



# **Development in the City 2023/2024**

The 2023/24 Authority Monitoring Report

of

Manchester City Council

Monitoring the delivery of the Local Plan

April 2023 - March 2024

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## **1 Executive Summary**

Manchester's 2023/24 Authority Monitoring Report (AMR) summarises the City's development from 1<sup>st</sup> April 2023 to 31<sup>st</sup> March 2024, based on key indicators measuring policies in the Local Plan. It should be read alongside the Places for Everyone Annual Monitoring Report 2024.

The City has a strong and competitive economy, good infrastructure, and its population continued to grow. The latest Census data (2021) from the Office for National Statistics (ONS) records the population as 552,000 and the ONS 2018 based subnational population projections indicate that Manchester's population will reach 563,300 by 2025. The City's latest forecasting model (MCCFM W2023 (final)), which takes into account planned development, and differs in its migration assumptions, predicts a stronger rate of growth, with 638,587 residents expected by 2025. Evidence from indicators within this AMR show that Manchester is continuing to make substantial progress towards achieving the sustainable development goals set out in the Local Plan.

Development that supports economic growth has remained steady, with almost 199,000 sqm of employment-related floorspace being completed over the past year. 96% of the employment development floorspace took place inside the Regional Centre which includes

offices, industry and warehousing, retail, hotels and leisure.

Net housing completions were 2,962 units completed (net of demolitions) between 2023 and 2024, with new housing continued to be built in sustainable locations with good public transport connections to key services, social infrastructure and employment locations.

In Manchester's neighbourhoods, district centres have remained focal points for community activity, showing resilience compared to general trends across the country. Vacancy rates were lower than national levels, and the proportion of E(a) retail uses has remained stable, despite the growing importance of on-line shopping.

Investment in sustainable modes of transport continued during 2023/24, supporting a rising trend in walking, cycling and public transport use in Manchester, including the development of the Bee Network and cycling and walking network.

The Green and Blue Infrastructure (G&BI) Strategy and the accompanying Stakeholder Implementation Plan adopted in July 2015, was refreshed in 2021. It continued to deliver many benefits 'on the ground' throughout 2023, over 2,000 new hedge trees, over 4,000 new trees, and five new community orchards. New development schemes, from strategic regeneration frameworks

(SRFs) and masterplans to individual applications, were encouraged to incorporate new or improved G&BI. The work on G&BI continues to inform the evolution of the Council's Climate Change Action Plan and these links will continue to be strengthened.

Measures are being taken to reduce dependency on the car and increase walking, cycling and public transport use. Meanwhile, the most recent BEIS figures for CO<sub>2</sub> emissions indicate a further reduction in 2021 (latest data) to 3.3 tonnes per capita emissions, significantly lower than the regional and national averages.

The Places for Everyone Plan, the Strategic Plan for the nine districts of Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford and Wigan, progressed to Submission stage in February 2022 and an examination of the plan commenced between November 2022 and July 2023. The Plan was found sound and following adoption on 22<sup>nd</sup> March 2024 became part 1 of Manchester's Local Plan. It sets out the scale of economic and residential development for each district and includes key locations for delivery, a town centre hierarchy, strategic transport schemes and other strategic infrastructure.

In Spring 2020, the review of the Local Plan commenced with the Issues Consultation. An updated Local Plan will enable the Council to further strengthen its support for sustainable development to

ensure that the potential of the City and the needs and aspirations of its residents are fully met. The Issues Consultation included the consideration of a number of key strategic matters. Evidence is being gathered across a range of matters to inform the next stage of the Local Plan which will develop a first iteration of a draft plan.

## 2. Introduction

**This is Manchester's Authority Monitoring Report for April 2023 to March 2024 and should be read alongside the Places for Everyone Annual Monitoring Report 2024.**

The Council produces an Authority Monitoring Report (AMR) to inform the public about recent achievements and progress towards achieving the Spatial Objectives in the Local Plan. In Manchester, the Local Plan consists of the 2012 Core Strategy Development Plan Document (DPD) and the 2024 Places for Everyone Joint Development Plan (PfE), together with a set of saved Unitary Development Plan (UDP) policies, and the Greater Manchester Joint Waste DPD and the Greater Manchester Joint Minerals DPD.

The Core Strategy was prepared in the context of the 2006-2015 Manchester Community Strategy. The Manchester Community Strategy was replaced by the Our Manchester Strategy 2015-25 and reset as part of the Council's Covid-19 recovery planning in 2021. It focusses on:

- A thriving and sustainable City
- A highly skilled City
- A progressive and equitable City

- A liveable and low carbon City
- A connected City

It is a document developed for the City as a whole and is monitored annually via Manchester's State of the City Report, which provides a broad overview of progress towards the City's overarching vision. The Authority Monitoring Report focuses on the spatial objectives in the Local Plan, which relate particularly to development and its impact on the local environment.

Manchester's Local Plan plays a crucial role in delivering the Council's vision for the City, by providing a policy framework that guides investment and supports the delivery of development and essential infrastructure in a sustainable manner. The Core Strategy identified six key strategic Spatial Objectives:

**SO1. Spatial Principles** - provide a framework within which the sustainable development of the City can contribute to halting climate change

- support a significant further improvement of the City's economic performance and spread the benefits of this growth across the City to reduce economic, environmental and social disparities, and to help create inclusive sustainable communities

- SO3. Housing** - provide for a significant increase in high quality housing provision at sustainable locations throughout the City, to both address demographic needs and to support economic growth
- SO4. Centres** - provide a network of distinctive, attractive and high quality centres, strengthening local identity, providing essential services close to homes and local access to healthy food
- SO5. Transport** - improve the physical connectivity of the City, through sustainable and accessible transport networks, to enhance its functioning and competitiveness and provide access to jobs, education, services, retail, leisure and recreation
- SO6. Environment** - protect and enhance both the natural and built environment of the City and ensure the sustainable use of natural resources, in order to mitigate and adapt to climate change, support biodiversity and wildlife, improve air, water and land quality, recreational opportunities and provide networks of high quality green infrastructure, ensuring that the City is inclusive and attractive to residents, workers, investors and visitors

The local development policies in the Core Strategy are grouped under the six spatial objectives above and are accompanied by monitoring indicators that are intended to measure progress towards

these objectives. The following chapter analyses the findings of this monitoring for 2023/24, highlighting some of the significant achievements during this period.

Monitoring the plan on a regular basis helps to assess whether the key objectives of the plan are continuing to be met, and whether the plan and its policies are still appropriate, bearing in mind that rates and patterns of development are also influenced by the wider context in which it operates.

It is important to note that this AMR considers the position up to the end of March 2024 and the State of the City Report 2023 provides a full picture of the impacts of COVID-19 up until March 2024.

## Setting the Scene

The City has a strong and competitive economy, good infrastructure, and its population has continued to grow. The latest Census data (2021) from the Office for National Statistics (ONS) is 552,000 and the ONS 2018 based subnational population projections indicate that Manchester's population will reach 563,300 by 2025. However, this is a significant reduction on the ONS 2016 based projection. The City's latest forecasting model (MCCFM W2023 (final)), which takes into account planned development, and differs in its migration assumptions, predicts a stronger rate of growth, with 638,587 residents expected by 2025.

Between 2021 and 2022 (latest available data) Manchester's GVA grew by 14.6%, this was ahead of the national rate which grew by 9.7% over the same period. When we look at GVA per head, again Manchester is ahead of the national rate, with Manchester's GVA per head being £55,371 compared with £33,976 in England. The number of employees in Manchester in 2023 was recorded at 453,600 which was a 6.0% increase on the figure from 2022. The number of enterprises increased by 34.3%, from 17,045 in 2015 to 22,895 in 2024.

The two sectors that are most contributing to Manchester's increased GVA are Financial and insurance activities & Professional, Scientific

and Technical activities contributing 14.2% and 14.0% respectively in 2022. Between 2015 and 2022, the Financial and Insurance activities sector grew by 1,000 employees and accounts for 4.7% of all employees in Manchester. The Professional, Scientific and Technical grew by 20,000 and accounts for 13.8% of Manchester employees, an increase of 2.7 percentage points from 2015. The 2.7 percentage point increase was the largest seen across all 18 employee sectors in Manchester.

Further information on the demographic and economic context and trends can be found in the State of the City Report 2023.

Manchester City Council is part of the wider Greater Manchester Combined Authority (GMCA) made up of the ten Greater Manchester districts and an elected Mayor. The GMCA has powers in relation to transport, housing, planning, policing, business support, skills, health and social care, together with control over substantial budgets, giving considerable freedom and flexibility to make decisions that meet the City region's needs.

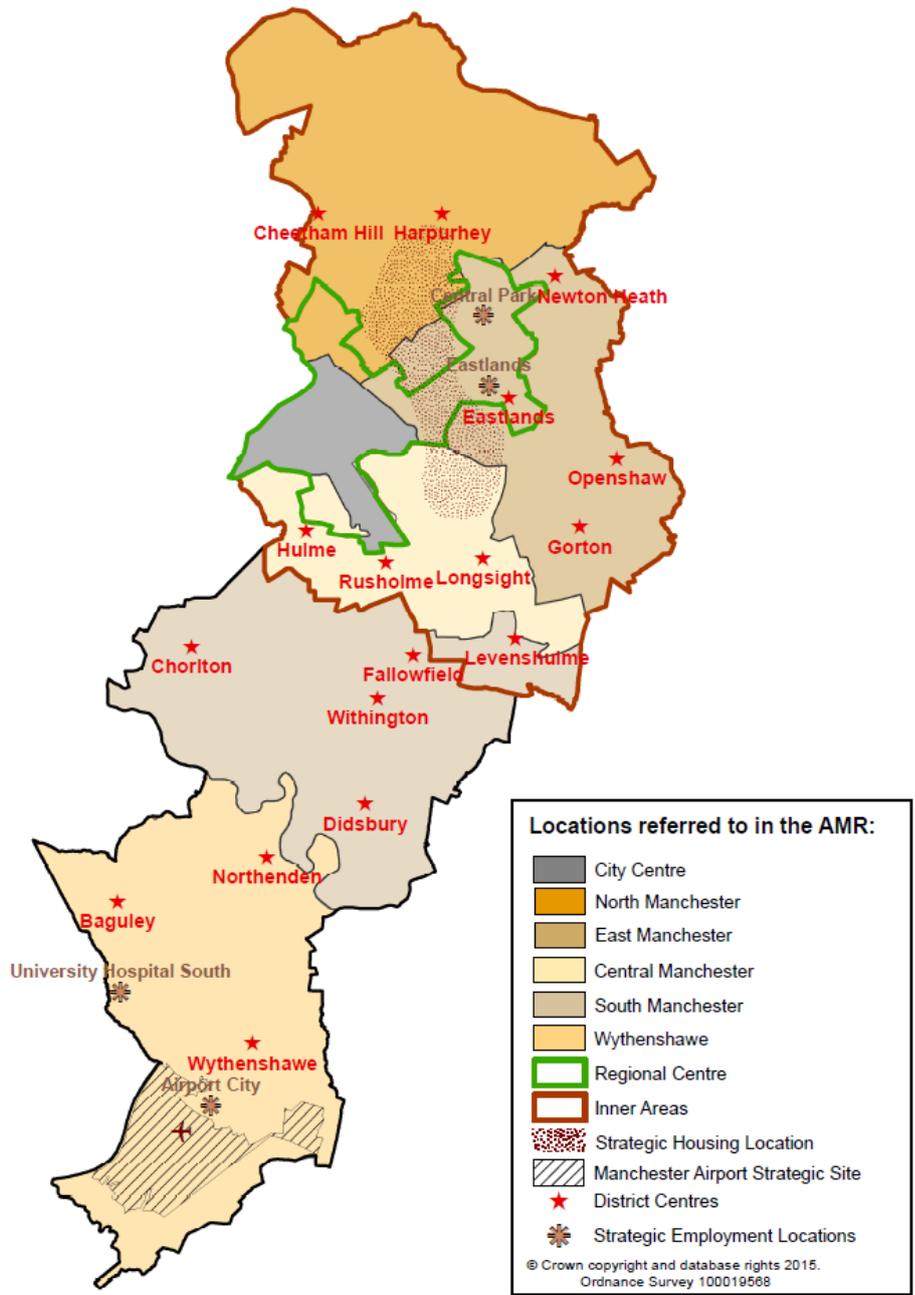
Further details of the monitoring framework and the Local Plan can be found in **Appendices A to C**. Updates on the Local Development Scheme, the Statement of Community Involvement, Neighbourhood Planning, and action taken under the 'Duty to Co-operate' on strategic matters can be found in **Appendices D to G**. The complete

indicator data tables, with targets, trends and comparators where relevant, can be found in **Appendix H**. The current data relates mainly to the period April 2023 to March 2024. There are exceptions to this where data is not available for the exact time period, or where it makes sense to provide more recent information.

### **3. Development in Manchester in 2023-24**

The following analysis considers whether the strategic Spatial Objectives for Manchester, set out within the Core Strategy, are being successfully delivered. It presents, for 2023-24, achievements and progress in relation to the relevant policy indicators listed in Appendix H to assess the plan's six spatial objectives in turn.

The following map shows the location of key geographical areas within Manchester that are referred to in the analysis. This shows the City divided into 6 areas. These areas were succeeded by 3 larger regeneration areas (North, Central, and South) in 2015, but the Core Strategy still refers to the previous geography and the analysis will continue to relate to them, where appropriate, for 2023/24.



## **SO1. Spatial Principles**

**Objective: Provide a framework within which the sustainable development of the City can contribute to halting climate change.**

Within the context of mitigation and adaptation to climate change, the framework will guide the scale and distribution of economic, housing, transport, environmental, health, education and other service and infrastructure investment across the City.

The creation of a framework which allows the sustainable development of the City is the first of the Core Strategy objectives. The strategic principles which guide this development are set out in Policy SP1 and refer to:

- the Regional Centre as the focus for economic growth;
- Manchester Airport as a secondary hub;
- the creation of neighbourhoods of choice with the majority of new housing located in the Inner Areas (which cover North, East, and Central Manchester and the City Centre);
- good access to services such as education and health;
- the promotion of public transport, walking and cycling;
- a network of open spaces.

These key themes of economy, housing, centres, transport, and environment are developed in the subsequent chapters of the Core

## Strategy.

In line with this objective, the Regional Centre remains the focus for economic and commercial development, with a vibrant retail and cultural offer and a significant amount of high-quality living accommodation. During 2023/24, 96% of floorspace and 81% of land developed for employment was in the Regional Centre. In the last year completions have included:

- Erection of two mixed use buildings in the City Centre at Manchester Goods Yard and No.1 Grape Street
- Flexible arts and events space at Aviva Studios comprising a range of activities including theatre, music, dance, art, exhibitions and conferences
- The multi-use Co-op Live Arena which will host different entertainment and leisure events including music, sport, performances, awards ceremonies and other live entertainment
- Conversion of the existing Granada House building into a 175 bed hotel.

These developments are supporting the fastest-growing sectors in Manchester: business, financial and professional services and cultural, creative and digital; and science, research and development.

As in previous years, the vast majority of new housing (95%) in 2023/24 was built within the Regional Centre and inner areas. The schemes with the largest numbers of completed units this year within the Regional Centre and Inner Areas, included 868 co-living bedspaces on Water Street and 520 units at New Vic on Corporation Street in the City Centre. City Centre completions were considerably higher than last year due to the above schemes.

This pattern of development enables more residents to live close to employment within the Regional Centre, reducing travel to work distances and encouraging use of the public transport network and active travel. This is one of the ways in which the City is moving towards its target of reducing carbon emissions to be net zero by 2038. Good progress has been made towards this target despite a growing population and in 2022 (most recent figure) total Citywide CO<sup>2</sup> emissions (1.86m t) were 46% lower than the 2005 baseline. In 2019 the City Council declared a climate emergency, following this the carbon emission target was reviewed and the aim was set of making Manchester a zero-carbon City by 2038 or before.

However, over a five-year period from 2018 to 2022, Manchester emitted 9.54 million tonnes of CO<sup>2</sup> (m t CO<sup>2</sup>), against a total carbon budget of 15m t CO<sup>2</sup>, allocated to last until 2038 and beyond (until

2100). This means that 63% of the City's total carbon budget has been utilised in its first five years. Despite an overall downward trajectory, with the City's emissions reducing by 46% between 2005 and 2022, urgent action at pace and scale is needed in all sectors to ensure Manchester stays within its carbon budget. Since 2005, positive progress can be seen as Manchester's emissions have fallen significantly and this downward trajectory has been driven by the introduction of more renewable energy into the national grid as well as by positive local action. In the same timeline, Manchester has significantly upped its climate game, making bold climate commitments, working collaboratively to deliver action, and reporting transparently on the progress being made. The City is now recognised by CDP (Carbon Disclosure Project) as a climate change leader alongside global cities like Paris, New York and Tokyo.

Manchester Airport passenger numbers had been increasing steadily over the years but have been severely affected by Covid-19 and lockdown measures restricting travel within the UK and international travel resulting. However, the latest figures indicate that passenger numbers are now approaching pre pandemic levels. The Airport has also completed a £1billion transformation programme of investment and improvement to terminal capacity and a redeveloped terminal 2, allowing greater throughput of passengers and the opportunity to

grow to a capacity of 55 million passengers per annum using its two runways. Its economic role is expected to expand further with the future development of Airport City North.

Good access to services, including jobs, shops, health and education facilities is being maintained throughout the City as new housing is completed, with all residents continuing to be within a 30 minute travel time (walking, wheeling, cycling, or public transport) of health facilities, schools, employment and a foodstore.

Improvements to both the quality of and access to open space in and around Manchester continue to be promoted through the Manchester Green & Blue Infrastructure Strategy and accompanying Stakeholder Implementation Plan, adopted in July 2015, refreshed in 2021 and monitored annually.

## **SO2. Economy**

**Objective: Support a significant further improvement of the City's economic performance and spread the benefits of this growth across the City to reduce economic, environmental and social disparities, and to help create inclusive sustainable communities.**

The Regional Centre will continue to be the main focus for business, retail, higher education, leisure, cultural and tourism development, to further develop its role as the main employment location and primary economic driver of the City region. The growth of Manchester Airport will entail a significant increase in employment.

This Core Strategy objective is supported by a suite of policies relating to economic growth, with the focus of this growth being: the Regional Centre, City Centre, Manchester Airport and strategic employment locations.

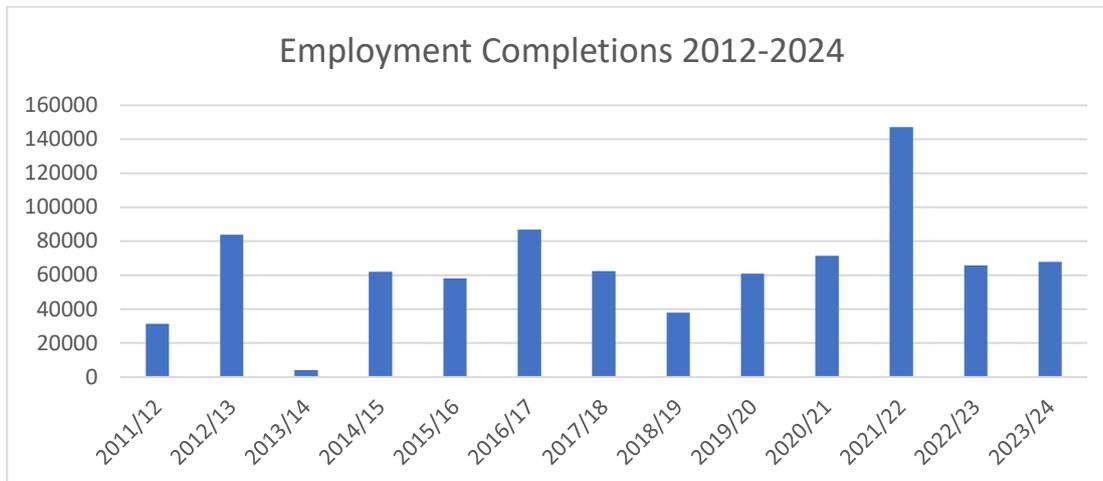
The City's economy continues to grow. Between 2021 and 2022 (latest available data) Manchester's GVA grew by 14.6%, this was ahead of the national rate which grew by 9.7% over the same period. When we look at GVA per head, again Manchester is ahead of the national rate, with Manchester's GVA per head being £55,371 compared with £33,976 in England. The number of employees in

Manchester in 2023 was recorded at 453,600 which was a 6.0% increase on the figure from 2022. The number of enterprises increased by 34.3%, from 17,045 in 2015 to 22,895 in 2024.

The two sectors that are most contributing to Manchester's increased GVA are Financial and Insurance activities & Professional, Scientific and Technical activities contributing 14.2% and 14.0% respectively in 2022. Between 2015 and 2022, the Financial and Insurance activities sector grew by 1,000 employees and accounts for 4.7% of all employees in Manchester. The Professional, Scientific and Technical sector grew by 20,000 and accounts for 13.8% of Manchester employees, an increase of 2.7 percentage points from 2015. The 2.7 percentage point increase was the largest seen across all 18 employee sectors in Manchester.

Increased investor confidence has led to an increased pace of commercial development. In recent years, total employment space completed in the City has reflected this investor confidence and during 2023/24, 64,277sqm of offices and 3,584sqm of industrial/warehousing space was completed in Manchester (see Chart of Employment Completions below).

Chart 1: Employment Completions 2023-2024



In 2023/24, two significant office completions took place, two brand new multi-use buildings at Enterprise City and a five-storey building at Manchester Science Park. These high-quality schemes offer flexible Grade A office floorspace.

In 2023/24 retail completions were at 27,519sqm of new floorspace and of these completions, 76% took place in the City Centre. The Presbar Foundry Store changed its use from an industrial foundry (Class B2) to a mixed-use development with retail, leisure and office uses.

Manchester’s visitor economy has continued to thrive. The City remains the third most visited destination in the UK by international visitors, after London and Edinburgh. Manchester’s hotel sector has increased further during 2023/24 with the completion of the part

redevelopment and part refurbishment of the existing Granada House building into a 175-bed hotel. The opening of Aviva Studios (The Factory) in 2023 to host the Manchester Festival is the largest investment in a national cultural project since the Tate Modern in London in 2000. It is estimated that the economic impact of new cultural space will be considerable with 1,500 direct and indirect jobs created and adding £1.5 billion to the City's economy over a decade. The new indoor Co-op Live Arena also opened in 2024, featuring a "smart bowl" design, it is located at the Etihad Campus and will further boost the visitor economy.

Between October 2023 and October 2024, the claimant count in Manchester has seen a rise of 4,035 and now stands at 27,440 claimants. In 2024, the month with the highest claimant count was July 2024 with 27,920. This was the highest the claimant count had been since September 2021. It should be noted that under Universal Credit a broader span of claimants are required to look for work than under Jobseeker's Allowance. The level of the Claimant Count is likely to be higher than it would have been otherwise, due to more claimants being classified as unemployed.

In order to continue to meet the Council's economic objectives, as the economy continues to grow, it will be important to ensure that the increased job opportunities are accessible to all sections of the resident population from all areas of the City. This will mean ensuring

that new employment generating development continues to be located and designed to be accessible by a range of transport means and by sustainable transport and active travel measures wherever possible.

## **Regional Centre**

In 2023/24, 99% of employment floorspace developed for office was in the Regional Centre. The majority of this was either in the City Centre or on the edge of the City Centre.

In the planning pipeline, a significant proportion of floorspace is within the Regional Centre. Approximately 408,818sqm of office floorspace is under construction, and over 192,175qm of office floorspace has planning permission.

In terms of development, major schemes have continued to progress apace throughout 2023/24. The erection of two large buildings at Enterprise City added 40,850 sqm of office floor space. Significant progress has been made at St. Johns with approximately 80,000sqm of office space plus a new arts and culture venue, Aviva Studios opening in June 2023. In addition, the 6.5-acre public park at Mayfield opened in September 2022 and is the first City Centre park in more than 100 years. The opening of the landmark park, which has already proved very popular, will kick-start further commercial

elements of the Mayfield Development scheme. Ambitious plans for commercial space at Mayfield will see the delivery of approximately 150,000 sqm of high-quality workspace, retail and leisure opportunities; there is also the potential for up to 10,000 new jobs. Work is now underway on the first phase of the St Michael's development in the heart of the Civic Quarter. This first phase consists of 18,581 sqm of new BREEAM outstanding commercial space, a 1,486 sqm rooftop terrace, a 5\* hotel, and new public realm and is expected to complete in 2024.

Proposed growth in office provision over the next 20 years is also expected in Piccadilly, Sister (formerly known as ID), First Street, Manchester Science Park, Great Ducie Street, St. Mary's Parsonage and in parts of East Manchester, proposing over 1.4 million sqm of additional floorspace.

The Regional Centre remains the main employment location and economic driver of the City and City Region, in line with Core Strategy policy SP1.

## **City Centre**

- Manchester's economy and employment offer continues to grow, broaden and diversify, and the City Centre is a major driver of this growth. During 2023/24, 133,698sqm employment

related development comprising retail, office, leisure/education, hotel and warehousing completed in the City Centre and Fringe. Almost a third of this 2023/24 growth was due to two mixed use buildings in the City Centre at Manchester Goods Yard and No.1 Grape Street

Growth in employment development is set to continue over the next 15 years with an additional 2.2 million sqm of offices expected by 2040.

Manchester's high-growth sectors in terms of Gross Value Added (GVA) and number of jobs have remained consistent over recent years. These sectors include business, financial and professional services; cultural; creative; cyber security; digital; advanced materials and manufacturing; wholesale, and retail. The majority of businesses in these sectors are located in the City Centre. Cultural, health, innovation, creative and digital industries continue to make a significant contribution to Manchester's economy, making the City a more attractive place to live, visit, work and study.

Manchester's population growth has also been concentrated in and around the City Centre, with students, graduates and young professionals in particular attracted by the growth in skilled jobs and an increasingly attractive accommodation, leisure and cultural offer. New apartment-led residential development will add further capacity

in the future. In 2023/24, 1,755 units were completed in the City Centre (1,755 flats).

Manchester City Centre is made up of a collection of distinct and recognisable neighbourhoods. Featured below are examples of the type of development and approach to areas in the City Centre:

Mayfield – a 20-acre site providing the opportunity to create a distinctive City Centre district. Development will see the delivery of 1,300 new homes, approximately 150,000 sqm of high-quality workspaces, and retail and leisure opportunities, including two hotels and the newly completed 6.5 ha new City Centre park, the first in Manchester for more than 100 years.

First Street – over the past decade, phased development has delivered major regeneration, creating a mixed-use neighbourhood providing a new cultural facility, 240,000 sqm of new commercial space with 100,000 sqm of office space, and retail, leisure and hotel space. Future phases of development, include Grade A commercial floor space, alongside new residential development.

St. Johns - completed in June 2023 is Aviva Studios (The Factory), a world-class cultural space in the heart of the City. It is one of the biggest developments of its kind in Europe, Aviva Studios (The Factory) will be the permanent home for MIF. It will present a year-

round programme, featuring artists from around the world, as well as creating jobs, skills and training opportunities for people from across the City.

The London Road Fire Station has a permission and has commenced on site for a mixed-use scheme comprising retail, offices and a hotel. Other major commercial schemes under construction include the former Bauer Millet site and M&M on Pollard Street.

Previously known as ID Manchester, Sister is a joint venture between The University of Manchester and Bruntwood SciTech. The draft SRF for ID Manchester was approved for public consultation by Manchester City Council's Executive Committee on 28 June 2023. Once completed, Sister will create over 10,000 new jobs and bring significant economic, social and environmental benefits to the city. Totalling over 4 million sq ft, the illustrative masterplan has the potential to accommodate over 2 million sq ft of commercial and retail space, and over 1,500 homes.

In 2023/24 there were 20 major planning approvals, of which seven were major residential planning approvals. The seven residential schemes will provide 1,813 units. Four of the remaining approvals were for major office development whilst the rest consisted of a variety of uses.

City Centre footfall is measured at five locations (King Street, Market Street, New Cathedral Street, St Ann's Square, Exchange Square – Arndale steps), giving an insight into trends in the number of City Centre shoppers. Taking 2023/24 as a whole, City Centre footfall increased by 6% compared to 2022/2023.

## **The Airport**

Manchester Airport is the Global Gateway to the North. It supports Manchester's international role, outward looking focus and connectivity, by providing direct connections to cities in Europe, the United States of America, the Middle East, and in south and east Asia (all important export markets and economic growth areas). The network of direct flight destinations had been steadily expanding but air travel was severely impacted by Covid-19 restrictions in recent years. However, the passenger figure for Manchester Airport 2023/24 was 28,736,112 which was a 13.9% increase on 2022/23 and has now caught up with pre-covid usage levels.

The Airport has completed a £1 billion transformation programme of investment and improvement with new terminal capacity allowing greater throughput of passengers and the opportunity to grow to a capacity of 55 million passengers per annum using its two runways.

The Airport City is a major new employment area expected to create a significant number of jobs in a new hi-tech campus, providing offices, research and development and two hotels. Global Logistics is a large-scale logistics location with infrastructure delivery and take-up of warehouse space by businesses required to co-locate with the Airport to support its growth, including distribution companies such as DHL and Amazon.

In terms of sustainable access to the airport, the percentage of passengers accessing the airport by non-car modes in the first six months of 2023 was 16%.

### **SO3. Housing**

**Objective: Provide for a significant increase in high quality housing provision at sustainable locations throughout the City, to both address demographic needs and to support economic growth.**

The emphasis will be on providing a good range of high-quality housing, (in terms of size, type, tenure, accessibility and price) including affordable housing across the City; to create sustainable lifetime neighbourhoods with high quality environments, good local facilities and with easy access to employment opportunities.

In recent years, Manchester has experienced rapid population growth, largely as a result of the inward migration of people seeking work in the City's growing economy, and this is forecast to continue. These new residents are looking for good quality affordable accommodation, both for owner-occupation and in the private rented sector. There continues to be a need for social housing delivered by registered providers and the City Council. It is essential to provide a choice of size, type, tenure, and value, in sustainable and attractive locations, if the City is to continue to attract and retain economically active people. Core Strategy policies play an important role in supporting this goal.

Manchester launched a new Housing Strategy in June 2022. It aims to meet demand for all types of housing in every part of the City, while committing to build 36,000 homes up to 2032. Of these, 10,000 will be social and affordable housing.

As Manchester adopted the Places for Everyone (PfE) Joint Development Plan in March 2024 the annual net housing need figure in PfE for Manchester of 3,533 units per year from April 2022 is the target figure for the City.

In 2023/24, 3,006 new homes (gross) were completed across the City. A total of 4,899 (gross) units have been completed since 2022. These figures include communal establishments such as purpose-built student accommodation and sheltered accommodation which is not made up of self-contained units. Different ratios are applied to bedspaces in the various types of communal accommodation to come up with a completions figure, as required by the Government's Housing Delivery Test Measurement Rule Book.

Residential completions in 2023/24 were higher than the previous year. As expected, the number of completions has recovered in 2023/24 as overall, the pipeline is showing good signs of resilience despite the ongoing volatility and economic challenges.

There were forty-four residential demolitions in 2023/24, meaning that net completions were 2,962 units – comprising 386 houses (13%) and 2,576 flats (87%).

The PfE figure of 3,533 is also used when assessing five-year supply and for the purposes of the Government's Housing Delivery Test. The Housing Delivery Test looks at net completions over the previous three-year period and is used to determine whether a LPA needs to produce an Action Plan to address housing under-delivery (National Planning Policy Framework paragraph 75) and to calculate the level of buffer to add to the five year housing supply (NPPF paragraph 73). Achieving 95% of the requirement counts as meeting the Housing Delivery Test, which Manchester City Council has achieved each year since the test was introduced, so the Council has not had to prepare an Action Plan to date. The most recent published Housing Delivery Test is 2023 (results published Dec 2024) and showed Manchester had delivered 129 % of the required housing over the past three years.

In total there were 25,090 units in the planning pipeline at the end of March 2024. This comprised 16,385 units in schemes already under construction, and 8,705 units in schemes with planning approval where construction had not yet started at this date.

The City Centre contains 47% of the planning pipeline (11,887), with large permissions granted in 2023/24 including 1,202 flats on the former gas works site at Gould Street, and a 1,014-bed purpose built student accommodation development at One Medlock Street.

As demand for housing and commercial space has grown in the City Centre, significant new opportunities for development have come forward on the fringe of the City Centre and beyond.

In some instances, this involves repurposing existing residential and commercial sites that require significant infrastructure investment, including opportunities within Victoria North and other parts of north Manchester. Expanding outwards from the City Centre, the residential-led Victoria North regeneration project has the potential to contribute up to 15,000 new homes over the next 10–15 years, of which 20% will be affordable. Victoria North is the City's biggest opportunity to deliver an ambitious affordable housing plan. A well-planned, place-based approach to development, it will provide a diversity of housing types that reflect the City's changing demographic, including much-needed family homes. There are also opportunities adjacent to the extending City Centre including Holt Town and Miles Platting. Towards the eastern edge of the local authority area, planning approval has now been granted for over 650 new homes on the Jackson's Brickworks site (May 2023), and a number of recently approved sites in Newton Heath are now under construction. At the southern end of the city, it was

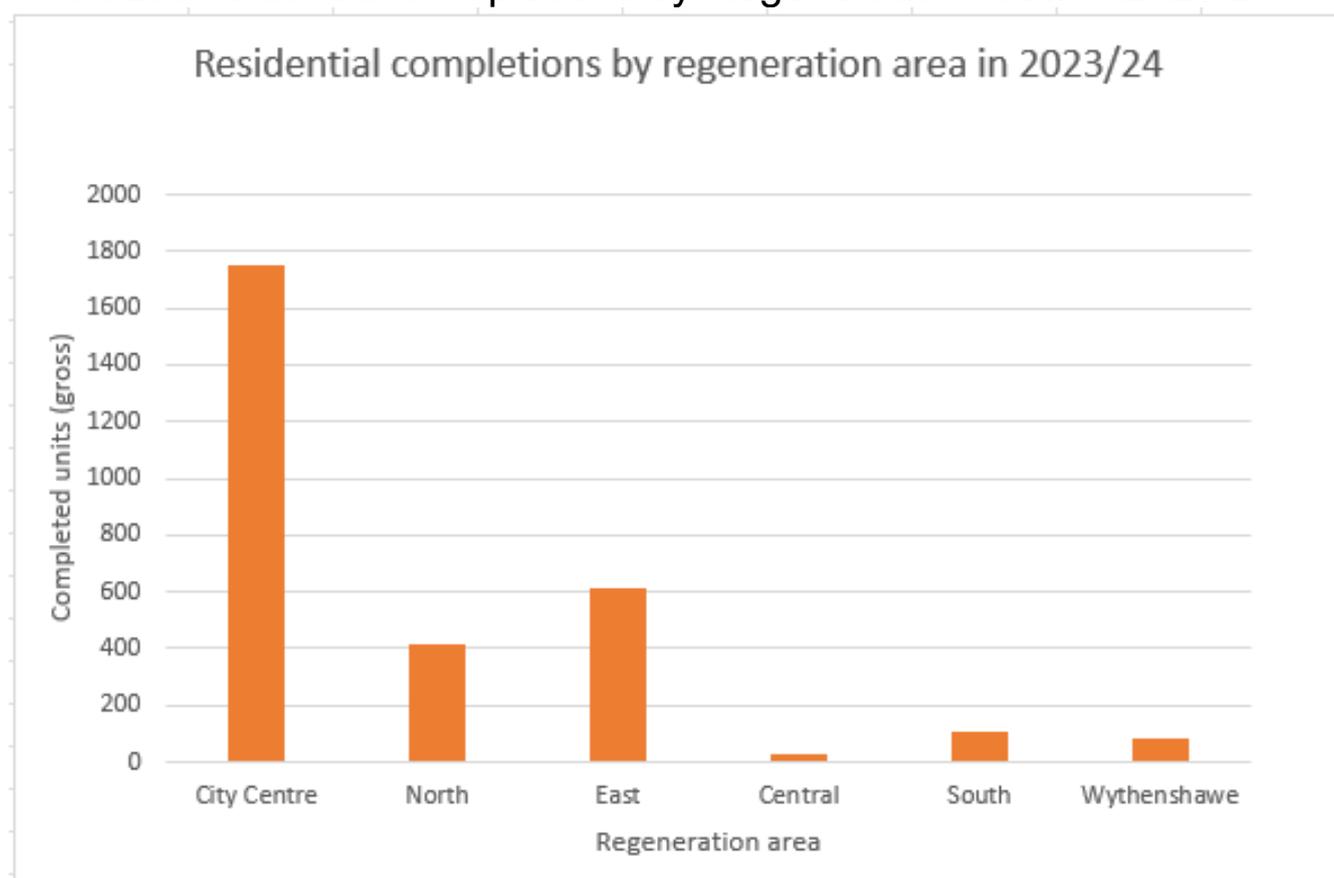
confirmed in November 2023 that Wythenshawe town centre will benefit from £20 million from the Government's Levelling Up Fund - regeneration plans there will deliver around 1,600 new homes on Council-owned land over the next 10-15 years, as well as a new public square, new shops and net zero commercial, community and cultural space.

The graph below shows gross housing completions in 2023/24 by strategic regeneration framework (SRF) area<sup>1</sup>. Completions in the City Centre have increased considerably as predicted in the AMR 2023, with 520 apartments at the New Vic development on Corporation Street and the 868-bedroom Union co-living scheme on Water Street both completing in 2023/24. Completions in the North and the East of the city have also seen an increase, the Central area has seen a reduced number of completions, whilst the South and Wythenshawe areas have remained at a similar level as in 2022/23.

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<sup>1</sup> These SRF areas were current in 2012 when the Core Strategy was adopted and there are a number of CS indicators which are based on them.

Chart 2: Residential Completions by Regeneration Area in 2023/24



In 2023/24, 87% of net residential completions in Manchester were flats. The average density of residential completions within the City Centre was 917 units per hectare in 2023/24 - well in excess of the target density of at least 100 dwellings per hectare for this part of the City, as has always been the case.

The number of empty homes on the Council Tax register in 2024 was 2.17%. Empty property figures can sometimes be misleading in Manchester as new properties may be technically empty, for example a new tower block in the City Centre which in time will be occupied.

In 2023/24 there has also been 603 additions to the number of affordable housing units added consisting of:

- 132 social rent;
- 99 affordable rent;
- 51 discounted market rent;
- 218 shared ownership; and
- 103 rent to buy.

The number of affordable housing completions increased by 45% in 2023/24 to 603 homes. A total of 1,018 affordable homes have completed since the launch of the Housing Strategy. As part of the ongoing work to meet the affordable housing targets in the Housing Strategy (2022-2032), the affordable pipeline is expanding with c. 1,800 new affordable homes currently under construction (including 666 new affordable homes expected to complete in 2024/25) and a further c 1,400 with planning permission, as of October 2024.

We want our residents to live in the homes they want and need. With this in mind, the Council is working to significantly upscale the delivery of new affordable homes through a number of programmes of work designed to help deliver the homes needed by our most vulnerable residents. Working collaboratively with our Registered

Provider (RP) partners and through our joint ventures in Victoria North and the Eastern Gateway will be fundamental to our success.

The Council is also looking to improve energy efficiency of its existing social housing stock – which represents around a third of all homes in Manchester – in line with our net zero carbon ambitions. It is progressing Project 500, a housing initiative that will deliver new low carbon affordable housing on smaller Council-owned brownfield sites across the City in partnership with Manchester’s network of registered providers. This programme will increase the number of low carbon affordable homes available to Manchester residents, while bringing underused brownfield sites back into use. 137 units were given planning approval on Project 500 sites across North and East Manchester in 2023/24.

The efficient use of both land and buildings is supported through several Core Strategy policies. The Council encourages development in sustainable, brownfield locations and 98% of residential completions in 2023/24 were on brownfield land, exceeding the Core Strategy target of 90%.

## **SO4. Centres**

**Objective: Provide a network of distinctive, attractive and high quality centres, strengthening local identity, providing essential services close to homes and local access to healthy food.**

Developments providing additional services and retail will be encouraged in the district centres where such development is consistent with the City's retail hierarchy. Particular emphasis will be given to development that helps to create distinctive local character.

District centres are the core commercial and service hubs at the heart of Manchester's neighbourhoods, where people access key services and have the chance to meet and interact with their community. Retailing has been experiencing wider changes in how people shop in general with more shopping taking place online. Manchester's district centres have proved relatively resilient when compared to national trends with few closures or increases in vacancy rates. Footfall was more resilient in most district centres compared to the City Centre during the pandemic, and this confirms the importance of our district centres to their neighbourhoods. Access to funding has been sought, such as the Levelling Up Fund and Shared Prosperity Fund, to continue our investment in these centres.

In 2023/24, 1,372sqm of commercial floorspace was created in district centres. Despite being below the overall Core Strategy target, in recent years retail provision has increased in district centres. District centres continue to be the main location for convenience shopping and are also visited to access services for those living in the local community and by people working nearby. The Core Strategy promotes residential growth in and around centres, and the Council undertakes proactive centre management to encourage people to continue using them.

The Council undertakes regular surveys of the City's district centres. The survey in 2024 showed that the proportion of shops remained similar to the 2015 survey, at 41%. Vacancy levels were at 10% across the City's district centres, which is significantly below the national average of 13.9% and a sign of stability. The number of pubs in centres has been decreasing as they close and change use, making up only 2% of all uses in centres in 2024 compared to 5% in 2009. The Council adopted a Hot Food Takeaway Supplementary Planning Document (SPD) in March 2017, to protect the vitality and viability of centres and also consider the food environment around schools. Previous AMR report monitoring data demonstrates that the growth of hot food takeaways has stabilised over recent years as hot food takeaways make up 8% of district centre uses in 2024. This figure has now remained consistent over the past decade.

## **SO5. Transport**

**Objective: Improve the physical connectivity of the City, through sustainable and accessible transport networks, to enhance its functioning and competitiveness and provide access to jobs, education, services, retail, leisure and recreation.**

Access to the facilities and opportunities of the Regional Centre and Manchester Airport, from residential areas will be particularly important, as will improving links between the City and City regions across the country via high-speed rail links and internationally via Manchester Airport.

Manchester has a well-established local network of train, bus and tram services, and good connections to other areas of the country and beyond; with Manchester Airport providing global connectivity. A key challenge over the coming years is to ensure that the necessary public transport capacity and sustainable transport infrastructure is in place to support future growth. The GM2040 Strategy was adopted in 2017 and provides a strategic approach to transport planning going forward. The 2040 Strategy has been given a light-touch refresh to take account of progress made and the wider context, along with a Five-Year Delivery Plan and Local Implementation Plans for each GM district, which were adopted in February 2021. Sitting as part of the 2040 suite of documents, co-produced by Manchester and

Salford City Councils and Transport for Greater Manchester, a brand-new City Centre Transport Strategy was adopted in March 2021. The Manchester Active Travel Strategy and Investment Plan was adopted by the Council in February 2023 and sets out the scale of our ambition for walking, wheeling and cycling.

Manchester is working with Transport for Greater Manchester and National Highways to increase the capacity, quality, accessibility and integration of the highways network, to achieve the goal of a comprehensive, efficient, and sustainable transport system that supports a growing economy and a larger number of people visiting and living in the City. Improved transport links can help to regenerate parts of the City, helping to tackle worklessness and social exclusion. Improvements to public transport and to walking, wheeling and cycling facilities are a key requirement for reducing CO<sup>2</sup> emissions and improving air quality.

Within the City, up to the Covid-19 pandemic, recent investment in transport improvements had been supporting a rising trend in public transport patronage and a continuation of the shift towards more sustainable modes in peak commuting patterns into the City Centre, in line with the Core Strategy objective of further developing the City's sustainable and accessible transport networks. In 2023, 76% of all trips into the City Centre in the morning peak (7.30-9.30am) were by

non-car modes (public transport, walking, wheeling, and cycling), which is almost at pre-pandemic levels (2018).

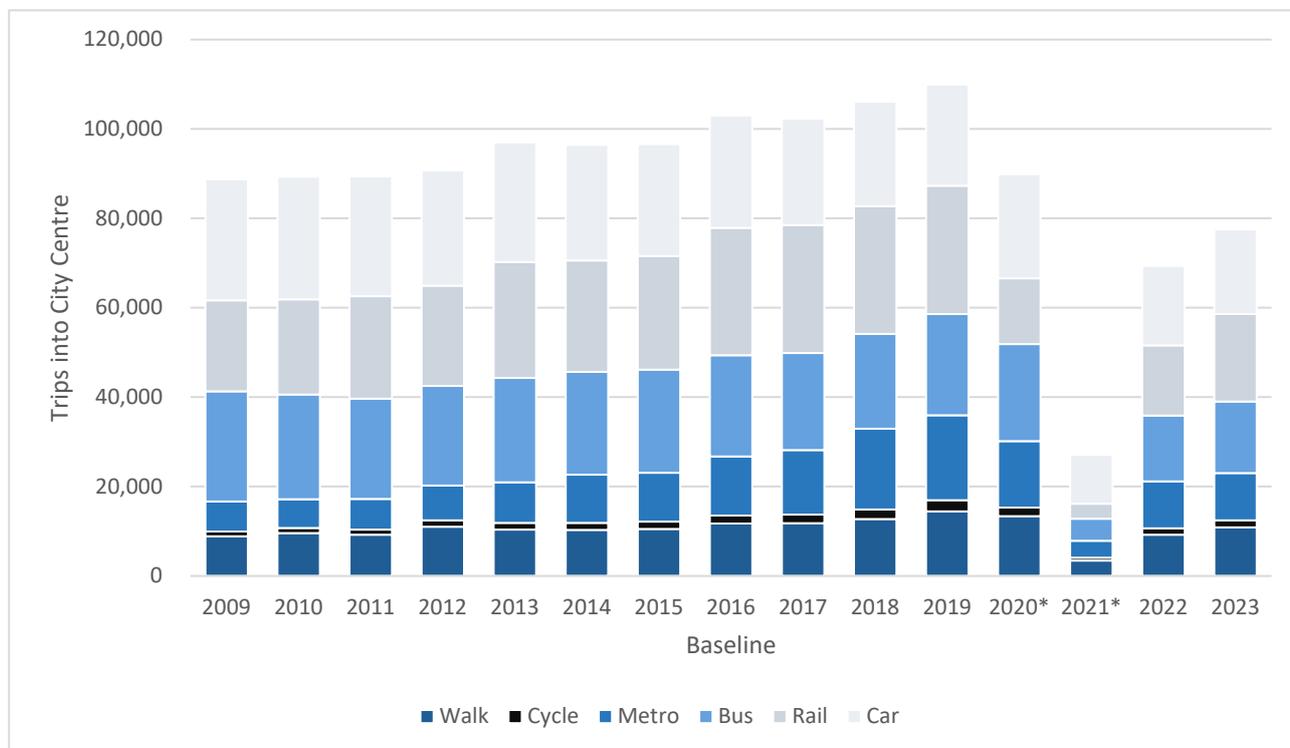
**Table 1: Trips made to City Centre in the morning peak by non-car modes (%) (The morning peak is 07:30-09:30)**

<b>Modes of transport</b>	<b>2023</b>	<b>2022</b>	<b>2021</b>	<b>2020</b>	<b>2018</b>	<b>2005</b>
<b>All non-car modes*2:</b>	76%	74%	60%	74%	78%	63%
<b>Public transport</b>	60%	59%	45%	57%	64%	55%
<b>Cycle</b>	2%	2%	2%	2%	2%	0.6%
<b>Walking</b>	14%	13%	13%	15%	12%	7.%

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<sup>2</sup> Source: Manchester City Centre cordon count, TfGM © Crown Copyright 2020

## Trips into Manchester City Centre (7.30–9.30am) by various modes of transport



Source: Source: Manchester City Centre cordon count, TfGM © Crown Copyright 2022 -

The cordon count takes place in March each year

Note: No data is available for 2007 and 2008.

**\*Rail surveys in 2020 and 2021 were affected by the Covid-19 pandemic**

Details of developments at Manchester Airport can be found in Section 2 (Economy). There are further plans to improve rail connectivity in the north of England that will add both capacity for freight and people as well as improve journey times. The One North<sup>3</sup>

<sup>3</sup> *One North* is a strategic proposition for transport in the North, to transform connectivity in the North of England, led by the City regions of Leeds, Liverpool, Manchester, Newcastle and Sheffield, published in July 2014.

report published in 2014, set out proposals for road and rail improvements which will link the cities of the north through higher speed rail connections and improved road links. Further details and refinements to these proposals are set out in the Strategic Transport Plan published in February 2019 by Transport for the North, with the accompanying Investment Plan setting out a number of projects. Proposals for Northern Powerhouse Rail gained support from the Government in March 2017 and feature in this plan as a way of connecting the northern cities with high-speed rail connections, improving rail journey times and frequency of services. The decision to cancel the planned delivery of HS2 to Piccadilly and Manchester Airport is a significant setback for the potential to enhance capacity and connectivity on routes to London and the Midlands, and to free up capacity on the classic rail network for local, regional and freight services. The Council, along with key partners, is continuing to lobby for delivery of Northern Powerhouse Rail in full and is awaiting further detail on future rail investment from central government.

The on-going expansion of the Metrolink network is improving connectivity across Manchester and the wider City region. Services now run on seven lines to 99 stops, covering nearly 105km. An extension of the network to Trafford Park opened in March 2020, with a further extension to Terminal 2 at the Airport planned.

Improvements to the Greater Manchester bus network continue, with works now concluded on the bus priority package to allow faster more reliable and more punctual bus services on an improved network to key destinations such as employment, education, health, leisure and retail centres. On Oxford Road for example, a key route into the City Centre, the scheme includes the removal of general traffic from key sections of the road, to improve the journey time and reliability for the high volume of buses on that route. In addition, a multi-million-pound Cross-City bus package is helping to facilitate Cross-City bus services to run through the heart of the City, making better connections between north and south Manchester and improving access to the destination parks such as Heaton and Wythenshawe Park and to specialist health provision.

The Bus Services Act came into force in April 2017 this has resulted in significant changes in how bus services are planned and provided. The Greater Manchester Combined Authority approved the introduction of a franchised bus network in March 2021. Under franchising, GMCA will coordinate the bus network and contract bus companies to run the services. This will enable GMCA to develop an integrated, multimodal public transport network that can meet the demands of both passengers and the City-region's economy, with integrated ticketing and service planning between bus and other forms of public transport. The first tranche of franchised services, primarily in Bolton and Wigan, began operation in September 2023,

followed by tranche 2, covering services through North and East Manchester, in March 2024. The final tranche, covering south Manchester and beyond, will begin in January 2025.

The Council continues to encourage an increase in walking, wheeling, and cycling as modes of choice for local journeys. Through the planning process, the Council works with developers to plan places that encourage walking, wheeling, and cycling as much as possible. During 2019 the Bee Network was published to provide a comprehensive walking, wheeling, and cycling network across GM, and funding has been made available over a five-year period through the Mayor's Challenge Fund (MCF) to assist in implementing this network. The Council currently has 24 Active Travel schemes either already under construction or at development stage as part of the MCF and other funding such as DfT Active Travel Fund. Walking and wheeling have grown their share of morning peak journeys into the City Centre, and we anticipate this to continue to rise with improvements to the City Centre public realm and an increasing residential population in and on the fringe of the City Centre. It is important that these successes are maintained and extended, with the continuing support of appropriate Local Plan policies.

Further details of transport developments can be found in the State of the City Report 2023.

## **SO6. Environment**

**Objective: Protect and enhance both the natural and built environment of the City and ensure the sustainable use of natural resources, in order to mitigate and adapt to climate change, support biodiversity and wildlife, improve air, water and land quality, recreational opportunities and provide networks of high quality green infrastructure, ensuring that the City is inclusive and attractive to residents, workers, investors and visitors.**

The development of networks of green infrastructure across the City and City Region, together with protecting and enhancing townscape character and securing a high standard of design in all development proposals, will promote healthy, low-carbon lifestyles, contribute to a sense of wellbeing, and help to facilitate the sustainable and inclusive growth of the City.

One of the Council's key environmental aims relates to climate change. As a City, Manchester has been collectively working towards a target of zero carbon by 2038 but the monitoring data trails two years behind with CO<sup>2</sup> emission and the new targets will be measured against the data as it catches up. Manchester's Climate Change Partnership (MCCP) and Manchester Climate Change Agency are responsible for setting the City's targets for all partners.

The latest data on Manchester's direct, energy-related emissions shows that the city's carbon emissions fell by 5% in 2022, a decrease that is also seen in the national emissions data because of warmer temperatures and higher energy prices resulting in less energy being used to heat buildings. This was despite an increase in emissions in some sectors showing continued recovery from COVID-19 pandemic. Since 2005, Manchester's emissions have fallen by 46%. This downward trajectory has been driven by the phasing-out of coal and the introduction of more renewable energy into the national grid as well as by positive local action. In 2019 the City Council declared a climate emergency, following this the carbon emission target was reviewed and the aim was set of making Manchester a zero-carbon City by 2038 or before. Since 2018, Manchester's emissions should have reduced by 49% in keeping with the targeted budget, but it has only achieved a reduction of 16%. If Manchester is to stay within its carbon budget and reduce emissions in the region, then urgent action will be required to increase both the pace and scale of climate action.

**Table 2: CO2 emissions in Manchester since 2005**

<b>Year</b>	<b>Total CO<sub>2</sub> emissions (Kilotonnes/KT)</b>	<b>% change from 2005 baseline</b>	<b>Per capita emissions (tonnes)</b>	<b>Manchester population ('000s, mid-year estimate)</b>
<b>2005</b>	3,424.6	-	7.5	455.7
<b>2006</b>	3,501.4	2.24%	7.6	463.7
<b>2007</b>	3,351.5	-2.13%	7.1	470.5
<b>2008</b>	3,339.5	-2.48%	7.0	477.4
<b>2009</b>	3002	-12.34%	6.2	483.8
<b>2010</b>	3,165.6	-7.56%	6.4	492.6
<b>2011</b>	2,876.4	-16.00%	5.7	502.9
<b>2012</b>	3,070.9	-10.32%	6.1	507.0
<b>2013</b>	2,982.6	-12.90%	5.9	507.7
<b>2014</b>	2,622	-23.44%	5.1	511.1
<b>2015</b>	2,532.7	-26.04%	4.9	518.0

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<b>2016</b>	2,336.9	-31.76%	4.4	533.0
<b>2017</b>	2,235.4	-34.72%	4.2	534.1
<b>2018</b>	2,212.9	-35.38%	4.1	533.9
<b>2019</b>	2,140.3	-37.50%	3.9	544.0
<b>2020</b>	1,868	-45.45%	3.4	543.2
<b>2021</b>	1,951.1	-42.79	3.6	549.9
<b>2022</b>	1,855.8	-45.81	3.3	569.0

Source: BEIS Estimated CO<sub>2</sub> emissions dataset 2005-2022

The Council has identified its own target to reduce CO<sub>2</sub> emissions as part of its contribution to the overall City-wide target and is on track to achieve its goal to become a zero-carbon organisation by 2038 or earlier. So far, over £320million has been invested in climate change projects. That funding has come from national and local schemes as well as our own investments. This has helped projects such as retrofitting the city's social homes. This work improves their energy efficiency as well as cutting harmful emissions. Meeting the zero carbon by 2038 target will require the City to become even more energy and fuel-efficient and to generate more low carbon and renewable energy. The Manchester Climate Change Framework 2020-2025 published in February 2020, sets out the approach to achieving this target over the next 5 years. Manchester's emissions are affected by a number of factors, some of which the City has limited control over, including the carbon intensity of the National Grid and the state of the economy. At a building level, the Local Plan continues to encourage energy efficient and low-carbon development. The new Local Plan will aim to put zero carbon at the fore in new development. And ensure the management of the city's parks, green spaces and waterways makes the most of their environmental benefits. The next climate change action plan for 2025 to 2030 is also being prepared.

Manchester's built environment must address resilience to the likely impacts of climate change. As a City, we must adapt our buildings, infrastructure, and natural environment to cope with hotter, drier summers; warmer, wetter winters; and more frequent periods of extreme weather, with for example improved surface water management and flood defences. We have continued to seek to direct development away from high probability flood areas. Yet again, no planning permissions in 2023-24 were granted contrary to Environment Agency advice.

Manchester's work on green and blue infrastructure has continued to be guided by the Green and Blue Infrastructure (G&BI) Strategy and the accompanying Stakeholder Implementation Plan, adopted in July 2015 and refreshed in 2021.

This award-winning Strategy provides more detail to underpin the environment policies within the Core Strategy and creates the vision that encourages the collaborative approach needed to achieve the high-quality green infrastructure referred to in SO6.

### **Places for Everyone Joint Local Plan**

Places for Everyone (PfE), sets out strategic level policies including those relating to the environment, such as green infrastructure and biodiversity.

## **Manchester Local Plan**

A Local Plan for Manchester is in development and will provide greater detail and Manchester specific policy approaches. Much of the research work completed as part of our Green and Blue Infrastructure Strategy, such as Our Rivers Our City, Biodiversity Strategy and Tree Capacity work, will provide evidence for the environmental policies within the Local Plan. The planning policy framework created by both PfE and Manchester's Local Plan will ensure that we can protect and enhance our G&BI assets, in the context of achieving the housing and employment growth that our city and future residents need.

## **Biodiversity Net Gain (BNG) and Urban Green Factor**

The Environment Act 2021 introduced Biodiversity Net Gain (BNG) as a requirement for Local Planning Authorities. This came into force in February 2024 for major developments and will be applied to smaller sites from April 2024. Developments will be expected to provide a 10% uplift in biodiversity provision, on site if possible or alternatively off site as near as possible to the development site.

In readiness for BNG becoming mandatory a new study has recently been completed to inform potential policy approaches for both BNG and the Urban Green Factor (UGF) in the emerging Local Plan. The study's main purposes were:

1. To identify the amount of biodiversity units that are likely to be required to provide 10% Biodiversity Net Gain (BNG), due to the level of development taking place in Manchester over the period 2023/24-2038/9.
2. To scope out potential sites for BNG within Manchester to allow biodiversity units to be provided as near to the development sites as possible.
3. To consider the application of an Urban Green Factor policy on developments proposed within Manchester.

The purpose of an Urban Green Factor (UGF) is to enable green infrastructure to be embedded within new developments to increase both biodiversity and resilience to climate change.

In 2023/24 work continued on key projects with the aim of providing better evidence to inform decision making and develop best practice approaches. This updated evidence, including key new studies and strategies, will underpin the review of Local Plan policies and included:

- Manchester's Open Space Study, an audit to understand the distribution of different types of open space across the City has been completed. The study shows that most parts of the City

have reasonable access to open space although not to all types of open space.

- In 2022 Manchester delivered Managing Manchester's Trees, a comprehensive assessment of the City's tree and woodland resource. The documents are now published and are underpinning the development of a new Tree and Woodland Action Plan. Tree Action MCR – This £1million capital investment programme has continued to deliver significant tree planting across the City. In total, during phase 1 and 2, 2,288 standard trees have been planted as part of the programme so far across all of the City.

The momentum behind delivering key large scale GI related schemes has continued, as illustrated by the schemes identified below:

### **Medlock Valley Nature Partnership**

In 2023 a consortium of environmental partners including the Councils of Manchester, Tameside and Oldham, worked on developing a five-year partnership project for the Medlock Valley, stretching from the City Centre to the foothills of the Peak district.

## **The Natural Course Project**

This eight-year EU funded project has concluded. Natural Course was an EU LIFE Integrated Project aimed at accelerating the delivery of the EU Water Framework Directive (WFD) objectives across the Northwest England River Basin District, with an early focus on Greater Manchester and the River Irwell catchment.

## **Park Development Programme**

Green space which has always played a key role in the City and it became demonstrably even more important during the pandemic. The Park Development Programme is a key mechanism for delivering the Park's Strategy. Circa £4.6m has been invested across the existing Parks estate, with over 107 capital projects identified and delivered in collaboration with Manchester residents.

Awareness of the benefits of G&BI continue to be raised throughout 2023/24. Despite the challenges faced by all, over the last three years, much innovative and creative work was undertaken by partners in delivering engagement activity across the City. Examples included:

## **Greater Manchester Green Spaces Fund**

The £2.6m Greater Manchester Green Spaces Fund (2022/24) offered grants to communities for projects that improve or create local green spaces in areas of greatest need. In total this has

equated to over £1 million pounds worth of investment into Manchester projects,

### **National Recognition - Chartered Institute for Ecology and Environmental Management Awards (CIEEM) 2023**

Manchester received significant recognition at this year's national CIEEM Awards. CIEEM is the leading professional body representing and supporting ecology and environmental management in the UK, Ireland and abroad. The council was a Highly Commended Finalist in the prestigious Climate and Nature Action 2030 category, which recognises targeted work to combat Climate Change. The Mayfield Park Partnership won the Innovation Category for its landscape led approach integrating a swathe of exciting nature-based solutions as part of the City Centre's first new City Centre park in 100 years.

### **Key Environmental Assets**

Manchester has one Site of Special Scientific Interest, an area of ancient woodland at Cotterill Clough in Wythenshawe, which remains in a 'favourable' condition. There are 37 sub-regionally designated Sites of Biological Importance (SBIs), 25 of which are currently in active conservation management.

As of 2023/24 the City has in total 10 Local Nature Reserves (LNRs) covering 442 hectares, and is working towards the Natural England target of 1ha of LNR per 1000 residents. The Water Framework Directive requires all waterways to achieve 'good' ecological status or potential by 2027; in Manchester in 2022 (latest data available), none were 'good', 12 were 'moderate', 3 were 'poor' and 2 were 'bad'.

There continue to be 35 Conservation Areas within Manchester, designated to manage and protect areas of special architectural and historic interest. The number of Grade I, II\* and II listed buildings is respectively 15 Grade I, and 82 Grade II\* and 752 Grade II.

Manchester has a substantial amount of brownfield land, which is an important resource for future development. The Council's Contaminated Land Strategy<sup>4</sup> and the Local Plan together support the remediation and safe re-use of potentially contaminated land, with 13.8ha remediated through Planning's development management process between Jan-Dec 2023.

The total amount of household waste has slightly risen in correlation with the increase in the City's population. Tonnages have now settled down following covid and the increase is thought to be due to

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<sup>4</sup> MCC Contaminated Land Strategy, updated March 2011

household growth. The proportion of waste which is recycled and composted has continued to rise, with 39.6% recycled/re-used/composted in 2023/24, compared with only 3.3% in 2001-02.

Air quality in Manchester is improving on a long-term basis and the measures being taken to reduce dependency on the car and increase walking, cycling and public transport use will help this trend to continue. Currently, Manchester is within acceptable limits for all of pollutants prescribed in the national air quality strategy except the annual concentration of nitrogen dioxide, which regularly exceeds the objective. Nitrogen dioxide levels are particularly high in the City Centre and close to busy roads. Manchester continues to meet the Local Air Quality Management objectives for all of the pollutants prescribed in the national air quality strategy. Despite meeting legal limits for particulates, pollutants and NO<sub>2</sub> remain a serious concern in Manchester, as they do in the rest of Greater Manchester and most other urban areas. The main source of NO<sub>2</sub> is road vehicles, in particular older diesel vehicles, but for fine particulates (PM<sub>2.5</sub>) the main source is from domestic solid fuel burning. Manchester is working with the other Greater Manchester Councils to try and reduce the impact of this pollutant by discouraging the use and misuse of appliances such as wood burning stoves and reminding residents of smoke control area rules.

**Table 3: Air quality statistics – annual mean concentrations of nitrogen dioxide (NO<sub>2</sub>) and particulate matter PM<sub>10</sub> (shown as a concentration value µg/m<sup>3</sup>)**

<b>Year</b>	<b>Manchester Oxford Road NO<sub>2</sub> (µg/m<sup>3</sup>)</b>	<b>Manchester Oxford Road PM<sub>10</sub> (µg/m<sup>3</sup>)</b>	<b>Piccadilly Gardens NO<sub>2</sub> (µg/m<sup>3</sup>)</b>	<b>Piccadilly Gardens PM<sub>10</sub> (µg/m<sup>3</sup>)</b>
2015 (baseline)	66	28	39	20
2016	66	27	40	20
2017	65	27	36	20
2018	62	30	35	21
2019	59	26	36	20
2020	36	18	27	15
2021	44	18	30	15
2022	43	18	29	17
2023	41	18	27	15

Source: Air Quality England

Following on from publication of the Greater Manchester Low-Emission Strategy and Air Quality Action Plan in 2016, the 10 Greater Manchester Authorities, working with GMCA and TFGM have produced a Clean Air Plan, aimed at reducing roadside NO<sub>2</sub> emissions to legal levels by tackling air pollution from traffic. The current Greater Manchester Clean Air Plan was prepared with Government to achieve legal NO<sub>2</sub> Limit Values in the shortest possible time, and by 2024 at the latest. A new Direction requires compliance with roadside NO<sub>2</sub> limits in the shortest possible time and by no later than 2026. GM districts have worked to formulate a revised Clean Air Plan to meet this Direction. In January 2023, the Government asked for more evidence to support the case for an investment-led, non-charging Clean Air Plan. Work with the Government has continued to ensure Greater Manchester has an agreed Clean Air Plan as soon as possible and the new plan is currently being prepared.

## **4. Conclusion**

Manchester has a strong, competitive economy and good infrastructure, and there are many indicators in the 2023/24 AMR which show substantial progress over the year period towards achieving the sustainable development goals set out in the Local Plan. The City's population has continued to grow. Economic development completions remained at a high level, especially for offices, retail, hotels and leisure in the Regional Centre. District centres have also remained vibrant, and the proportion of retail uses has remained stable, despite the growing importance of on-line shopping. Net housing completions remained high, which will support forecast growth in the population. Investment in sustainable modes of transport continued. Carbon emissions decreased this year and progress is being made through various interventions to deliver net zero by 2038. Significant investment in the City's green and blue infrastructure took place, with more planned through both large and small-scale schemes. The Council will carry on working with partners and wider stakeholders to ensure that its policies continue to protect and enhance environmental assets, and to support and promote sustainable lifestyles and growth.

The emerging Local Plan will be informed by a comprehensive evidence base. The Council has commissioned studies across a range of issues including housing needs; retail and leisure

trends/needs; biodiversity net gain and urban green factor; net zero new development; open space study; employment land review; and a hotels/short term lets study.

The Places for Everyone Joint Local Plan was adopted in March 2024 and will guide district-level local plans in terms of the scale and location of economic and residential development; and provide thematic policies that will apply across the nine authorities involved in the joint plan. The Local Plan review will enable the Council to further strengthen its support for sustainable and inclusive development, to ensure that the potential of the City and the needs and aspirations of its residents are fully met.

