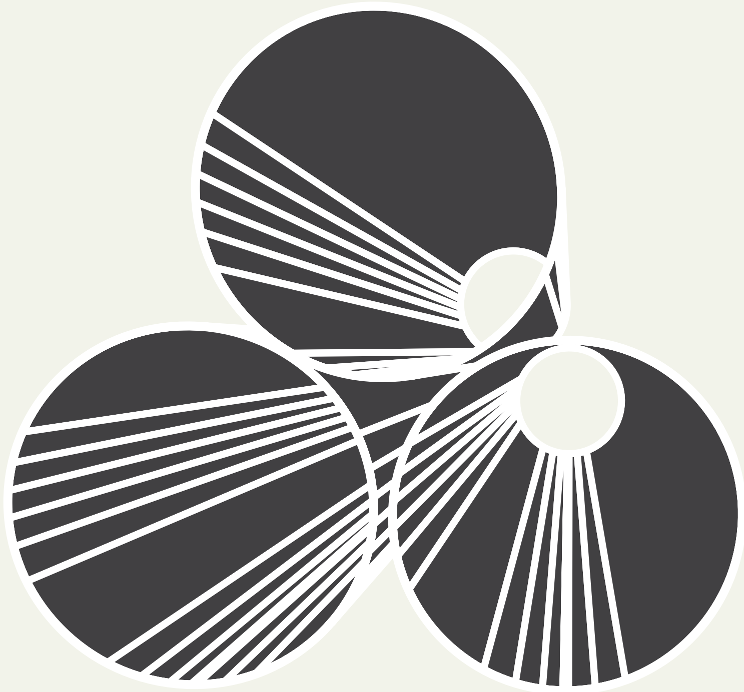
NEW

HOUSING PIPELINE



Q4 2024 REPORT

Published March 2025

Glenigan
Analysis of market conditions and prospects prepared by Glenigan.

HBF
HOME BUILDERS FEDERATION

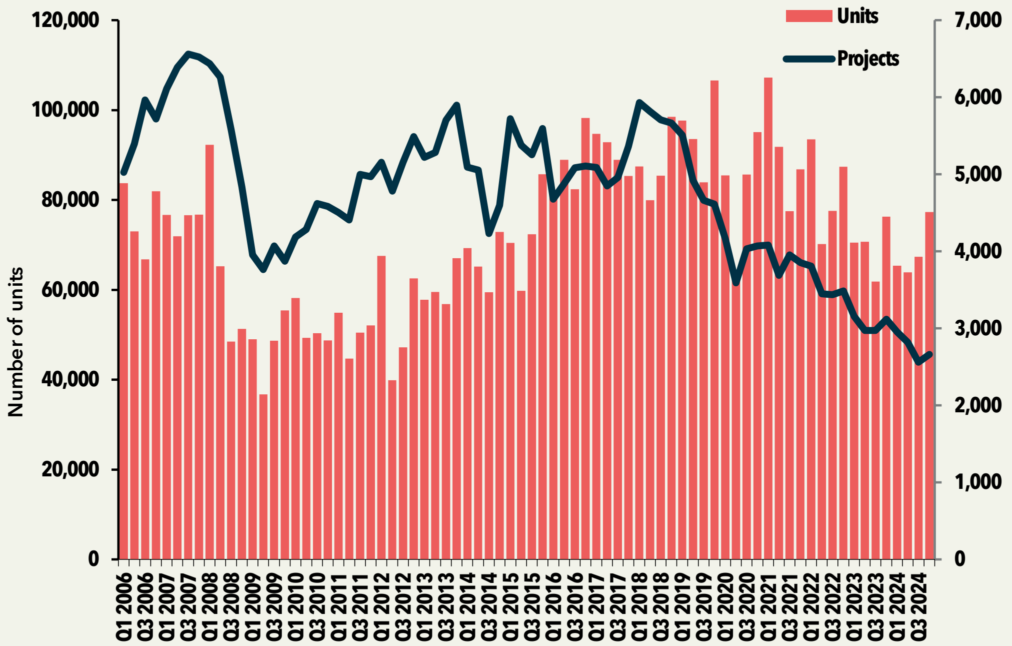
NEW HOUSING PIPELINE

The number of residential units approved rose by 15% during the final quarter of 2024, building on an increase during the preceding three months. The strengthening in approvals during the second half of the year limited the decline during 2024 to 2%.

At 2,663, the number of housing projects granted planning permission in the fourth quarter rose by 4% against the preceding quarter but were 15% lower than a year ago. Overall 10% fewer housing projects secured approval during 2024 than during the previous year. The number of units approved during the fourth quarter rose by 15% against the previous three months to 77,284 units and was 1% higher than during the fourth quarter of 2023.

Housing schemes of ten or more units during the fourth quarter accounted for 93% of approved units. At 71,857, the number of units on such schemes was 16% up on the preceding quarter and was 3% higher than a year earlier. The remaining 7% 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.

Chart1:Residentialplanningapprovals(GreatBritain)



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

At 1,718 the number of private sector housing projects (schemes of 3 or more units) securing approval was 1% lower than in the third quarter and was 15% down on a year earlier. At 68,357 the number of units on private sector projects granted planning permission was 17% up on the previous three months but 2% lower than a year earlier. The increase was driven by a rise in the number of approvals on larger sites of 100 units or more. Overall, at 240,279 the number of units on private sector projects granted planning permission during 2024 was 3% lower than during the previous year.

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 119, the number of social housing projects (of three or more units) rose 10% during the fourth quarter and was 8% higher than a year ago. At 7,974, the number of units was 1% lower than during the preceding quarter but 56% higher 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	32,820	329,704
2021	78,303	58,908	178,810	316,021	11,806	35,509	363,336
2022	62,708	54,448	176,783	293,939	8,399	26,301	328,639
2023	57,251	47,873	143,259	248,383	7,062	23,867	279,312
2024	63,725	41,399	137,486	242,610	7,762	23,499	273,871
	Change on a year earlier						
2020	-6%	-16%	-12%	-12%	-39%	-22%	-14%
2021	11%	-1%	12%	9%	62%	8%	10%
2022	-20%	-8%	-1%	-7%	-29%	-26%	-10%
2023	-19%	-16%	-18%	-18%	-40%	-31%	-20%
2024	11%	-14%	-4%	-2%	10%	-2%	-2%

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

Regionally, most parts of the Great Britain saw a rise the number of units approved during the fourth quarter. The North East, Yorkshire & the Humber and West Midlands bounced back strongly from weak approval levels during the preceding three months, rising by 177%, 79% and 134% respectively against the preceding quarter. There were also strong double digit rises in unit approvals in the East of England (59%), South East (21%) and Wales (24%). Units approved in the North West fell back 42% after a surge in approvals during the previous quarter. Units approved were also lower in Scotland (-4%) and London (-12%).

Over the course of 2024, the North East, North West, East of England, South West and Wales were the only parts of the country to see an increase in unit approvals, with rises of 8%, 25%, 2%, 2% and 10% respectively against 2023.

HOUSING APPROVALS

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

Housing Pipeline report – Q4 2024 Report March 2025

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 meant 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 dataset 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	GreatBritain	*MATEngland
Q1 2016	2,582	13,090	4,411	6,852	6,478	7,296	12,200	12,548	6,945	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	13,495	8,741	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	10,301	8,858	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	16,278	7,511	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	13,524	7,037	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	11,379	7,776	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	15,684	7,342	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	15,814	7,843	76,632	2,526	6,202	85,360	323,787
Q1 2018	3,101	9,857	6,341	6,831	7,323	7,451	13,217	15,649	6,717	76,487	2,489	8,455	87,431	313,812
Q2 2018	2,270	8,273	6,527	7,238	6,127	6,778	12,128	12,828	8,406	70,575	2,435	6,927	79,937	303,075
Q3 2018	2,445	9,830	6,932	6,693	7,747	10,116	13,249	12,511	7,054	76,577	2,434	6,375	85,386	300,271
Q4 2018	3,157	9,757	6,661	8,591	8,970	9,975	16,578	16,440	8,632	88,761	3,031	6,725	98,517	312,400
Q1 2019	1,892	9,240	6,706	7,578	9,492	12,471	17,951	15,910	6,794	88,034	2,953	6,658	97,645	323,947
Q2 2019	3,800	8,370	7,346	10,945	8,119	8,219	11,412	12,674	8,238	79,123	2,482	11,956	93,561	332,495
Q3 2019	1,706	7,322	5,335	7,682	6,399	9,392	11,901	12,809	7,608	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	15,145	6,810	90,601	2,310	13,700	106,611	327,912
Q1 2020	1,326	8,948	6,346	7,760	6,500	9,151	16,526	9,959	8,577	75,093	3,319	7,033	85,445	314,971
Q2 2020	1,440	5,380	3,517	6,811	6,016	6,497	11,991	8,135	4,176	53,963	1,346	8,177	63,486	289,811
Q3 2020	3,411	13,515	7,049	9,621	6,420	9,587	9,822	11,729	5,436	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	12,737	6,514	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	14,684	6,933	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	13,844	7,419	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	9,802	6,524	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	11,327	7,112	74,055	4,104	8,627	86,786	316,021
Q1 2022	2,929	8,273	5,853	11,202	6,109	10,714	20,902	11,493	6,228	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	9,931	7,737	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	11,481	5,080	70,306	2,146	5,128	77,580	290,647
Q4 2022	1,847	6,976	5,917	7,327	4,316	9,844	19,087	13,179	8,854	77,347	2,300	7,743	87,390	293,939
Q1 2023	1,788	7,502	5,110	7,530	4,464	7,062	12,559	9,649	6,804	62,468	2,123	5,911	70,502	272,704
Q2 2023	3,343	5,615	4,092	6,588	6,627	7,996	10,574	9,682	7,018	61,535	1,974	7,168	70,677	271,656
Q3 2023	1,204	7,393	4,798	4,165	4,928	5,906	9,732	10,668	5,104	53,898	1,375	6,579	61,852	255,248
Q4 2023	2,645	7,321	6,440	7,006	6,565	6,151	16,029	12,695	5,630	70,482	1,590	4,209	76,281	248,383
Q1 2024	2,245	8,722	3,794	4,880	4,877	6,787	9,602	10,114	6,861	57,882	2,226	5,248	65,356	243,797
Q2 2024	3,015	7,809	5,661	3,667	5,836	7,014	6,676	9,591	5,789	55,058	1,952	6,856	63,866	237,320
Q3 2024	1,177	11,493	3,527	6,243	2,805	5,361	13,768	10,325	5,248	59,947	1,598	5,820	67,365	243,369
Q4 2024	3,260	6,705	6,317	6,520	6,571	8,524	12,162	12,445	7,219	69,723	1,986	5,575	77,284	242,610

*Moving Annual Total for England

Housing Pipeline report – Q4 2024 Report March 2025

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	GreatBritain	*MAT England
Q1 2016	112	385	304	375	371	611	552	967	474	4,151	199	325	4,675	18,618
Q2 2016	107	400	326	395	430	676	555	952	546	4,387	197	294	4,878	18,193
Q3 2016	128	444	312	386	376	741	622	984	582	4,575	199	312	5,086	18,090
Q4 2016	113	410	365	349	402	690	684	1,018	531	4,562	213	334	5,109	17,675
Q1 2017	118	443	336	411	402	687	634	994	553	4,578	183	328	5,089	18,102
Q2 2017	123	363	344	384	358	677	630	953	526	4,358	170	321	4,849	18,073
Q3 2017	140	434	312	352	329	718	565	1,084	536	4,470	158	331	4,959	17,968
Q4 2017	113	405	393	424	438	805	576	1,095	614	4,863	205	295	5,363	18,269
Q1 2018	131	490	455	506	469	903	593	1,116	700	5,363	250	317	5,930	19,054
Q2 2018	140	432	428	544	460	871	617	1,084	712	5,288	200	327	5,815	19,984
Q3 2018	106	459	405	533	430	793	625	1,070	728	5,149	232	324	5,705	20,663
Q4 2018	116	461	417	511	463	764	539	1,067	758	5,096	248	323	5,667	20,896
Q1 2019	94	438	402	513	457	762	601	1,033	632	4,932	263	312	5,507	20,465
Q2 2019	89	366	400	467	388	740	462	887	594	4,393	195	333	4,921	19,570
Q3 2019	91	354	330	435	352	639	584	878	503	4,166	192	302	4,660	18,587
Q4 2019	122	355	311	378	341	664	549	935	449	4,104	178	330	4,612	17,595
Q1 2020	93	359	287	355	301	566	486	780	470	3,697	191	277	4,165	16,360
Q2 2020	59	245	230	278	287	523	468	734	394	3,218	114	257	3,589	15,185
Q3 2020	94	363	265	305	308	567	462	811	445	3,620	131	282	4,033	14,639
Q4 2020	94	340	300	328	313	564	463	748	459	3,609	151	308	4,068	14,144
Q1 2021	95	322	270	338	313	571	491	767	435	3,602	155	324	4,081	14,049
Q2 2021	90	275	305	285	265	507	374	717	396	3,214	131	343	3,688	14,045
Q3 2021	72	279	292	332	282	633	405	761	437	3,493	161	300	3,954	13,918
Q4 2021	74	270	270	311	295	581	415	783	408	3,407	156	289	3,852	13,716
Q1 2022	82	275	243	286	263	559	451	742	475	3,376	126	305	3,807	13,490
Q2 2022	57	252	242	304	259	444	383	689	425	3,055	109	283	3,447	13,331
Q3 2022	74	276	201	337	270	479	419	628	375	3,059	131	248	3,438	12,897
Q4 2022	72	270	239	320	269	438	401	655	423	3,087	121	276	3,484	12,577
Q1 2023	64	254	224	269	238	451	355	580	376	2,811	115	230	3,156	12,012
Q2 2023	72	238	185	227	232	373	343	589	380	2,639	116	216	2,971	11,596
Q3 2023	59	242	221	242	209	380	301	630	357	2,641	104	229	2,974	11,178
Q4 2023	66	249	225	275	245	373	349	671	363	2,816	113	190	3,119	10,907
Q1 2024	66	250	174	230	258	350	298	585	400	2,611	138	205	2,954	10,707
Q2 2024	71	251	207	205	191	368	314	535	356	2,498	118	204	2,820	10,566
Q3 2024	73	204	173	193	182	330	296	510	328	2,289	103	167	2,559	10,214
Q4 2024	52	214	181	216	207	382	274	511	341	2,378	110	175	2,663	9,776

*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	1,876	2,505	17	5,363
Q2 2018	851	1,876	2,544	17	5,288
Q3 2018	825	1,875	2,434	15	5,149
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	1,485	943	3	3,059
Q4 2022	680	1,484	913	10	3,087
Q1 2023	628	1,382	797	4	2,811
Q2 2023	544	1,308	778	9	2,639
Q3 2023	511	1,224	900	6	2,641
Q4 2023	606	1,324	879	7	2,816
Q1 2024	554	1,288	762	7	2,611
Q2 2024	520	1,172	804	2	2,498
Q3 2024	513	1,143	627	6	2,289
Q4 2024	569	1,099	703	7	2,378

*Thesearehousingunitsorprojectsthatarenotprimarilyforhousingbutdosupplysecondaryhousingspacee.goncommercialdevelopments.

Housing Pipeline report – Q4 2024 Report March 2025

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	7,740	2,937	52	76,487
Q2 2018	59,653	7,802	3,022	98	70,575
Q3 2018	65,776	7,709	2,878	214	76,577
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	5,596	1,112	5	70,306
Q4 2022	70,770	5,472	1,056	49	77,347
Q1 2023	56,373	5,145	940	10	62,468
Q2 2023	55,790	4,750	914	81	61,535
Q3 2023	48,121	4,392	1,032	353	53,898
Q4 2023	64,513	4,873	1,036	60	70,482
Q1 2024	52,183	4,801	882	16	57,882
Q2 2024	49,755	4,291	935	77	55,058
Q3 2024	54,987	4,214	734	12	59,947
Q4 2024	64,800	4,097	806	20	69,723

*Thesearehousingunitsorprojectsthatarenotprimarilyforhousingbutdosupplysecondaryhousingspacee.goncommercialdevelopments.

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.

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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.

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Glenigan

Analysis of market
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