NEW

HOUSING PIPELINE

Q1 2024 REPORT

Published June 2024

Glenigan

Analysis of market conditions and prospects prepared by Glenigan.

HOME BUILDERS FEDERATION

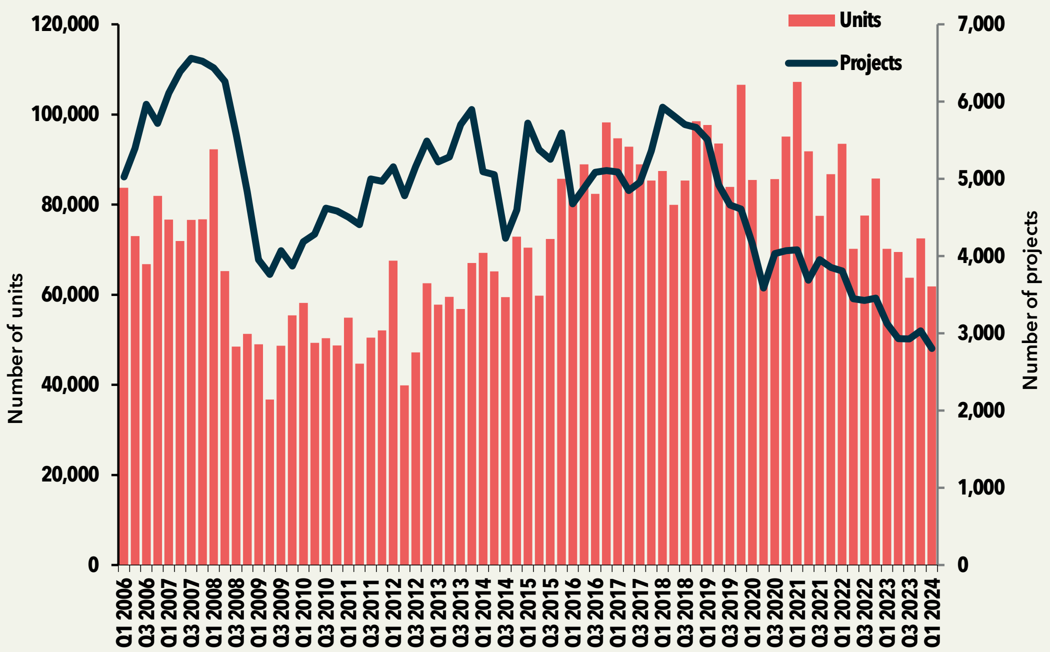
NEW HOUSING PIPELINE

Approvals declined during the first quarter of 2024, reversing a temporary pick-up in approvals during the final three months of last year. At 2,805, the number of housing projects granted planning permission in the first quarter dropped by 8% against the preceding quarter and were 10% lower than a year ago.

The number of units approved during the first quarter fell by 15% against the previous three months to total 61,823 units and was 12% lower than during the first quarter of 2023.

Housing schemes of ten or more units during the first quarter accounted for 90% of approved units. At 55,819, the number of units on such schemes declined by 15% against the preceding quarter and was 12% lower than a year earlier. The remaining 10% of units were on smaller new build projects of up to nine units including self-build schemes together with homes included within non-residential projects and from the conversion of non-residential properties.

Chart 1: Residential planning approvals (Great Britain)

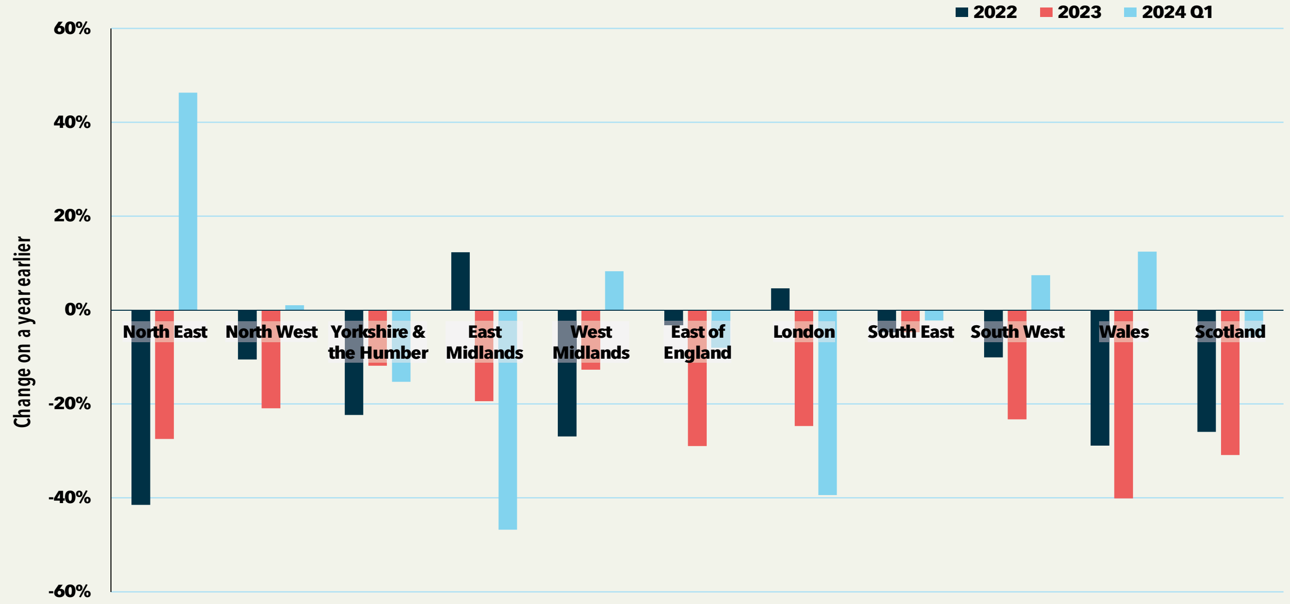


N.B. Includes residential projects of all sizes, residential units on non-residential schemes and conversions. Source: Glenigan

At 1,830 the number of private sector housing projects (schemes of 3 or more units) securing approval was 7% lower than in the fourth quarter of 2023 and was 11% down on a year earlier. At 54,379 the number of units on private sector projects granted planning permission dropped by 18% against the previous three months and was 10% lower than a year earlier. .

1. The range of projects covered by this report has been extended and now includes new build housing projects of all sizes, including schemes of less than 10 units, the conversion of non-residential buildings and residential units on mixed use developments.

Chart 2: Residential planning approvals by region (No. of units)



N.B. Includes residential projects of all sizes, residential units on non-residential schemes and conversions. Source: Glenigan

At 127, the number of social housing projects (of three or more units) rose sharply during the first quarter, increasing by 17% on the previous three months, although starts remained 16% down on a year ago. At 6,466, the number of units was 26% up on the preceding quarter but 24% fewer than a year earlier.

Table 1: Number of residential units approved

	North of England	Midlands	Southern England	England - All	Wales	Scotland	Great Britain
2020	70,442	59,228	159,943	289,613	7,271	32,806	329,690
2021	78,303	58,908	178,810	316,021	11,806	35,504	363,331
2022	62,708	54,448	175,143	292,299	8,399	26,301	326,999
2023	57,481	47,601	139,837	244,919	7,078	23,854	275,851
2024 H1	14,523	8,841	30,498	53,862	2,387	5,574	61,823
Change on a year earlier							
2020	-6%	-16%	-12%	-12%	-39%	-22%	-14%
2021	11%	-1%	12%	9%	62%	8%	10%
2022	-20%	-8%	-2%	-8%	-29%	-26%	-10%
2023	-19%	-16%	-20%	-19%	-40%	-31%	-21%
2024 H1	1%	-26%	-15%	-13%	12%	-6%	-12%

N.B. Residential projects of all sizes and residential units on non-residential projects and conversions.

Regionally, the North West, South West, Wales and Scotland bucked the national downward trend in the number of units approved during the first quarter, rising by 44%, 26%, 45% and 30% respectively against the preceding quarter. Approvals also edged higher in the East of England. Elsewhere, the number of units approved declined, with London (-51%), the East (-36%) and West Midlands (-24%), Yorkshire & the Humber (-33%) and the South East (-24%) seeing the sharpest declines.

Housing Pipeline report – Q1 2024 Report June 2024

HOUSING APPROVALS

The tables provide a regional breakdown of new building planning approvals since 2016

IMPORTANT NOTE:

As a result of changes made by Glenigan to how they collect data on the number of permissions granted, there are some significant changes to the number of permissions reported in the Housing Pipeline reports from Q4 2020 onwards for quarters prior to that date, and to information in previous Housing Pipeline reports.

The procedural changes mean that the data collection is now more extensive and accurate than it was previously and so the numbers reported in the reports from Q4 2020, are a better reflection of the actual number of permissions being granted. The revised methodology has been agreed with the Department of Housing, Communities and Local Government, who Glenigan also provide planning permission data for and so this data set will match the official Government numbers. In its *Taking stock: The geography of housing need, permissions and completions report published in May 2021,* Lichfields considered in detail why planning permission data reported prior to Q4 2020 was not wholly accurate (and included, for example re-submitted applications) and so not a fair reflection of the number of actual plots given a permission.

Table 2: Number of housing units securing detailed planning approval by region & country

	North of England			Midlands			Southern England							
	North East	North West	Yorkshire & the Humber	East Midlands	West Midlands	East of England	London	South East	South West	England	Wales	Scotland	Great Britain	*MAT England
Q1 2016	2,582	13,090	4,411	6,852	6,478	7,296	12,200	12,193	7,300	72,402	2,432	6,347	81,181	**269,508**
Q2 2016	5,152	12,382	5,463	4,344	8,336	9,582	12,570	13,084	9,152	80,065	2,408	6,490	88,963	**295,713**
Q3 2016	1,926	13,853	6,576	5,235	4,857	8,352	14,961	9,774	9,385	74,919	1,794	5,684	82,397	**304,749**
Q4 2016	4,794	12,603	8,402	5,432	6,113	11,186	14,318	15,910	7,879	86,637	4,038	7,553	98,228	**314,023**
Q1 2017	2,921	12,898	6,004	10,027	8,386	9,701	15,964	13,279	7,282	86,462	2,302	5,945	94,709	**328,083**
Q2 2017	4,468	11,768	5,605	7,490	9,126	8,287	15,413	11,144	8,011	81,312	2,350	9,205	92,867	**329,330**
Q3 2017	4,192	10,436	6,457	7,344	5,317	10,428	12,181	14,901	8,125	79,381	2,478	7,105	88,964	**333,792**
Q4 2017	2,384	10,237	8,869	6,616	6,377	8,508	9,984	15,349	8,308	76,632	2,526	6,202	85,360	**323,787**
Q1 2018	3,101	9,857	6,341	6,831	7,323	7,451	13,216	14,930	7,436	76,486	2,489	8,455	87,430	**313,811**
Q2 2018	2,270	8,273	6,527	7,238	6,127	6,778	12,128	12,501	8,733	70,575	2,435	6,927	79,937	**303,074**
Q3 2018	2,445	9,830	6,932	6,693	7,747	10,116	13,204	12,092	7,473	76,532	2,434	6,375	85,341	**300,225**
Q4 2018	3,157	9,757	6,661	8,591	8,970	9,975	16,578	15,845	9,227	88,761	3,031	6,725	98,517	**312,354**
Q1 2019	1,892	9,240	6,706	7,578	9,492	12,471	17,951	15,048	7,656	88,034	2,953	6,658	97,645	**323,902**
Q2 2019	3,800	8,370	7,346	10,945	8,119	8,219	11,412	11,967	8,945	79,123	2,482	11,956	93,561	**332,450**
Q3 2019	1,706	7,322	5,335	7,682	6,399	9,392	11,901	12,439	7,978	70,154	4,144	9,644	83,942	**326,072**
Q4 2019	4,783	10,849	7,720	6,977	12,912	10,574	14,831	14,961	6,994	90,601	2,310	13,674	106,585	**327,912**
Q1 2020	1,326	8,948	6,346	7,760	6,500	9,151	16,526	9,311	9,225	75,093	3,319	7,027	85,439	**314,971**
Q2 2020	1,440	5,380	3,517	6,811	6,016	6,497	11,991	7,918	4,393	53,963	1,346	8,169	63,478	**289,811**
Q3 2020	3,411	13,515	7,049	9,621	6,420	9,587	9,822	11,488	5,677	76,590	1,488	7,609	85,687	**296,247**
Q4 2020	2,533	10,673	6,304	7,765	8,335	9,670	19,436	12,005	7,246	83,967	1,118	10,001	95,086	**289,613**
Q1 2021	4,401	13,454	6,695	9,224	10,097	11,288	19,699	13,759	7,858	96,475	2,469	8,278	107,222	**310,995**
Q2 2021	4,535	8,345	6,346	5,611	6,248	8,800	17,622	13,370	7,893	78,770	2,273	10,766	91,809	**335,802**
Q3 2021	2,409	9,095	7,475	7,533	4,988	9,207	9,688	9,501	6,825	66,721	2,960	7,838	77,519	**325,933**
Q4 2021	2,482	7,479	5,587	6,683	8,524	9,372	15,489	10,466	7,973	74,055	4,104	8,622	86,781	**316,021**
Q1 2022	2,929	8,273	5,853	11,202	6,109	10,714	20,902	10,889	6,832	83,703	2,478	7,283	93,464	**303,249**
Q2 2022	1,483	9,594	4,222	6,521	4,575	8,899	9,621	9,500	8,168	62,583	1,475	6,147	70,205	**287,062**
Q3 2022	1,834	9,496	4,284	7,577	6,821	7,952	15,781	11,302	5,222	70,269	2,146	5,128	77,543	**290,610**
Q4 2022	1,847	6,976	5,917	7,327	4,316	9,844	19,087	13,179	7,251	75,744	2,300	7,743	85,787	**292,299**
Q1 2023	1,788	7,502	5,110	7,530	4,464	7,062	12,559	9,649	6,473	62,137	2,123	5,911	70,171	**270,733**
Q2 2023	3,343	5,615	4,092	6,588	6,627	7,996	10,574	9,682	5,796	60,313	1,974	7,165	69,452	**268,463**
Q3 2023	1,189	7,886	6,582	4,637	5,139	5,873	9,286	10,472	4,860	55,924	1,335	6,492	63,751	**254,118**
Q4 2023	2,645	5,249	6,480	6,258	6,358	6,128	15,543	12,358	5,526	66,545	1,646	4,286	72,477	**244,919**
Q1 2024	2,616	7,578	4,329	4,008	4,833	6,495	7,613	9,437	6,953	53,862	2,387	5,574	61,823	**236,644**

*Moving Annual Total for England

Housing Pipeline report – Q1 2024 Report June 2024

Table 3: Number of housing projects securing detailed planning approval by region & country

	North of England			Midlands		Southern England							
	North East	North West	Yorkshire & the Humber	East Midlands	West Midlands	East of England	London	South East	South West	England	Wales	Scotland	Great Britain	*MAT England
Q1 2016	112	385	304	375	371	611	552	929	512	4,151	199	325	4,675	**18,618**
Q2 2016	107	400	326	395	430	676	555	907	591	4,387	197	294	4,878	**18,193**
Q3 2016	128	444	312	386	376	741	622	934	632	4,575	199	312	5,086	**18,090**
Q4 2016	113	410	365	349	402	690	684	966	583	4,562	213	334	5,109	**17,675**
Q1 2017	118	443	336	411	402	687	634	959	588	4,578	183	328	5,089	**18,102**
Q2 2017	123	363	344	384	358	677	630	914	565	4,358	170	321	4,849	**18,073**
Q3 2017	140	434	312	352	329	718	565	1,044	576	4,470	158	331	4,959	**17,968**
Q4 2017	113	405	393	424	438	805	576	1,048	661	4,863	205	295	5,363	**18,269**
Q1 2018	131	490	455	506	469	903	592	1,054	762	5,362	250	317	5,929	**19,053**
Q2 2018	140	432	428	544	460	871	617	1,015	781	5,288	200	327	5,815	**19,983**
Q3 2018	106	459	405	533	430	793	624	1,007	791	5,148	232	324	5,704	**20,661**
Q4 2018	116	461	417	511	463	764	539	1,010	815	5,096	248	323	5,667	**20,894**
Q1 2019	94	438	402	513	457	762	601	977	688	4,932	263	312	5,507	**20,464**
Q2 2019	89	366	400	467	388	740	462	823	658	4,393	195	333	4,921	**19,569**
Q3 2019	91	354	330	435	352	639	584	838	543	4,166	192	302	4,660	**18,587**
Q4 2019	122	355	311	378	341	664	549	901	483	4,104	178	328	4,610	**17,595**
Q1 2020	93	359	287	355	301	566	486	739	511	3,697	191	275	4,163	**16,360**
Q2 2020	59	245	230	278	287	523	468	691	437	3,218	114	256	3,588	**15,185**
Q3 2020	94	363	265	305	308	567	462	788	468	3,620	131	282	4,033	**14,639**
Q4 2020	94	340	300	328	313	564	463	708	499	3,609	151	308	4,068	**14,144**
Q1 2021	95	322	270	338	313	571	491	729	473	3,602	155	324	4,081	**14,049**
Q2 2021	90	275	305	285	265	507	374	683	430	3,214	131	343	3,688	**14,045**
Q3 2021	72	279	292	332	282	633	405	721	477	3,493	161	300	3,954	**13,918**
Q4 2021	74	270	270	311	295	581	415	748	443	3,407	156	288	3,851	**13,716**
Q1 2022	82	275	243	286	263	559	451	702	515	3,376	126	305	3,807	**13,490**
Q2 2022	57	252	242	304	259	444	383	653	461	3,055	109	283	3,447	**13,331**
Q3 2022	74	276	201	337	270	479	419	616	375	3,047	131	248	3,426	**12,885**
Q4 2022	72	270	239	320	269	438	401	655	394	3,058	121	276	3,455	**12,536**
Q1 2023	64	254	224	269	238	451	355	580	345	2,780	115	230	3,125	**11,940**
Q2 2023	72	238	185	227	232	373	343	589	340	2,599	116	215	2,930	**11,484**
Q3 2023	58	242	223	239	209	380	289	628	329	2,597	103	227	2,927	**11,034**
Q4 2023	66	235	224	263	238	371	335	670	336	2,738	109	187	3,034	**10,714**
Q1 2024	64	232	175	207	246	347	268	577	356	2,472	136	197	2,805	**10,406**

*Moving Annual Total for England

Table 4: England – No. of housing PROJECTS by project size

	10 or more	3-9 units	1 & 2 Units	Misc*	Total
Q1 2016	890	1,728	1,521	12	4,151
Q2 2016	905	1,800	1,665	17	4,387
Q3 2016	908	2,008	1,644	15	4,575
Q4 2016	1,010	2,001	1,528	23	4,562
Q1 2017	1,052	2,014	1,497	15	4,578
Q2 2017	932	1,910	1,507	9	4,358
Q3 2017	930	1,964	1,556	20	4,470
Q4 2017	894	1,974	1,976	19	4,863
Q1 2018	965	1,875	2,505	17	5,362
Q2 2018	851	1,876	2,544	17	5,288
Q3 2018	824	1,875	2,434	15	5,148
Q4 2018	937	1,786	2,363	10	5,096
Q1 2019	944	1,688	2,285	15	4,932
Q2 2019	822	1,676	1,884	11	4,393
Q3 2019	787	1,759	1,610	10	4,166
Q4 2019	860	2,058	1,177	9	4,104
Q1 2020	777	1,655	1,258	7	3,697
Q2 2020	592	1,431	1,185	10	3,218
Q3 2020	768	1,571	1,271	10	3,620
Q4 2020	842	1,724	1,032	11	3,609
Q1 2021	870	1,653	1,071	8	3,602
Q2 2021	722	1,469	1,016	7	3,214
Q3 2021	682	1,663	1,139	9	3,493
Q4 2021	667	1,662	1,073	5	3,407
Q1 2022	763	1,633	975	5	3,376
Q2 2022	630	1,452	960	13	3,055
Q3 2022	628	1,474	942	3	3,047
Q4 2022	672	1,468	908	10	3,058
Q1 2023	622	1,367	787	4	2,780
Q2 2023	537	1,287	766	9	2,599
Q3 2023	501	1,207	883	6	2,597
Q4 2023	587	1,303	841	7	2,738
Q1 2024	514	1,227	724	7	2,472

*These are housing units or projects that are not primarily for housing but do supply secondary housing space e.g on commercial developments.

Table 5: England – No. of housing UNITS by project size

	10 or more	3-9 units	1 & 2 Units	Misc*	Total
Q1 2016	63,373	7,127	1,787	115	72,402
Q2 2016	70,494	7,422	1,943	206	80,065
Q3 2016	64,763	8,157	1,941	58	74,919
Q4 2016	76,069	8,271	1,832	465	86,637
Q1 2017	75,965	8,665	1,792	40	86,462
Q2 2017	71,439	8,039	1,814	20	81,312
Q3 2017	69,251	8,048	1,841	241	79,381
Q4 2017	65,840	8,217	2,335	240	76,632
Q1 2018	65,758	7,739	2,937	52	76,486
Q2 2018	59,653	7,802	3,022	98	70,575
Q3 2018	65,731	7,709	2,878	214	76,532
Q4 2018	78,246	7,475	2,811	229	88,761
Q1 2019	77,992	7,170	2,694	178	88,034
Q2 2019	70,039	6,828	2,218	38	79,123
Q3 2019	60,988	7,267	1,878	21	70,154
Q4 2019	81,201	8,007	1,375	18	90,601
Q1 2020	66,719	6,899	1,461	14	75,093
Q2 2020	46,835	5,738	1,359	31	53,963
Q3 2020	68,328	6,300	1,447	515	76,590
Q4 2020	76,100	6,631	1,202	34	83,967
Q1 2021	88,724	6,402	1,265	84	96,475
Q2 2021	71,952	5,605	1,195	18	78,770
Q3 2021	59,498	5,868	1,316	39	66,721
Q4 2021	66,721	6,080	1,244	10	74,055
Q1 2022	76,306	5,957	1,157	283	83,703
Q2 2022	56,013	5,371	1,145	54	62,583
Q3 2022	63,593	5,560	1,111	5	70,269
Q4 2022	69,220	5,426	1,049	49	75,744
Q1 2023	56,103	5,095	929	10	62,137
Q2 2023	54,633	4,697	902	81	60,313
Q3 2023	50,207	4,349	1,015	353	55,924
Q4 2023	60,697	4,799	989	60	66,545
Q1 2024	48,445	4,561	840	16	53,862

*These are housing units or projects that are not primarily for housing but do supply secondary housing space e.g on commercial developments.

NOTES

This report is based upon an analysis of housing projects being tracked by Glenigan and held on its database of construction projects. We have now extended the range of projects covered by this report in order to provide a more complete assessment of the residential development pipeline.

The following restrictions and filters apply to the analysis:

1. New build projects of all sizes are covered by the report (Coverage was previously restricted to approvals for 10 or more units.)
2. Housing schemes are included where the development is primarily identified as being: Apartments/ flats, Bungalows, Houses/ Luxury Housing or Sheltered Housing, Key Worker Accommodation or Sheltered Housing.
3. Conversions of non-residential properties for housing are included.
4. Private and social housing data includes schemes of 3 or more units.
5. Total residential approvals include 1 & 2 unit schemes together with residential units on mixed use developments.
6. Elderly people's homes, hostels and student accommodation have been excluded from the analysis.
7. Approvals are recorded at the detailed planning stage. Where a project has secured outline planning approval and the detailed consent is being resolved through the approval of reserve matters the date of 'detailed consent' is deemed to be that of the approval of reserve matters. In the case of some projects, the reserve matters are approved piecemeal; in these circumstances the earliest approval date has been used in order to avoid double counting.
8. The approvals data excludes Amendment of Planning Applications, Certificates of Lawfulness, Non-Building Applications, Removal or Variations of Conditions and responses by neighbouring planning authorities.
9. The late publication of planning approval decisions by local authorities may lead to the revision of planning approval data for the latest 12 months.

ABOUT HBF

The Home Builders Federation (HBF) is the representative body of the home building industry in England and Wales. HBF's members' accounts for 80% of all new homes built in England and Wales in any one year, and include companies of all sizes, ranging from multi-national, household names through regionally based businesses to small local companies.

CONTACT
Home Builders Federation Ltd
HBF House
27 Broadwall
London SE1 9PL
Tel: 020 7960 1600
Email: info@hbf.co.uk
Website: www.hbf.co.uk

ABOUT GLENIGAN

Glenigan is the trusted provider of project information, analysis and sales leads for the construction industry. Its comprehensive company intelligence has been helping contractors, sub-contractors and suppliers build new working relationships for more than 40 years.

With exclusive content from leading industry bodies including The Builders' Conference, Glenigan offers the widest coverage of UK tenders and construction contracts. These construction project leads are unique to Glenigan and unavailable anywhere else.

The housing approvals data analysed in this report is drawn from Glenigan's extensive database of current and planned construction projects. Glenigan's detailed coverage of planned housing projects across the UK offers valuable strategic and tactical insights into developers' active sights and pipeline, with sites tracked through to completion.

CONTACT
Glenigan
4th Floor, 80 Holdenhurst Road
Bournemouth
BH8 8AQ
Tel: 0800 060 8698
Email: info@glenigan.com
Website: www.glenigan.com

Glenigan

Analysis of market conditions and prospects prepared by Glenigan.

HBF

HOME BUILDERS FEDERATION