



Nathaniel Lichfield
and Partners

Planning Design Economics

EVIDENCE REPORT

**PEMBROKESHIRE – THE HAVEN
SPATIAL PLAN AREA
COMPLEMENTARITY STUDY**

Welsh Assembly Government in
association with Pembrokeshire
County Council, Pembrokeshire
Coastal National Park Authority and
Carmarthenshire County Council

May 2009

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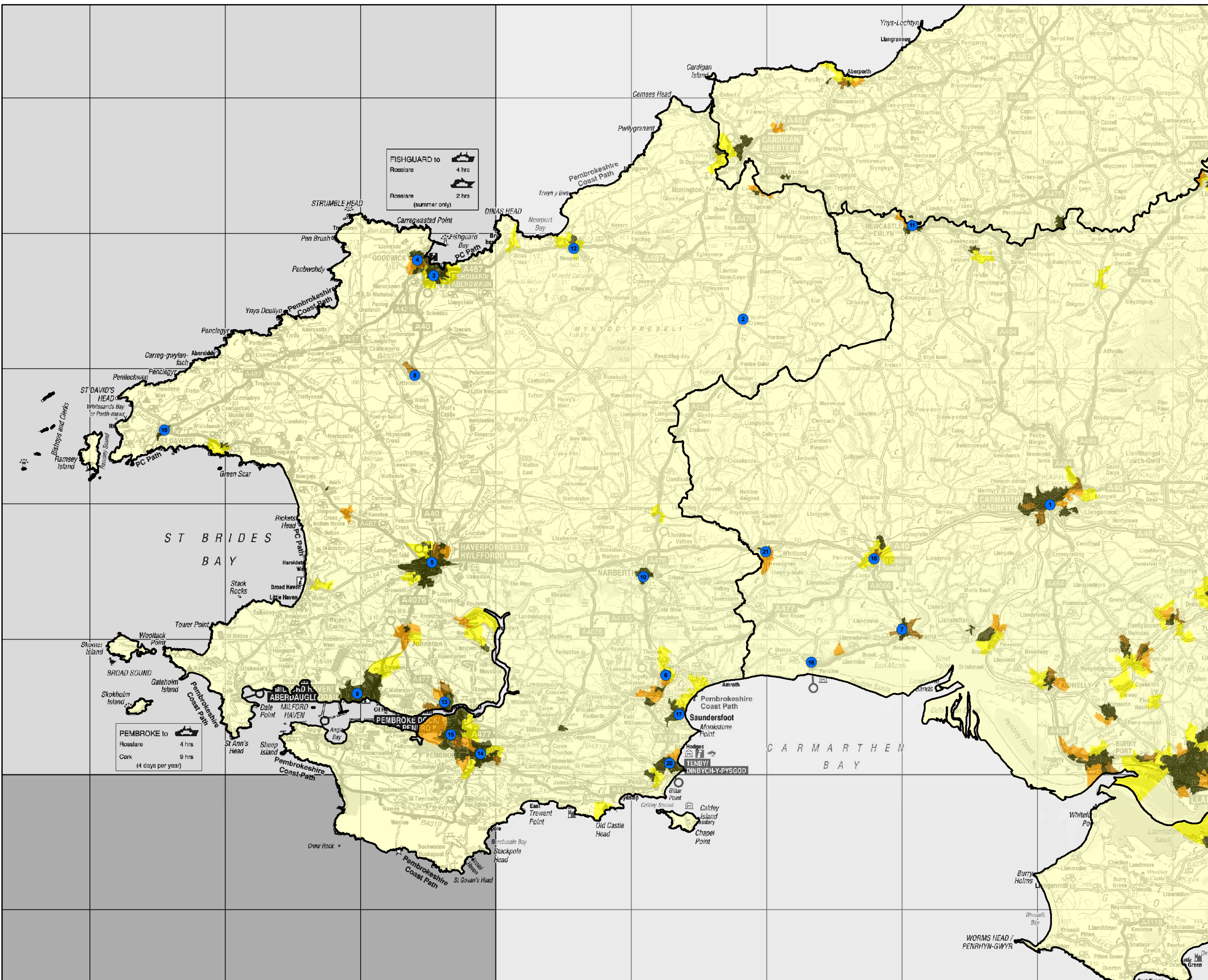
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APPENDIX 1 – POPULATION



Key

- Settlement
- 1. Carmarthen
- 2. Crymych
- 3. Fishguard
- 4. Goodwick
- 5. Haverfordwest
- 6. Kilgetty
- 7. Laugharne
- 8. Letterston
- 9. Milford Haven
- 10. Narberth
- 11. Newcastle Emlyn
- 12. Newport
- 13. Neyland
- 14. Pembroke
- 15. Pembroke Dock
- 16. Pendine
- 17. Saundersfoot
- 18. St Clears
- 19. St Davids
- 20. Tenby
- 21. Whitland

▭ Local Authority boundary

Population Density (number of people per hectare)*

- 0.00 - 2.00
- 2.01 - 4.00
- 4.01 - 6.00
- 6.01 - 8.00
- 8.01 +

* Source: Office for National Statistics, 2001 (Crown Copyright)

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Project Pembrokeshire Haven Complementarity Study

Title Population Density

Client Welsh Assembly Government

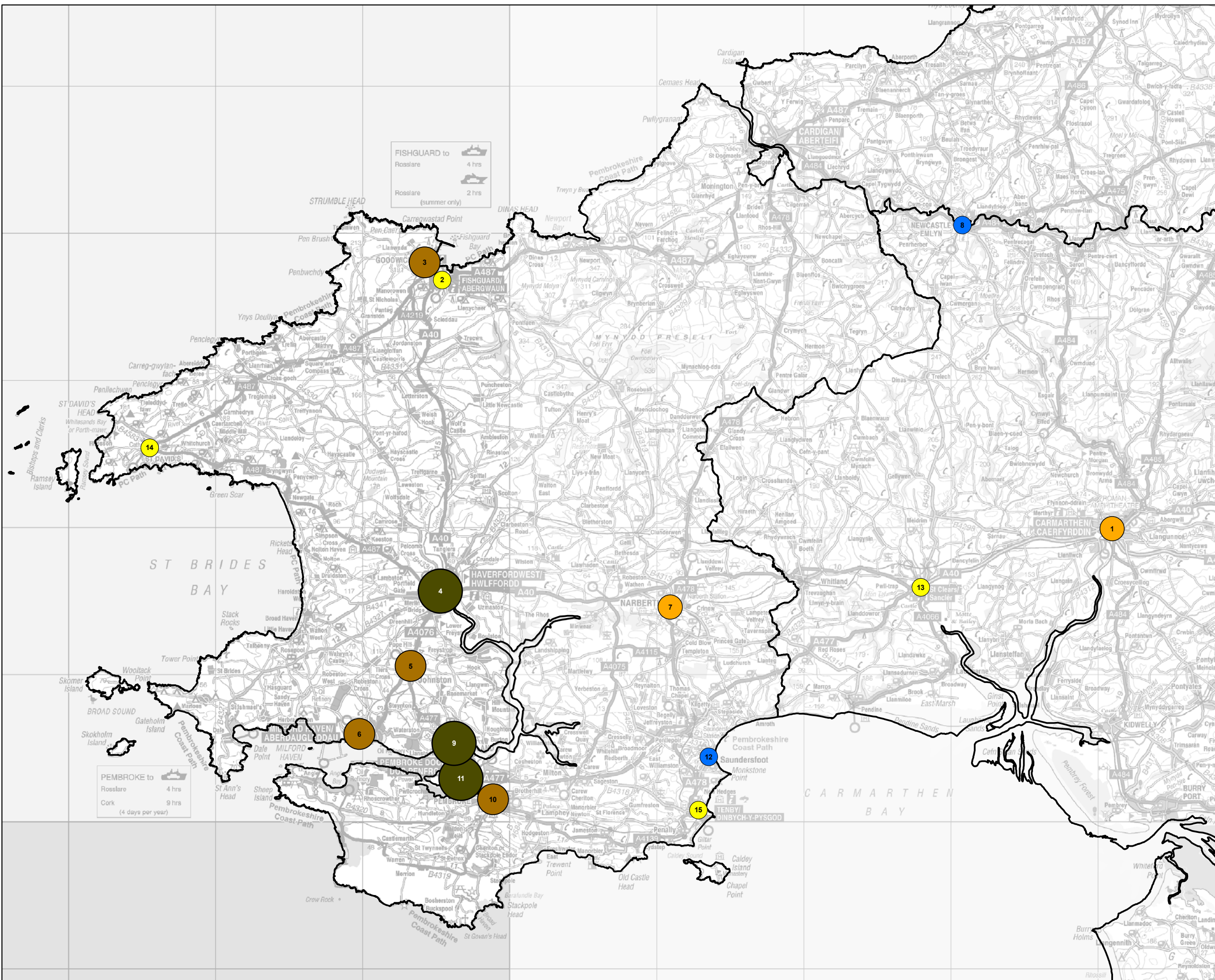
Date 26.02.09

Scale 1 : 250,000 @ A3

Drawn by MAR

Dwg. No GIS30576-008

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Key

Local Authority boundary

Population Projections: % Increase (2006-2026)*

- 15.01% and more
- 10.01% to 15.00%
- 5.01% to 10.00%
- 0.01% to 5.00%
- 5.00% to -0.00%

* Source: Experian Retail Planner 2006

- Settlement**
1. Carmarthen (6.68%)
 2. Fishguard (0.87%)
 3. Goodwick (10.18%)
 4. Haverfordwest (17.95%)
 5. Johnston (10.11%)
 6. Milford Haven (11.95%)
 7. Narberth (6.99%)
 8. Newcastle Emlyn (-1.4%)
 9. Neyland (15.78%)
 10. Pembroke (10.74%)
 11. Pembroke Dock (15.80%)
 12. Saundersfoot (-0.86%)
 13. St Clears (4.45%)
 14. St Davids (2.68%)
 15. Tenby (4.71%)



Project Pembrokeshire Haven Complementarity Study

Title Population Projections: % Increase, 2006-2026

Client Welsh Assembly Government

Date 29.04.09

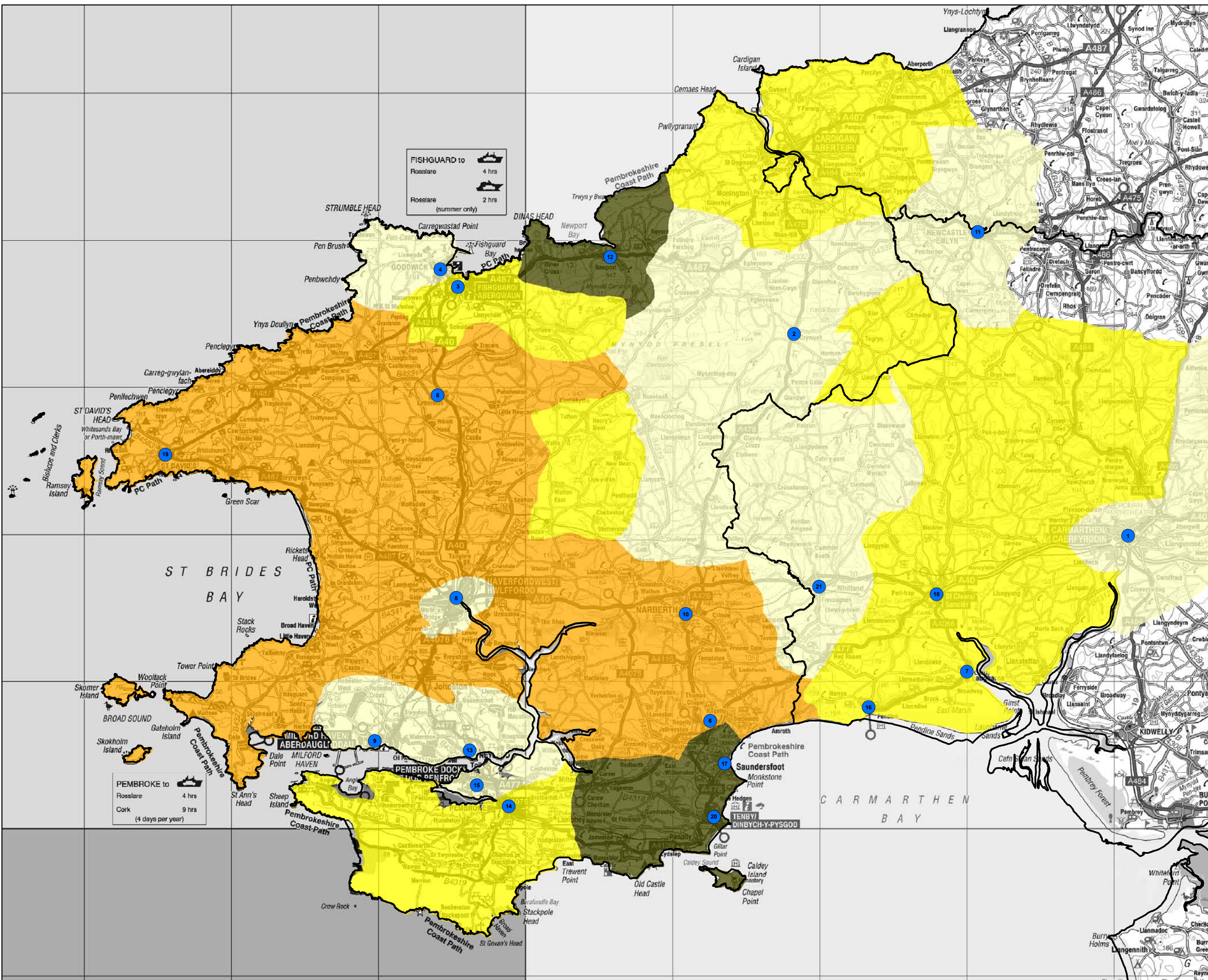
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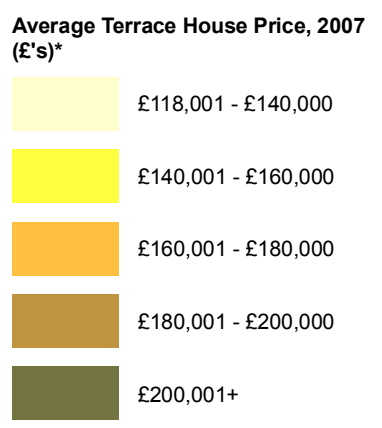
Dwg No GIS30576-037

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APPENDIX 2 – HOUSING



- Key**
- Settlement
 - 1. Carmarthen
 - 2. Crymych
 - 3. Fishguard
 - 4. Goodwick
 - 5. Haverfordwest
 - 6. Kilgetty
 - 7. Laugharne
 - 8. Letterston
 - 9. Milford Haven
 - 10. Narberth
 - 11. Newcastle Emlyn
 - 12. Newport
 - 13. Neyland
 - 14. Pembroke
 - 15. Pembroke Dock
 - 16. Pendine
 - 17. Saundersfoot
 - 18. St Clears
 - 19. St Davids
 - 20. Tenby
 - 21. Whitland
- ▭ Local Authority boundary



* Source: www.rightmove.co.uk

nlp Nathaniel Lichfield and Partners

Project: Pembrokeshire Haven Complementarity Study

Title: Average House Prices (2007) - Terraced

Client: Welsh Assembly Government

Date: 27.03.09

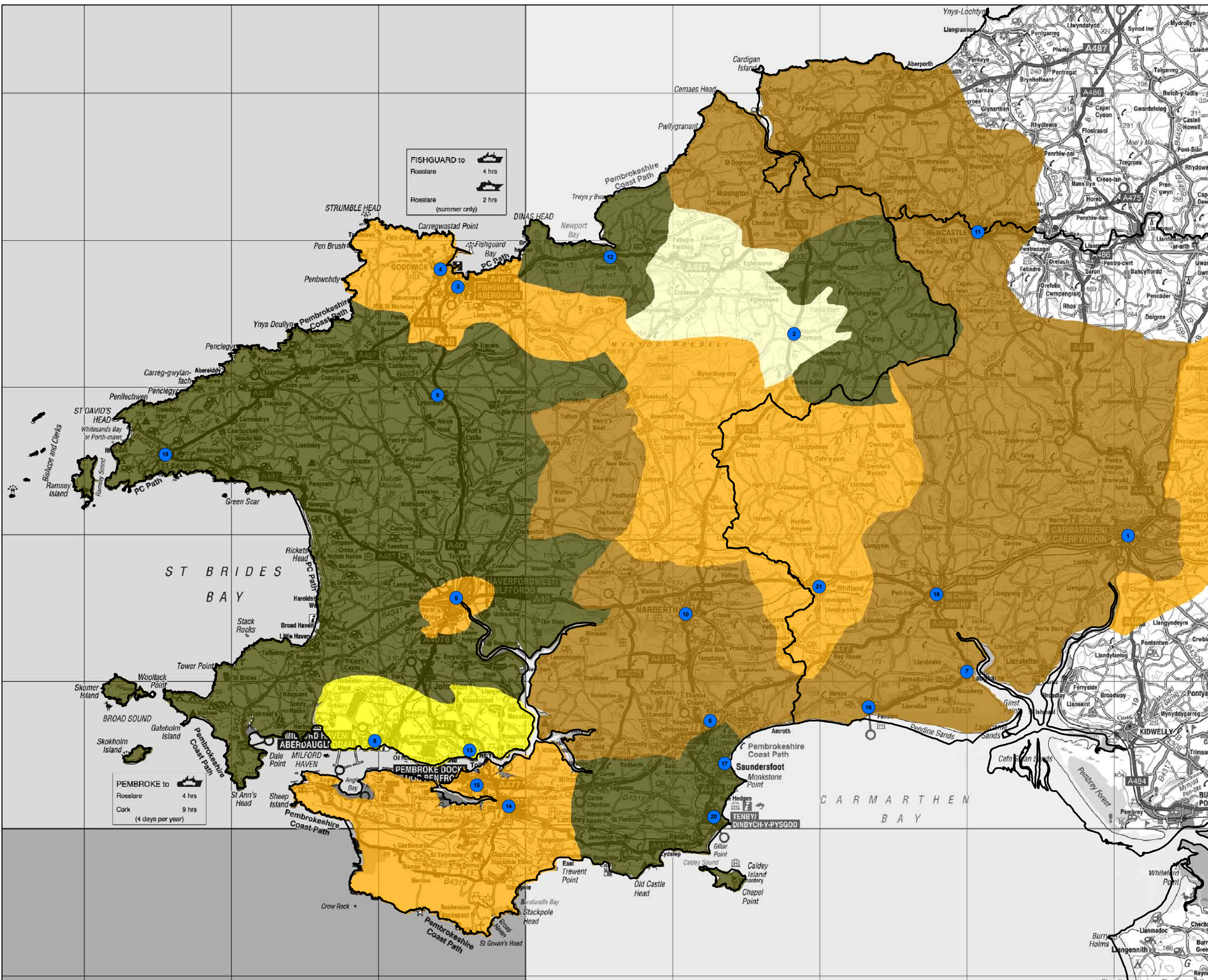
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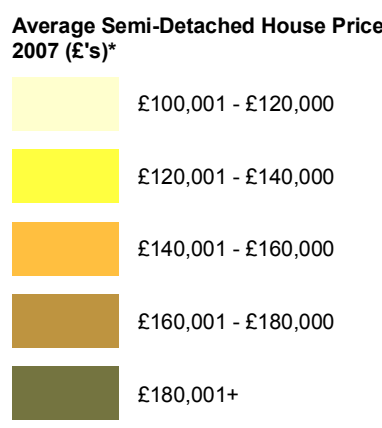
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GIS Reference: S:\WE30576 - Pembrokeshire Haven Complementarity Study\WE30576 - Pembrokeshire Haven Complementarity Study - Average House Prices (2007) - Terraced - 27.03.09.mxd



- Key**
- Settlement
 - 1. Carmarthen
 - 2. Crymych
 - 3. Fishguard
 - 4. Goodwick
 - 5. Haverfordwest
 - 6. Kilgetty
 - 7. Laugharne
 - 8. Letterston
 - 9. Milford Haven
 - 10. Narberth
 - 11. Newcastle Emlyn
 - 12. Newport
 - 13. Neyland
 - 14. Pembroke
 - 15. Pembroke Dock
 - 16. Pendine
 - 17. Saundersfoot
 - 18. St Clears
 - 19. St Davids
 - 20. Tenby
 - 21. Whitland
- ▭ Local Authority boundary



* Source: www.rightmove.co.uk

nlp Nathaniel Lichfield and Partners

Project: Pembrokeshire Haven Complementarity Study

Title: Average House Prices (2007) - Semi-Detached

Client: Welsh Assembly Government

Date: 27.03.09

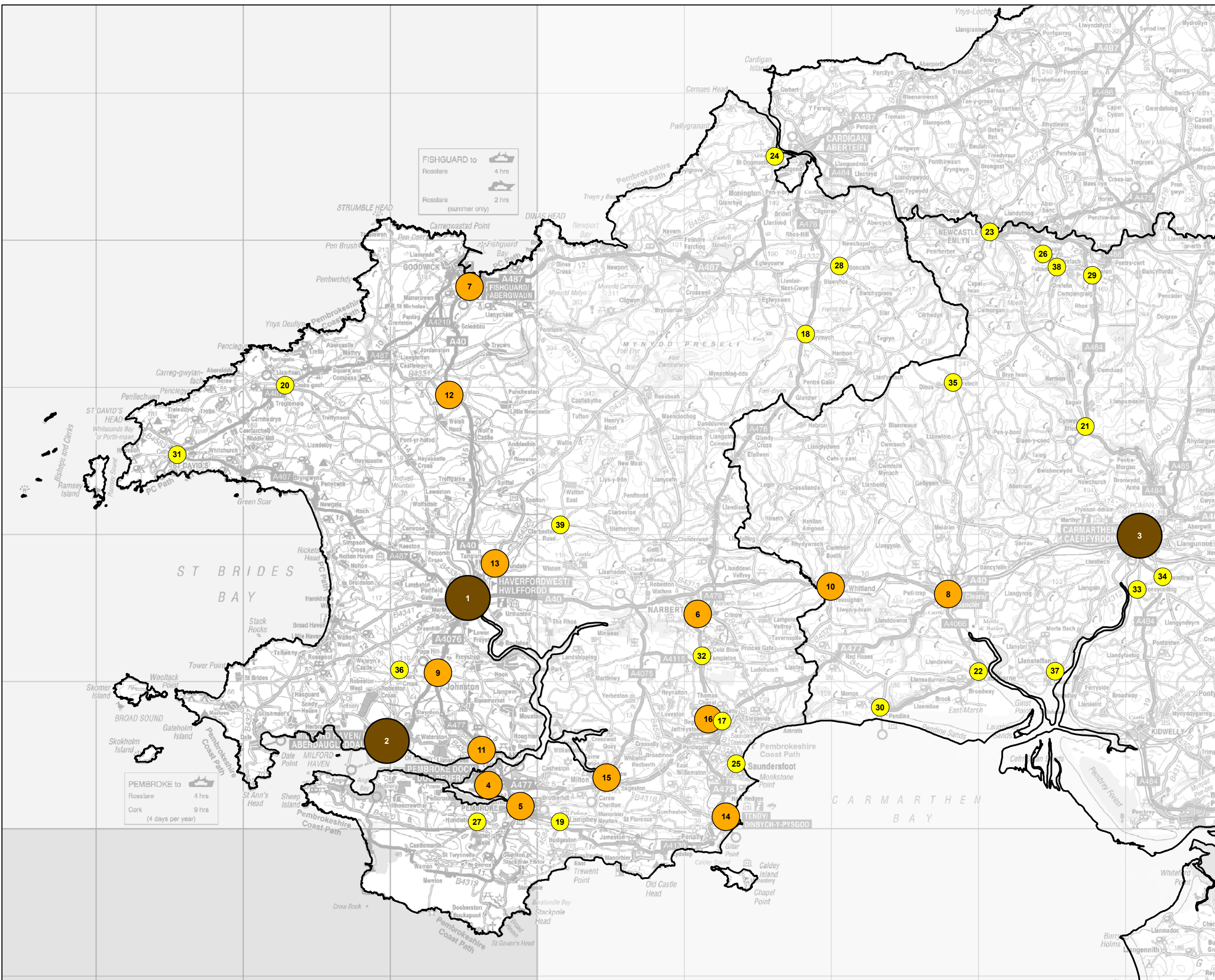
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Drawn by: MAf

Drwg No: GIS30576-020

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GIS Reference: S:\WE30576 - Pembrokeshire Haven Complementarity Study\WE30576 - Pembrokeshire Haven Complementarity Study - Average House Prices (2007) - Semi-Detached - 27.03.09.mxd



Key

Local Authority boundary

Housing Allocations: Number of Residential Units Allocated

- 500+ Dwellings
- 100-499 Dwellings
- 20-99 Dwellings

Centre: 500+ Dwellings

- Haverfordwest (1859)
- Milford Haven (1021)
- Carmarthen (642)

Centre: 100-499 Dwellings

- Pembroke Dock (496)
- Pembroke (363)
- Narberth (335)
- Fishguard (273)
- St Clears (270)
- Johnston (218)
- Whitland (216)
- Neyland (181)
- Letterston (140)
- Crundale (126)
- Tenby (120)
- Carew (115)
- Begelly (115)

Centre: 20-99 Dwellings

- Kilgetty (82)
- Crymych (80)
- Lamphey (70)
- Croes-goch (64)
- Cynwyl Elfed (62)
- Laugharne (50)
- Newcastle Emlyn (48)
- St Dogmaels (40)
- Saundersfoot (35)
- Waungilwen (35)
- Hundleton (30)
- Boncath (30)
- Saron (30)
- Pendine (26)
- St Davids (25)
- Templeton (25)
- Croesyeiliog (25)
- Cwmfrwd (23)
- Trelech (22)
- Tiers Cross (22)
- Llansteffan (20)
- Drefach Frelindre (20)
- Clarbeston Road (20)



Project Pembrokeshire Haven Complementarity Study

Title Housing Allocations

Client Welsh Assembly Government

Date 30.04.09

Scale 1 : 230,000 @ A3

Drawn by MAR

Dwg No GIS30576-038

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GIS Reference: S:WE30576 - Pembrokeshire Haven Complementarity Study\WE30576 - Pembrokeshire Haven Complementarity Study - Housing Allocations - 30.04.09.mxd



Schedule of Housing Allocations, Completions and Planning Applications

County	Site Name	No of Units Allocated	Housing Completions Since 2005	Planning Permission and Applications Since 2004
Carmarthenshire	Bancyfelin - R/O Fox & Hounds	8	3	
Carmarthenshire	Blaenycloed - Land adj Derlwyn	7	3	
Carmarthenshire	Bronwydd - Land at Parc yr Ebol	12		
Carmarthenshire	Carmarthen - Dolyronnen	5	1	
Carmarthenshire	Capel Iwan - adj Afallon	9		
Carmarthenshire	Capel Iwan - adj Pleasant View	5		
Carmarthenshire	Carmarthen - Adj Bryn Meurig	20		
Carmarthenshire	Carmarthen - adjacent Bro dawl	7		
Carmarthenshire	Carmarthen - Ashgrove	20		
Carmarthenshire	Carmarthen - Bronwydd Road, south	8		Permission for 38 units (only part of application site allocated)
Carmarthenshire	Carmarthen - Bronwydd Road, north	18		Permission for 9 Units
Carmarthenshire	Carmarthen - Cemetery Road	18		
Carmarthenshire	Carmarthen - Deveraux Drive	9		
Carmarthenshire	Carmarthen - Former coach depot, Abergwili	100		
Carmarthenshire	Carmarthen - Former Hospital, Priory Street	60	34	
Carmarthenshire	Carmarthen - Former MAFF Depot	18		
Carmarthenshire	Carmarthen - Land adj Lime Grove Avenue	15	15	Permission for 15 units
Carmarthenshire	Carmarthen - Mounthill	80	2	
Carmarthenshire	Carmarthen - Parc Thomas	5		
Carmarthenshire	Carmarthen - Penymorfs	150		
Carmarthenshire	Carmarthen - Plas Ystrad	14		
Carmarthenshire	Carmarthen - Rhandir Farm, Bronwydd Road	9		
Carmarthenshire	Carmarthen - Rhiw Babell	6		

Carmarthenshire	Carmarthen - Starling Park	60	39	Alteration - No. not specified
Carmarthenshire	Carmarthen- Parc y Delyn	20		Outline - No. not specified
Carmarthenshire	Cenarth - Adj allt y Gelli	11		
Carmarthenshire	Croesyceiliog - Opp Awel Lon (OS 6555)	8		
Carmarthenshire	Croesyceiliog - R/O Coppers	17	2	
Carmarthenshire	Cwmffrwd - adj Ffrwdwen	23		
Carmarthenshire	Cynwyl Elfed - adj Dolwerrd	6		
Carmarthenshire	Cynwyl Elfed - adj Fron Heulog	8		
Carmarthenshire	Cynwyl Elfed - Derwydd	18		
Carmarthenshire	Cynwyl Elfed - Land adj Lleine	30		
Carmarthenshire	Drefach Felindre - Parc Puw	20		
Carmarthenshire	Efailwen - R/O Hafod Wen etc	6		
Carmarthenshire	Glandy Cross - Land at Cross Roads	9		
Carmarthenshire	Glandy Cross - Land to the R/O Maesglas	8		
Carmarthenshire	Hermon - OS 4000	5		
Carmarthenshire	Laugharne / Broadway - Pludds Meadow	50		Permission for 24 units
Carmarthenshire	Llandbiody - Maesgwyne Arms Hotel - conversion opportunity	5		
Carmarthenshire	Llangeler - Brogeler	6		
Carmarthenshire	Llangynin - OS 8671, r/o Irfonan	10	4	
Carmarthenshire	Llangynog - Adj College Bach	6	1	
Carmarthenshire	Llansaint / Broadway - adj Hafan Deg	5		
Carmarthenshire	Llansaint / Broadway - adj Tabor Chapel	12		
Carmarthenshire	Llansteffan - adj Brynhedd	20		
Carmarthenshire	Llanybri - Adj Parc y Delyn	10		
Carmarthenshire	Meidrim - Drefach Road	16	1	
Carmarthenshire	Mynyddygarreg - Adj The Croft	24		
Carmarthenshire	Mynyddygarreg - land fronting Horeb Road and School Road	41		

Carmarthenshire	Nantycaws - Pt OS 7627 (Gwynfan)	6		
Carmarthenshire	Newcastle Emlyn - Whitegates	17		Application for 17 units - Undetermined
Carmarthenshire	Newcastle Emlyn - Pt OS 1100 Penlon	6		
Carmarthenshire	Newcastle Emlyn - R/O Sycamore Street	13		
Carmarthenshire	Newcastle Emlyn - Ty Llwyd	12		
Carmarthenshire	Pendine - Llanmiloe - Cysgod y Coed	15		Permission for 16 units
Carmarthenshire	Pendine - Llanmiloe - Pendine Hill	11	3	
Carmarthenshire	Peniel - Aberdauddwr Farm	17		
Carmarthenshire	Peniel - Adj Aberdauddwr Farm	6		
Carmarthenshire	Peniel - Greenhill Field	8		
Carmarthenshire	Pentrecwtr - pt OS 7040 opp Dyffryn Orio, Saron Road	15		
Carmarthenshire	Red Roses - Land adj Avola Farm	5		
Carmarthenshire	Rhos- Land South of Noddfa	5	1	
Carmarthenshire	Saron - adj Brynhyfryd	6		
Carmarthenshire	Saron - adj Capel Saron	8		
Carmarthenshire	Saron - adj Tyddyn y Celyn	9		
Carmarthenshire	Saron - opp Maes Geler	5		
Carmarthenshire	St Clears - Adj Brintannia Terrace	30		
Carmarthenshire	St Clears - adj Brynheulog etc	30		
Carmarthenshire	St Clears - adj Gardde Fields	10		
Carmarthenshire	St Clears - adj Lower Ostrey	40		Permission for 50 units
Carmarthenshire	St Clears - adj Pwlltrap Road	40	8	Permission for 28 units
Carmarthenshire	St Clears - Glasfryn School, Station Road	60	12	Permission for 48 units
Carmarthenshire	St Clears - Land at salem Road	20		
Carmarthenshire	St Clears - Pwlltrap Rpad R/O Merwyn etc	5		
Carmarthenshire	St Clears - R/O Avon bank	7	5	
Carmarthenshire	St Clears - School Site	12	1	
Carmarthenshire	St Clears - Station Road	16		Application for 20 units - Undetermined

Carmarthenshire	Trelech - adj Picton House	15		
Carmarthenshire	Trelech - adj Tower Hill	7	2	
Carmarthenshire	Waungilwen - adj Nant Y Bran	5		
Carmarthenshire	Waungilwen - Land at Arwel	11		
Carmarthenshire	Waungilwen - Land at Crossroads	5		
Carmarthenshire	Waungilwen - Land at Waungilwen Road	8		
Carmarthenshire	Waungilwen - opp Springfield	6		
Carmarthenshire	Whitland - North Road Surgery	18	7	
Carmarthenshire	Whitland- adj Lon Hywel	28		Outline - No. not specified - undetermined
Carmarthenshire	Whitemill - Allt-Ty-Llwyd	6		
Carmarthenshire	Whitland - adj Spring Gardens	70		Outline - No. not specified - undetermined
Carmarthenshire	Whitland - Lingfield Park / lley Ty Gwyn	25	8	
Carmarthenshire	Whitland - Spring Gardens	75	12	
Pembrokeshire	Abercych - adjacent to Penrhiw	9		
Pembrokeshire	Abercych - OS 9736 (part)	4		
Pembrokeshire	Begelly - Barley Park Cottages site	35		
Pembrokeshire	Begelly - extension to the New Road site	35		
Pembrokeshire	Begelly - north of New Road	45		
Pembrokeshire	Blaenffos - opposite Lodge Fach	16		
Pembrokeshire	Boncath - Old Station Yard	30		Permission for 30 Units
Pembrokeshire	Camrose - land south of Beech Grove	8		
Pembrokeshire	Carew / Sageston - National Park caravan stie	75		
Pembrokeshire	Carew / Sageston - South of Ashleigh Heights	40	5	
Pembrokeshire	Cilgerran- OS parcel 0386 adjacent to Holly Lodge	18		
Pembrokeshire	Clarbeston Road - OS 6879 and OS 6871 (part)	20		
Pembrokeshire	Cosheston - west of Woodfield Grove	7	6	
Pembrokeshire	Croesgoch - east of the Forge	25		
Pembrokeshire	Croesgoch - OS 7445, N of the Forge	39		
Pembrokeshire	Crundale - adjacent to Greenwell Park	40		Outline - No. not specified

Pembrokeshire	Crundale - Land at Cardigan Slade	55		Outline - No. not specified
Pembrokeshire	Crundale - opposite Woodholm Close	13		Outline - No. not specified
Pembrokeshire	Crundale- South of Elm Park	18		Permission for 12 Units
Pembrokeshire	Crymych- between the school and Station Road	80		
Pembrokeshire	Dale-Castle Way	5		
Pembrokeshire	Dinas Cross - Tabor	4		
Pembrokeshire	Dinas Cross- Opposite Bay View Terrace	4		
Pembrokeshire	Fishguard - east of Vergam Terrace	33	2	
Pembrokeshire	Fishguard - Maesgwynne Farm	120	10	
Pembrokeshire	Goodwick - adjacent to Dyffryn Garage	13	1	
Pembrokeshire	Haverfordwest - adjacent to Priory Cottage, Ellis avenue	10		
Pembrokeshire	Haverfordwest - behind City Road	168	12	
Pembrokeshire	Haverfordwest - between Shoalshook Lane and the by pass	277		
Pembrokeshire	Haverfordwest - Cardigan Road	72		
Pembrokeshire	Haverfordwest - Hermitage Farm	23		
Pembrokeshire	Haverfordwest - Land South of Thomas Parry Way	29		
Pembrokeshire	Haverfordwest - Scarrowscant	266	4	Outline - No. not specified
Pembrokeshire	Haverfordwest - slade Lane North	446		
Pembrokeshire	Haverfordwest- - Slade Lane South	516		Application refused
Pembrokeshire	Haverfordwest - Gas depot site, Lower Cambrian Way	16		
Pembrokeshire	Herbrandston - Rear of the Sir Benfro Hotel	10		
Pembrokeshire	Hook, r/o Pill Road	12	7	
Pembrokeshire	Hundleton - east of Bentlass Road	30		
Pembrokeshire	Jameston - Land rear of Bush Terrace	16		
Pembrokeshire	Johnston- adjacent to Milfrod Road	119		
Pembrokeshire	Johnston- between fairfield and the railway	20	32	
Pembrokeshire	Johnston- adjacent to the Filling Station	79		Permission for 123 Units
Pembrokeshire	Keeston - Land adjacent to West Lane Close	15		
Pembrokeshire	Kilgetty - extension to James Park and Cotswold Gardens	36		
Pembrokeshire	Kilgetty - land to the south of Kilveggy Park	12		

Pembrokeshire	Kilgetty - west of Stepside School	10		
Pembrokeshire	Lamphey - south of Cleggar's Park	30		
Pembrokeshire	Lamphey - south of Cleggar's park - extension site	40		
Pembrokeshire	Letterston - adjacent to 47 Station Road	7	2	
Pembrokeshire	Letterston - adjacent to Court House	65	2	
Pembrokeshire	Letterston - OS 5574 St David's Road	23		Permission for 11 Units
Pembrokeshire	Letterston - OS 8975, Station Road	45		
Pembrokeshire	Little Haven - The Boatyard	3		
Pembrokeshire	Milford Haven - Kings Functions Center, Dale Road	90		
Pembrokeshire	Milford Haven - East of Bunkers Hill	50		
Pembrokeshire	Milford Haven - East of Lilac Close	75		
Pembrokeshire	Milford Haven - Greenmeadow, Steynton	177	23	
Pembrokeshire	Milford Haven - Land adjacent to King's function centre, Dale Road	50		Permission for 32 Units
Pembrokeshire	Milford Haven - Land at Grove Estate	22		
Pembrokeshire	Milford Haven - Land West of Silverstream, Hubberston	50	8	
Pembrokeshire	Milford Haven - Milford Dock	80	75	
Pembrokeshire	Milford Haven - South of the Meads	70		
Pembrokeshire	Milford Haven - Thornton Road	224		
Pembrokeshire	Milford Haven - Westhill Estate	144	52	
Pembrokeshire	Narberth - west of OS 9922, Rushacre	30		
Pembrokeshire	Narberth - Dingle Farm	90		
Pembrokeshire	Narberth - east of B4313, Redston Road	50		
Pembrokeshire	Narberth - east of Northmead	52		
Pembrokeshire	Narberth - west of Bloomfield Gardens	50		
Pembrokeshire	Neyland - Adjacent to Bluebell Close	40		
Pembrokeshire	Neyland - east of Poppy Drive	101		
Pembrokeshire	Neyland - Neyland Vale (Honeyborough Farm)	40	51	
Pembrokeshire	Pembroke - adjacent to Long Mains and North East of Marshall Lane	80		
Pembrokeshire	Pembroke - adjacent to Monkton Swifts	62		

Pembrokeshire	Pembroke - north and west of Railway Tunnel	70		
Pembrokeshire	Pembroke - north of Monkton Priory	25		
Pembrokeshire	Pembroke Dock - adjacent to Fairways, Pennar	24	4	
Pembrokeshire	Pembroke Dock - adjacent to Southampton Row	17		
Pembrokeshire	Pembroke Dock - east of Hill Farm, Imble	40		
Pembrokeshire	Pembroke Dock - east of Sycamore Street	17	5	
Pembrokeshire	Pembroke Dock - Llanion Park extension	50		
Pembrokeshire	Pembroke Dock - N of Imble Lane	40		
Pembrokeshire	Pembroke Dock - north of Essex Road, West Llanion	20		
Pembrokeshire	Pembroke Dock - north of Pembroke Road	60		
Pembrokeshire	Pembroke Dock - Pennar Park	85	26	Permission for 77 Units
Pembrokeshire	Pembroke Dock - south of Straenraer Road	10		
Pembrokeshire	Pembroke Dock - south west of Nelson Stree, Pennar	15		
Pembrokeshire	Pembroke Dock - Straenraer Road, Pennar	40		
Pembrokeshire	Pembroke Dock - west of Ferry Road, Lower Pennar	20	13	Permission for 18 Units
Pembrokeshire	Pentlepoir - land to the South of Valley Road	13		
Pembrokeshire	Penybryn - NE of Llys Gwyn	7		
Pembrokeshire	Rosebush - Near Belle Vue	2		
Pembrokeshire	Saundersfoot - The Incline	35		
Pembrokeshire	Scleddau - part OS 4200, N of Cefn Coed	15		
Pembrokeshire	Skrinkle Manorbier- Between Gray Avenue and Housel Avenue	4		
Pembrokeshire	Solva - Adjacent to Bro Dawel	18		
Pembrokeshire	Spittal - Adjacent to the New School	14		Outline- Undetermined
Pembrokeshire	St Davids - North of Twr-y-Felin	25		
Pembrokeshire	St Dogmeals - site at the rear of Longdown Street and Adjoining Mwtshwr	40	2	
Pembrokeshire	St Ishmaels - Land N of Birgage Green Close	5		
Pembrokeshire	Stepaside - land opposite the school	10		
Pembrokeshire	Templeton - land South of the B4315	25		
Pembrokeshire	Tenby- Brnhir	120		

Pembrokeshire	Tiers Cross - N of Bjulford Road	22	
Pembrokeshire	Waterston - land North of Main Road	18	

APPENDIX 3 – EMPLOYMENT