

Housing Pipeline

Q1 2025 Report

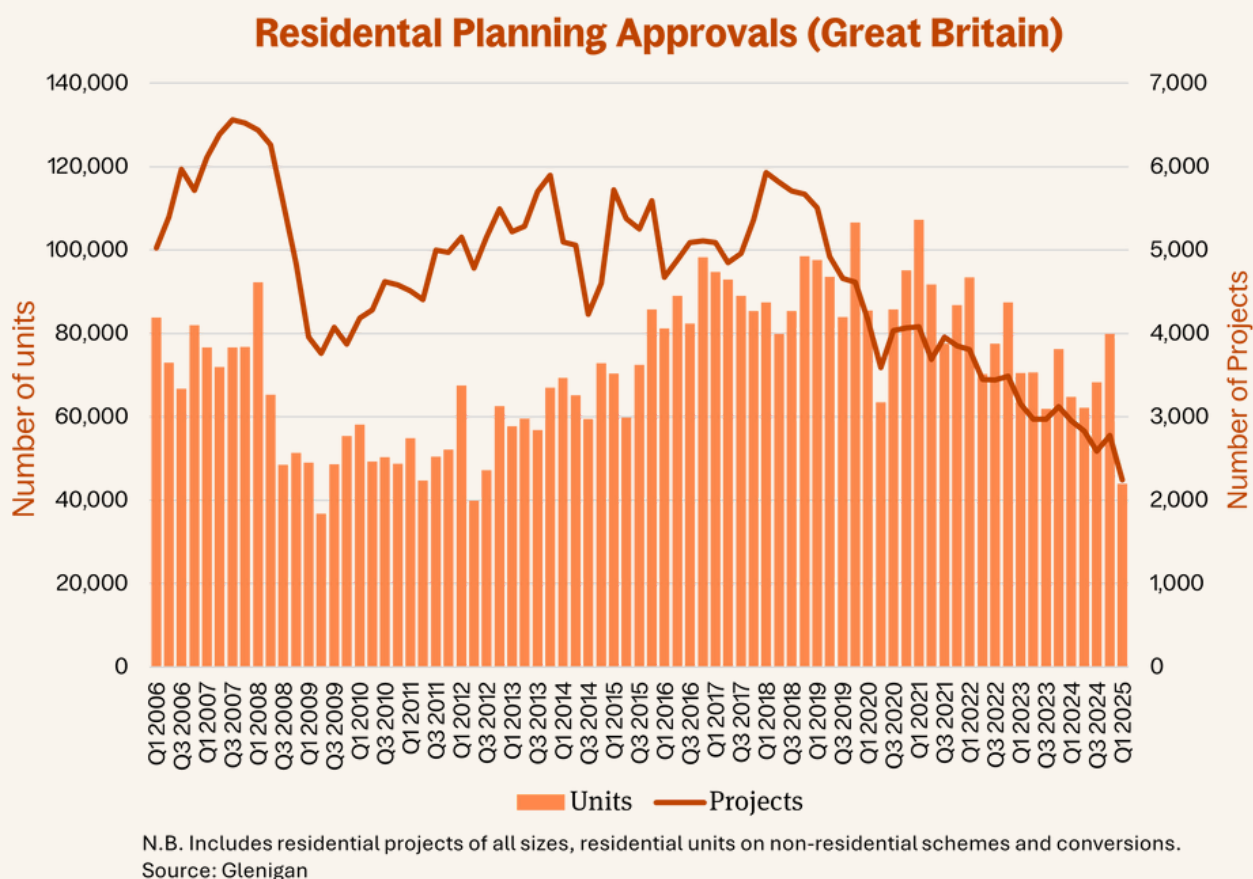
The Housing Pipeline report provides quarterly statistics on the number of units and sites granted planning approval, offering insight into future housing supply.

New Housing Pipeline

The number of residential units approved fell by 45% during the first quarter of 2025, in sharp contrast to the rise in approvals during the second half of last year. At 43,893, the number of units approved was 32% down on the first quarter of 2024 and the lowest quarterly total since 2012 Q2.

At 2,243, the number of housing projects granted planning permission in the first quarter dropped by 19% against the preceding quarter and was 24% lower than a year ago.

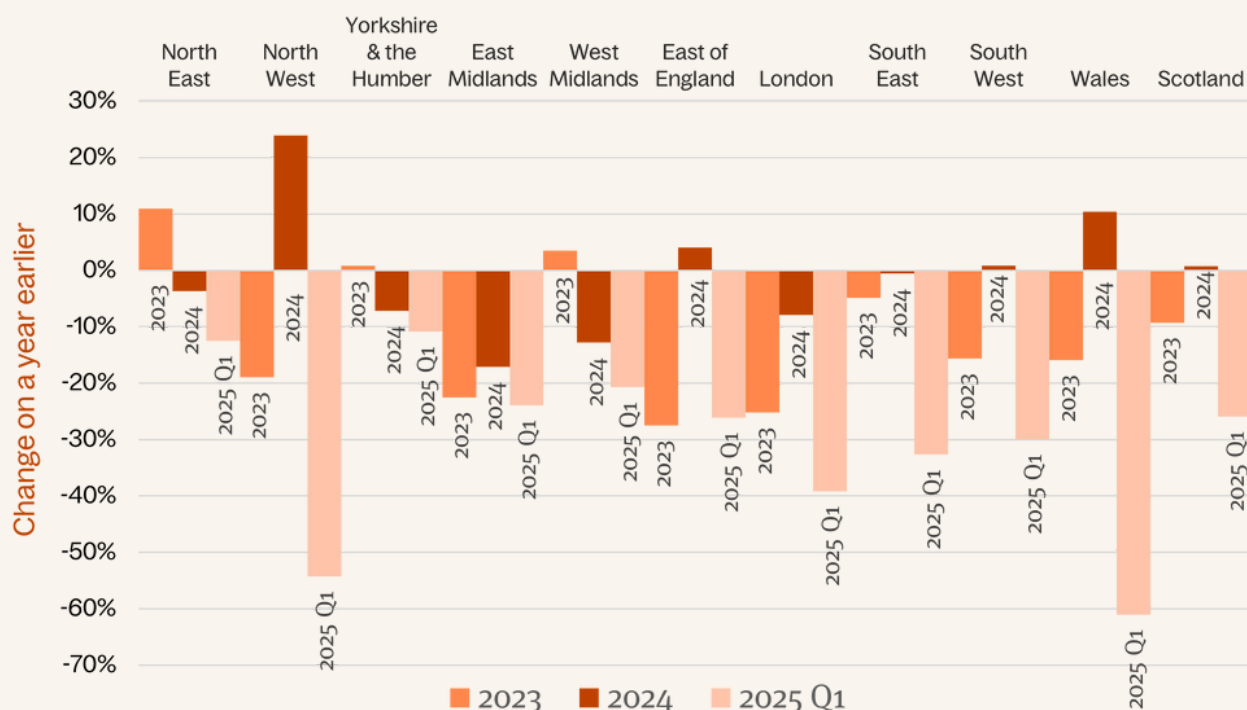
Housing schemes of ten or more units during the first quarter accounted for 89% of approved units. At 38,955, the number of units on such schemes fell 48% against the preceding quarter and was 33% lower than a year earlier. The remaining 11% of units were on smaller new build projects of up to nine units including self-build schemes together with homes included within non-residential projects and from the conversion of non-residential properties.



At 1,436 the number of private sector housing projects (schemes of 3 or more units) securing approval was 19% lower than in the fourth quarter and was 25% down on a year earlier.

At 38,583 the number of units on private sector projects granted planning permission was 46% down on the previous three months and 32% lower than a year earlier. The fall was led by a decline in the number of approvals on larger sites of 126 units or more.

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 71, the number of social housing projects (of three or more units) fell by 44% during the first quarter and was 49% lower than a year ago. At 4,530, the number of units was 43% lower than during the preceding quarter and 38% down on a year earlier.

	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	62,123	40,654	140,441	243,218	7,799	24,036	275,053
2025 Q1	9,019	7,816	22,335	39,170	840	3,883	43,893
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	9%	-15%	-2%	-2%	10%	1%	-2%
2025 Q1	-36%	-22%	-33%	-32%	-61%	-26%	-32%

Regionally, all parts of the Great Britain suffered double digit declines in the number of units approved during the first quarter. The number of units approved more than halved in Wales and London with the approvals dropping by 58% and 59% respectively against the preceding three months. There were also strong declines in unit approvals in the North West (-43%), Yorkshire & the Humber (-44%), East Midlands (-48%), and the South East (-46%). The North East, West Midlands, South West and Scotland saw declines in unit approvals of 33%, 34%, 39% and 37% respectively against the fourth quarter of 2024.

Housing Approvals

There have been changes to the number of permissions reported in the Housing Pipeline reports from Q4 2020 onwards. See notes on page 12 for more information.

Number of housing units securing detailed planning approval

	North of England			Midlands		
	North East	North West	Yorkshire and the Humber	East Midlands	West Midlands	East of England
Q1 2016	2,582	13,090	4,411	6852	6,478	7,296
Q2 2016	5,152	12,382	5,463	4344	8,336	9,582
Q3 2016	1,926	13,853	6,576	5235	4,857	8,352
Q4 2016	4,794	12,603	8,402	5432	6,113	11,186
Q1 2017	2,921	12,898	6,004	10027	8,386	9,701
Q2 2017	4,468	11,768	5,605	7490	9,126	8,287
Q3 2017	4,192	10,436	6,457	7344	5,317	10,428
Q4 2017	2,384	10,237	8,869	6616	6,377	8,508
Q1 2018	3,101	9,857	6,341	6831	7,323	7,451
Q2 2018	2,270	8,273	6,527	7238	6,127	6,778
Q3 2018	2,445	9,830	6,932	6693	7,747	10,116
Q4 2018	3,157	9,757	6,661	8591	8,970	9,975
Q1 2019	1,892	9,240	6,706	7578	9,492	12,471
Q2 2019	3,800	8,370	7,346	10945	8,119	8,219
Q3 2019	1,706	7,322	5,335	7682	6,399	9,392
Q4 2019	4,783	10,849	7,720	6977	12,912	10,574
Q1 2020	1,326	8,948	6,346	7760	6,500	9,151
Q2 2020	1,440	5,380	3,517	6811	6,016	6,497
Q3 2020	3,411	13,515	7,049	9621	6,420	9,587
Q4 2020	2,533	10,673	6,304	7765	8,335	9,670
Q1 2021	4,401	13,454	6,695	9224	10,097	11,288
Q2 2021	4,535	8,345	6,346	5611	6,248	8,800
Q3 2021	2,409	9,095	7,475	7533	4,988	9,207
Q4 2021	2,482	7,479	5,587	6683	8,524	9,372
Q1 2022	2,929	8,273	5,853	11202	6,109	10,714
Q2 2022	1,483	9,594	4,222	6521	4,575	8,899
Q3 2022	1,834	9,496	4,284	7577	6,821	7,952
Q4 2022	1,847	6,976	5,917	7327	4,316	9,844
Q1 2023	1,788	7,502	5,110	7530	4,464	7,062
Q2 2023	3,343	5,615	4,092	6588	6,627	7,996
Q3 2023	1,204	7,393	4,798	4165	4,928	5,906
Q4 2023	2,645	7,321	6,440	7006	6,565	6,151
Q1 2024	2,245	8,030	3,794	4592	5,452	6,783
Q2 2024	2,316	7,700	5,661	3705	4,545	7,179
Q3 2024	1,177	12,289	3,535	5990	3,184	5,710
Q4 2024	2,915	6,471	5,990	6680	6,506	8,541
Q1 2025	1,965	3,673	3,381	3494	4,322	5,012



Number of housing units securing detailed planning approval (continued)

	Southern England			England	Wales	Scotland	Great Britain	Moving annual total for England
	London	South East	South West					
Q1 2016	12,200	12,193	7,300	72,402	2,432	6347	81,181	
Q2 2016	12,570	13,084	9,152	80,065	2,408	6490	88,963	295,713
Q3 2016	14,961	9,774	9,385	74,919	1,794	5684	82,397	304,749
Q4 2016	14,318	15,910	7,879	86,637	4,038	7553	98,228	314,023
Q1 2017	15,964	13,279	7,282	86,462	2,302	5945	94,709	328,083
Q2 2017	15,413	11,144	8,011	81,312	2,350	9205	92,867	329,330
Q3 2017	12,181	14,901	8,125	79,381	2,478	7105	88,964	333,792
Q4 2017	9,984	15,349	8,308	76,632	2,526	6202	85,360	323,787
Q1 2018	13,217	14,930	7,436	76,487	2,489	8455	87,431	313,812
Q2 2018	12,128	12,501	8,733	70,575	2,435	6927	79,937	303,075
Q3 2018	13,249	12,092	7,473	76,577	2,434	6375	85,386	300,271
Q4 2018	16,578	15,845	9,227	88,761	3,031	6725	98,517	312,400
Q1 2019	17,951	15,048	7,656	88,034	2,953	6658	97,645	323,947
Q2 2019	11,412	11,967	8,945	79,123	2,482	11956	93,561	332,495
Q3 2019	11,901	12,439	7,978	70,154	4,144	9644	83,942	326,072
Q4 2019	14,831	14,961	6,994	90,601	2,310	13700	106,611	327,912
Q1 2020	16,526	9,311	9,225	75,093	3,319	7033	85,445	314,971
Q2 2020	11,991	7,918	4,393	53,963	1,346	8177	63,486	289,811
Q3 2020	9,822	11,488	5,677	76,590	1,488	7609	85,687	296,247
Q4 2020	19,436	12,005	7,246	83,967	1,118	10001	95,086	289,613
Q1 2021	19,699	13,759	7,858	96,475	2,469	8278	107,222	310,995
Q2 2021	17,622	13,370	7,893	78,770	2,273	10766	91,809	335,802
Q3 2021	9,688	9,501	6,825	66,721	2,960	7838	77,519	325,933
Q4 2021	15,489	10,466	7,973	74,055	4,104	8627	86,786	316,021
Q1 2022	20,902	10,889	6,832	83,703	2,478	7283	93,464	303,249
Q2 2022	9,621	9,500	8,168	62,583	1,475	6147	70,205	287,062
Q3 2022	15,781	11,302	5,259	70,306	2,146	5128	77,580	290,647
Q4 2022	19,087	13,179	8,854	77,347	2,300	7743	87,390	293,939
Q1 2023	12,559	9,649	6,804	62,468	2,123	5911	70,502	272,704
Q2 2023	10,574	9,682	7,018	61,535	1,974	7168	70,677	271,656
Q3 2023	9,732	10,668	5,104	53,898	1,375	6579	61,852	255,248
Q4 2023	16,029	12,695	5,630	70,482	1,590	4209	76,281	248,383
Q1 2024	9,869	10,042	6,514	57,321	2,156	5241	64,718	243,236
Q2 2024	6,732	9,594	5,847	53,279	1,985	6856	62,120	234,980
Q3 2024	13,699	10,300	4,920	60,804	1,679	5788	68,271	241,886
Q4 2024	14,719	12,506	7,486	71,814	1,979	6151	79,944	243,218
Q1 2025	6,002	6,759	4,562	39,170	840	3883	43,893	225,067



Number of housing projects securing detailed planning approval

	North of England			Midlands		
	North East	North West	Yorkshire and the Humber	East Midlands	West Midlands	East of England
Q1 2016	112	385	304	375	371	611
Q2 2016	107	400	326	395	430	676
Q3 2016	128	444	312	386	376	741
Q4 2016	113	410	365	349	402	690
Q1 2017	118	443	336	411	402	687
Q2 2017	123	363	344	384	358	677
Q3 2017	140	434	312	352	329	718
Q4 2017	113	405	393	424	438	805
Q1 2018	131	490	455	506	469	903
Q2 2018	140	432	428	544	460	871
Q3 2018	106	459	405	533	430	793
Q4 2018	116	461	417	511	463	764
Q1 2019	94	438	402	513	457	762
Q2 2019	89	366	400	467	388	740
Q3 2019	91	354	330	435	352	639
Q4 2019	122	355	311	378	341	664
Q1 2020	93	359	287	355	301	566
Q2 2020	59	245	230	278	287	523
Q3 2020	94	363	265	305	308	567
Q4 2020	94	340	300	328	313	564
Q1 2021	95	322	270	338	313	571
Q2 2021	90	275	305	285	265	507
Q3 2021	72	279	292	332	282	633
Q4 2021	74	270	270	311	295	581
Q1 2022	82	275	243	286	263	559
Q2 2022	57	252	242	304	259	444
Q3 2022	74	276	201	337	270	479
Q4 2022	72	270	239	320	269	438
Q1 2023	64	254	224	269	238	451
Q2 2023	72	238	185	227	232	373
Q3 2023	59	242	221	242	209	380
Q4 2023	66	249	225	275	245	373
Q1 2024	66	247	174	229	260	349
Q2 2024	71	250	207	206	191	370
Q3 2024	73	205	174	196	182	339
Q4 2024	51	215	199	221	210	396
Q1 2025	57	151	147	139	174	350



Number of housing projects securing detailed planning approval (continued)

	Southern England			England	Wales	Scotland	Great Britain	Moving annual total for England
	London	South East	South West					
Q1 2016	552	929	512	4151	199	325	4,675	18,618
Q2 2016	555	907	591	4387	197	294	4,878	18,193
Q3 2016	622	934	632	4575	199	312	5,086	18,090
Q4 2016	684	966	583	4562	213	334	5,109	17,675
Q1 2017	634	959	588	4578	183	328	5,089	18,102
Q2 2017	630	914	565	4358	170	321	4,849	18,073
Q3 2017	565	1,044	576	4470	158	331	4,959	17,968
Q4 2017	576	1,048	661	4863	205	295	5,363	18,269
Q1 2018	593	1,054	762	5363	250	317	5,930	19,054
Q2 2018	617	1,015	781	5288	200	327	5,815	19,984
Q3 2018	625	1,007	791	5149	232	324	5,705	20,663
Q4 2018	539	1,010	815	5096	248	323	5,667	20,896
Q1 2019	601	977	688	4932	263	312	5,507	20,465
Q2 2019	462	823	658	4393	195	333	4,921	19,570
Q3 2019	584	838	543	4166	192	302	4,660	18,587
Q4 2019	549	901	483	4104	178	330	4,612	17,595
Q1 2020	486	739	511	3697	191	277	4,165	16,360
Q2 2020	468	691	437	3218	114	257	3,589	15,185
Q3 2020	462	788	468	3620	131	282	4,033	14,639
Q4 2020	463	708	499	3609	151	308	4,068	14,144
Q1 2021	491	729	473	3602	155	324	4,081	14,049
Q2 2021	374	683	430	3214	131	343	3,688	14,045
Q3 2021	405	721	477	3493	161	300	3,954	13,918
Q4 2021	415	748	443	3407	156	289	3,852	13,716
Q1 2022	451	702	515	3376	126	305	3,807	13,490
Q2 2022	383	653	461	3055	109	283	3,447	13,331
Q3 2022	419	616	387	3059	131	248	3,438	12,897
Q4 2022	401	655	423	3087	121	276	3,484	12,577
Q1 2023	355	580	376	2811	115	230	3,156	12,012
Q2 2023	343	589	380	2639	116	216	2,971	11,596
Q3 2023	301	630	357	2641	104	229	2,974	11,178
Q4 2023	349	671	363	2816	113	190	3,119	10,907
Q1 2024	301	585	399	2610	137	204	2,951	10,706
Q2 2024	316	537	357	2505	119	204	2,828	10,572
Q3 2024	302	510	326	2307	104	179	2,590	10,238
Q4 2024	286	520	355	2453	111	210	2,774	9,875
Q1 2025	227	422	343	2010	70	163	2,243	9,275



England - Number of housing projects by project size

	10 or more	3-9 units	1 and 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	551	1,290	762	7	2,610
Q2 2024	527	1,172	804	2	2,505
Q3 2024	516	1,156	629	6	2,307
Q4 2024	596	1,126	723	8	2,453
Q1 2025	409	949	647	5	2,010



England - Number of housing units by project size

	10 or more	3 to 9 units	1 and 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	51,601	4,822	882	16	57,321
Q2 2024	47,975	4,292	935	77	53,279
Q3 2024	55,802	4,254	736	12	60,804
Q4 2024	66,741	4,223	827	23	71,814
Q1 2025	34,723	3,714	726	7	39,170



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.



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 for Levelling Up....](#) who Glenigan also provide planning permission data for. Therefore 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.



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 powered by Hubexo, 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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