout of future developments that have yet to be submitted as planning applications.
- 2.5 The government collects statistics on housing delivery through an exercise known as Housing Flows Reconciliation (HFR), and the guidance related to this advocates a different approach to London Plan paragraph 4.1.9. In essence, the guidance indicates that each micro-studio should be treated as a single self-contained dwelling, and each cluster of bedrooms should be treated as a dwelling in multiple occupation. If this approach was adopted in relation to the first five years of the

² Para 4.1.9 of the London Plan 2021 states (in part) - Net non-self-contained accommodation for students should count towards meeting housing targets on the basis of a 2.5:1 ratio, with two and a half bedrooms/units being counted as a single home. Net non-self-contained accommodation for older people (C2 Use Class) should count towards meeting housing targets on the basis of a 1:1 ratio, with each bedroom being counted as a single home. All other net non-self-contained communal accommodation should count towards meeting housing targets on the basis of a 1.8:1 ratio, with one point eight bedrooms/units being counted as a single home.

Government guidance on the Housing Delivery Test (from 2023) uses adjusted ratios based on the Census 2021. These are 2.4:1 for student accommodation and 1.9:1 for all other accommodation. These may well be adopted by a future London Plan, but for the time being the London Plan 2021 ratios have been used for the purpose of the Camden housing trajectory and five-year housing land supply.

housing trajectory and the five-year housing land supply, this would lead to an estimated increase of around 200 in the number of homes delivered by 31 March 2031. As indicated above, for later developments that have yet to be submitted as planning applications, the layout is unknown.

3. Major developments and smaller developments

Major developments

- 3.1 Figures 1, 2 and 4 also distinguish between major developments and smaller developments (non-major developments).
- 3.2 Sites where major development is expected (those that will involve 10 or more dwellings, or over 1,000 sqm gross internal area) have been assessed against the definitions of "deliverable" and "developable" provided by the National Planning Policy Framework 2024 (NPPF). All major development sites forming part of the trajectory are considered to be developable, and those sites included for the first five years (2026/27 to 2030/31) are considered to be deliverable.
- 3.3 All major developments expected to deliver housing during the Plan period are included in Figure 1 below. The vast majority of these are proposed as Allocations in the Submission Draft Local Plan, but a small number do not appear in the Plan because either:
- they were submitted or determined after the Plan was drafted; or
 - at the time of drafting the Plan we anticipated that they would complete before the start of the Plan period.
- 3.4 The Figure 1 sites include:
- sites that were previously allocated or identified in one of our adopted development plans³ and have yet to be fully built-out;
 - uncompleted sites that benefit from an unexpired planning consent, or are the subject of applications where there has been a resolution of Planning Committee to grant consent, but a legal agreement to secure planning obligations has yet to be completed; and
 - sites that have been proposed to the Council by landowners and/ or prospective developers, for example through earlier consultations relating to local plan preparation (including 'call for sites' exercises carried out between late 2017 and late 2022).
- 3.5 We have estimated the number of homes likely to come forward each year on the basis of information submitted with planning applications, or submitted in response to earlier consultations in relation to local plan preparation (including 'call for sites' exercises), along with our own assessments carried out as part of the preparation of the Submission Draft Camden Local Plan and earlier proposed plans⁴.

³ Camden Site Allocations 2013, Fitzrovia Area Action Plan 2014, Euston Area Plan 2015 and Camden Local Plan 2017

⁴ The earlier proposed plans are the draft Camden Site Allocations Local Plan 2020 and the draft of the Camden Local Plan published in 2024 (which incorporated the content of the draft Site Allocations Local Plan)

Smaller developments (non-major developments)

- 3.6 The Submission Draft Camden Local Plan only allocates sites where major development is anticipated, and does not identify sites for smaller developments (those providing fewer than 10 homes, or buildings with total floor areas below 1,000 sqm). For each of the three years 2025/26 (before the Plan period), 2026/27 and 2027/28, we have assumed completion of a third of the non-major developments that were permitted before April 2025 and have have neither been completed nor expired. Two-thirds of these completions (215 additional homes) are assumed to be within the Plan period, 107 additional homes in 2026/27, and 108 additional homes in 2027/28⁵. For each year of the Plan period from 2028/29, the housing trajectory includes a 'windfall' figure equal to the average annual number of homes completed as part of non-major developments from April 2015 to March 2025. The term 'windfall' describes development which is anticipated to arise on the basis of evidence of past housing delivery, but where specific development sites have not been identified.

⁵ Development monitoring in Camden is currently carried out and collated on the basis of financial years, so the latest set of data available is for the year ending 31 March 2025. Under Section 91 of the Town and Country Planning Act 1990 (as amended), planning permission is generally granted subject to a condition that development must commence not later than three years from the date of the permission (after which the permission "expires" or "lapses"). Taking these factors into account, we consider that it is reasonable to assume that smaller developments that have the benefit of planning permission that has neither expired nor completed at 31 March 2025 will proceed to completion by 31 March 2028.

Our monitoring indicates that (at the end of 2024/25) there were 214 additional homes in smaller developments where permission had been granted from 1 April 2015, and work had commenced, but not completed. There were also 108 additional homes in smaller developments where permission had been granted from 1 April 2022, and work had *not* commenced. Accordingly, we have divided these 322 homes between the three financial years from 31 March 2025, and assumed that 107 additional homes in smaller developments will complete in each of the years 2025/26 and 2026/27, and 108 additional homes in smaller developments will complete in the year 2027/28.

The progress of individual permitted non-major developments towards completion will clearly be far more complex, and a number may not proceed, but they will be augmented by completion of smaller developments granted permission after 31 March 2025.

Figure 1. Submission Draft Camden Local Plan - Housing Trajectory 2026-2040 – List of Sites by Sub-Area
(includes separate lists of self-contained and non-self-contained homes for each sub-area)

	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41
South sub-area (major self-contained)															
S2 Euston Area															
S5 120-136 Camley Street															
S6 104-114 Camley St and Cedar Way															
S7 24-86 Royal College Street															
S8 St Pancras Hospital															
S9 Shorebase Access															
S10 Bangor Wharf and Eagle Wharf															
S11 Former RN Throat, Nose and Ear Hospital															
S13 Former Thameslink Station, Pentonville Rd															
S14 Land at Pakenham Street and Wren St															
S16 Former St Martin's College															
S17 166 High Holborn/ 1 Museum Street															
S19 Cockpit Yard and Holborn Library															
S20 York Way Depot and land at Freight Lane															
S21 Agar Grove Estate															
S22 6 St Pancras Way															
S23 Tybalds Estate															
S24 294-295 High Holborn															
S25 156-164 Gray's Inn Road/ Panther House															
S26 8-10 Southampton Row															
S28 Central Somers Town Estate															
Unallocated site (approved)															

	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41
Central sub-area (major self-contained)															
C2 Regis Road and Holmes Road Depot															
C3 Murphy Site															
C4 Kentish Town Police Station															
C5 369-377 Kentish Town Road															
C6 Kentish Town Fire Station															
C7 Morrisons Supermarket															
C9 100 Chalk Farm Road															
C10 Juniper Crescent Estate															
C11 Network Rail land at Juniper Crescent															
C12 Gilbey's Yard Estate															
C13 West Kentish Town Estate															
C15 Wendling Estate and St Stephens Close															
C17 Camden Town over-station development															
C19 Arlington Road former depot site															
C21 Grand Union Ho, 18-20 Kentish Town Rd															
C22 Heybridge Garages, Hadley Street															
C23 Former flats at Bacton, Haverstock Road															
C24 52-54 Avenue Road															
C25 5-17 Haverstock Hill (Eton Garage)															
C26 160 Malden Road															
Unallocated sites (approved/ awaiting determination/ Council development)															

	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41
West sub-area (major self-contained)															
W2 (part) O2 Centre, car park, car showrooms															
W2 (part) 14 Blackburn Road (O2, Ph 2, Plot 8)															
W3 11 Blackburn Road															
W4 13 Blackburn Road															
W5 188-190 Iverson Road															
W6 Meridian House, 202-204 Finchley Road															
W7 Gondar Gardens Reservoir															
W8 88 – 92 Kilburn High Road															
W9 Land at Midland Crescent, Finchley Road															
W10 104A Finchley Road															
W12 100 Avenue Road															
Unallocated sites (approved/ awaiting determination)															
North sub-area (major self-contained)															
N2 Former Mansfield Bowling Club															
N3 Queen Mary's House															
N4 Hampstead Delivery Office															
Unallocated site (Council development)															
Total major self-contained (all sub-areas)	354	477	812	834	965	659	641	543	658	575	585	637	785	750	724

	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41
South sub-area (non-self-contained, C3 equiv)															
17-37 William Road															
Land at Stephenson Way (r/o 222 Euston Road)															
42 Phoenix Road NW1 1TA															
King's Cross Methodist Ch, Birkenhead Street															
Central sub-area (non-self-contained, C3 equiv)															
C9 100 Chalk Farm Road															
C14 Hawkrigge House															
C16 Shirley House, 25-27 Camden Road															
C18 UCL Camden Campus, 109 Camden Road															
180 Arlington Road/ 14 Parkway															
Camden Rd Hostel, 248-250 Camden Road															
Former PH, 89 Holmes Road/ 76 Willes Road															
65-69 Holmes Road															
West sub-area (non-self-contained, C3 equiv)															
W2 (part) 14 Blackburn Road (O2, Ph 2, Plot 8)															
W9 Land at Midland Crescent, Finchley Road															
IQ Haywood House Student, Blackburn Road															
North sub-area (non-self-contained, C3 equiv)															
Chester Rd Hostel, 2 Chester Road															
Total non-self-contained (all sub-areas)	22.1	147.6	161.2	154.8	155.6	7.6		36	36						

Figure 2. Submission Draft Camden Local Plan - Housing Trajectory 2026-2040 – Totals and Comparisons
(includes self-contained and non-self-contained homes)

	2019/20- 2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41
Major self-contained housing developments (allocations/permissions)	3,545	354	477	812	834	965	659	641	543	658	575	585	637	785	750	724
Smaller self-contained housing developments (permissions 2026-28, 'windfalls' from 2028/29)	1,038	107	108	145	145	145	145	145	145	145	145	145	145	145	145	145
Non-self-contained (NSC) housing developments (allocations/permissions)	-41.8	22.1	147.6	161.2	154.8	155.6	7.6	0	36	36	0	0	0	0	0	0
Total net additional C3 equivalent (self-contained and NSC housing)	4,541.2	483.1	732.6	1,118.2	1,133.8	1,265.6	811.6	786	724	839	720	730	782	930	895	869
Annualised Housing Target	1,038	1,038	1,038	1,038	703	703	703	703	703	703	703	703	703	703	703	703
Cumulative Housing Target to 2026	7,266															
Cumulative Housing Target from 2026		1,038	2,076	3,114	3,817	4,520	5,223	5,926	6,629	7,322	8,035	8,738	9,441	10,144	10,847	11,550
Cumulative Completions from 2026		483.1	1,215.7	2,333.9	3,467.7	4,733.3	5,544.9	6,330.9	7,054.9	7,893.9	8,613.9	9,343.9	10,125.9	11,055.9	11,950.9	12,819.9
Monitor (cumulative completions minus the cumulative targets) – estimated backlog 2026	-2,724.8															
Monitor (cumulative completions minus the cumulative targets) – from 2026		-554.9	-860.3	-780.1	-349.3	213.3	321.9	404.9	425.9	561.9	578.9	605.9	684.9	911.9	1,103.9	1,289.9

4. Housing Target for the Submission Draft Camden Local Plan

- 4.1 The housing target is a key component of Figures 2, 3 and 4.
- 4.2 The proposed Local Plan period is 2026/27 to 2040/41. A housing target for Camden running from 2019/20 to 2028/29 has been set by the London Plan 2021. As the Local Plan period continues for a further twelve years beyond 2028/29, a housing requirement has been set for the whole Plan period having regard to paragraph 4.1.11 of the London Plan⁶.
- 4.3 The Submission Draft Camden Local Plan includes a target to deliver a total of at least 11,550 additional homes over the plan period 2026/27 to 2040/41. The housing trajectory assumes that the current London Plan 2021 target for Camden will continue to apply from 1 April 2026 to 31 March 2029 (3,114 homes in total or 1,038 additional homes per year), and that a target of 8,436 homes in total (703 additional homes per year) will apply thereafter.
- 4.4 The housing target in the draft Local Plan is a capacity-based target, comprising all expected housing delivery over the Plan period (from sites with planning permission and allocated sites), including a windfall⁷ allowance for smaller sites (non-major development). The target also reflects the delay associated with HS2 and development at Euston, assuming delivery within the Local Plan period of 875 homes from sites encompassed by the Euston Area Plan⁸ (in addition to delivery from existing permissions). This compares with the target of 1,500 to 2,500 additional homes in the draft update of the Euston Area Plan published for consultation in January 2023.
- 4.5 As the target of 11,550 is capacity-based, it encompasses the cumulative backlog from under-delivery of completed homes from 2019/20 (the first year of the London Plan period) to 2025/26⁹. At the time of calculation for the Regulation 18 draft Local Plan, we anticipated that the backlog would reach a little over 1,700 homes (1,721.4) by April 2026.
- 4.6 Once adopted, the draft Local Plan will replace the site allocations in the Fitzrovia Area Action Plan (2014), and most allocations in the Camden Site Allocations Plan (2013). The remaining allocations will be replaced by the updated Euston Area Plan in due course. Consequently, the target of 11,550 includes the capacity on sites allocated in those plans if they are not fully built-out and have been re-allocated by the draft Local Plan.

⁶ Para 4.1.11 of the London Plan 2021 states - If a target is needed beyond the 10 year period (2019/20 to 2028/29), boroughs should draw on the 2017 SHLAA findings (which cover the plan period to 2041) and any local evidence of identified capacity, in consultation with the GLA, and should take into account any additional capacity that could be delivered as a result of any committed transport infrastructure improvements, and roll forward the housing capacity assumptions applied in the London Plan for small sites.

⁷ The term 'windfall' describes development which is anticipated to arise on the basis of evidence of past housing delivery, but where specific development sites have not been identified.

⁸ We currently anticipate that 1,750 homes will be delivered within the boundary of the Euston Area Plan in addition to existing permissions, but only half will be delivered within the Local Plan period.

⁹ The GLA have advised that the backlog should be assessed in terms of under-delivery against the London Plan 2021 housing target for Camden commencing from the start of London Plan period in 2019 rather than the date on which the finalised London Plan 2021 was formally published ("adopted").

- 4.7 The housing trajectory in the Camden Local Plan 2017 anticipated the completion by 2025/26 of housing development on several large sites where no housing delivery has yet taken place, including 24-58 Royal College Street (Parcelforce), St Pancras Hospital and the O2 Car Park (all allocated in 2013). These effectively form part of our backlog against the target set by the London Plan 2021. These sites are incorporated by the draft Local Plan into Allocations S7, S8 and W2 respectively.
- 4.8 In late 2023 (when we calculated the housing target of 11,550 originally included in the draft of the Camden Local Plan published in 2024), we anticipated delivery of 11,650 additional homes from 1 April 2026 to 31 March 2041. The 'planned surplus' of 100 homes is broadly consistent with the surplus identified at public examination of the Camden Local Plan 2017, with the trajectory at that time showing delivery of approximately 200 homes more the 2017 target of 16,800.

5. Housing trajectory and changes to anticipated housing delivery

- 5.1 During preparation of the Submission Draft Local Plan, the capacity of several sites was re-assessed, and additional sites were allocated (the largest being York Way Depot and adjacent land at Freight Lane). This led to an increase of approximately 400 in the total capacity of sites in the housing trajectory. However, since publication of the Submission Draft Local Plan, we have also updated our assessment of the cumulative 15-year delivery of self-contained housing from smaller developments to reflect the latest available information, leading to a reduction from 2,595 to 2,100 additional homes (a reduction of 495)¹⁰.
- 5.2 The overall estimated anticipated delivery shown by the trajectory is now just over 12,800 additional homes (12,819.9) from 1 April 2026 to 31 March 2041. However, due to delays in delivery of existing permissions (associated with changing fire safety requirements and increasing costs of construction), most of the additional capacity now appearing in the trajectory will be absorbed by an increase of 1,003.4 homes in the anticipated backlog from the period 2019/20 to 2025/26 (increased from 1,721.4 to 2,724.8 homes).
- 5.3 As stated above, the housing trajectory assumes the target will remain at 1,038 additional homes per year for the first three years of the Plan period, and reduce to 703 additional homes per year for the remaining twelve years. At this stage, we have not sought to make-up the entire backlog in the early part of the Plan period by increasing the targets for the first five years, nor have we added

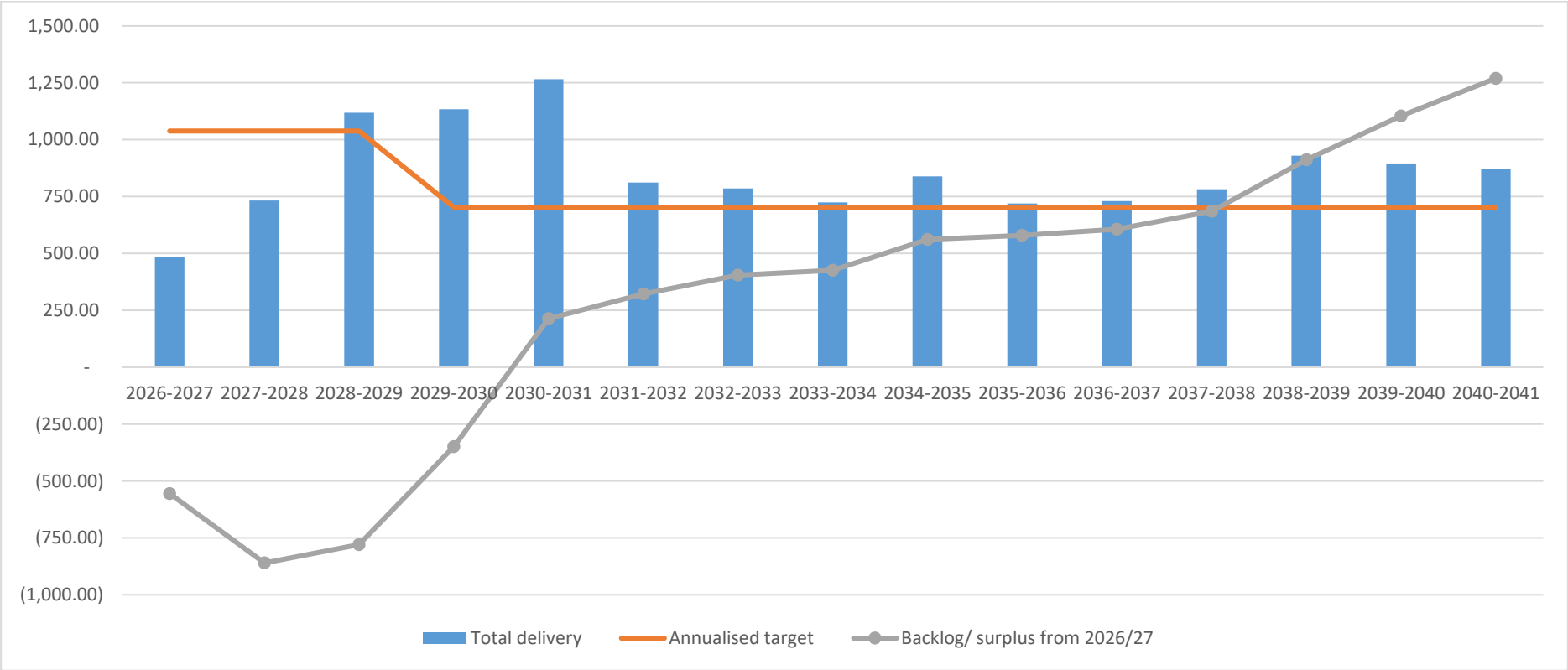
¹⁰ the figure of 2,595 was generated from an annual windfall of self-contained homes from smaller developments of 173 additional homes per year, based on the record of homes completed in smaller developments from April 2010 to March 2020. This has now been updated to 145 homes per year based on the record of additional homes completed in smaller developments from April 2015 to March 2025, and applied to the period from April 2028 to March 2041 (a total of 1,885 additional homes across thirteen years). For the years 2026/27 and 2027/28, annual delivery of additional self-contained homes has been updated to 107 and 108 respectively, based on 2/3 of the planning permissions for smaller developments granted before April 2025 that have neither been completed nor expired. This takes the anticipated total delivery of additional self-contained homes from smaller developments between April 2026 and March 2041 to 2,100.

a buffer¹¹ to the first five years, since the trajectory and the five-year housing land supply indicate that this additional early delivery simply would not be achieved.

- 5.4 If new information becomes available that will materially affect the trajectory or the five-year housing land supply, such as firmer information about completions anticipated during 2025/26, or the level and pace of housing development associated with HS2, Euston Station, and the Euston Area Plan, we will submit an update of this assessment to the public examination of the Local Plan.
- 5.5 We note that the London Plan is currently being reviewed, and will result in a new capacity-based housing target for Camden. Once any new London Plan housing target for Camden is published in its final form, this will supersede the housing target in the new Camden Local Plan. The GLA are aiming to publish the new London Plan in its final form in 2027/28 (following examination in public), consequently the housing target included in the new Camden Local Plan housing target may only apply for a short period of time.

¹¹ The NPPF 2024 indicates that the housing trajectory should add a buffer to the target for the first five years of the Plan period in the form of an additional supply of specific deliverable sites (moved forward from later in the Plan period). This buffer should either be 5% (where delivery in previous years has met targets) or 20% (where there has been significant under-delivery in previous years).

Figure 3. Submission Draft Camden Local Plan - Housing Trajectory 2026-2040 - Chart
(includes self-contained and non-self-contained homes)



6. Housing trajectory and Figure 3 explanation and conclusions

- 6.1 The blue bars shown in Figure 3 (labelled total delivery) show the number of additional homes we anticipate will be completed in each year of the Plan period from developments of any scale. These include self-contained homes, and non-self contained housing converted into an equivalent by applying the factors set out in London Plan paragraph 4.1.9¹².
- 6.2 The line shown in orange in Figure 3 (labelled annualised target) shows the annualised target of 1,038 additional homes for the first three years (to the end of 2028/29) and the remaining annualised Local Plan housing target of 703 additional homes for the following twelve years (from the start of 2029/30).
- 6.3 The line shown in grey in Figure 3 (labelled backlog/surplus) is the gap between cumulative targets and cumulative completions. This shows that cumulative completions will fall short of cumulative targets in the early years of the trajectory period (before 2030/31), but will exceed them in the later years. At its starting point in 2026/27, the grey line shows a backlog of 554.9 homes arising from the gap between the annualised London Plan target of 1,038 and that year's anticipated delivery of approx. 483.1 additional homes. At the end of 2040/41, the grey line shows a surplus of 1,269.9 homes when overall delivery is compared with the cumulative target of 11,550 additional homes.
- 6.4 The grey line does not directly take account of under-delivery of the annualised London Plan target from 2019/20 to 2025/26, in the sense that it does not include that backlog within the 554.9 home backlog shown for 2026/27. Instead, the 11,550 target incorporates the London Plan backlog of 1,721.4 to 2025/26 as anticipated at the time the target was derived in late 2023.
- 6.5 The surplus of 1,269.9 homes shown for 2040/41 takes account of the anticipated increase of 1,003.4 in the starting London Plan backlog, and shows that we have maintained and increased the planned surplus of 100 above the draft Local Plan target. However, as indicated above, the increase of 400 homes arising from the re-assessment of site capacities and the additional site allocations involved in the Submission Draft Local Plan has been absorbed and exceeded by the reduction of 495 in our assessment of the cumulative 15-year delivery of self-contained housing from smaller developments (from 2,595 to 2,100 additional homes)¹³. Consequently, the surplus simply makes up for the

¹² Para 4.1.9 of the London Plan 2021 states (in part) - Net non-self-contained accommodation for students should count towards meeting housing targets on the basis of a 2.5:1 ratio, with two and a half bedrooms/units being counted as a single home. Net non-self-contained accommodation for older people (C2 Use Class) should count towards meeting housing targets on the basis of a 1:1 ratio, with each bedroom being counted as a single home. All other net non-self-contained communal accommodation should count towards meeting housing targets on the basis of a 1.8:1 ratio, with one point eight bedrooms/units being counted as a single home.

¹³ the figure of 2,595 was generated from an annual windfall of self-contained homes from smaller developments of 173 additional homes per year, based on the record of homes completed in smaller developments from April 2010 to March 2020. This has now been updated to 145 homes per year based on the record of homes completed in smaller developments from April 2015 to March 2025, and applied to the period from April 2028 to March 2041 (a total of 1,885 additional homes across thirteen years). For the years 2026/27 and 2027/28, annual delivery of additional self-contained homes has been updated to 107 and 108 respectively, based on 2/3 of the planning permissions for smaller developments granted before April 2025 that have neither been completed nor expired. This takes the

increased backlog at the start of the trajectory and the reduced delivery from smaller developments, rather than allowing for a significantly higher (and unrealistic) Local Plan target. Overall, the trajectory confirms that we anticipate that the proposed housing target will be slightly exceeded by the end of the Plan period¹⁴.

7. Five year housing land supply

- 7.1 Figure 4 sets out our five year housing land supply on a site-by-site basis in terms of the number of homes we expect to be delivered on each site in each year from 2026/27 to 2030/31. The sites are drawn from Camden's housing trajectory as summarised in Figures 1 to 3, and all figures assume the same scale and rate of delivery across those five years. An equivalent number of homes (C3) are included for development involving non-self-contained (NSC) housing as also explained above in the paragraphs accompanying Camden's housing trajectory.
- 7.2 All sites where major development is expected (those that will involve 10 or more dwellings, or over 1,000 sqm gross internal area) are individually identified, and have been assessed against the definition of "deliverable" provided by the National Planning Policy Framework 2024 (NPPF). The vast majority of these relate to sites that benefit from a full unexpired planning permission, or outline permissions where reserved matters have been approved. Other sites identified include those with applications that are awaiting completion of a legal agreement to secure planning obligations, a small number of allocated sites where positive pre-application discussions indicate that they are deliverable, and Council-led regeneration schemes where the Council's Cabinet has authorised preparations for submission of a planning application.
- 7.3 Figure 4 includes an allocation reference column and a planning reference column, but to maintain the compactness of the table, the latter is not exhaustive.
- The allocation reference provided is from the Submission Draft Local Plan, with a note in brackets where an earlier adopted allocation or policy exists – these relate to the Camden Site Allocations Local Development Document 2013, except for one reference to the Camden Local Plan 2017.
 - The planning reference provided is to the most recent planning application or permission(s) (in the form ****/****/P). Where no planning application has yet been submitted, this column indicates the basis of our assessment that the site is deliverable, which includes where the Council has control of the site and is involved in bringing forward proposed development, where a Planning Performance Agreement (PPA) is in place indicating the timescale for an application, and where pre-application discussions are advanced.
- 7.4 Please note that the number of homes included for each site in Figure 4 refers only to those homes we expect to be delivered in the period 2026/27 to

anticipated total delivery of additional self-contained homes from smaller developments between April 2026 and March 2041 to 2,100.

¹⁴ after taking account of the increase of 1,003.4 in the starting London Plan backlog, the cumulative delivery anticipated is 11,816.5 additional homes, rather than the 11,650 additional homes anticipated in late 2023 when the Local Plan target of 11,550 was set.

2030/31, and several sites will deliver more homes in total through completions before or after that period.

- 7.5 As explained in the paragraphs about smaller developments preceding Figure 1, and having regard to the NPPF, Figure 4 provides total figures for development involving less than 10 homes/ 1,000 sqm based on the pipeline of live permissions for 2026/27 and 2027/28, and based on past records of the average annual number of homes completed in smaller developments for the subsequent three years¹⁵.

Figure 4. Five year housing land supply 2026/27 – 2030/31

Allocation ref.	Planning application ref.	Address	Homes in this period
Allocations/ major developments (> 1,000 sqm or 10+ x C3 or equivalent)			
W2 (part) (2013 site 29)	2022/0528/P	O2 Centre, car park and car showroom sites	608
C7	2017/3847/P, 2020/3116/P	Morrisons Supermarket, Camden Goods Yard	534
S6	Council regeneration	104 – 114 Camley Street and Cedar Way	281
W12 (2013 site 30)	2014/1617/P	100 Avenue Road	237
	2025/3057/P	Juniper Crescent (Estate Regeneration)	227
C23	2012/6338/P, 2016/5358/P	Former flats at Bacton, Haverstock Road (Council regeneration)	148
	2025/4055/P	180 Arlington Rd/ 14 Parkway (Mecca/ Odeon) (48 x C3, 244 x student accommodation)	145.6
S21	2013/8088/P, 2019/4280/P	Agar Grove Estate (Council regeneration)	139
C9	2024/0479/P	100 Chalk Farm Road (30 x C3, 264 x student accommodation)	135.6
C2 (2017 Policy G1e)	Part Council-owned, PPA/ pre-application	Regis Road and Holmes Road Depot	130
S5	Council regeneration	120-136 Camley Street	119
W2 (part)	2025/1685/P	14 Blackburn Road – part of O2 (Phase 2, Plot 8) (35 x C3, 192 x student accommodation)	111.8
S7 (part) (2013 site 37)	PPA/ pre-application	24 – 58 Royal College St	100
S8 (2013 site 6)	PPA/ pre-application	St Pancras Hospital	100
C19	2024/4953/P	Arlington Rd former depot site (27 x C3, 178 x student accommodation)	98.2
	2020/5473/P, 2025/0035/P	17-37 William Road (225 x student accommodation)	90
C16	Pre-application	Shirley House, 25-27 Camden Road (197 x student accommodation)	78.8
C25	2016/3975/P, 2021/3268/P	5-17 Haverstock Hill (Eton Garage)	77
	2020/2169/P/ 2024/0728/P	39/39a Fitzjohn's Ave/ adjt 46 Maresfield Gdns	67
S22	2017/5497/P, 2021/2671/P	6 St Pancras Way NW1	73

¹⁵ for the years 2026/27 and 2027/28, annual delivery of additional homes from smaller developments is assumed to be 107 and 108 respectively, based on 2/3 of the smaller development planning permissions granted before April 2025 that have neither been completed nor expired. For the three years from 2028/28 to 2030/31, annual delivery of additional homes is assumed to be 145 per year based on the record of homes completed in smaller developments from April 2015 to March 2025. This takes the total anticipated delivery of additional homes from smaller developments from April 2026 to March 2031 to 650 (107 + 108 + (3 x 145)).

Allocation ref.	Planning application ref.	Address	Homes in this period
C13	2025/2667/P	West Kentish Town Est. (Ph. 1) (Council regeneration)	52
S23	2021/3580/P	Tybalds Estate WC1N (Council regeneration)	46
S28	2015/2704/P, 2019/5882/P	Central Somers Town (Council regeneration)	38
C4 (2013 site 40)	PPA/ pre-application (associated with Allocation C2)	Kentish Town Police Station	35
S16 (2013 site 19)	2020/2470/P	Former Central St Martins College	34
W9	2014/5527/P, 2017/4160/P, 2018/0702/P	Land at Midland Crescent, Finchley Road (9 x C3 plus 60 x student accommodation)	33
W10	2022/3553/P	104a Finchley Road	31
	2018/2316/P	Stephenson Way (rear of 222 Euston Rd) NW1 (72 x student accommodation)	28.8
W4	2020/2940/P	13 Blackburn Road	24
N2	2015/1444/P, 2018/1701/P	Former Mansfield Bowling Club	23
	2015/6383/P	42 Phoenix Road NW1 (53 x student accommodation)	21.2
	2020/3461/P, 2020/3737/P	Chester Road and Camden Road Hostels (Council regeneration of homeless hostels) (28- and 27-bed rebuilt as 50-unit and 39-unit)	18.9
	Council small sites prog.	Raglan Street garages	18
	2017/7072/P	Haywood House, Blackburn Road NW6 (extension, 41 x student accommodation)	16.4
C26	2024/1193/P	160 Malden Road	15
S25	2015/6955/P, 2021/2321/P	156-164 Gray's Inn Road/ Panther House	14
C5	2019/0910/P	369-377 Kentish Town Road	14
	2021/5390/P	254 Kilburn High Road	13
C24	2022/1863/P	52 Avenue Road	12
S17	2023/2510/P, 2024/4662/P	166 High Holborn, 1 Museum Street	12
	2024/2810/P	Rugby Chambers, 2 Rugby St (prior approval)	11
	2023/3824/P	Car park adjt. Hurdwick House, Harrington Sq	11
S24	2017/1827/P	294-295 High Holborn	10
C22	Council small sites prog.	Heybridge Garages, Hadley Street	10
	Council small sites prog.	Highgate Rd/ Haddo House	10
	2023/0270/P	26-28 Rochester Place (prior approval)	10
	2022/3430/P	12 West End Lane (former Bird in Hand PH)	10
Total major developments (> 1,000 sqm or 10+ x C3 or equivalent) (above)			4,071.3
Self-contained housing non-major developments (up to 1,000 sqm or 9 x C3) ¹⁵			650
Non-self-contained housing non-major developments (up to 1,000 sqm/ 9 x C3 equiv)			12.0
Total of all net additional homes (C3 or equivalent)			4,733.3
London Plan annual target (1,038) 2026/27 to 2028/29, Local Plan annual target (703) 2029/30 to 2030/31			4,520

Source: Planning Policy Team, LB Camden

Note: please see the accompanying pages for more information, including how the sites in the table have been selected, the derivation of the figures and the significance of self-contained and non-self-contained housing

8. Housing land supply assessment

- 8.1 Taking into account all deliverable sites referred to above, Figure 4 shows that Camden's five-year housing land supply (2026/27 to 2030/31) of deliverable sites for housing amounts to 4,733.3 additional homes (or C3 equivalent). Comparing this with the annualised targets in the Submission Draft Local Plan (three years @ 1,038 additional homes per year, then two years @ 703 additional homes per year – total 4,520), Camden has a sufficient deliverable housing land supply to meet the proposed target for 5.2 years.
- 8.2 The 2023 Housing Delivery Test (HDT) assessment indicated that Camden had delivered 53% of the housing required over the previous three years. Consequently, Camden must add a 20% buffer to its annual housing targets when assessing the five-year housing land supply. Applying the 20% buffer to the Submission Draft Local Plan target for 2025/26 to 2030/31¹⁶ takes the five-year target up to 5,424 additional homes (1,084.8 per year). Comparing with the anticipated 4,733.3 additional homes completed over the five-year period, Camden has a sufficient deliverable housing land supply to meet the proposed target for 4.4 years.

Impact of delivery in previous years (shortfall or backlog)

- 8.3 The calculation of five year housing supply for the Submission Draft Local Plan commences at the start of April 2026. Planning practice guidance advises that any shortfall/ backlog against housing requirements in earlier years of the plan period should be taken into account in assessing the housing land supply. As set out in the earlier sections of this assessment and in Figure 2, we anticipate that a total of 4,541.2 net additional homes will be completed from 2019/20 to 2025/26. When compared with the annualised London Plan target of 1,038 additional homes (7,266 in total across the period), this represents a shortfall/ backlog of 2,724.8 dwellings.
- 8.4 Planning practice guidance indicates that the shortfall should be added to the target for the following five years, and any necessary buffer should be applied. As set out in Figure 4, the Submission Draft Local Plan target for 2026/27 to 2030/31 (as calculated in the paragraphs above and Figure 4) is 4,520 additional homes. Before the full shortfall/ backlog against the London Plan target to 2025/26 can be added, because the Submission Draft Local Plan target already includes an anticipated shortfall of a little over 1,700 dwellings (1,721.4), it is first necessary to adjust the target to remove that element of the shortfall/ backlog that has already been incorporated. Across this five-year period, the adjustment is only necessary in relation to the two years following the London Plan period (2029/30 and 2030/31). For each of these years the

¹⁶ prior to application of the full backlog – we note that government guidance indicates that a buffer should also be applied to the backlog

target needs to reduce from 703 homes to 559.6¹⁷ homes, so that the overall five-year target becomes 4,233.2 additional homes (3 x 1,038 plus 2 x 559.6).

- 8.5 With the addition of the total anticipated shortfall/ backlog of 2,724.8 additional homes at 1 April 2026, this five-year target becomes 6,958 additional homes, and with application of the 20% buffer this target becomes 8,349.6 additional homes. The resulting annualised target is 1,669.9 additional homes per year. Comparing with the anticipated 4,733.3 additional homes completed from 2026/27 to 2030/31, when applying the past shortfall/ backlog and a 20% buffer, Camden has a sufficient deliverable housing land supply to meet the proposed target for 2.8 years.

¹⁷ as set out in earlier in this assessment, when the Submission Draft Local Plan 15-year target of 11,550 was calculated, it incorporated an anticipated shortfall/ backlog of a little over 1,700 homes (1,721.4) against the London Plan target for Camden from 2019/20 to 2025/26. In effect, this element of the past shortfall has been divided between the 12 years of the Local Plan period which extend beyond the end of the London Plan period. To satisfy the NPPF and planning practice guidance in relation to the five-year housing land supply, it needs to be addressed in the first five years of the Plan period. For this to occur, initially the incorporated backlog needs to be removed from the Submission Draft Local Plan target for 2029/30 to 2040/41. This removal reduces the annualised target by 143.4 (1,721.4/ 12) from 703 homes per year to 559.6 homes per year.