HBF Home Builders Federation

Glenigan
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Housing Pipeline

Q3 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.

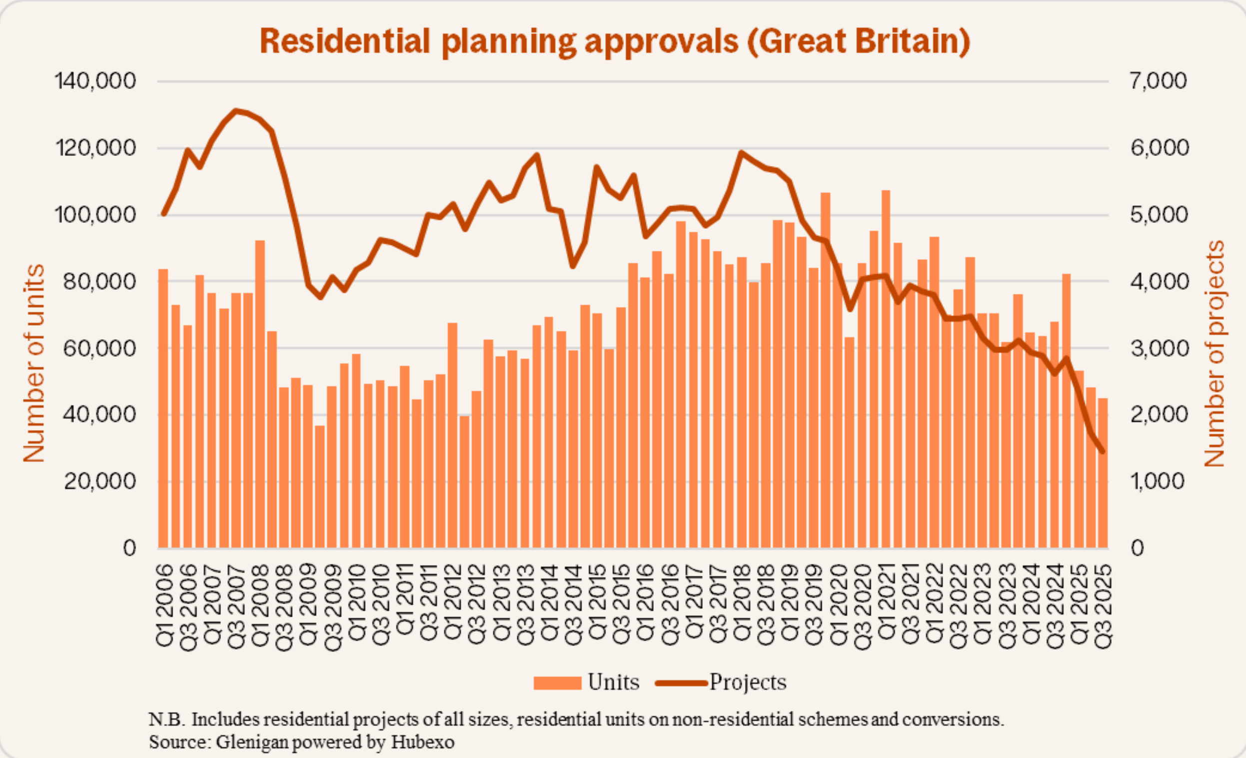
Published December 2025

New housing pipeline

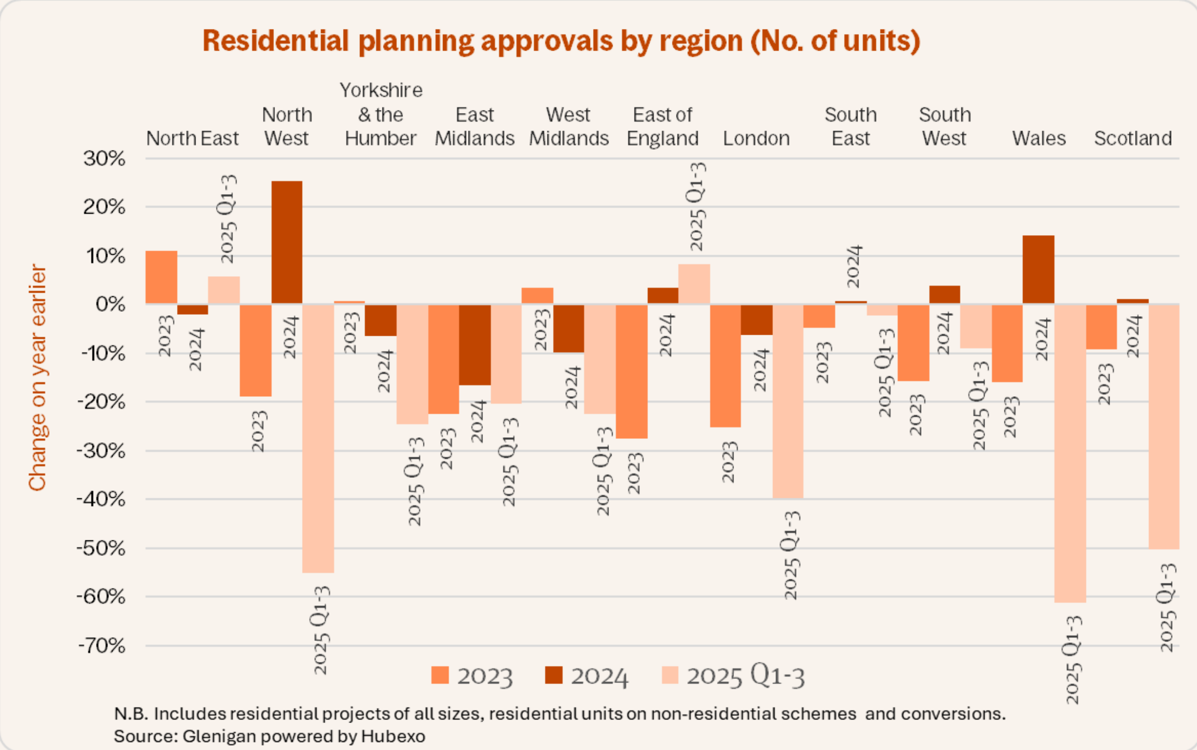
The number of residential units approved fell by 7% during the third quarter of 2025, extending the decline seen during the first half of the year. At 45,075, the number of units approved was 34% down on the third quarter of 2024 and the lowest quarterly total since 2012 Q2. At 146,798, the overall number of units approved during the first nine months of 2025 was 25% lower than a year ago.

At 1,452, the number of housing projects granted planning permission in the third quarter dropped by 17% against the preceding quarter and was 45% lower than a year ago.

Housing schemes of ten or more units during the third quarter accounted for 92% of approved units. At 41,382, the number of units on such schemes slipped 6% against the preceding quarter and was 34% lower than a year earlier. The remaining 8% 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 1,128 the number of private sector housing projects (schemes of 3 or more units) securing approval was 8% lower than in the second quarter and was 37% down on a year earlier. At 39,916 the number of units on private sector projects granted planning permission was 9% down on the previous three months and 33% lower than a year earlier. The decline would have been sharper, but for the approvals of two 1,000 plus unit sites.



At 66, the number of social housing projects (of three or more units) rose by 2% during the third quarter but was 41% lower than a year ago. At 4,832, the number of units was 24% up on the preceding quarter but 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	62,797	41,454	142,438	246,689	8,059	24,124	278,872
2025 Q1-3	28,602	21,494	85,372	135,468	2,307	9,023	146,798
Change on a year earlier							
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	10%	-13%	-1%	-1%	14%	1%	0%
2025 Q1-3	-39%	-21%	-13%	-21%	-61%	-50%	-25%

There was a sharp divergence in regional approvals during the third quarter. The North East, West Midlands and East of England saw a rise in the number of units approved during the third quarter, rising by 52%, 131% and 90% respectively against the preceding quarter. In contrast, the number of units approved in the North West, Yorkshire & the Humber and London fell back by 57%, 56% and 49% respectively.

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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

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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
Q2 2025	1,407	5,443	4,418	4,123	1,531	5,565	7,409	9,623	5,259	44,778	647	2,898	48,323
Q3 2025	2,143	2,359	1,950	3,635	3,537	10,554	3,814	8,382	5,553	41,927	715	2,433	45,075

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

	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	131	490	455	506	469	903	593	1,054	762	5,363	250	317	5,930
Q2 2018	140	432	428	544	460	871	617	1,015	781	5,288	200	327	5,815
Q3 2018	106	459	405	533	430	793	625	1,007	791	5,149	232	324	5,705
Q4 2018	116	461	417	511	463	764	539	1,010	815	5,096	248	323	5,667
Q1 2019	94	438	402	513	457	762	601	977	688	4,932	263	312	5,507
Q2 2019	89	366	400	467	388	740	462	823	658	4,393	195	333	4,921
Q3 2019	91	354	330	435	352	639	584	838	543	4,166	192	302	4,660
Q4 2019	122	355	311	378	341	664	549	901	483	4,104	178	330	4,612
Q1 2020	93	359	287	355	301	566	486	739	511	3,697	191	277	4,165
Q2 2020	59	245	230	278	287	523	468	691	437	3,218	114	257	3,589
Q3 2020	94	363	265	305	308	567	462	788	468	3,620	131	282	4,033
Q4 2020	94	340	300	328	313	564	463	708	499	3,609	151	308	4,068
Q1 2021	95	322	270	338	313	571	491	729	473	3,602	155	324	4,081
Q2 2021	90	275	305	285	265	507	374	683	430	3,214	131	343	3,688
Q3 2021	72	279	292	332	282	633	405	721	477	3,493	161	300	3,954
Q4 2021	74	270	270	311	295	581	415	748	443	3,407	156	289	3,852
Q1 2022	82	275	243	286	263	559	451	702	515	3,376	126	305	3,807
Q2 2022	57	252	242	304	259	444	383	653	461	3,055	109	283	3,447
Q3 2022	74	276	201	337	270	479	419	616	387	3,059	131	248	3,438
Q4 2022	72	270	239	320	269	438	401	655	423	3,087	121	276	3,484
Q1 2023	64	254	224	269	238	451	355	580	376	2,811	115	230	3,156
Q2 2023	72	238	185	227	232	373	343	589	380	2,639	116	216	2,971
Q3 2023	59	242	221	242	209	380	301	630	357	2,641	104	229	2,974

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Q4 2023	66	249	225	275	245	373	349	671	363	2,816	113	190	3,119
Q1 2024	66	247	174	229	260	349	301	585	399	2,610	137	204	2,951
Q2 2024	71	250	210	215	194	377	328	550	372	2,567	120	209	2,896
Q3 2024	73	211	178	201	186	345	301	514	335	2,344	106	178	2,628
Q4 2024	54	218	205	225	217	399	307	530	363	2,518	117	216	2,851
Q1 2025	63	177	148	143	179	364	250	435	349	2,108	80	169	2,357
Q2 2025	45	149	124	134	113	227	211	334	243	1,580	62	110	1,752
Q3 2025	34	123	102	131	105	191	142	268	215	1,311	71	70	1,452

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Table 4: England - Number 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	551	1,290	762	7	2,610
Q2 2024	536	1,225	804	2	2,567
Q3 2024	511	1,197	630	6	2,344
Q4 2024	626	1,160	724	8	2,518
Q1 2025	455	999	649	5	2,108
Q2 2025	381	792	397	10	1,580
Q3 2025	348	732	226	5	1,311

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Table 5: England - Number 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	51,601	4,822	882	16	57,321
Q2 2024	49,129	4,472	935	77	54,613
Q3 2024	55,289	4,403	738	12	60,442
Q4 2024	69,107	4,354	829	23	74,313
Q1 2025	44,085	3,882	726	70	48,763
Q2 2025	41,037	3,252	464	25	44,778
Q3 2025	38,540	3,088	281	18	41,927

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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.

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About HBF

The Home Builders Federation (HBF) is the representative body of the home building industry in England and Wales. HBF's members account 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.

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