

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 37% during the first quarter of 2025, in sharp contrast to the rise in approvals during the second half of last year. At 50,610 the number of units approved was 32% down on the first quarter of 2024 and the lowest quarterly total since 2012 Q2.

At 2,306, the number of housing projects granted planning permission in the first quarter dropped by 17% against the preceding quarter and was 22% lower than a year ago.

Housing schemes of 10 or more units during the first quarter accounted for 90% of approved units. At 38,955, the number of units on such schemes fell 39% against the preceding quarter and was 22% 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.



At 1,481 the number of private sector housing projects (schemes of 3 or more units) securing approval was 17% lower than in the fourth quarter and was 23% down on a year earlier. At 45,154 the number of units on private sector projects granted planning permission was 37% down on the previous three months and 20% 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.



At 74, the number of social housing projects (of three or more units) fell by 41% during the first quarter and was 46% lower than a year ago. At 4,616, the number of units was 42% lower than during the preceding quarter and 36% down on a year earlier.

Table 1: Number of residential units approved

| | North of England | Midlands | Southern England | England - All | Wales | Scotland | Great Britain |
|--------------------------|------------------|----------|------------------|---------------|--------|----------|---------------|
| 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 | 62,602 | 40,712 | 142,181 | 245,495 | 7,799 | 24,054 | 277,348 |
| 2025 Q1 | 9,732 | 8,225 | 27,564 | 45,521 | 905 | 4,184 | 50,610 |
| Change on a year earlier | | | | | | | |
| 2021 | 11% | -1% | 12% | 9% | 62% | 8% | 10% |
| 2022 | -20% | -8% | -1% | -7% | -29% | -26% | -10% |
| 2022 | -19% | -16% | -18% | -18% | -40% | -31% | -20% |
| 2024 | 9% | -15% | -1% | -1% | 10% | 1% | -1% |
| 2025 Q1 | -31% | -18% | -17% | -21% | -58% | -20% | -22% |

Regionally, all parts of 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 54% and 57% respectively against the preceding three months. There were also strong declines in unit approvals in the North West (-40%), Yorkshire & the Humber (-44%) and East

Midlands (-47%). The North East, West Midlands, South West and Scotland saw declines in unit approvals of 40%, 325%, 34% and 32% 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 9 for more information.

Table 2: Number of housing units securing detailed planning approval

| | North of England | | | Midlands | | Southern England | | | | | | | |
|---------|------------------|------------|--------------------|---------------|---------------|------------------|--------|------------|------------|---------|-------|----------|---------------|
| | North East | North West | Yorkshire & Humber | East Midlands | West Midlands | East of England | London | South East | South West | England | Wales | Scotland | Great Britain |
| Q1 2018 | 3,101 | 9,857 | 6,341 | 6,831 | 7,323 | 7,451 | 13,217 | 14,930 | 7,436 | 76,487 | 2,489 | 8,455 | 87,431 |
| 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 |
| Q3 2018 | 2,445 | 9,830 | 6,932 | 6,693 | 7,747 | 10,116 | 13,249 | 12,092 | 7,473 | 76,577 | 2,434 | 6,375 | 85,386 |
| 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 |
| 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 |
| 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 |
| 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 |
| Q4 2019 | 4,783 | 10,849 | 7,720 | 6,977 | 12,912 | 10,574 | 14,831 | 14,961 | 6,994 | 90,601 | 2,310 | 13,700 | 106,611 |
| Q1 2020 | 1,326 | 8,948 | 6,346 | 7,760 | 6,500 | 9,151 | 16,526 | 9,311 | 9,225 | 75,093 | 3,319 | 7,033 | 85,445 |
| Q2 2020 | 1,440 | 5,380 | 3,517 | 6,811 | 6,016 | 6,497 | 11,991 | 7,918 | 4,393 | 53,963 | 1,346 | 8,177 | 63,486 |
| 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 |
| 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 |
| 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 |
| 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 |
| 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 |
| Q4 2021 | 2,482 | 7,479 | 5,587 | 6,683 | 8,524 | 9,372 | 15,489 | 10,466 | 7,973 | 74,055 | 4,104 | 8,627 | 86,786 |

| | | | | | | | | | | | | | |
|---------|-------|--------|-------|--------|-------|--------|--------|--------|-------|--------|-------|-------|--------|
| 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 |
| 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 |
| Q3 2022 | 1,834 | 9,496 | 4,284 | 7,577 | 6,821 | 7,952 | 15,781 | 11,302 | 5,259 | 70,306 | 2,146 | 5,128 | 77,580 |
| 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 |
| 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 |
| 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 |
| 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 |
| 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 |
| Q1 2024 | 2,245 | 8,030 | 3,794 | 4,592 | 5,452 | 6,783 | 9,869 | 10,042 | 6,514 | 57,321 | 2,156 | 5,241 | 64,718 |
| Q2 2024 | 2,316 | 7,662 | 5,661 | 3,736 | 4,545 | 7,179 | 7,266 | 9,594 | 5,847 | 53,806 | 1,985 | 6,856 | 62,647 |
| Q3 2024 | 1,177 | 12,256 | 3,576 | 5,990 | 3,477 | 5,727 | 14,053 | 10,566 | 4,920 | 61,742 | 1,679 | 5,806 | 69,227 |
| Q4 2024 | 2,915 | 6,901 | 6,069 | 6,682 | 6,238 | 8,532 | 15,297 | 12,506 | 7,486 | 72,626 | 1,979 | 6,151 | 80,756 |
| Q1 2025 | 2,240 | 4,110 | 3,382 | 3,550 | 4,675 | 5,080 | 6,562 | 10,996 | 4,926 | 45,521 | 905 | 4,184 | 50,610 |

Table 3: England - Number of housing projects by project size

| | 10 or more | 3-9 Units | 1 and 2 Units | Misc | |
|---------|------------|-----------|---------------|------|-------|
| 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 | 529 | 1,172 | 804 | 2 | 2,507 |
| Q3 2024 | 522 | 1,156 | 629 | 6 | 2,313 |
| Q4 2024 | 602 | 1,125 | 723 | 8 | 2,458 |
| Q1 2025 | 426 | 977 | 656 | 5 | 2,064 |

Table 4: England - Number of housing units by project size

| | 10 or more | 3-9 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 | 48,502 | 4,292 | 935 | 77 | 53,806 |
| Q3 2024 | 56,744 | 4,250 | 736 | 12 | 61,742 |
| Q4 2024 | 67,562 | 4,214 | 827 | 23 | 72,626 |
| Q1 2025 | 40,949 | 3,830 | 735 | 7 | 45,521 |

Notes

This report is based on 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, Housing and Communities (now called Ministry of Housing, Communities and Local Government) 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, powered by Hubexo

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. Glenigan

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