NEW

HOUSING PIPELINE

Q3 2020 REPORT

Published December 2020

Glenigan

Analysis of market conditions and prospects prepared by Glenigan.

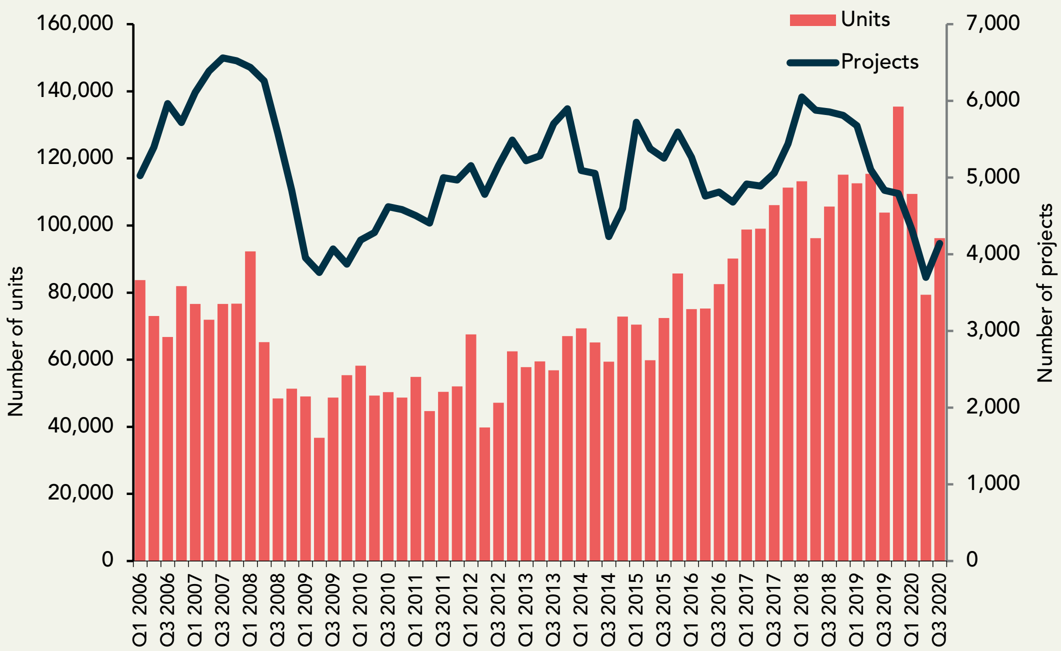
HBF HOME BUILDERS FEDERATION

NEW HOUSING PIPELINE

The number of units approved rebounded during the third quarter after the disruption of the national lockdown during the Spring. The number of units approved grew by 21% against the previous three months but was 7% lower than a year ago. The recovery in approvals during the third quarter was led by a rise in private sector approvals, while social sector projects remained weak during the quarter.

Glenigan recorded the approval of 96,191 residential units during the third quarter of 2020. At 86,859 units, housing schemes of ten or more units accounted for 90% of approved units; the remainder being on smaller new build projects including self-build schemes, homes included within non-residential projects, and 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

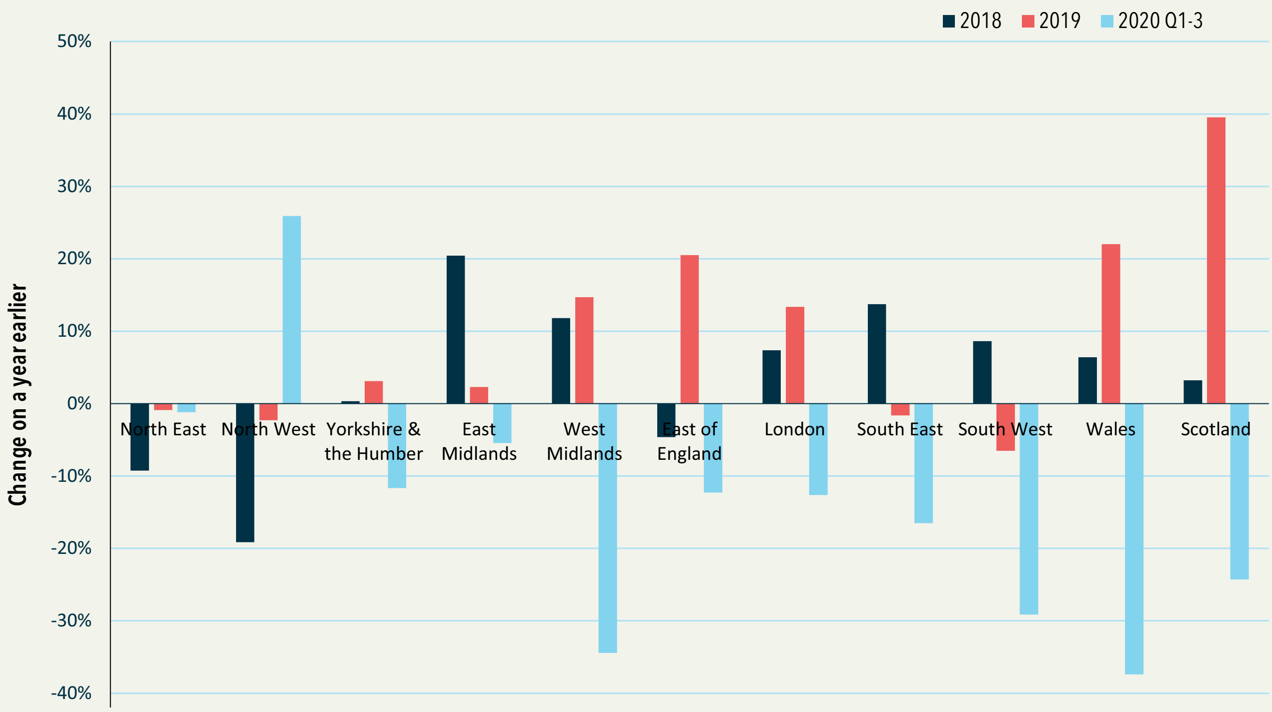
At 2,677, the number of private sector housing projects (schemes of three or more units) securing approval during the third quarter rose 16% against April to June but was 5% lower than during the corresponding period last year.

The number of units granted planning permission on private sector projects rebounded sharply during the third quarter. At 84,019 the number of units was 32% up on the preceding quarter although they were still 5% lower than a year ago. The recovery in the number of units on private sector projects was bolstered by a sharp rise in larger schemes of 250 or more units securing approval.

At 161, the number of social housing projects (of three or more units) dropped by 35% against the previous quarter and was 11% lower than a year ago. In contrast, at 13,739, the number of units was 17% down on the previous three months but 53% up on a weak performance a year ago.

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)



While most parts of the country saw a rise in unit approvals during the third quarter, there was marked divergence in the strength of the recovery. The North East of England, North West and Yorkshire & the Humber enjoyed the sharpest recoveries, rising by 125%, 89% and 114% respectively against the preceding three months. There was also firm growth in the number of units approved in the West Midlands (+21%), South East (+11%), South West (+44%) and Wales (+26%). In contrast approvals in the East Midlands only rose by 1%, while approvals fell in London and Scotland by 9% and 3% respectively.

Table 1: Number of residential units approved

	North of England	Midlands	Southern England	England - All	Wales	Scotland	Great Britain
2015	66,842	48,792	145,144	260,778	8,270	19,300	288,348
2016	83,034	44,464	165,629	293,127	9,020	20,914	323,061
2017	97,117	63,651	210,935	371,703	10,169	33,362	415,234
2018	85,471	73,924	225,575	384,970	10,821	34,433	430,224
2019	85,219	80,023	240,766	406,008	13,206	48,042	467,256
2020 Q1-3	62,747	48,778	142,420	253,945	6,086	24,985	285,016
	Change on a year earlier						
2015	15%	16%	4%	9%	-15%	8%	8%
2016	24%	-9%	14%	12%	9%	8%	12%
2017	17%	43%	27%	27%	13%	60%	29%
2018	-12%	16%	7%	4%	6%	3%	4%
2019	0%	8%	7%	5%	22%	40%	9%
2020 Q1-3	9%	-20%	-16%	-12%	-37%	-24%	-14%

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

HOUSING APPROVALS

The tables provide a regional breakdown of new building planning approvals since 2011

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

	North of England			Midlands		
	North East	North West	Yorkshire & the Humber	East Midlands	West Midlands	East of England
Q1 2012	2,381	4,881	5,227	3,223	4,674	3,937
Q2 2012	1,780	4,081	2,977	2,968	2,967	3,361
Q3 2012	2,703	7,080	3,270	1,883	2,805	3,559
Q4 2012	2,338	7,092	5,137	3,212	4,637	5,221
Q1 2013	3,037	5,884	5,377	5,155	4,672	5,398
Q2 2013	2,198	6,781	5,389	6,304	4,693	4,436
Q3 2013	2,297	6,721	3,414	3,942	5,413	6,230
Q4 2013	2,437	6,361	3,604	6,452	4,486	6,484
Q1 2014	3,107	7,899	3,903	6,305	4,674	4,703
Q2 2014	1,080	6,329	4,340	4,266	4,173	5,003
Q3 2014	2,124	7,215	4,382	4,761	6,435	4,597
Q4 2014	3,851	9,479	4,532	5,582	5,924	5,249
Q1 2015	1,943	7,593	6,390	4,537	4,522	7,257
Q2 2015	2,944	6,353	5,630	4,404	5,787	5,596
Q3 2015	2,511	10,459	4,556	4,598	6,372	9,519
Q4 2015	2,751	10,651	5,061	8,808	9,764	6,198
Q1 2016	1,842	11,298	3,953	7,244	5,570	5,789
Q2 2016	5,763	9,056	4,575	3,781	7,608	7,730
Q3 2016	2,356	14,202	6,168	4,918	4,363	8,128
Q4 2016	4,665	11,670	7,486	4,483	6,497	9,934
Q1 2017	2,457	14,133	6,123	9,790	7,275	9,768
Q2 2017	4,815	12,242	6,061	7,535	8,646	9,728
Q3 2017	4,078	15,920	7,367	7,260	6,798	12,859
Q4 2017	3,000	12,103	8,818	7,306	9,041	11,728
Q1 2018	3,727	12,388	6,704	9,594	10,894	9,014
Q2 2018	2,504	9,863	7,262	8,945	8,085	8,859
Q3 2018	3,502	11,561	7,654	10,221	6,835	10,896
Q4 2018	3,289	10,176	6,841	9,648	9,702	13,271
Q1 2019	1,913	11,105	7,302	9,292	12,152	14,594
Q2 2019	3,783	9,636	7,267	12,147	11,317	8,782
Q3 2019	1,991	8,320	6,441	8,570	7,645	11,639
Q4 2019	5,218	13,911	8,332	9,280	9,620	15,646
Q1 2020	1,432	13,519	6,729	10,460	6,470	11,049
Q2 2020	1,895	7,993	3,773	8,934	6,709	9,597
Q3 2020	4,268	15,082	8,056	8,982	7,223	10,067

*Moving Annual Total for England

Southern England							
London	South East	South West	England	Wales	Scotland	Great Britain	*MAT England
24,652	6,888	5,696	61,559	1,769	4,241	67,569	**190,763**
4,660	7,212	5,036	35,042	1,747	3,055	39,844	**187,176**
8,667	7,849	5,534	43,350	1,225	2,606	47,181	**186,244**
11,676	10,511	5,525	55,349	1,716	5,447	62,512	**195,300**
10,818	5,197	5,916	51,454	2,540	3,791	57,785	**185,195**
8,921	8,275	6,692	53,689	1,698	4,115	59,502	**203,842**
10,479	7,574	5,229	51,299	1,722	3,808	56,829	**211,791**
14,919	9,122	7,181	61,046	1,861	4,138	67,045	**217,488**
10,941	13,445	6,119	61,096	3,000	5,212	69,308	**227,130**
15,633	10,423	7,432	58,679	2,053	4,429	65,161	**232,120**
9,937	9,083	4,649	53,183	2,517	3,746	59,446	**234,004**
15,530	9,976	6,229	66,352	2,120	4,425	72,897	**239,310**
15,966	8,273	7,191	63,672	1,722	5,041	70,435	**241,886**
8,406	8,744	5,996	53,860	2,590	3,363	59,813	**237,067**
13,001	8,213	6,654	65,883	1,448	5,065	72,396	**249,767**
15,948	12,796	5,386	77,363	2,510	5,831	85,704	**260,778**
12,552	11,210	7,690	67,148	2,275	5,682	75,105	**264,254**
11,058	9,423	9,264	68,258	1,599	5,371	75,228	**278,652**
17,971	11,189	6,947	76,242	1,911	4,404	82,557	**289,011**
12,343	17,000	7,401	81,479	3,235	5,457	90,171	**293,127**
18,903	12,837	7,817	89,103	3,090	6,579	98,772	**315,082**
15,083	14,598	8,397	87,105	1,858	10,123	99,086	**333,929**
15,665	17,782	8,158	95,887	2,346	7,810	106,043	**353,574**
20,866	17,233	9,513	99,608	2,875	8,850	111,333	**371,703**
19,078	19,774	9,103	100,276	2,803	10,140	113,219	**382,876**
15,643	14,735	9,722	85,618	2,445	8,189	96,252	**381,389**
18,659	16,092	8,293	93,713	2,554	9,373	105,640	**379,215**
22,329	20,419	9,688	105,363	3,019	6,731	115,113	**384,970**
21,119	16,506	7,675	101,658	3,095	7,842	112,595	**386,352**
20,156	15,592	10,562	99,242	2,520	13,678	115,440	**399,976**
16,647	17,844	9,133	88,230	4,103	11,484	103,817	**394,493**
27,901	19,930	7,040	116,878	3,488	15,038	135,404	**406,008**
22,445	16,733	8,998	97,835	3,125	8,457	109,417	**402,185**
14,721	11,835	4,258	69,715	1,310	8,383	79,408	**372,658**
13,443	13,129	6,145	86,395	1,651	8,145	96,191	**370,823**

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

	North of England			Midlands		
	North East	North West	Yorkshire & the Humber	East Midlands	West Midlands	East of England
Q1 2012	101	410	358	341	349	563
Q2 2012	172	378	337	338	341	622
Q3 2012	134	418	382	337	387	676
Q4 2012	116	434	363	371	429	669
Q1 2013	155	462	361	366	420	644
Q2 2013	130	489	364	390	431	719
Q3 2013	123	501	364	422	428	743
Q4 2013	152	486	418	443	451	785
Q1 2014	132	424	368	376	390	627
Q2 2014	101	447	363	374	350	661
Q3 2014	94	362	299	317	358	584
Q4 2014	116	395	308	358	371	605
Q1 2015	145	422	431	403	421	783
Q2 2015	128	444	355	386	396	713
Q3 2015	117	451	350	407	379	697
Q4 2015	128	502	365	430	495	695
Q1 2016	133	437	334	384	413	703
Q2 2016	119	388	314	353	430	674
Q3 2016	130	432	299	349	372	694
Q4 2016	114	379	329	286	373	645
Q1 2017	114	438	340	397	351	683
Q2 2017	118	370	354	379	362	648
Q3 2017	143	459	312	349	339	721
Q4 2017	117	420	395	416	452	798
Q1 2018	136	502	458	508	484	911
Q2 2018	144	437	436	549	468	875
Q3 2018	109	464	411	534	431	813
Q4 2018	116	477	423	496	466	790
Q1 2019	95	450	413	524	471	794
Q2 2019	94	378	403	477	416	758
Q3 2019	96	365	334	444	366	657
Q4 2019	129	367	319	390	351	686
Q1 2020	96	375	290	368	307	580
Q2 2020	61	261	234	289	296	538
Q3 2020	99	372	269	318	316	583

*Moving Annual Total for England

Southern England

London	South East	South West	England	Wales	Scotland	Great Britain	*MAT England
846	927	655	4,550	236	371	5,157	**17,155**
478	959	607	4,232	195	356	4,783	**17,543**
590	974	678	4,576	232	349	5,157	**17,758**
683	1,059	750	4,874	242	375	5,491	**18,232**
625	957	646	4,636	230	353	5,219	**18,318**
642	967	617	4,749	218	318	5,285	**18,835**
706	1,097	689	5,073	256	373	5,702	**19,332**
692	1,090	751	5,268	278	352	5,898	**19,726**
640	910	656	4,523	218	353	5,094	**19,613**
585	928	681	4,490	228	336	5,054	**19,354**
479	790	463	3,746	180	305	4,231	**18,027**
529	830	548	4,060	196	341	4,597	**16,819**
693	1,051	798	5,147	234	340	5,721	**17,443**
653	1,032	705	4,812	220	344	5,376	**17,765**
638	975	664	4,678	224	351	5,253	**18,697**
688	1,019	655	4,977	251	365	5,593	**19,614**
635	1,047	614	4,700	224	340	5,264	**19,167**
550	890	570	4,288	193	278	4,759	**18,643**
574	906	570	4,326	192	293	4,811	**18,291**
595	917	541	4,179	186	315	4,680	**17,493**
607	937	543	4,410	175	331	4,916	**17,203**
667	925	570	4,393	165	333	4,891	**17,308**
592	1,072	575	4,562	158	340	5,060	**17,544**
600	1,084	660	4,942	190	309	5,441	**18,307**
619	1,083	775	5,476	239	337	6,052	**19,373**
643	1,022	784	5,358	194	328	5,880	**20,338**
659	1,041	814	5,276	235	345	5,856	**21,052**
573	1,038	849	5,228	251	332	5,811	**21,338**
637	1,010	698	5,092	263	322	5,677	**20,954**
503	855	676	4,560	197	346	5,103	**20,156**
616	880	559	4,317	190	327	4,834	**19,197**
597	935	486	4,260	182	351	4,793	**18,229**
520	769	524	3,829	196	288	4,313	**16,966**
493	707	449	3,328	112	260	3,700	**15,734**
480	808	477	3,722	131	287	4,140	**15,139**

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

	10 or more	3-9 units	1 & 2 Units	Misc*	Total
Q1 2012	51,923	6,439	2,869	328	61,559
Q2 2012	26,623	5,080	3,136	203	35,042
Q3 2012	34,307	5,721	3,244	78	43,350
Q4 2012	45,432	6,274	3,371	272	55,349
Q1 2013	42,170	6,426	2,758	100	51,454
Q2 2013	44,416	6,230	2,918	125	53,689
Q3 2013	41,060	7,005	3,050	184	51,299
Q4 2013	50,558	7,320	3,092	77	61,047
Q1 2014	51,700	6,822	2,498	76	61,096
Q2 2014	49,522	6,427	2,670	62	58,681
Q3 2014	44,781	6,586	1,772	44	53,183
Q4 2014	57,207	7,023	1,946	176	66,352
Q1 2015	52,454	7,823	2,809	586	63,672
Q2 2015	43,245	7,588	2,618	409	53,860
Q3 2015	55,786	7,405	2,489	203	65,883
Q4 2015	65,390	7,580	2,549	1,844	77,363
Q1 2016	56,713	7,204	2,412	819	67,148
Q2 2016	57,320	7,236	2,120	1,582	68,258
Q3 2016	64,391	7,923	1,827	2,101	76,242
Q4 2016	71,954	7,562	1,682	281	81,479
Q1 2017	78,907	8,441	1,737	18	89,103
Q2 2017	77,176	8,061	1,859	9	87,105
Q3 2017	83,814	8,287	1,817	1,969	95,887
Q4 2017	87,452	6,891	3,731	1,534	99,608
Q1 2018	89,465	7,804	2,958	49	100,276
Q2 2018	74,668	7,836	3,049	65	85,618
Q3 2018	82,438	7,782	2,945	548	93,713
Q4 2018	94,878	7,633	2,844	8	105,363
Q1 2019	91,487	7,429	2,742	-	101,658
Q2 2019	89,743	7,081	2,267	151	99,242
Q3 2019	79,356	7,444	1,921	28	88,749
Q4 2019	107,332	8,160	1,373	13	116,878
Q1 2020	89,321	7,215	1,283	16	97,835
Q2 2020	62,424	6,027	1,246	18	69,715
Q3 2020	77,780	6,687	1,305	1,157	86,929

*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 PROJECTS by project size

	10 or more	3-9 units	1 & 2 Units	Misc*	Total
Q1 2012	778	1,310	2,442	20	4,550
Q2 2012	500	1,068	2,648	16	4,232
Q3 2012	551	1,201	2,802	22	4,576
Q4 2012	695	1,318	2,840	21	4,874
Q1 2013	827	1,354	2,438	17	4,636
Q2 2013	772	1,356	2,598	23	4,749
Q3 2013	789	1,564	2,696	24	5,073
Q4 2013	857	1,592	2,804	16	5,269
Q1 2014	745	1,513	2,243	22	4,523
Q2 2014	697	1,445	2,332	18	4,492
Q3 2014	697	1,502	1,519	28	3,746
Q4 2014	829	1,594	1,609	28	4,060
Q1 2015	837	1,830	2,456	24	5,147
Q2 2015	682	1,799	2,310	21	4,812
Q3 2015	703	1,759	2,184	32	4,678
Q4 2015	846	1,844	2,247	40	4,977
Q1 2016	799	1,740	2,134	27	4,700
Q2 2016	766	1,718	1,774	30	4,288
Q3 2016	859	1,896	1,548	23	4,326
Q4 2016	923	1,808	1,404	44	4,179
Q1 2017	1,033	1,909	1,452	16	4,410
Q2 2017	991	1,881	1,513	8	4,393
Q3 2017	1,025	1,978	1,535	24	4,562
Q4 2017	1,007	1,955	1,957	23	4,942
Q1 2018	1,093	1,856	2,510	17	5,476
Q2 2018	938	1,853	2,562	5	5,358
Q3 2018	918	1,872	2,484	2	5,276
Q4 2018	1,028	1,807	2,389	4	5,228
Q1 2019	1,048	1,725	2,319	-	5,092
Q2 2019	916	1,709	1,926	9	4,560
Q3 2019	883	1,782	1,641	12	4,318
Q4 2019	976	2,102	1,175	7	4,260
Q1 2020	871	1,860	1,091	7	3,829
Q2 2020	663	1,580	1,078	7	3,328
Q3 2020	819	1,764	1,131	10	3,724

*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 used 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 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
5th Floor, 80 Holdenhurst Road
Bournemouth
BH8 8AQ
Tel: 0800 373 771
Email: info@glenigan.com
Website: www.glenigan.com

Glenigan

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