Course correction

How to densify British cities

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The analysis, views and recommendations in the report are those of Centre for Cities only.

Notes

This report is the latest in a series of Centre for Cities research on housing density. Interested readers should also refer to:

Flat Britain: The urban density gap and how to close it

Croydon Calling: Lessons on rules-based planning

Further research investigating how the quality of transport infrastructure interacts with housing density will be published later this year.

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Executive summary

The Government has rightly made densification of cities a key policy priority and has set out several proposals in recent months, including a City Densification Fund and new planning reforms through the National Planning Policy Framework.

This policy attention is welcome. Recent Centre for Cities research found that British cities have a 'density gap' of 2.3 million homes across their urban cores compared to their French and Japanese peers. The density gap is largest in the big cities outside London and is a likely cause of their economic underperformance.

This research uses data on historic neighbourhood age and Centre for Cities' residential densities dataset to dig deeper into **where densification needs to occur** and **what policy needs to do differently.**

Findings

This research finds:

- **The urban cores of all British cities mostly consist of old housing stock**. The share of recent development will need to increase if densities are to increase.
- **Low-density post-war neighbourhoods are common in the urban cores of the largest big cities such as Manchester, Liverpool and Birmingham.** These neighbourhoods explain a large share of these cities' density gap.
- **Other cities face different challenges to increase densities,** including low-density pre-war neighbourhoods.
- **The density of recent development has barely replicated the density of older development**, except in the very centres of big cities and in London.
- **Previous policy attempts to increase densities using national minimum density standards have not achieved significant increases in the density of development in cities.**

What needs to change

1. **Planning reform needs to continue to move towards a more spatial, rules-based system that actively promotes densification in cities.** Measures to achieve this include:
    - The NPPF should require local authorities to designate urban cores, and amend recent proposals for national minimum density policies.
    - Mayors should use Spatial Development Strategies to introduce London-style density matrices to set expectations that densities should increase and vary according to connectivity to city centres.
    - Local authorities should establish minimum and maximum building heights in all parts of the urban core, and introduce Croydon-style policies to encourage intensification.
2. **Funding should be made available specifically for regeneration of low-density post-war neighbourhoods in the urban cores of the largest cities.**
3. **Metro mayors should use new powers introduced in the English Devolution Bill to establish and use Mayoral Development Corporations**
4. **National government should take action to increase viability of urban development.** Measures to do this include:
    - Site threshold reforms, including to enable cash, rather than on-site, affordable housing contributions.
    - Removing Biodiversity Net Gain requirements on brownfield sites.

01

Introduction

The Government has recently set out new proposals to try to increase housing densities in cities, including measures in the National Planning Policy Framework which will apply to all cities and a City Densification Fund focused on the big cities outside London.[1]

The recognition of the need to increase densities in cities is welcome. British cities have a 'density gap' of 2.3 million homes across their urban cores compared to their French and Japanese peers.[2] This gap is largest in the 12 big cities outside London and is likely a key cause of their economic underperformance, as it means the effective size of their labour markets is like those of much smaller places.[3]

Working out how to increase housebuilding in big cities' urban cores is therefore crucial, not only to addressing the UK's shortage of 4.3 million homes, but also to increasing productivity and economic growth.[4]

Despite the clear rationale for doing so, cities struggle to build in urban core locations.[5] As policymakers seek to address this, two important questions will need to be answered:

- Where does densification need to occur within the urban cores of British cities?
- What does policy need to do differently to increase densities and housebuilding in these locations?

This research uses data on historic neighbourhood age and Centre for Cities' residential densities dataset to answer these questions.

1 Recent announcements in the December 2025 draft NPPF suggest minimum densities in 'well-connected' locations of 50 dwellings per hectare, and other measures to shift toward a 'default yes' for within-settlement development. MHCLG (2025) National Planning Policy Framework: proposed reforms and other changes to the planning system.
An £800m grant-based City Densification Fund is to be allocated to established Mayoralties along with £1.5 billion in financial transactions through the Housing Acceleration Fund.
MHCLG (2026) Chancellor backs North with £1.7bn for city-centre projects.

2 Lange, M, Breach A, & Kovacevic, L (2025), Flat Britain: The urban density gap and how to close it. Centre for Cities.

3 Breach, A & Swinney, P (2024), Climbing the Summit: Big cities in the UK and the G7. Centre for Cities.

4 Watling, S & Breach, A (2023) The housebuilding crisis: The UK's 4 million missing homes. Centre for Cities.

5 Between 2011 and 2021 big British cities built roughly half the amount of housing in their urban cores as their peer cities in France and Japan – see Section 3 of Lange, M, Breach A, & Kovacevic, L (2025) Flat Britain: The urban density gap and how to close it. Centre for Cities.
Low housebuilding rates have been a longstanding issue in British cities. See Breach, A (2024) Restarting housebuilding I: Planning reform and the private sector. Centre for Cities.

Section 2 delves deeper into the density and distribution of neighbourhoods from different time periods to better understand how Britain's low-density cities have been built over time and identify where policy attention is needed.

Section 3 reviews how policies have shaped these outcomes and identifies what will need to change in future. Section 4 sets out the range of strategies needed to increase density across different neighbourhoods in urban cores. Section 5 sets out policy recommendations for national, mayoral and local government.

Box 1: The analytical approach and data used in this briefing

This paper discusses different neighbourhoods purely in density terms to narrow the focus of the analysis. Housing policies and interventions could, of course, be justified on other grounds, such as improving affordability or quality even if that did not involve increasing densities.

Measuring 'housing density' and identifying neighbourhood age:

Data on housing density uses Centre for Cities' dataset, which combines Census, administrative and satellite datasets to measure residential floorspace per hectare.[6]

Neighbourhood age is calculated at the postcode level using Energy Performance of Buildings data for individual properties, which provides housing age (as bands or individual years) and location data.[7] The term 'neighbourhood' is used throughout this briefing, and when referring to data on neighbourhood age this means individual postcodes.

The density of neighbourhoods from different time periods is calculated by interacting the two datasets.[8] This provides a snapshot of the density of neighbourhoods from each period which survive today. It does not reflect the density of all development from a given time period, as some neighbourhoods built in the past have since been replaced or demolished.

6 For details on how this is estimated, see Appendix 8 of Lange, M, Breach, A & Kovacevic, L (2025) Flat Britain: The urban density gap and how to close it. Centre for Cities.

7 Postcodes are attributed to age bands according to the following logic:

i) if over 80 per cent of dwellings are in a single, narrow age band (e.g. 1950-1965), the postcode is attributed to that age band.

ii) if conditions for i) are not met, and if 80 percent of dwellings are in a wider age band (e.g. 1950-1995), the postcode is attributed to that age band.

iii) if neither i) or ii) conditions are met, the postcode is labelled 'mixed'. Mixed neighbourhoods can be further subcategorised e.g. according to whether any dwellings were built between 1996 and 2020 or according to the modal occurring age band.

Figures below present combinations of the categories produced by this logic to simplify presentation. For example, in most charts all narrow and wide post-war categories are presented as a single post-war period. Note that for Scottish cities age bands differ by +/- 3 years and are grouped with their most similar English & Welsh category.

8 Areas with density measured below 1000 metres squared per hectare (~9 dwellings per hectare) are excluded to consistently remove 'edge of city' areas from the dataset and avoid downward biasing of density of neighbourhoods built more recently (more likely to be at the edge of the built up area).

City sizes:

Cities are grouped according to the number of people in their commuting area, using the OECD's Functional Urban Area definition.[9] Categories are as follows: London; big cities: 0.9–3 million; medium cities: 0.3-0.9 million; and small cities: 0.1-0.3 million.

Urban core:

This briefing follows recent Centre for Cities research, focusing on the 'urban core' – the main residential built-up area of the city. Most housing development in urban cores would involve brownfield, infill or regeneration, rather than greenfield development.

The urban core includes but should not be confused with the city centre, or central business district, as it covers a much larger area of the city.

The urban core is defined consistently between cities in the same size category. London: 14.1km; big cities: 4.5km; medium cities: 2.2km; and small cities: 2.0km.

9 The OECD FUA definition and population is used rather than CfC PUA for consistency with the first density paper in this series. Cities fall into the same groupings as other CfC research which uses PUAs. Dijkstra, L, Poelman, H & Veneri, P (2019) The EU-OECD definition of a functional urban area. OECD Regional Development Working Papers 2019/11

02

Britain's big cities have experienced a century of low-density housebuilding

Policy to increase densities needs to understand how British cities have come to be built as they are. Which neighbourhoods are especially low-density, what is their built form, and where are they located? Has recent housebuilding contributed to the density gap, or is some course-correction through denser building already underway?

This section addresses these questions and identifies the different challenges densification policies need to address if British cities are to close the density gap.

Densification requires an increase in the share of new housing in urban cores

Figure 1 shows that regardless of their size, British cities mostly consist of older housing stock. Two-thirds of neighbourhoods are comprised of housing built before 1996. Urban cores are older than the outer suburbs, with almost half of all their neighbourhoods built before the Second World War.[10] The outer suburbs have a particularly large share of stock built in the suburban housebuilding booms of the 1930s and post-war period.

10 See Footnote 7 for methodology for attributing postcode areas to age bands. Note 1: This chart shows postcodes as they represent 'chunks' of the city. Dwellings built since 1996 are ~15 per cent of all dwellings in EPC data in urban cores (20 per cent in the largest big cities). Note 2: This chart 'conceals' a small number of postcodes with new dwellings: between 5 and 10 per cent of pre-1949 postcodes, and between 11 and 17 per cent of post-war postcode areas, contain at least one post-1996 dwelling.

Figure 1: Most neighbourhoods in British cities are comprised of homogeneous, older housing stock[11]

Share of neighbourhoods by time periods, in urban cores and outer suburbs

Sources: MHCLG Energy Performance of Buildings Data

Increasing the density of British cities will require the share of neighbourhoods with new housing (purple and pink) to increase in urban cores. This could happen through a combination of adding new, higher-than-average density neighbourhoods where no housing currently exists; by replacing older, low-density neighbourhoods; and/or by adding housing in existing neighbourhoods.

Low densities in urban cores are driven by neighbourhoods built between 1930 and 1995

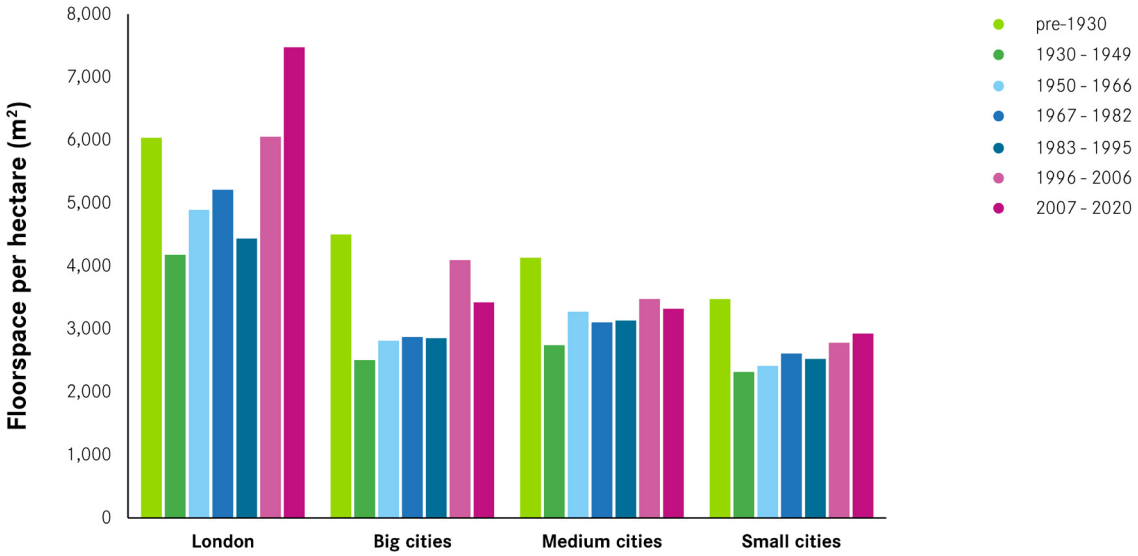
Figure 2 shows that the density of neighbourhoods from different time periods varies significantly – some are contributing more to the urban core density gap than others.

In most cities' urban cores, the densest neighbourhoods present today were built before 1930, while neighbourhoods built between 1930 and 1995 were built at markedly lower densities. The difference in densities between these periods is particularly stark in the big cities.

11 Note that pre-war housing is the modal age group in 57 per cent of urban core mixed neighbourhoods and 54 per cent of outer suburb mixed neighbourhoods.

Figure 2: In most cities, the densest neighbourhoods present today were developed before 1930[12]

Average density of single-period neighbourhoods in urban cores



Sources: Centre for Cities Residential Density Dataset and MHCLG Energy Performance of Buildings Data

Recent housebuilding (since 1996) has increased densities slightly compared to post-war lows but remains below pre-1930s densities. The fact that neighbourhoods from 2007–2020 are lower density on average than those from the preceding period in big cities suggests any trend toward higher-than-post-war densities in urban cores is relatively weak.

London is the exception in two ways. First, it has consistently built at higher densities than other cities, regardless of the period. Second, it is the only city in which recent housebuilding is the densest of any period.

Post-war neighbourhoods are a key cause of the density gap in the largest big cities

Recent Centre for Cities research showed that the largest big cities (Manchester, Birmingham, Liverpool, Leeds and Glasgow) have some of the largest density gaps to their peer cities.[13] Addressing these gaps in particular should be a priority for the Government.

Figures 3a and 3b show that **post-war neighbourhoods, located just beyond the city centre are a key driver of the density gap in the urban cores of the largest big cities.** Post-war neighbourhoods are up to 40 per cent less dense than similarly located pre-war neighbourhoods (Figure 3a). These neighbourhoods comprise a large share of urban cores

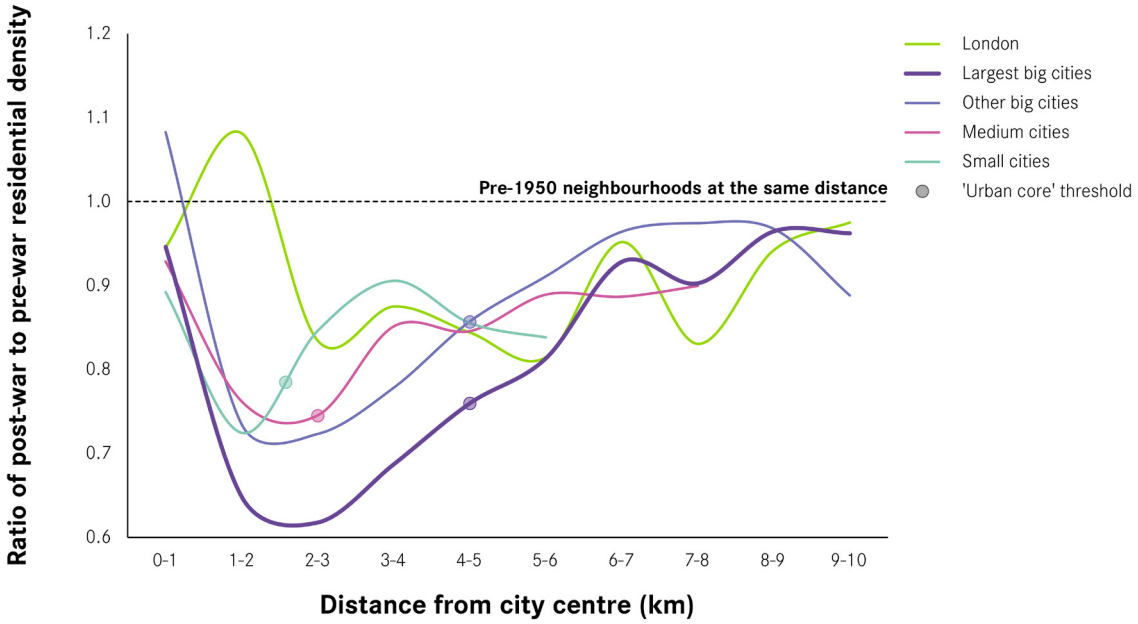
12 Note this chart includes only neighbourhoods in which >80 per cent of dwellings are in the single, narrower age categories shown. Densities of larger age categories (where >80 per cent of dwellings are 1900-1949, and 1950-1995, 1990-2020) generally reflect the average of single periods but are not shown.

13 See Section 6 of Lange, M, et al. (2025) Flat Britain: The urban density gap and how to close it. Centre for Cities. Sheffield and Newcastle also have substantial density gaps to peers but are separated because of their smaller populations and because they show the reported pattern to a lesser degree.

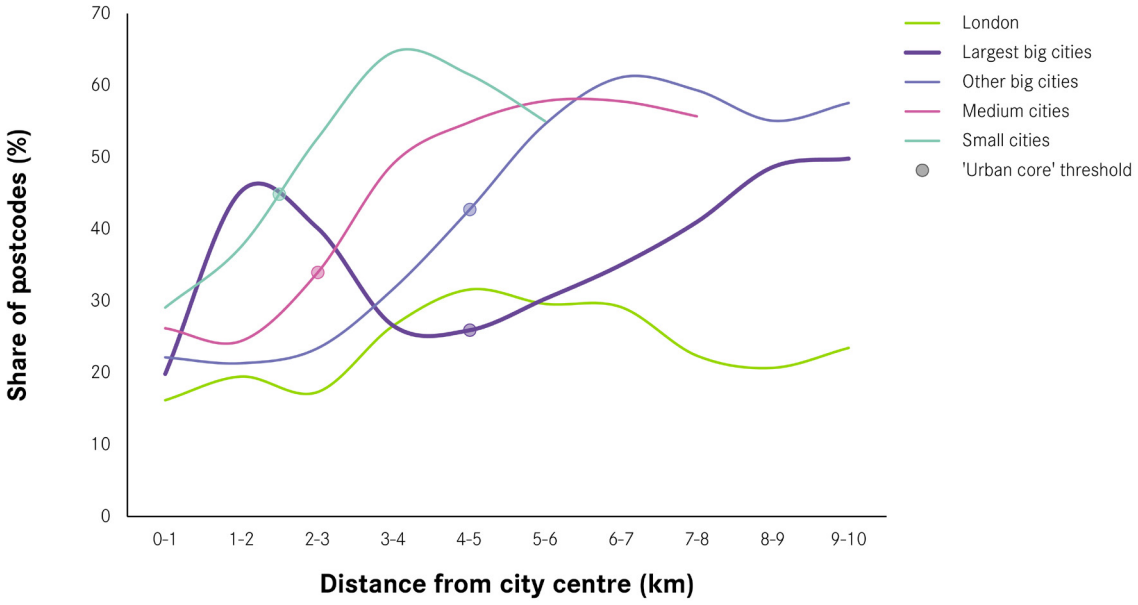
– nearly half of all the neighbourhoods between 1 to 2 kilometres from the city centres of the largest big cities were built in the post-war period (Figure 3b).

Figure 3a and 3b: Low densities in the urban core of the largest cities is driven by post-war neighbourhoods[14]

Ratio of post-war to pre-war average residential density, by distance from city centre



Post-war (1950-1995) share of neighbourhoods, by distance from city centre



Sources: Centre for Cities Residential Density Dataset and MHCLG Energy Performance of Buildings Data

14 Note that London's post-war to pre-war ratio remains similar throughout the urban core and increases slightly in the suburbs. Similarly, the share of post-war housing is largely constant and increases slightly in the suburbs.

Post-war neighbourhoods are substantially less dense than pre-war neighbourhoods in other cities, but they make up a smaller share of neighbourhoods in their urban cores and the difference in density is not as great.

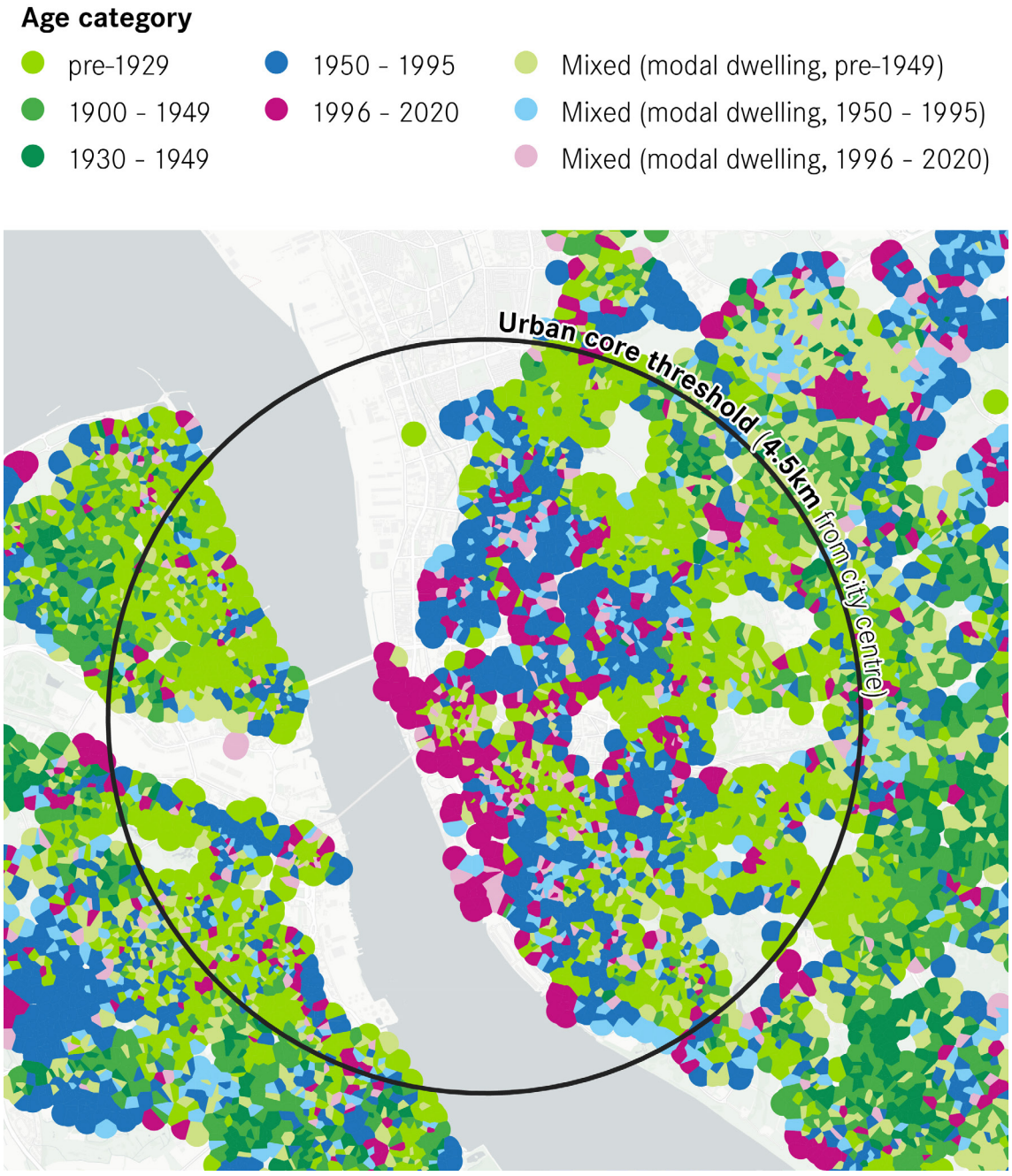
Figures 4a and 4b show where neighbourhoods of different ages are located, in Liverpool and Manchester, respectively. Postcodes are represented by small polygons and coloured according to their age category.[15]

These maps clearly show a 'collar' of post-war neighbourhoods (blues) located just beyond the city centre, between kilometres 1 and 4, in the part of the city with the greatest accessibility to the city centre and its jobs and amenities.

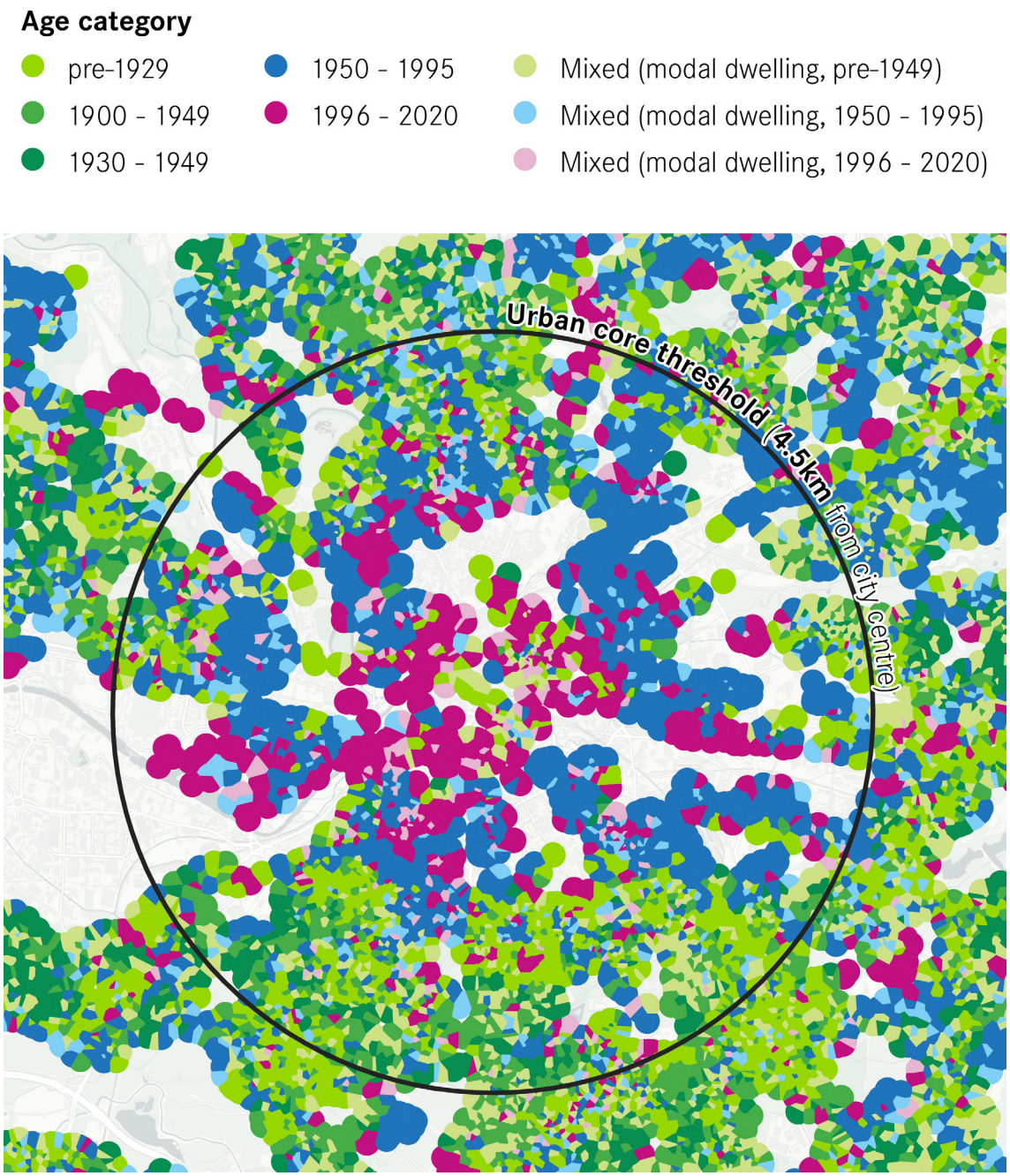
The denser pre-1929 neighbourhoods (light greens) are mostly further out in the urban core, then followed by less dense pre-war neighbourhoods (darker greens) further out again. Meanwhile, the majority of recent housebuilding activity (purples) has been focused in city centres.

15 Postcode centroid points are used to create Voronoi polygons, clipped either by proximity to neighbouring postcodes or 150 metres, whichever is closer – hence the 150m circles on the edges of residential areas. Mixed neighbourhoods are coloured according to the modal age category in the postcode.

Figure 4a and 4b: Post-war neighbourhoods are in the middle of the urban cores of many big cities. Liverpool and Manchester shown



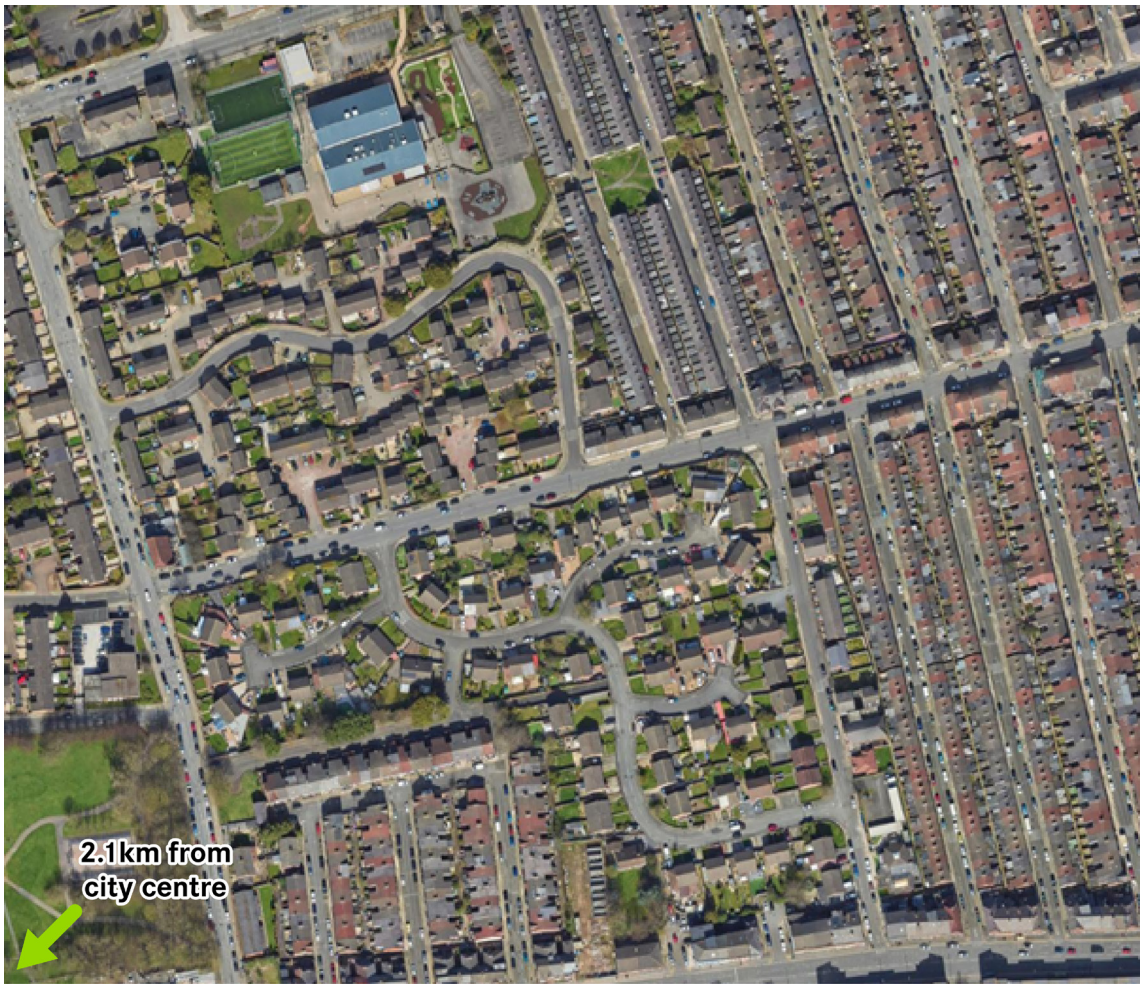
Sources: Centre for Cities Residential Density Dataset and MHCLG Energy Performance of Buildings Data



Sources: Centre for Cities Residential Density Dataset and MHCLG Energy Performance of Buildings Data

To illustrate this further, Figure 5 shows a typical example of post-war housing in aerial view, next to a much denser pre-war terraced neighbourhood, 2.1 kilometres away from Liverpool's city centre. These semi-detached and detached houses on curved streets produce a suburban built form in the parts of urban cores closest to the centres of the country's largest labour markets outside of London.

Figure 5: Low-density post-war housing in Liverpool, next to denser pre-war terraces is typical in large British cities



Example: Liverpool L6, 2.1 kilometres from city centre. Source: Google maps

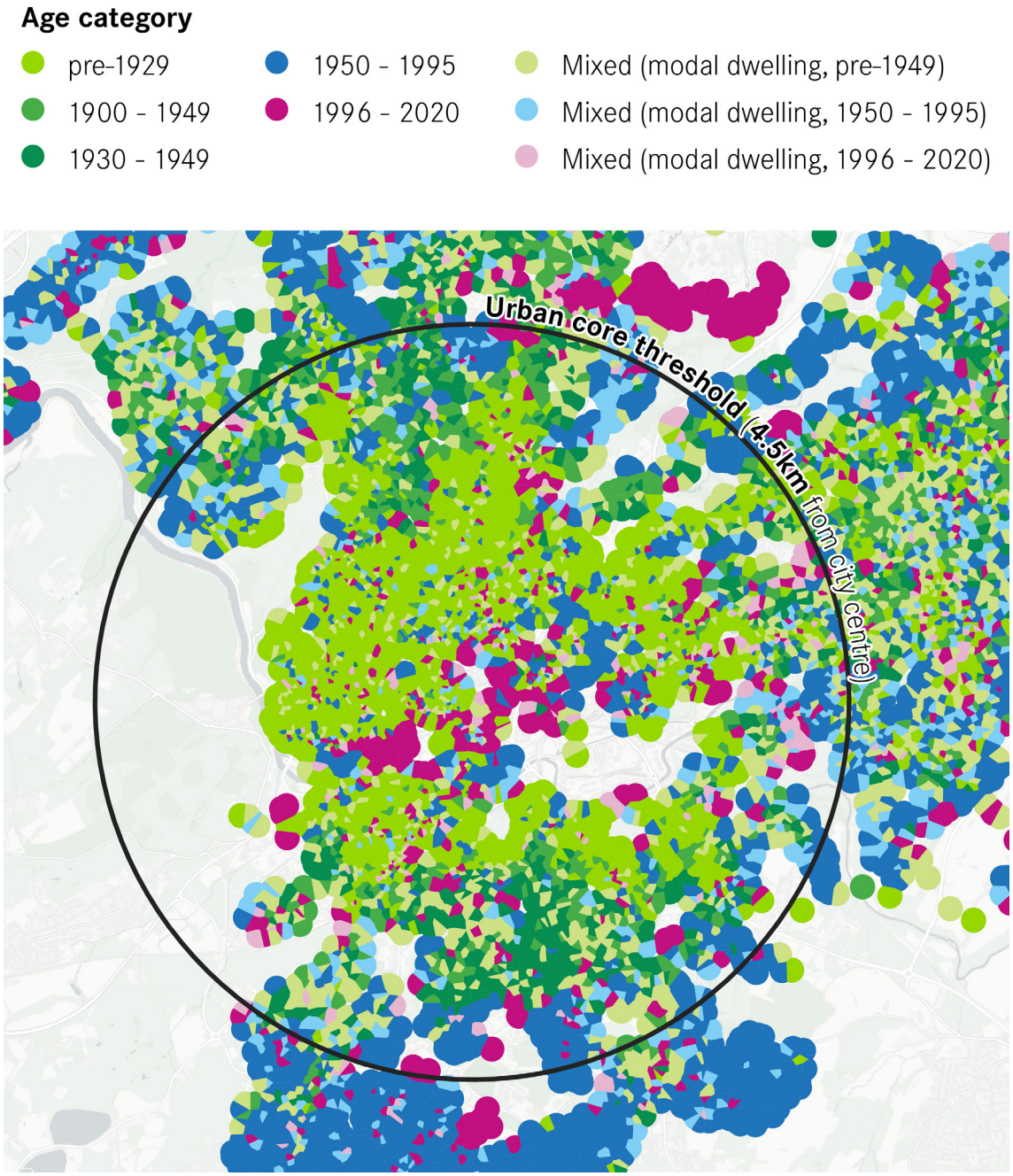
In some cities, urban cores mostly consist of pre-war housing

While this 'collar' of post-war, low-density housing in urban cores is common in the largest big cities outside London, and to a lesser extent in Newcastle, Sheffield and Nottingham, some cities' urban cores remain mostly built of pre-war neighbourhoods.

For example, as Figure 6 shows, Bristol's urban core is mostly comprised of relatively dense pre-1929 terraces, while the typology reducing its average urban core density is semi-detached housing built between 1930 and 1949.[16]

16 For example, see the dark green area in the south of Bristol's urban core. It is of equivalently low-density to low-density post-war neighbourhoods in the larger big cities.

Figure 6: Bristol's neighbourhoods are mostly pre-war, meaning densification will require different approaches



Sources: Centre for Cities Residential Density Dataset and MHCLG Energy Performance of Buildings Data

Post-war neighbourhoods are mostly located towards the city's edge, where densities are more similar between periods, and lower densities give households space in return for reduced transport accessibility.

Recent development has mostly followed past densities, except in London and the centres of the largest cities

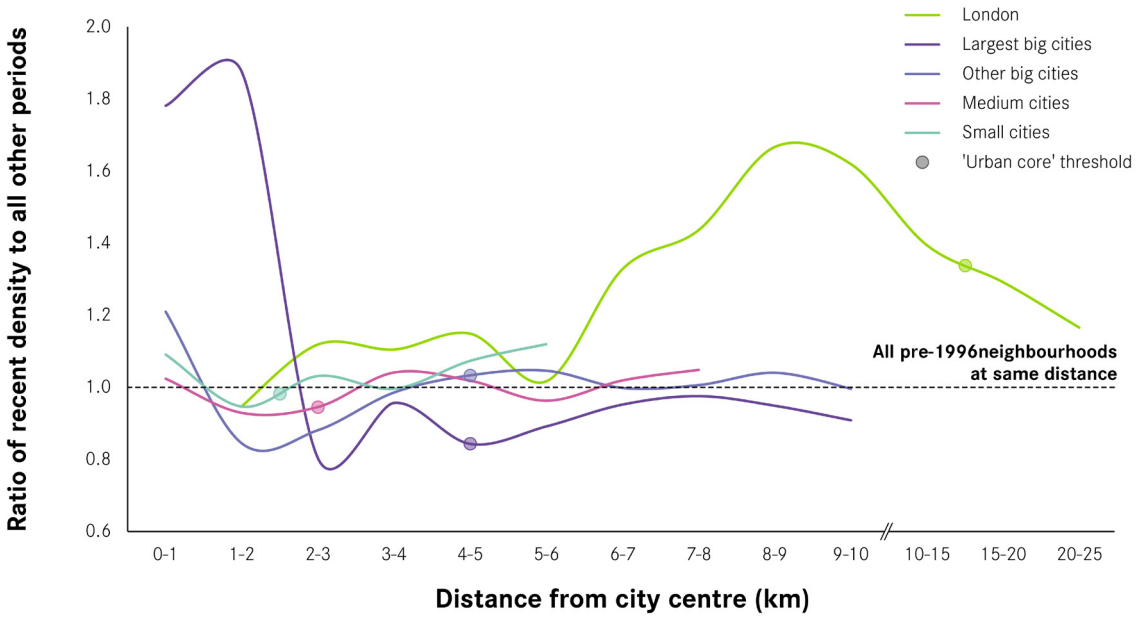
As densification requires the share of new housing in urban cores to increase, policymakers need to understand where recent housing development is already contributing to increasing average densities, and where it is not.

Figure 7 shows how the density of recent development since 1996 compares to all other neighbourhoods at similar distances from the city centre for each category of city. In smaller cities, recent development has been replicating the density of previous neighbourhoods, at all distances from the city centre. New developments have added housing units but not changed the average density of residential areas.

In London, new development within the first 5 kilometres from the city centre has also mostly followed historic densities, but further out it has clearly broken with past trends, increasing densities especially in the wider urban core between 5 and 15 kilometres.

Figure 7: Most recent development has followed historic densities[17]

Ratio of recent (1996-2020) average residential density to all other time periods, by distance from city centre



Sources: Centre for Cities Residential Density Dataset and MHCLG Energy Performance of Buildings Data. Note: X axis changes from 1km categories to 5 km categories beyond 10km.

The most distinctive pattern is seen **in the largest big cities – recent development has been driving significant densification in the city centre but decreasing average densities across the wider urban core**.

Figure 8 shows examples from Manchester of the kinds of recent development driving these

17 Note that data for 0-1 kilometres in London is omitted from the chart due to low sample size of recent development.

trends. Blocks of flats such as that shown on the left are now common in the city centre.[18] Meanwhile, low-density detached and semi-detached housing estates have also recently been built within the urban core – the example shown, built in 2015 is only 2.5 kilometres from Manchester's city centre.[19]

Figure 8: High and low-density recent housebuilding in Manchester's urban core

Source: Google maps. Left Manchester, M4 1.5km from the city centre, Right Manchester, M11, 2.5km from the city centre.

This 'cliff edge' in the density of recent developments means new development in big cities has been both closing the density gap in some places but widening it in others.

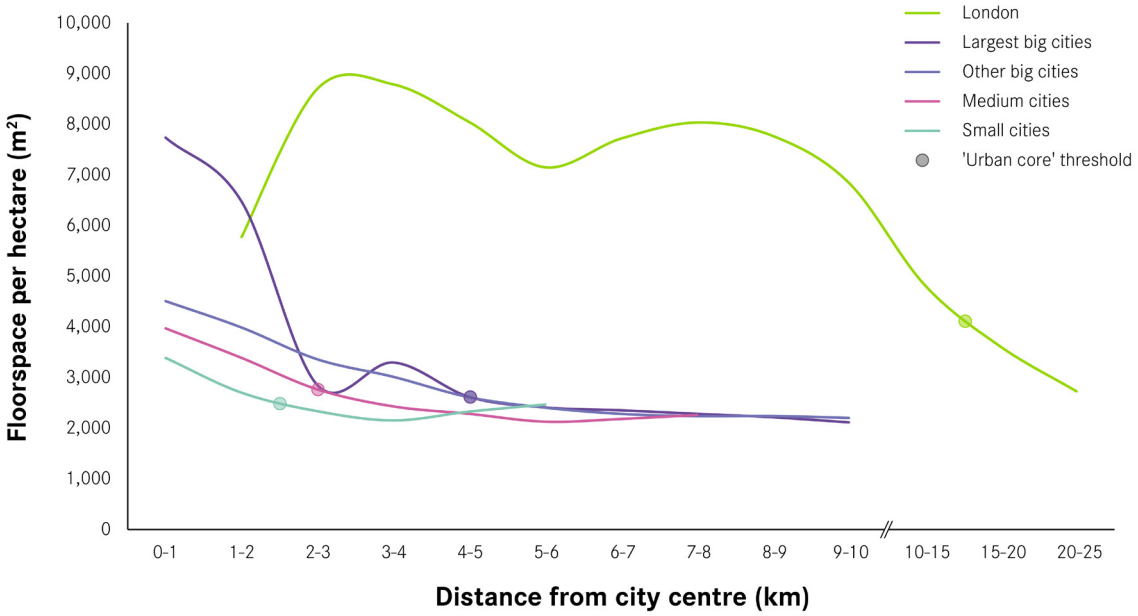
This means that **beyond the city centre, recent building in the big cities has not been substantially denser than that in the smaller cities,** as Figure 9 shows**.** While big cities should be expected to be built at densities between those of London and smaller cities in their urban cores, in practice British cities outside the capital build at similar densities beyond the city centre regardless of city size or site location.

18 Left shows a 9-storey block of flats, built in Salford, Manchester, M3, in 2021 (21/33754/IN). Similar, larger blocks of a wide range of heights have been built within Manchester's city centre and are incrementally moving out.

19 Right shows detached houses built as part of 175 home development of mostly detached houses, resulting in 35 dwellings per hectare. Planning permission was granted in 2012 (095667/FO/2011/N2), and the site built between 2013 and 2015. Note that a slightly denser development mostly comprised of short terraces was granted permission in 2008 to the same developer on the same site (086107/FO/2008/N2). It is unclear whether this change in approach by the developer relates to the opportunity for lower densities presented by change in national planning policy, which removed minimum density targets and regional development strategies (See Box 2).

Figure 9: Recent building in big cities has been more like that in small cities than that in London

Average residential density on recent (1996-2020) developments, by distance from city centre



Sources: Centre for Cities Residential Density Dataset and MHCLG Energy Performance of Buildings Data. Note: X axis changes from 1km categories to 5 km categories beyond 10km.

This low-density housebuilding should be of particular concern given that these big cities have the largest density gap to their peer cities abroad.[20]

Policy needs to address both the density of new housebuilding and existing low-density neighbourhoods

The data presented in this section highlights several key challenges densification policies will need to address:

- British cities' urban cores consist mostly of old, low-density housing stock. The share of new buildings in British cities will need to increase through a combination of new development, regeneration and the incremental addition of houses in existing neighbourhoods.
- In the largest big cities, like Manchester and Liverpool, closing the density gap will require specific policy attention to increase densities in post-war neighbourhoods just beyond the city centre.
- The same strategy for increasing densities in existing neighbourhoods would not apply in all cities. For example, cities like Bristol would need strategies to increase densities

20 See Figure 6 in Lange, M, Breach, A & Kovacevic, L (2025) Flat Britain: the urban density gap and how to close it. Centre for Cities.

across a mix of pre-war typologies.[21]

- The average density of new development needs to push beyond existing densities, especially in the urban cores of the big cities.

21 Further, these cities which benefit from a higher starting density because of large amounts of terraced housing might target policy at regenerating or improving these neighbourhoods for reasons other than increasing densities. For example, regeneration might be justified if the quality and energy efficiency of old terraced stock has degraded significantly.

03

A century of policies on densities has not aligned with cities' economic role today

The findings in Section 2 pose a number of questions:

- Why did post-war housebuilding result in especially low-densities?
- Why has recent housebuilding not been at higher densities in most urban cores?
- How has London increased densities and can other cities learn from its approach?

Low-density post-war neighbourhoods are the result of explicitly anti-density policies and urban economic decline

The post-war period as defined in this paper (1950-1995) encompasses multiple housebuilding eras which resulted in low-density neighbourhoods not suited to cities' economic role today.

Immediately after the Second World War, housing and industrial policy actively focused on de-densification. The 1940 Barlow Report advocated for the de-concentration of industry, while 'garden city' planning ideals promoted suburban, low-density living.[22] These agendas, along with the imperative to improve housing conditions as quickly as possible, led to slum clearances in industrial cities, and rapid suburbanisation.

The largest cities had some of the most significant clearance programmes, with some losing over a quarter of their pre-war stock, laying the ground for the low-density post-war urban core 'collar' seen in Figure 4 above.[23]

22 Barlow, A. 'The Report of The Royal Commission on the Distribution of the Industrial Population, 1937-1940', HMSO, (1939-40 iv 263; Cmd. 6153).
For example, in 1942 Manchester's city engineer idealised satellite towns and said "When a central area is re-developed, there must be a reduction in density." Municipal Dreams (2016) The Ellor Street Redevelopment Area, Salford.

23 Between 1956 and 1979, Leeds demolished 27 per cent of its pre-war housing stock, Manchester demolished 26 per cent, Liverpool 23 per cent and Birmingham 18 per cent. These figures are for whole Primary Urban Areas. If looking only at most centrally located pre-1973 authorities, these figures rise. For example, 30 per cent of Manchester County Borough's stock was demolished between 1956 and 1973 alone. Demolitions data is not available before 1956 or after 1979. Assumes all demolitions in this period were of pre-war stock. Source: Centre for Cities Local Housebuilding dataset 1946-2023.

After the 1950s, most housebuilding was shaped by urban economic decline. While cities are now the driving force in Britain's services-based economy, for much of the latter half of the 20th century, they were places of de-industrialisation, high unemployment rates, and in some cities, depopulation.[24]

There were public-sector led attempts at denser high-rise and mixed-typology housebuilding in the 1960s, but these struggled and ultimately cut against the prevailing economic trajectory.[25] Partly because of the backlash against high-rise development, and partly reflecting low demand, **low-density estates similar to those shown in Figure 5 (above) came to comprise the majority of what was built through the 1970s, 80s and 90s**.[26]

While these very low-density estates are an understandable response by local authorities trying to bring people into areas still blighted by bomb-damage, cleared slums and de-industrialisation, they now present challenges for policymakers seeking to increase the number of people who can live near city centres.

Recent policies on density have not done enough to enable higher densities in urban cores

As Section 2 showed, recent development densities have been mixed. London and the centres of the largest cities have seen significant increases. Elsewhere, recent developments densities mostly follow the density of nearby existing neighbourhoods.

Disentangling the role of economic factors and planning policy in determining density outcomes is not possible.[27] The substantial increase in densities near city centres in big cities and low densities slightly further out (see Figure 7), could reflect highly differentiated demand – demand for denser urban living in very central areas, demand for houses with gardens elsewhere, and no demand for anything in between.

But as demand to live in cities has increased in recent years, and understanding the assumptions baked into British planning policymaking, there is strong reason to believe that it has also shaped density outcomes.

As Box 2 describes, where recent **national planning policy since 2000 has focused on density, it has mostly focused on preventing very low densities through minimum density standards**. This likely reduced the frequency of very low-density development and enabled the higher densities in city centres, such as those seen in Figure 7.[28]

24 For example, Liverpool and Manchester's populations both declined by hundreds of thousands of people.

25 The denser 1960s estates typically comprised a mix of houses, maisonettes and high-rise blocks, with some cities such as Birmingham building primarily high-rises. Due to wide spacing, high-rises weren't necessarily denser than terraces they replaced or more mixed 1960s typologies. Poor build quality, as well as social and economic troubles, was also a key cause of the backlash to this denser building. For example, the Hulme Estate in Manchester was described as a 'disaster' only seven years after its completion. The estate was demolished in 1994. Municipal Dreams (2014) The Hulme Crescents, Manchester'.
Widespread demolition also means the density of building during this decade also isn't fully reflected in the data. Birmingham, for example, demolished over one third of its high-rise blocks between 1980 and 2001. Municipal Dreams (2015), Post-War High-Rise in Birmingham III: the blocks come down.

26 In Liverpool, the council was even replacing dense 1930s municipal housing with low-density estates in the name of regeneration. Municipal Dreams (2016), Municipal Dreams goes to Liverpool, part II.

27 Fine-grained analysis of the impact of specific policies is also not possible – partly because of the numerous policy changes that have occurred over the past two decades (reviewed in Box 2), and partly because EPC data only enables analysis in broad age-band categories which do not align with changes in local or national policy.

28 This likely led to lower densities where explicitly higher densities were not required in local policy. Footnote 19 notes Figure 7 may show one example of this.

But this policy has been both undermined by political U-turns and limited by its lack of spatial sensitivity.

Box 2: More policymaking than policy impact? Three decades of national policy on density and brownfield development.

The last three decades have seen the rise, withdrawal, and rise again of nationwide density policies. This box provides an overview, and a more complete policy summary is provided in Appendix 1, Table 1.

New Labour introduced density policies in 2000 and tweaked policy through their tenure.[29] Key policies included:

- a national minimum density of 30 dwellings per hectare and a minimum of 50 dwellings per hectare in city centres, with the threat of enforcement via central government call-ins;
- national maximum parking standards; and
- a national target that 60 per cent of new development be on brownfield land.

The Coalition government changed course and removed most of this national density programme.[30] The 2012 National Planning Policy Framework (NPPF) gave local authorities latitude to set their own approaches, reflecting 'local circumstances'.[31]

The Conservative government tentatively returned to encouraging denser development in cities:

- The 2017 TCPA required that local authorities publish brownfield land registers and gave them power to grant permission in principle for registered brownfield land (though this power has rarely been used).[32]
- The 2018 NPPF 'strongly encouraged' local planning authorities to create local density targets, including specifically for town and city centres, though policy required that local character also be taken into account.[33]

29 This built on guidance encouraging densities between 30 and 50 dwellings per hectare introduced in 2000. Communities and Local Government (2006), Planning Policy Statement 3 (PPS3): Housing. The National Archives, paragraph 47, November 2006.
Department of the Environment, Transport and the Regions (2000), Planning Policy Guidance Note No.3: Housing. The National Archives, paragraphs 60-61, 22 June 2000.
Deputy Prime Minister (2005), Town and Country Planning (Residential Density) (London, South East England, South West England, East of England and Northamptonshire) Direction 2005. Planning Portal, The National Archives. [Accessed March 2026]

30 All hard national density, parking, and brownfield targets were revoked, and regional planning authorities were abolished. Communities and Local Government (2010), Planning Policy Statement 3 (PPS3): Housing. HSMO, paragraph 47, June 2010.

31 Department for Communities and Local Government (2010), Circular 08/2010 Changes to Planning Regulations for Dwellinghouses and Houses in Multiple Occupation. The National Archives, November 2010.

32 House of Commons (2017), The Town and Country Planning (Brownfield Land Register) regulations 2017. The National Archives, UK Statutory Instruments, no. 403.

33 Ministry of Housing, Communities and Local Government (2018), National Planning Policy Framework. The National Archives, paragraph 122, July 2018.

The current Government has returned to introducing nationwide policies on density, which focus on cities in general, rather than different parts of cities:

- The 2024 NPPF removed text which stated that significant uplifts in density may be inappropriate if development was 'wholly out of character' with the existing area, but other local character considerations were retained.[34]
- A national minimum density of 50 dwellings per hectare in 'well-connected' locations has been proposed in the December 2025 draft NPPF.[35]

National planning policy has consistently required local planners to identify city centres and encouraged higher density standards there, but it has not required any further delineation between different parts of the city.

This has meant that **policies covering the wider urban core where the density gap is greatest have not been differentiated from those for the outer suburbs**.[36] Outside city centres, local planning policies have largely deferred to national density guidance such that national minimum densities have acted more like a ceiling, not a floor, for new development.[37]

Further, **emphasis on maintaining 'local character' and has meant the status quo densities are the logical outcome wherever the system does not actively promote higher densities.** Simply, when fitting in with neighbouring low-density neighbourhoods is an important planning consideration and local decision-making applies these concepts in an unpredictable manner (as discussed in Box 3), it is politically easier for developers to secure permission for more low-density building than to push densities higher.

Box 3: Appeals to local character have led to low-density outcomes and an inconsistent planning process

Phased redevelopment of former Withington Community Hospital issues with 'local character' as a planning concept

The site is on the edge of Manchester's urban core and was redeveloped in multiple phases. Those granted permission in 2002, 2003, 2004 and 2007 each comprised a mix

34 Local Government Association (2024) Revisions to the National Planning Policy Framework (NPPF) and other announcements on planning reform. [Accessed April 2026]

35 Ministry of Housing, Communities and Local Government (2025), National Planning Policy Framework. Open Government License, December 2025. [Accessed March 2026]

36 At best, policies for the wider urban core have taken only modestly higher density targets than elsewhere. For example, Manchester's 2012 Local Plan states that residential developments in the city centre should target exceeding 100 dwellings per hectare. Meanwhile, only 40dph was required in 'Inner Areas' beyond the city centre, to be assessed on a site-by-site basis, while 'family' lower density housing would be the expectation further out. The example given in Figure 7 falls in this area covered by modest 40dph density targets, and latter phases were permitted at 35dph.

37 Regional Spatial Strategies, which set regional policies between 2004 and 2011 all set density standards within the 30-50dph national guidance. There was some divergence between places – with the South West setting minimum densities at 40dph and the North East explicitly encouraging lower density regeneration strategies. No regional strategies pushed local authorities to think more spatially than national planning policies required them to. See Appendix 1, Table 2 for more detail.

of 3-4 storey apartments, terraced and semi-detached houses, achieving an average density of approximately 75 dwellings per hectare.[38] This area, highlighted in green, shows the potential for denser mid-rise development at this distance from the city centre.

Figure 10: Two approaches to appropriate densities taken on the same redevelopment

Source: Google maps

The final phase highlighted in pink, granted permission in 2016, meanwhile is made up of detached and semi-detached houses, with over two parking spaces per dwelling.[39] In pre-application meetings for the second phase, Manchester City Council advised the applicant to reduce the planned number of apartments to ensure the delivery of family housing and to limit height to 'safeguard the character' of the area.[40]

These justifications seem difficult to explain given the immediately adjacent site had recently delivered approximately twice the density, and it included larger properties suitable for families. This last phase is also significantly less dense than the pre-war terraced housing seen in the background.

It therefore seems more than just low demand for flats explains low-density building in cities in recent years: the relatively aspatial expectations and inconsistency of direction from national policy has left local planning practices making relatively aspatial and inconsistent decisions on appropriate densities.

38 See sequential applications Manchester City Council 2002-2007, 067581/MO/SOUTH2/03, 065663/MO/SOUTH2/02, 073030/MO/2004/S1, 080297/FO/2006/S1. [Accessed April 2026].

39 See pre-application consultation documents here: Manchester City Council (2016) 113937/MO/2016 [Accessed April 2026]

40 The applicant was the NHS Trust which sold the land sequentially to developers. NHS Trusts are required to secure best value for money when selling land for development. It is possible this also informed the decision to submit a low-density proposal, but given higher densities would have likely generated greater total development value, and there is evidence of pre-application planning decisions discussed above, this seems unlikely to have been the case.

This chequered history of density policy is understandable. The politics of urban densification can be challenging for national government and local authorities. As demand to live in cities increases, densification will rely on each layer of planning policy working together to ensure the right density expectations are selected for the neighbourhoods where policy rationale is strongest.

London's increases in density have been spatially concentrated, limiting the impact of denser development on overall housebuilding

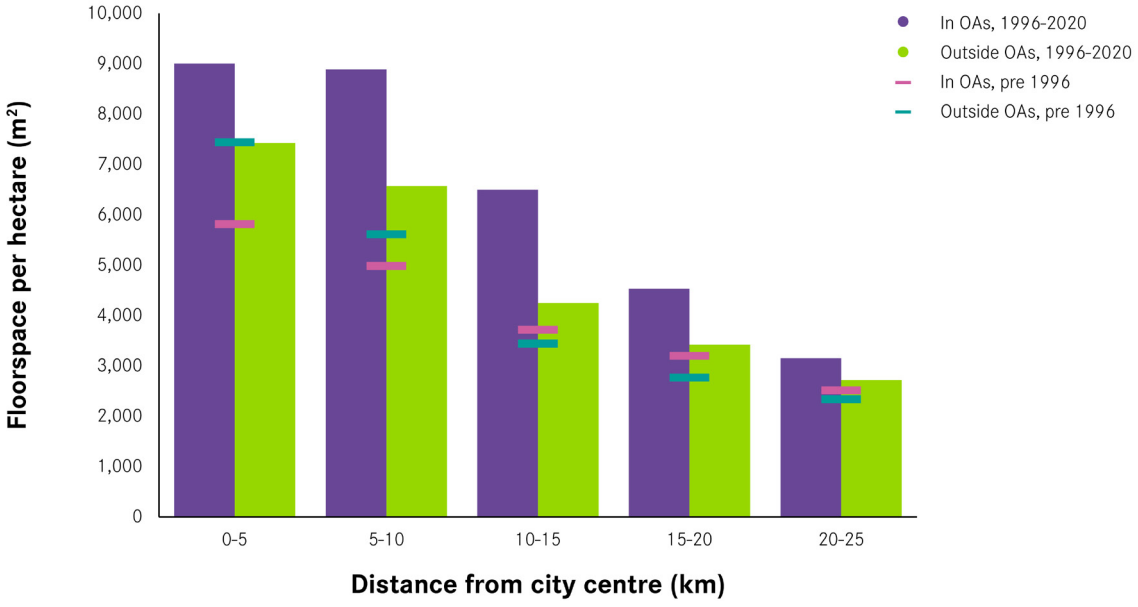
Recent development has been much higher in London than in other cities, and higher than any previous period of building in the capital. This is made possible by high demand and economic success, but there are also important lessons – positive and cautionary – for planning in other cities.

Since 2004, London has used 'Opportunity Areas' to identify areas of the city, some of which are very large, where significant regeneration and intensive densification is expected.[41]

Figure 11 shows that recent development densities have increased on average everywhere in London, but that this increase has been much larger within Opportunity Areas than outside of them. This is a policy success on its own terms – in areas where intensification has been especially promoted by policy, very dense housebuilding has occurred. Though other cities would likely struggle to match the densities achieved in London, they should learn from this that spatial policies can support densification.

Figure 11: London has increased densities the most in Opportunity Areas

Average density of recent and pre-1996 neighbourhoods inside and outside of Opportunity Areas



Sources: Centre for Cities Residential Density Dataset, MHCLG Energy Performance of Buildings Data and London Datastore

41 Mayor of London (2004) The London Plan: Spatial Development Strategy for Greater London.

Density increases elsewhere are also more than has been achieved in most cities. This more modest success likely reflects the impact of London's 2004 density matrix policy which created potentially allowable densities between 30 and 430 dwellings per hectare, varying neighbourhood by neighbourhood, and established clear principles around car-free development.[42] Similar policies based on accessibility to city centres would also help policy for other cities move beyond the simple binary of city centres and everywhere else.

But these increases **in average development densities have occurred alongside London's broader struggle to build enough homes to meet demand**, even prior to the collapse in building seen in the last few years.[43]

The paradoxical outcome of simultaneous increases in densities and low overall housebuilding in part reflects the concentrated nature of building in London. **The system expects high-density Opportunity Areas to do too much of the heavy lifting on both densities and housebuilding**, while not designating enough of the existing urban area as developable land.[44]

Permitting of more significant increases in densities in and near existing neighbourhoods, as well as measures to address existing viability challenges, will be needed to increase housebuilding and densities in London.

42 The strictness with which the matrix has been applied has been gradually relaxed by successive London Plans and was abandoned in 2021, enabling both higher and lower densities. See Appendix 1, Table 3 for more detail.
Some have called for it to return to increase certainty for in the planning process. See Make Planning Make Sense (2025) Episode 22. Centro Planning Consultancy podcast. [Accessed April 2026]

43 For discussion of recent housebuilding issues in London, see Lange, M (2025) Support package: London housebuilding, the 'emergency measures', and what further action is needed. Centre for Cities.

44 While housebuilding since the introduction of the London plan has significantly exceeded that in decades preceding it, it has never achieved its housebuilding target let alone come close to its new 88,000 target. Recent Centre for Cities research has shown that mega cities covered by zoning systems have significantly outperformed London in housebuilding terms, in part because they build in more locations across the urban area. Paris delivered over 50 per cent more additional floorspace than London between 2011 and 2021 in its urban core. Osaka added over three times more in its urban core over the same period. See Lange, M (2026) Why British planning needs to expand the definition of developable land in cities. Centre for Cities.

04

Strategies for densification in different types of neighbourhoods

This section draws on the policy lessons above and previous Centre for Cities research to illustrate how policymakers can use a variety of strategies, and apply them spatially, to densify British cities.

The three scenarios set out are not exhaustive but discuss some of the key challenges highlighted above, recognising the following vary between places:

- The realistic potential density uplift, given the city size and location within the city;[45]
- The existing housing typology; and
- Land ownership.

Scenario 1: Getting more out of brownfield sites in urban cores

- **Potential uplift in density**: Significant, highest near city centres and higher than existing neighbourhoods everywhere.
- **Housing typology**: Previously developed land with no or little housing currently. Surrounding residential areas are low-density for the proximity to city centre.
- **Ownership**: Both public and private land.

This scenario does not start from square one – some dense development on brownfield sites already happens, especially in city centres. The policy goal should be to encourage more of this and to push it further out into the urban core.

Sites are a mix of sizes and development is brought forward through a combination of speculative private-led schemes and development on public land. Achieving high densities

45 Lange, M, Breach, A & Kovacevic, L (2026) Flat Britain: The urban density gap and how to close it. Centre for Cities.

is important because brownfield land supply is constrained. Given the proximity to the city centre, future development could reasonably be at least mid-rise blocks of flats.

Planning and development values both present challenges to achieving these density goals.

On the planning side, councils need to be proactive and clearly indicate that higher-than-existing densities are desired, beyond what is expected by national policy (see Box 4). Crucially, **planning rules need to be established prior to planning applications being received, for most, if not all, land in the urban core**.[46] To do this, planning authorities should:

- Use Spatial Development Strategies, local plans and/or supplementary plans to establish allowable minimum and maximum building heights or densities, parking standards, and outside amenity space requirements, in each part of the urban core.[47] Such policies could be linked to levels of connectivity.[48] Above-maximum densities could be permitted discretionarily.
- Use Local/Mayoral Development Orders, or issue permission in principle on brownfield registered land, to add further detail on what will be permitted on allocated sites, and/or sites which share common features.

These measures would remove planning uncertainty, reducing costs and providing a signal to developers. Implementation would likely require increased resource in public-sector planning teams.

While development values are largely driven by demand, which in turn is driven by the employment opportunities the city offers, there are measures that can be taken to increase the viability of denser development. Some policy changes (discussed in Section 5) need to be enacted by national government, but subnational policymakers should also:[49]

- Ensure that affordable housing and other developer contributions policies reflect the fact development values vary between and within cities. Where development values are low, policy should expect less, or no, private-sector cross-subsidy.
- Intervene directly to overcome issues with fragmented landownership, using compulsory purchase powers if necessary.
- Use Mayoral Development Corporations to concentrate capacity and expertise to aid large-scale regeneration, making use of powers in the forthcoming English Devolution Bill.

46 Previous Centre for Cities research has shown that these are features common to higher performing zonal planning systems. See Lange, M & Kovacevic, L (2025) Planorama: How the English planning system can learn from abroad. Centre for Cities.

47 SDSs could be used to set basic expectations, with local policies adding on top of this floor. To ensure planning authorities can introduce and change density policies outside of the local plan cycle, Government needs to ensure the new 'supplementary plan' regime is a straightforward replacement for supplementary planning documents as possible. See Lange, M (2026) The Government must ensure 'supplementary plans' are easy to introduce. Centre for Cities.

48 This would mirror the approach taken by the 2004 London Plan, and could instead use the Department for Transport's new Connectivity Tool. Department for Transport (2025) Connectivity Tool.

49 Other Centre for Cities research has highlighted important bottlenecks to denser development which increase costs and reduce development values, which likely negatively impact housebuilding rates in urban core locations. Breach, A (2025) Breaking the Bottlenecks: Reforming 'anti-supply measures' to support urban housebuilding. Centre for Cities.

Box 4: Why local density policies are more important than national density policies

This research has found that national policies have had a limited impact on development densities in cities. This is because **it is very difficult to set rules on densities which are appropriate for all places from central government**.

Previous policies have taken a cautious, nationwide approach – setting low minimums that are achievable in most places. The Government's draft proposal is spatial to a degree – focused on well-connected places – but it still results in a blanket minimum density across most urban land.[50] The policy does not differentiate between a neighbourhood 2 kilometres from Manchester's city centre (where much higher than 50 dwellings per hectare should be the aim) and a much more peripheral location (where 50 dwellings per hectare might not be achievable).

One alternative approach could be to make centrally defined policies much more spatially differentiated – for example by setting different minimum densities based on public transport connectivity.[51] But this would continue to risk either setting minimums lower than some places could achieve, so that the policy doesn't preclude development in lower value areas, or the reverse.

Mayoral and local policymakers are better positioned to enact fine-grained policies which respond to local conditions. As discussed above, they have tools available to introduce these policies – the priority for national government should be to require that they use them and give them sufficient resources to do so.

Scenario 2: Redevelopment of low-density post-war housing estates in the urban core

- **Potential uplift in density**: Significantly higher than at present, especially nearer to the city centre.
- **Housing typology:** Houses and small low-rise blocks of flats.
- **Ownership:** Public land, some private leaseholders.

This scenario represents the situation in many post-war neighbourhoods, especially those in the urban core 'collar' in the largest cities highlighted above. Some regeneration of these neighbourhoods is already taking place, but far more is needed if larger cities are to close the density gap.

Significantly higher densities than present would be expected given proximity to the city centre. Redevelopment is justified as it would improve housing availability and quality.

50 MHCLG (2025) National Planning Policy Framework: proposed reforms and other changes to the planning system.

51 The current well-connected definition is based on two-trains per hour granting access to a productive economic centre. This train-centric approach could be improved upon as most commuters do not use trains. An alternative public-transport oriented approach could switch to using the Department for Transport's connectivity tool to set locations where a minimum density would apply.

But these sites present specific challenges: local authorities need to manage rehousing social tenants and displacing leaseholders or freeholders, meaning balancing the cost and politics of development is more difficult than on non-residential brownfield sites.[52] **Addressing these challenges will likely necessitate a high degree of public-sector involvement.**

The rate of redevelopment of these neighbourhoods will be determined by:

- Access to grant and/or affordable finance.
- Levels of affordable housing required: if grant funding is limited, then more private housing will be required to cover the cost of development.
- The density uplift permitted: more new homes would generate more income to help fund redevelopment and increase the likelihood of an uplift in affordable housing provision.

To help manage the politics of redevelopment, public authorities can:

- Engage residents early and shape plans according to their feedback.
- Use estate-wide ballots on these proposals to gain consent for redevelopment.

While public-sector leadership will be important in any redevelopment, this can be achieved through a range of management structures. One option is for council-owned development companies to manage development, as described in Box 5. Other options include joint ventures, such as that for the Manchester Victoria North new town proposal, or direct management by housing associations or local authorities.[53]

Box 5: Newham's approach to regeneration could be a model for redeveloping low-density post-war estates

Populo Living, a limited company wholly owned by Newham Council, is currently redeveloping the Carpenters Estate – a large post-war neighbourhood with 710 homes. Engagement on site began in 2020 and works started on the first phase in 2025.

The full redevelopment will result in 2,300 homes (50 per cent at social rent), a new primary school, community centre and commercial space. Overall housing density will triple, and the number of social homes will increase from 400 to 1,100.

52 In some estates, councils remain the freeholder for all properties. In others, Land Registry data shows that some post-war public housing estates in which houses have been sold through Right to Buy now have a mix of homes in freehold and leasehold ownership. Both tenures present a challenge for regeneration as homeowners need to be persuaded to sell, and if they can't, admin-heavy and often politically challenging compulsory purchase orders need to be used.

53 The Manchester Victoria new town proposes to build 15,000 new homes on a site which includes a very low-density post-war estate, some of which has already been demolished. The City Council has a joint venture with Far-East Consortium, signed in 2017, which covers 75 per cent of the land for the proposed new town. It is unclear whether the development management structure would change at all if the project secures new town status. Northern Gateway Manchester (2026) Partners. [Accessed April 2026]; MHCLG (2025) New Towns Taskforce: Report to government. One Manchester is a housing association currently managing regeneration of the Beswick Estate. 128 existing dwellings have been demolished and are being replaced with apartments and townhouses, resulting in a small density uplift and like for like replacement of social housing. One Manchester (2026) Grey Mare Lane. One Manchester (2026) Have your say on our plans for Grey Mare Lane. [Accessed April 2026]

The scheme has secured broad buy-in from existing residents through the following:

- Extensive engagement on the masterplan and redevelopment process, and balloting residents on proposals.[54]
- Delivering 94 per cent social rented homes and some replacement homes for leaseholders in the first phase of development.
- Providing temporary community facilities while redevelopment takes place.

Like any scheme, the viability of redevelopment depends on the income generated by new homes balanced against build costs, borrowing costs, inflation, and profit expectations. In Populo's case, there is no requirement for the latter, and delivering development management services in-house has also resulted in lower costs compared to market costs, so far.[55] Market rate housing and commercial spaces will help pay for the affordable housing, new school and public spaces, though additional grant funding is also required to achieve the high percentage of affordable housing.

For similar schemes to proliferate across British cities, the following would be required:

- Similar access to grant funding and/or compromises on uplifts in affordable housing delivered through redevelopment. This will be more the case the lower the density uplift and the lower the value of market rate homes.
- Support for councils to establish their own similar companies, including guidance on light-touch governance models.
- Clear planning and direction from local authorities to give companies a long-term pipeline of work.
- Access to affordable borrowing, potentially from the newly created National Housing Bank.[56]

Scenario 3: Incremental densification in existing neighbourhoods near the edge of – or beyond – the urban core

- **Potential uplift in density**: Modest, but given the location and existing neighbourhoods, significant increases in height are likely politically and practically challenging.
- **Housing typology:** Mostly houses, detached and semi-detached.
- **Ownership:** Fragmented, mostly privately owned.

This scenario is applicable to many locations in British cities. Low-density neighbourhoods, in which very little additional housing is typically added over time, make up most of the existing residential land area of most cities.

54 Turnout was 66 per cent, and 73 per cent voted in favour of the proposed scheme.
55 Populo states that it has delivered these services at 2.2 per cent of total build costs, comparing favourably to the 3-4 per cent market standard.
56 National Housing Bank (2026) About us. [Accessed April 2026]

The potential uplift in density is more limited than previous scenarios because of the location, and because most plots are individual freeholds in fragmented ownership, there are practical and political challenges to systematic regeneration.

The goal of policy should be to enable piecemeal increases in density, which would proceed on a plot-by-plot basis through extending or small-scale redevelopment of existing properties.

Recent Centre for Cities research has shown that this kind of incremental densification can be facilitated by the introduction of clear planning rules which anticipate the slow evolution of existing neighbourhoods over time.[57] For example, Croydon Council's Suburban Design Guide described a range of allowable forms of intensification, including the redevelopment of detached properties into small blocks of flats (as shown in Figure 12).[58] This resulted in small-site housing delivery more than doubling, driven by the redevelopment of only 0.2 per cent of detached plots each year.

Figure 12: A three-and-a-half storey block of flats replaces a detached home on a main road in Croydon

Source: Author's photograph

The important features for successful policies to encourage incremental densification are:

- 'Hard' policies on building size, including on heights and overlooking angles.
- Policies specific to the typologies of houses present in the neighbourhood.[59]

57 Lange, M (2026) Croydon Calling: Lessons on rules-based planning. Centre for Cities.
58 Croydon Council (2019) Suburban Design Guide Supplementary Planning Document. [Accessed April 2026]
59 For example, Croydon's SDG provided clear guidance on how buildings should work with the hilly local topography.

The specificity of these policies can provide both a signal to potential developers and clear rulebook for planning officers to apply while assessing applications.

Different policies will be necessary for different housing typologies, and some neighbourhoods will enable greater piecemeal uplifts in density than others. Terraced neighbourhoods present specific challenges – though upward extensions can cost less than redevelopment, meaning permissive policies could still have a significant impact on densities.[60]

These policies will also likely have a greater impact where development values are higher – where the cost of small-scale development is significantly lower than the value of the housing produced. It is therefore likely a higher priority for cities like Bristol and London to introduce these policies than for those with lower house prices.

60 For one example of how more housing delivery could be achieved in terraced neighbourhoods, see Lin, X (2026) What British cities can learn from Zohran Mamdani's new housing policy. Centre for Cities blog.

05

What needs to change?

There are multiple challenges for national and local government as they seek to densify British cities. Different parts of cities require different strategies, and all levels of policy need to be geared toward facilitating them.

National government

National government needs to continue to reform the planning system, fund densification and address other bottlenecks to denser development.

National planning reform needs to continue to move towards a more spatial, rules-based system to emulate successful zoning systems**:**

- **The NPPF should require that local plans identify 'urban cores' as well as city centres.** This could be required in Spatial Development Strategies or in local plans.[61]
- **The NPPF should be clearer that changes in character should be expected within the urban core.** This could be achieved via a National Development Management Policy which explicitly states this.
- **Recently proposed national minimum density policies should be amended.** First, it should be made clear that local planning policies which set higher and more detailed density policies are expected in cities. Second, local authorities should be able to set lower minimum densities where they believe the national minimum density would preclude development. Finally, the national measure of 'well-connected' places should use the Department for Transport's Connectivity Tool to capture all forms of public transport connectivity, not only trains.[62]
- **The NPPF should be amended to avoid policies on incremental densification**

61 Centre for Cities' proposals to achieve the same, submitted to the recent NPPF consultation are detailed in Lange, M (2026) How the NPPF can work harder for cities. Centre for Cities blog.

62 The Department for Transport Connectivity Tool has a connectivity to workplace setting which would be the most appropriate for measuring connectivity to jobs, and establish a link between strength of employment opportunities and expected densities. Department for Transport (2025) Connectivity Tool.

setting conservative expectations on what is allowable. The 2025 draft NPPF contains text designed to create 'default yes' for types of intensification such as aligning rooflines and adding storeys on corner plots. Centre for Cities has proposed changes which would set the expectation that local authorities should go beyond, rather than defer to, this national baseline.[63]

- **Increase funding for local planning teams, especially in cities which are the target of the City Densification Fund**. This will ensure that authorities are equipped to take on the difficult task of planning for densification in general, as well as supporting specific schemes.

National government should focus resources on increasing densities in post-war neighbourhoods in the urban cores of the largest big cities:

- **Fund the regeneration and densification of low-density post-war housing estates.** This should be part of the Northern Growth Strategy. Additional funding should also be made available for Birmingham, Nottingham and Glasgow.
- **National government should support local authorities to manage redevelopment, including by helping them establish development companies**

National government should take action on issues which make building denser developments difficult: [64]

- Follow through with proposed site threshold reforms to make it easier to build on small and medium-sized sites.[65] This should include more widespread use of cash-in-lieu, rather than on-site, affordable housing delivery for small sites.[66]
- Remove Biodiversity Net Gain requirements on brownfield sites.[67]
- Reduce minimum space standards on one-bedroom flats to improve viability and affordability.
- Ensure delays created by the Building Safety Regulator (BSR) are entirely addressed, and keep the BSR and the definition of higher-risk buildings under review as recommended by Grenfell Tower Inquiry Phase 2 Report.[68]

63 Centre for Cities suggestions for changed wording in the new NPPF are detailed in Lange, M (2026), How the NPPF can work harder for cities. Centre for Cities blog.

64 For more discussion of these recommendations, see pages 40 to 44 in Lange, M, Breach, A & Kovacevic, L (2025) Flat Britain: The urban density gap and how to close it. Centre for Cities.

65 Curtis, R (2025) Raising the Barriers – in The Road to a Proportionate System. Pocket Living.

66 An alternative to accepting more cash-in-lieu payments through Section 106 agreements could be a simplified system based on the Community Infrastructure Levy. An illustrative, simple policy design could involve i) standard CIL rate for 0-9 unit developments ii) an additional CIL rate (or affordable housing levy to fund directly delivered affordable housing) for 10-49 unit developments and iii) on-site affordable housing requirements for larger sites.

67 Recent proposals are a strong movement in the right direction. The definition of 'brownfield land' to be adopted should be broad, and include regeneration of existing housing estates to limit the cost of increasing density in post-war estates. Department for Environment, Food & Rural Affairs (2026) Biodiversity net gain: considering a targeted exemption for brownfield residential development.

68 For further commentary see Breach, A (2025) Breaking the Bottlenecks: Reforming 'anti-supply measures' to support urban housebuilding. Centre for Cities.

Local government

Metro mayors

- **Introduce London Plan-style density matrix policies in Spatial Development Strategies.** These should set expectations that clear uplifts in density are expected in most urban locations, increasing with connectivity to city centres.
- **Use new powers introduced in the English Devolution Bill to establish Mayoral Development Corporations** to manage larger-scale regeneration.
- **Set ambitious targets for housing delivery on small sites, and require that local authorities use Croydon-style policies to achieve these targets**. Mayors could also introduce their own city-wide guidelines for intensification to serve as the default in absence of local authority action.[69]
- **Use Mayoral Development Orders** to reduce planning costs for dense development.

Local authorities

- **Identify urban cores in local plans.**
- **Establish allowable minimum and maximum building heights or densities**, parking standards, and outside amenity space requirements, in each part of the urban core. Such policies could be linked to levels of connectivity.[70]
- **Make widespread use of Local Development Orders and the power to issue permission in principle on brownfield registered land** to set clear expectations on density and reduce planning burden. These tools could be used on allocated sites, and/or sites which share common features. Local Development Orders could be used to permit more substantial roof extensions than currently allowed under national permitted development rights.[71]
- **Introduce Croydon-style policies to encourage incremental densification.** These can be introduced directly in local plans, or through supplementary plans.[72]
- **Proactively support densification by intervening in the land market.** Densification in complex brownfield sites often requires public sector assistance in land assembly and remediation, and councils should facilitate this as much as possible.

69 For more detail on this policy recommendation, see Lange, M (2026) Croydon calling: lessons on rules-based planning. Centre for Cities.

70 This would mirror the approach taken by the 2004 London Plan and could instead use the Department for Transport's new Connectivity Tool. Department for Transport (2025) Connectivity Tool.

71 See Lin, X (2026) What British cities can learn from Zohran Mamdani's new housing policy. Centre for Cities blog.

72 To ensure planning authorities can introduce and change density policies outside of the local plan cycle, Government needs to ensure the new 'supplementary plan' regime is a straightforward a replacement for supplementary planning documents as possible. See Lange, M (2026) The Government must ensure 'supplementary plans' are easy to introduce. Centre for Cities blog.

06

Appendix: Detailed history of national and regional density policies, 2000-2024

Table 1 provides an overview of significant changes in national policy which relate to development densities and urban development. It highlights both how regularly policy has changed over time, and that many policy ideas in discussion today are quite similar to attempts made in the recent past.

Table 2 provides an overview of the approaches taken by different Regional Development Agencies in setting different density policies. Differences which reflect regional circumstances are present, but spatial differentiation remains limited.

Table 3 provides an overview of iterations of London Plan policies on density. This both demonstrates how much more systematic London has been on its approach to density, and how the approach taken has become less rules-based over time.

Table 1: Significant national density policies, 2000-2024

Policy	Density Standards	Spatialised Standards	Parking Standards	Brownfield, Greenfield, and Previously Developed Land
PPG3 (2000)[73]	Encourages efficient use of land (30-50 dph) and discourages development under this threshold	Encourages exceeding 50 dph in city, town, district, and local centres	Discourages development that exceeds 1.5 parking spaces per dwelling; encourages flexible application of parking standards	Sets a national target for 60% of new housing development on previously developed land. Excludes greenfield sites from windfall allowances. Presumption for previously developed sites to be allocated for development before greenfield sites in local plans and housing capacity studies. Requires LPAS to notify the Secretary of State of proposals on greenfield land which exceed five hectares or 150 dwellings.
PPG13 (2001)[74]			Introduces maximum parking standards and encourages LPAs to set maximum parking standards	
Planning Circular 01/02[75]		Applies to residential density in London and South East England		Clarifies that intervention by DPM will be sought for residential developments of less than 30 dph on greenfield land
Planning and Compulsory Purchase Act (2004)[76]		Introduces Regional Spatial Strategies		
Planning Circular 01/05[77]		Expands applicable regions: London, South East England, South West England, East of England, and Northamptonshire		Clarifies that intervention by DPM will be sought for residential developments of less than 30 dph on greenfield land
PPS3 (2006)[78]	Introduces a national indicative minimum density of 30 dph	Encourages Regional Spatial Strategies to set density policies and targets		Removes requirement for LPAs to notify Secretary of State of development less than 30 dph on greenfield land. Encourages Regional Spatial Strategies and Local Plans to set targets for development on previously developed land.
PPS3 (2010)[79]	Removes national indicative minimum density			Exclude private residential gardens from the definition of previously developed land
Revised PPG13 (2011)[80]			Removes requirement for maximum parking standards in new residential development	
Localism act (2011)[81]		Abolishes Regional Spatial Strategies		
NPPF (2012)[82]	Devolves density policy to LPAs			Encourages LPAs to set targets for development on previously developed land Removes national target for development on previously developed land Encourages LPAs to set policies to restrict residential garden development
Town and Country Planning (Brownfield Land Register) Regulations (2017)[83]				Requires LPAs to prepare, publish, and maintain a register of previously developed land Enables the granting of permission in principle for housing-led development on land in the brownfield land register within a dwelling range specified by the LPA
NPPF (2018)[84]	Encourages planning policy that makes efficient use of land while considering housing need, market conditions and viability and an area's character Discourages low densities when there is a proven or anticipated shortage of housing land supply	Encourages LPAs to adopt minimum density standards for city and town centres and set a range of densities standards across areas	Requires justification for the setting of maximum parking standards	Requires local plans to assess density policy before allocating land for development on Greenbelt Gives substantial weight to brownfield land
NPPF (2023)[85]	Classifies significant uplift in residential density as inappropriate if resulting built form out of character with existing area			
NPPF (2024)[86]	Removes character consideration for residential uplift in density			
Draft NPPF (2025)		Proposes minimum density of 40 dph for all development within walking distance of a railway station, increasing to 50 dph where the station is well-connected		Strengthens language to tip planning balance in favour of within settlement development Strengthens language to toward a 'default yes' for incremental densification, including 'sensitive' redevelopment

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85 Paragraph 130. Department for Levelling Up, Housing & Communities, Ministry of Housing, Communities & Local Government (2023) National Planning Policy Framework. The National Archives, December 2023.
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Table 2: Regional Spatial Strategies for the English Regions and Greater London Authority, 2008-abolition in 2011

Regional Government Office	Density Standards	Spatialised Density Standards	Parking Standards	Brownfield Target
East of England (2008)[87]	-	Achieve highest possible net density appropriate for local character and transport accessibility	Defer to national policy (1.5 spaces per dwelling)	Defer to national policy (60%)
East Midlands[88]	Defer to national policy (30 dph minimum)	High densities achievable in cities and large towns with transport and service accessibility	Defer to national policy (1.5 spaces per dwelling)	Defer to national policy (60%)
Greater London Authority*[89]	Density matrix for habitable rooms and dwellings per hectare by area and PTAL score Target for 95% compliance	Opportunity Areas Areas for Intensification Density matrix for defined central, urban, and suburban areas	Maximum car parking standards by predominant housing type, measured in bedroom units	96%
West Midlands*	-	-	-	-
North East[90]	Defer to national policy (30 – 50 dph) at local level Encourage LPAs to set criteria for low-density redevelopments in market restructuring areas with old high-density stock Restrict high-density housing from subdivision and intensification	Higher densities should be provided at Strategic Transport Hubs	Defer to national policy (1.5 spaces per dwelling)	Regional: 70% Tees Valley: 70% Durham County: 65% Northumberland County: 50% Tyne and Wear: 80%
North West[91]	-	-	Defer to national policy (1.5 spaces per dwelling)	Regional: 70% **** Manchester / Salford: 90% Pennine Manchester: 80% Southern Manchester / North East Cheshire: 80% Northern Manchester: 80% Liverpool: 90%
South East[92]	Regional target of 40 dph	Regional Hubs identified as sites capable of exceeding 50 dph	Defer to national policy (1.5 spaces per dwelling)	Defer to national policy (60%)
South West**	-	-	-	-
Yorkshire and the Humber[93]	-	-	-	65%

*Phase Two Revision of the West Midlands RSS underwent public examination and did not progress before the abolition of Regional Strategies
**Public consultation for South West RSS resulted in severe delays
*** The Northwest RSS sets brownfield targets for every subregion, the list being too long to include in the table

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92 Policy H5, Policy SP2. Government Office for the South East (2009), The South East Plan: Regional Spatial Strategy for the South East of England. The Stationary Office, The National Archives, May 2009.
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Table 3: London Plan density policies, 2004-2021

London Plan	Density Standards	Residential Parking Standards	Brownfield Target	Area Allocations
2004[94]	Density matrix assigning indicative habitable rooms and dwellings per hectare considering: location, accessibility, setting, parking provision, and predominant housing type Compliance target: 95%	Maximum standards set by predominant housing type Detached and semi-detached houses: 2 per unit Terraced houses and flats: 1.5 per unit Flats: 1 per unit	5% improvement of development on previously developed land over five years	Introduction of 28 Opportunity Areas and additional Areas for Intensification
2008[95]	Simplified density matrix assigning indicative habitable rooms and dwellings per hectare considering: setting, average dwelling size, and PTAL score Compliance target: 95%	Maximum standards set by house type, with guidance for accessible locations to aim for less than 1 space per unit 4+ bed: 2 per unit 3 bed: 1.5 unit per unit 1-2 bed: 1 per unit	96%	Change of scope for some Opportunity Areas and Areas for Intensification in terms of indicative employment capacity metrics and the introduction of minimum home targets for site areas
2011[96]	Continuation of density matrix Guidance to not apply matrix mechanistically Compliance target: 95%	Maximum standards set by number of beds, with guidance for accessible locations to aim for less than 1 space per unit. Introduction of 20% minimum for electric spaces 4+ bed: 2 per unit 3 bed: 1.5 uni 1-2 bed: less than 1 per unit	96%	Change of scope of some Opportunity Areas and Areas for Intensification in terms of indicative employment capacity metrics and minimum home targets Introduction of strategic policy directions for site areas
2016[97]	Continuation of density matrix Guidance to not apply matrix mechanistically Compliance target: 95%	Reintroduced parking into density matrix, where parking provision determined by setting, dwelling size, and PTAL score Maximum densities by bedroom remain	96%	Change of scope of some Opportunity Areas and Areas for Intensification in terms of indicative employment capacity metrics and minimum home targets
2021[98]	Removal of density matrix and implementation of a “design-led approach” to density Introduction of character map New requirements for reporting density. Applications must include measure of floor area ratios, site coverage ratio, maximum height above sea level	New maximum residential parking matrix considering location, PTAL, and bed count	-	Change of scope of some Opportunity Areas and Areas for Intensification in terms of indicative employment capacity metrics and minimum home targets

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