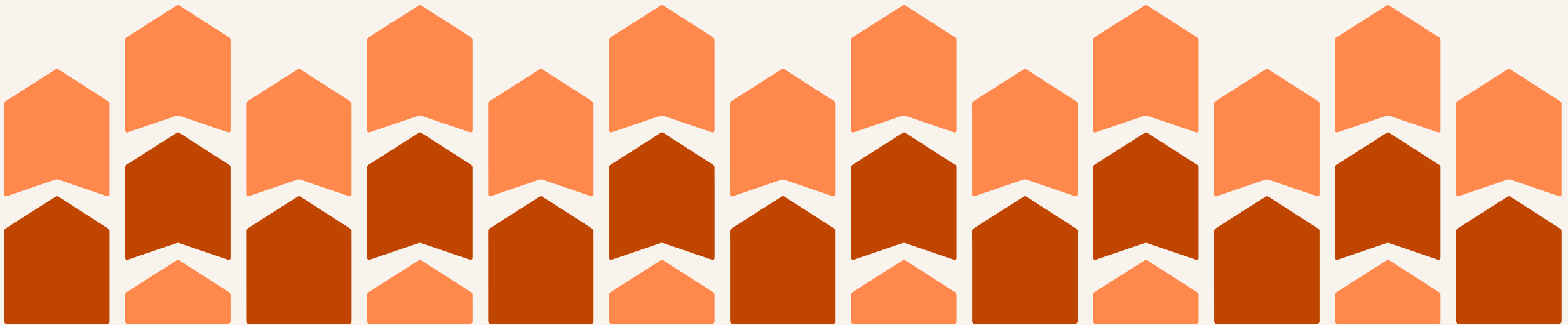


The 2026 Senedd Election: what the results mean for the home building industry

HBF Webinar: 3 June 2026



Chair

Mark Harris

Planning and Policy Advisor, Wales

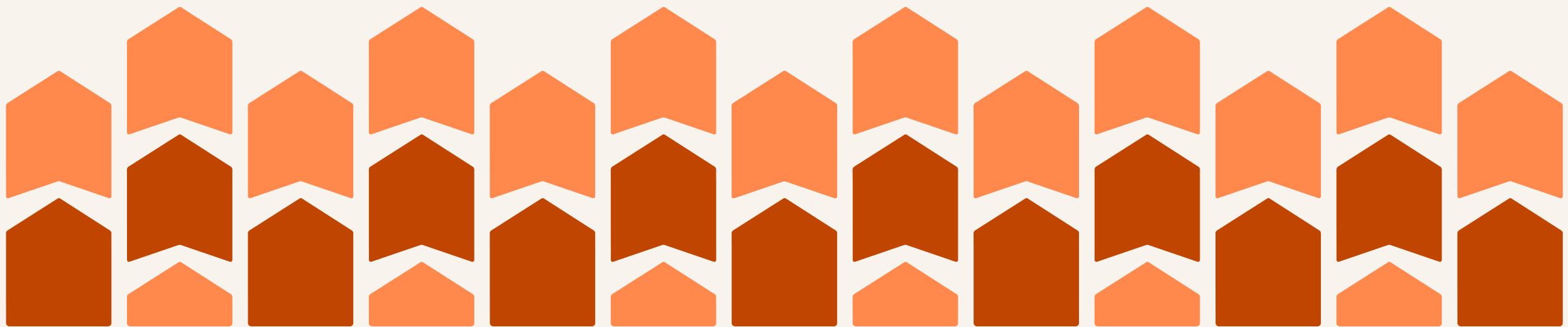
Home Builders Federation

Housekeeping slides

- One hour and a half session, with time at the end for Q&A
- Feel free to pose questions throughout the session via the Q&A function, instead of chat
- A recording of the session will be circulated and made available on the HBF website.

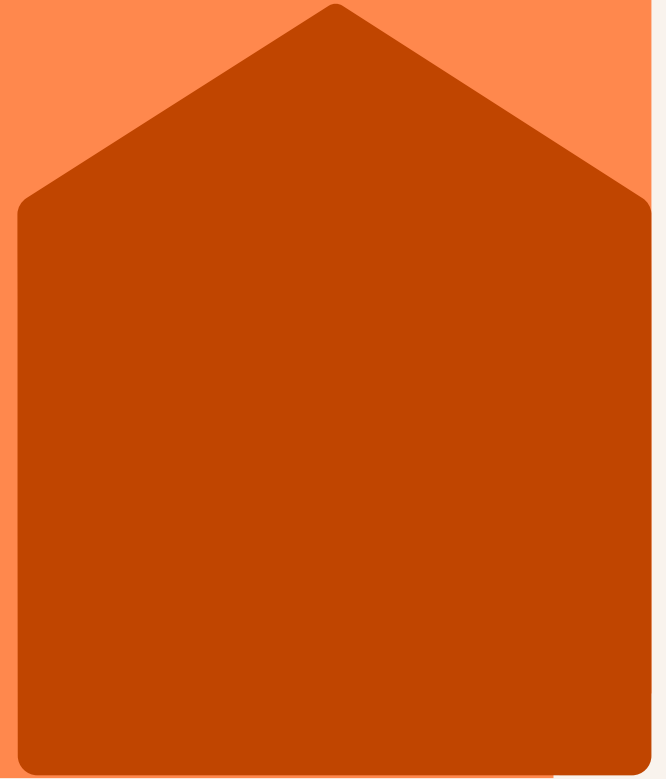


Government and Politics in Wales

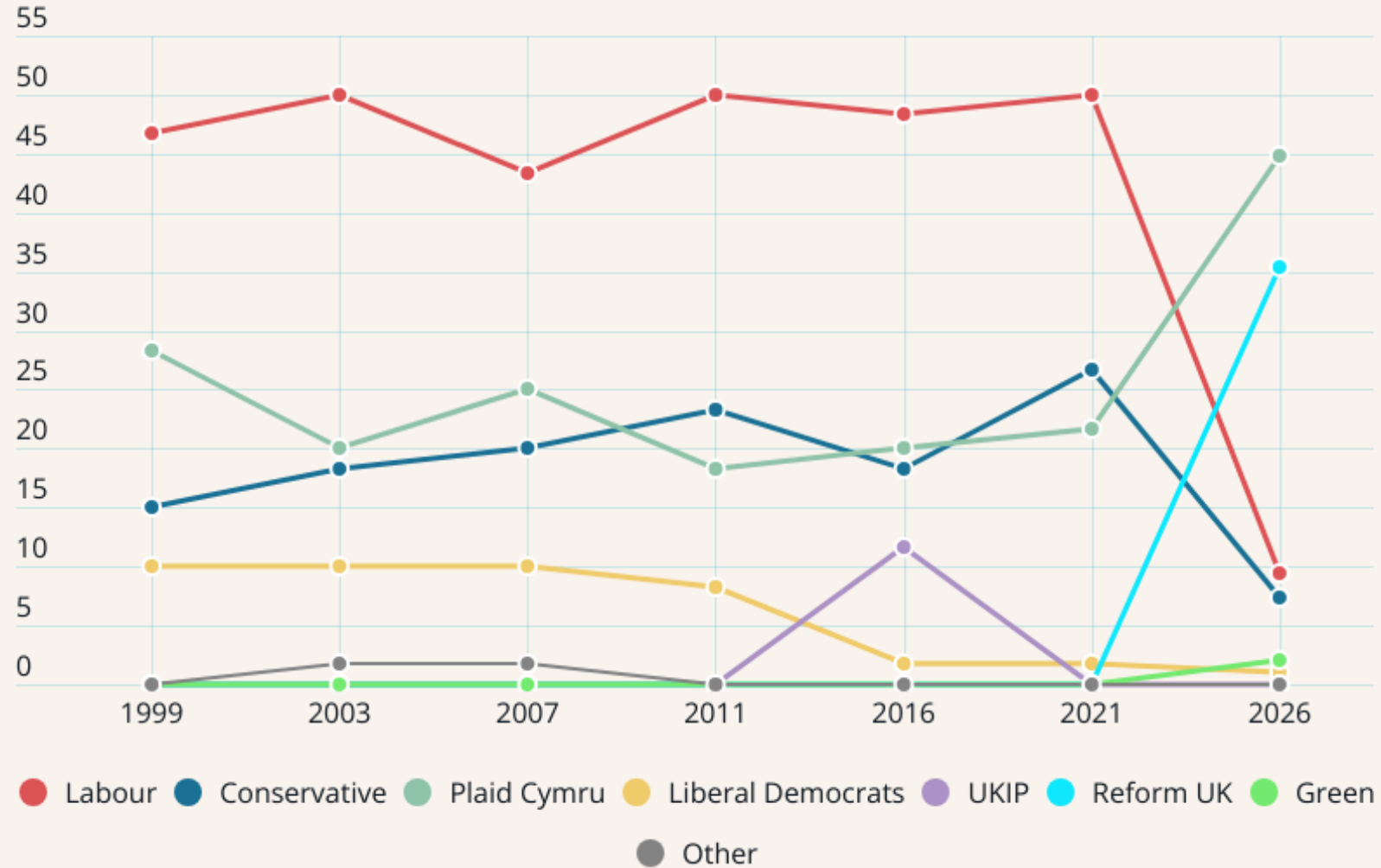


Alexander Magee
Account Director
Cavendish Cymru

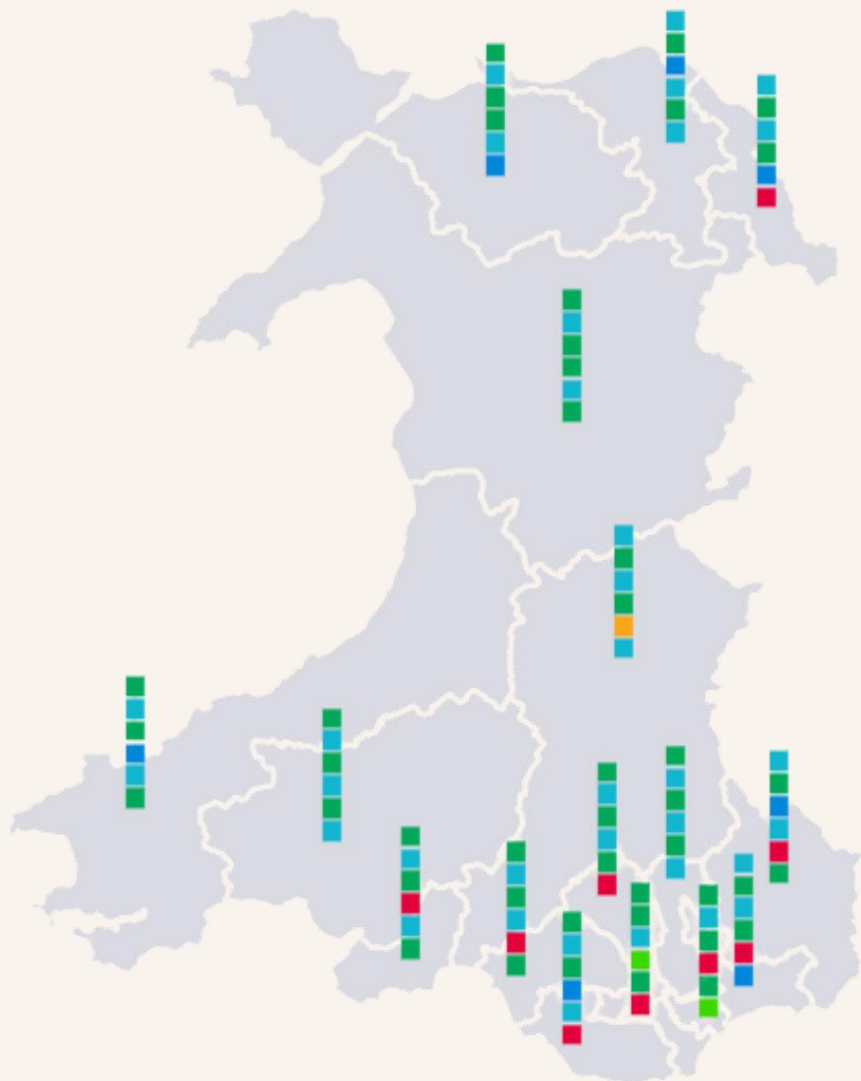
Welsh Politics in Numbers.



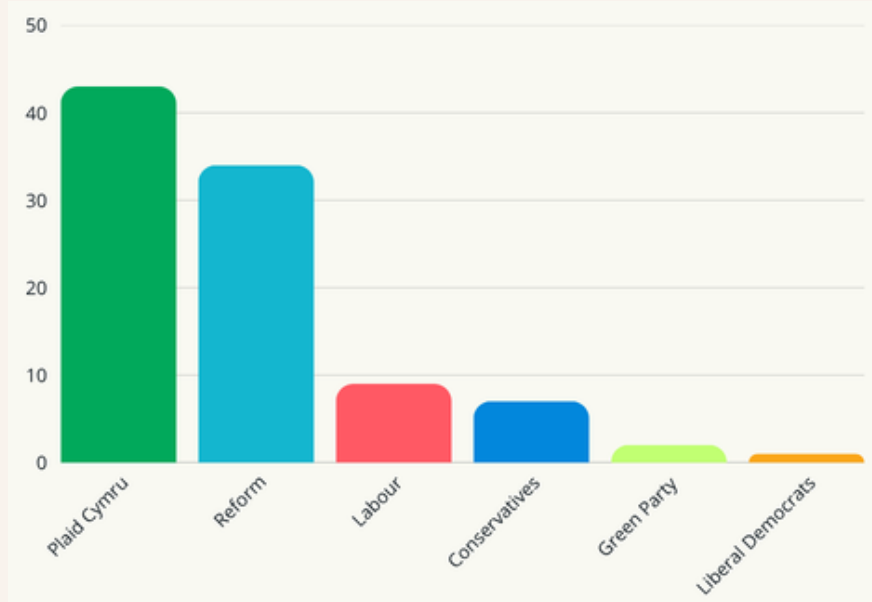
% of Senedd Seats



2026 Senedd Election



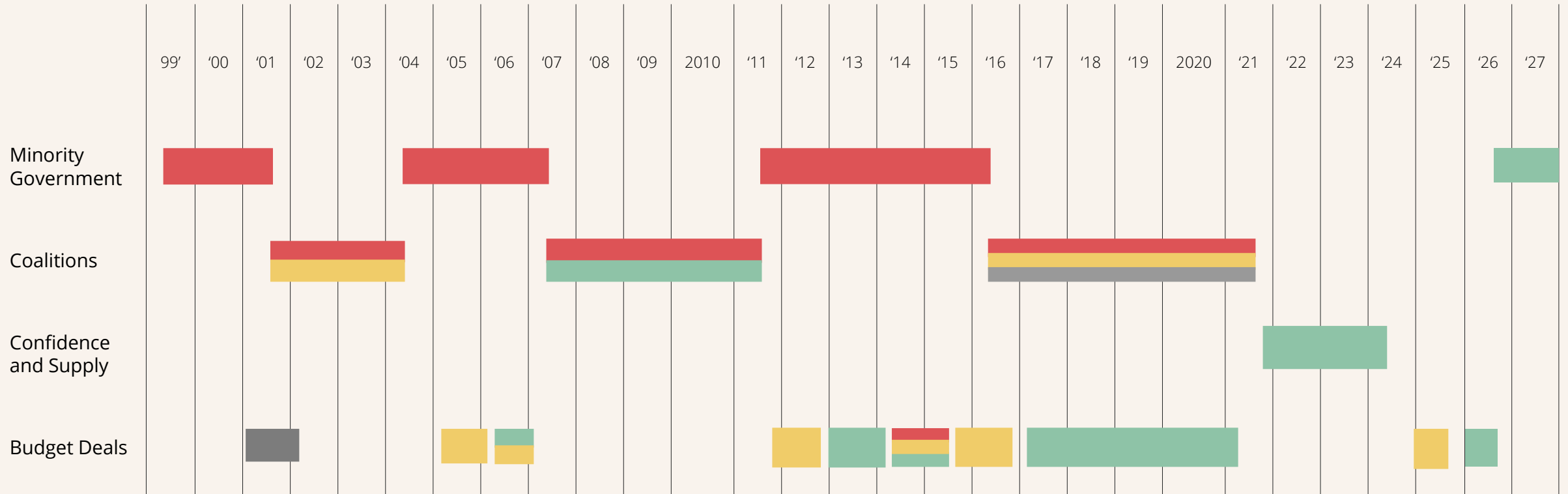
Seats Won



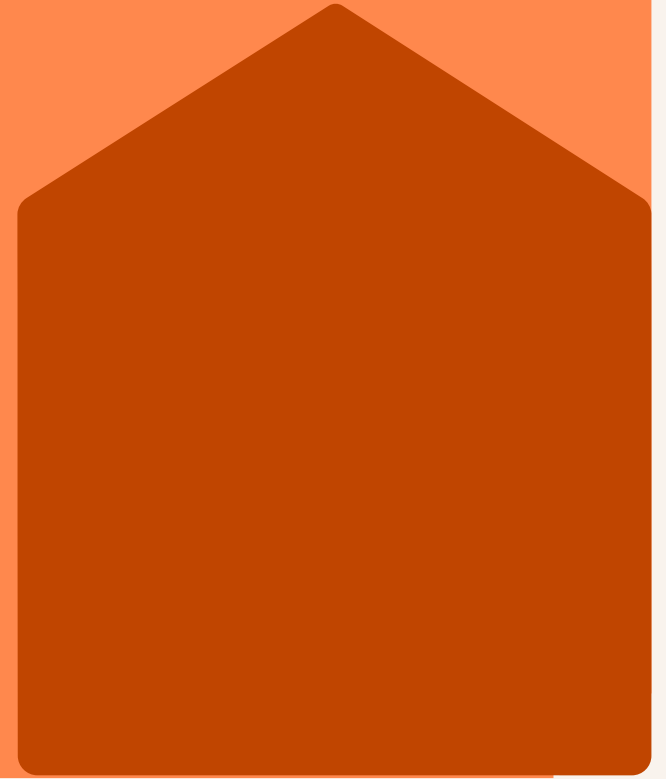
Vote Breakdown

Party	Vote %	Seats
Plaid Cymru	35.4%	43
Reform UK	29.3%	34
Labour	11.2%	9
Conservatives	10.7%	7
Green Party	6.7%	2
Liberal Democrats	4.5%	1

Who has governed Wales?



The Welsh Government.



Welsh Government Cabinet



Rhun ap Iorwerth

First Minister



Sioned Williams

Deputy FM, Social
Justice and Equality



Siân Gwenllian

Local Government,
Housing and Planning



Adam Price

Enterprise,
Connectivity and
Energy



Elin Jones

Finance



**Mabon ap
Gwynfor**

Health and Social Care



Anna Brychan

Education



Llŷr Gruffydd

Rural Resilience
and Sustainability



Dafydd Trystan

Government
Effectiveness and
Constitution



Heledd Fychan

Trefnydd, Chief Whip,
Culture and Sport

Rhun ap Iorwerth MS

First Minister

- First became a Member of the Senedd in 2013, winning a by-election in Ynys Môn.
- Former BBC Cymru Wales journalist and political correspondent.
- Became Leader of Plaid Cymru in June 2023.
- Becomes the first non-Labour First Minister of Wales since devolution.



Sian Gwenllian MS

**Cabinet Minister for Local Government,
Housing and Planning.**

First elected to the Senedd in 2016 - now MS
for Gwynedd Maldwyn.

Former BBC and HTV journalist; background
in local government leadership in Gwynedd.
Served as Deputy Leader of Plaid Cymru
(2018–2023).

Lead Designated Member in the Plaid–Labour
Co-operation Agreement (2021–2024).



Welsh Deputy Minister



Delyth Jewell

Social Care, Mental Health and Women's Health



Cefin Campbell

Skills and Tertiary Education



Mark Hooper

Transport



Nerys Evans

Public and Preventative Health



Elfyn Llwyd

Counsel General Designate

Welsh Government Budget

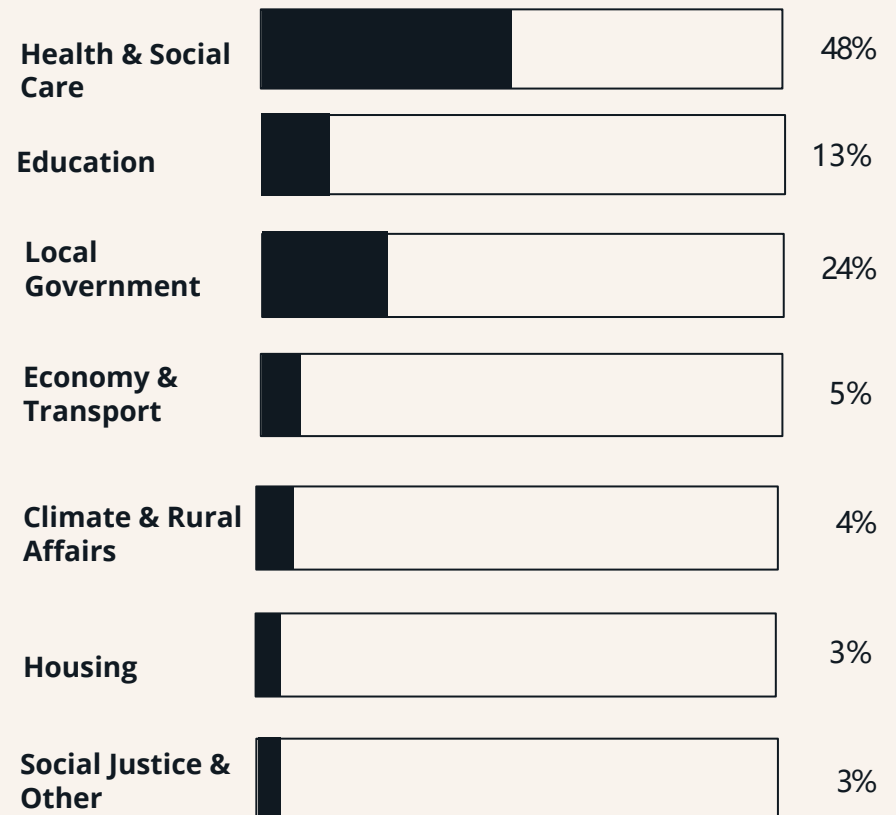
£26bn

Total managed expenditure - funded principally through the block grant from Westminster, with devolved Welsh taxes and limited borrowing.

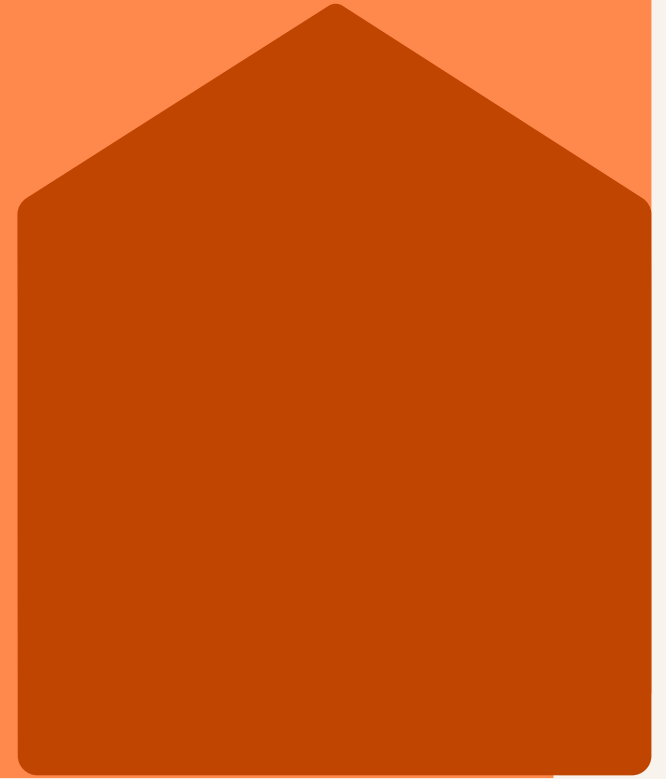
Three things to watch

- NHS & social care continues to absorb the largest share.
- Education remains under pressure post-pandemic.
- Capital limits and the Welsh Reserve cap remain key bargaining chips with HMT.

Departments as a % of total spend



The Senedd



Plaid Cymru Backbenchers



Zaynub Akbar

Caerdydd
Ffynnon Taf



Lis McClean

Pontypridd
Cynon Merthyr



Sera Evans

Afan Ogwr
Rhondda



Lindsay Whittle

Blaenau
Gwent Caerfilli
Rhymni



Rebeca Phillips

Brycheiniog
Tawe Nedd



Sara Crowley

Pontypridd
Cynon Merthyr



Alun Cox

Afan Ogwr
Rhondda



Peredur Owen Griffiths

Casnewydd
Islwyn



Donna Cushing

Sir Fynwy
Torfaen



Elfed Williams

Bangor Conwy
Mon



John Davies

Gwyr
Abertawe



Matthew Jones

Sir Fynwy
Torfaen



Sarah Rees

Pen-Y-Bont Bro
Morgannwg



Safa Elhassan

Gwyr Abertawe



Beca Brown

Gwynedd Maldwyn



Becca Martin

Clwyd

Plaid Cymru Backbenchers



Elyn Stephens

Afan Ogwr
Rhondda



Marc Jones

Flint
Wreccsam



Kiera Marshall

Caerdydd
Penarth



Niamh Salkeld

Blaenau Gwent
Caerfilli Rhymini



Nick Carter

Caerdydd
Ffynnon Taf



Elwyn Vaughan

Gwynedd
Maldwyn



Gwyn Williams

Gwyr Abertawe



Carrie Harper

Fflint Wreccsam



Mair Rowlands

Bangor Conwy
Mon



Marc Jones

Flint Wreccsam



Leticia Gonzalez

Caerdydd
Penarth



Anna Nicholl

Ceredigion Penfro



Lyn Ackerman

Casnewydd
Islwyn



Kerry Ferguson

Pen-Y-Bont Bro
Morgannwg
(DPO)

Reform UK Group



Dan Thomas
Casnewydd Islwyn
Group Leader



Helen Jenner
Bangor Conwy Mon



Llyr Powell
Blaenau Gwent Caerffili
Rhymini



Adrian Mason
Clwyd



Andrew Griffin
Gwynedd Maldwyn



Art Wright
Casnewydd Islwyn



Benjamin McKenna
Afan Ogwr Rhondda



Cai Parry-Jones
Caerdydd Ffynnon Taf



Carmelo Colasanto
Sir Gaerfyrddin



Catherine Cullen
Blaenau Gwent Caerffili
Rhymini



Claire Archibald
Ceredigion Penfro



Claire Johnson-Wood
Gwynedd Maldwyn



Cristiana Emsley
Flint Wrecsam



Gareth Beer
Sir Gaerfyrddin



David Hughes
Pontypridd Cynon
Merthyr



David Mills
Brycheiniog Tawe
Nedd



Francesca O'Brien
Gwyr Abertawe

Reform UK Group



Gareth Thomas
Pen-y-bont Bro
Morgannwg



Iain McIntosh
Brycheiniog Tawe
Nedd



James Evans
Brycheiniog Tawe
Nedd



Jason O'Connell
Pontypridd Cynon
Merthyr



Joe Martin
Caerdydd Penarth



John Clarke
Bangor Conwy
Mon



Joshua Kim
Blaenau Gwent
Caerfilli Rhymini



Louise Emery
Clwyd



Nigel Williams
Fflint Wrecsam



Paul Marr
Ceredigion Penfro



**Sarah
Cooper-Lesadd**
Pen-y-bont Bro
Morgannwg



Sarah Edwards
Sir Gaerfyrddin



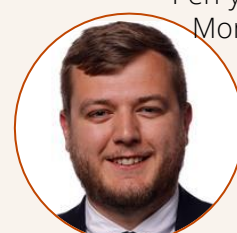
Stephen Senior
Sir Fynwy Torfaen



Steve Bayliss
Afan Ogwr Rhondda



Steven Rodaway
Gŵyr Abertawe



Tom Montgomery
Clwyd



Laura Anne Jones
Sir Fynwy Torfaen

Welsh Labour Group



Ken Skates

Fflint Wrecsam
Interim Leader



Huw Irranca-Davies

Afan Ogwr
Rhondda
Llywydd



Jayne Bryant

Casnewydd Islwyn



Mike Hedges

Gwyr Abertawe



Sarah Murphy

Pen-y-Bont Bro
Morgannwg



Vikki Howells

Pontypridd Cynon
Merthyr



Lynne Neagle

Casnewydd Islwyn



Huw Thomas

Caerdydd Penarth



Shavannah Taj

Caerdydd Ffynnon
Taf

Welsh Conservatives



Darren Millar

Clwyd
Leader



Janet Finch-Saunders

Bangor Conwy
Mon



Peter Fox

Sir Fynwy Torfaen



Sam Rowlands

Fflint Wrecsam



Paul Davies

Ceredigion Penfro



Natasha Asghar

Casnewydd Islwyn

Wales Green Party



Anthony Slaughter

Caerdydd Penarth
Party Leader



Paul Rock

Caerdydd Ffynnon
Taf

Welsh Liberal Democrats



Jane Dodds

Brycheiniog Tawe
Nedd
Party Leader

Welsh housing policy



Mark Harris

Planning and Policy Advisor, Wales
Home Builders Federation

Housing policy in Wales

“While not unique to Wales, having a thriving home-building sector is fundamental to the health of our economy. It affects whether people can stay in their communities, employers can attract and retain talent, and local areas are able to grow sustainably.

Without a step change in the supply of homes, the existing housing need gap will continue to grow, and affordability will worsen for future generations. ”

Iain Mansfield
CEO,
Principality Building Society





Plaid Cymru on housing and planning

First 100 days document on priorities for their first few months in office

- Examine options for reducing the complexity and bureaucracy of planning processes.
- Work with local authorities and other regional partners to develop a new National Development Framework.
- Establish Unnos – a new national development body and social housing enabler . To support land assembly, funding, and delivery of social housing.

Plaid's Manifesto

- A target of delivering at least 20,000 new social homes by 2030.
- Establishing Unnos, a new national development body and social housing enabler.
- Reform consultation processes so communities have real power to influence local development plans, prioritise a community-centred approach to planning.
- Reduce the complexity and bureaucracy of planning processes.
- Produce a new National Development Framework, giving real strategic vision and oversight and overhauling planning and regional development in Wales.
- Strengthen Section 106 contributions, improve clarity, speed up decisions, and ensure schemes deliver tangible local benefits.

Plaid Cymru on housing



Plaid Cymru's core priorities centre on achieving a fairer, more prosperous, and self-sufficient Wales, with a focus on five key pillars:

- Healthcare:
- Cost of Living & Childcare:
- Education & Poverty:
- Economy:
- Energy & Sustainability:

Plenary 19th May - First Ministers' response to a question on housing:

It is something that we have probably put as much research work and policy planning into as any other subject area in the build-up to the recent election.

I probably would like to have more ambitious targets, but in pushing the limits of what we can do, you also look at what is deliverable.

We're determined to get on with the work of delivering the housing stock that the people of Wales deserve.

Key stakeholders and policy responsibilities



Sian Gwenllian MS - Cabinet Minister for Local Government, Housing and Planning

- Housing and housing-related activities of Local Authorities and housing associations, Supply and quality of market, social and affordable housing
- Land division
- Oversight and implementation of the Planning Acts and all aspects of planning policy and the determination of called-in planning applications and appeals
- Planning gain – Section 106 Agreements
- Building regulations and Fire safety in high-rise buildings
- Future Wales: the national plan 2040

Key stakeholders and policy responsibilities



Llyr Gruffydd MS - Cabinet Minister for Rural Resilience and Sustainability

- Cross-cutting measures of mitigation and adaptation in relation to climate change, including water, land drainage, flood and coastal risk; and control of marine and air pollution
- Net Zero, climate change, emission reduction targets and carbon budgets
- Natural Resources Management, including oversight and implementation of the Environment (Wales) Act and Natural Resources Wales
- Marine and freshwater planning, biodiversity, conservation and licensing
- Biodiversity policy, including the implementation of the Nature Recovery Plan



Adam Price MS - Cabinet Minister for Enterprise, Connectivity and Energy

- National Development Agency
- Development Bank of Wales

Key issues for the Seventh Senedd

Homelessness and the housing crisis: new solutions to long-standing challenges?

‘Nobody seems to disagree that Wales is in a housing crisis, which is making itself felt in rising rents, growing waiting lists for social housing and, most acutely, in high levels of homelessness. ‘

Focus on affordable housing with no mention of private house building.

What's next?

Key issues for the Seventh Senedd

May 2026



What is still not clear



Help to Buy



Level of Policy focus on Affordable Housing

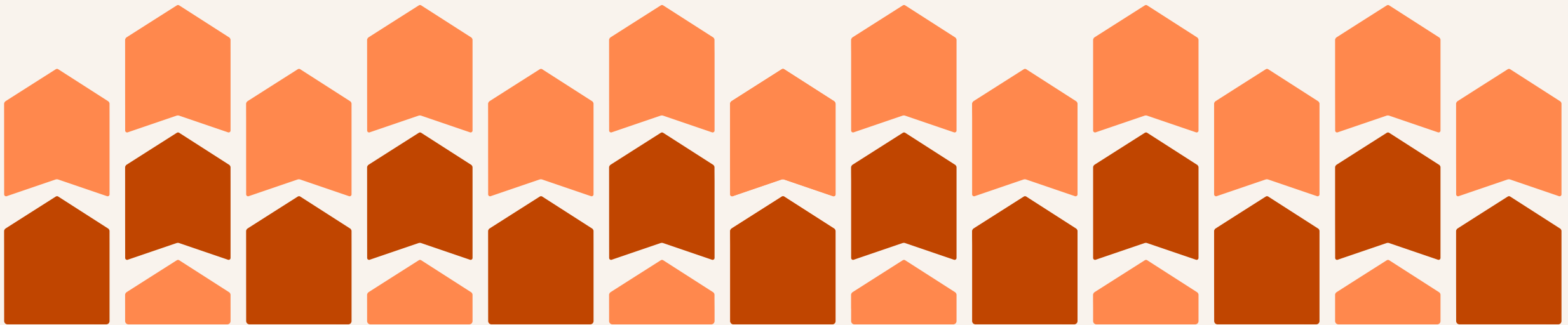


Willingness to engage with the Sector



The level of Planning reform and timescales

HBF engagement and reports



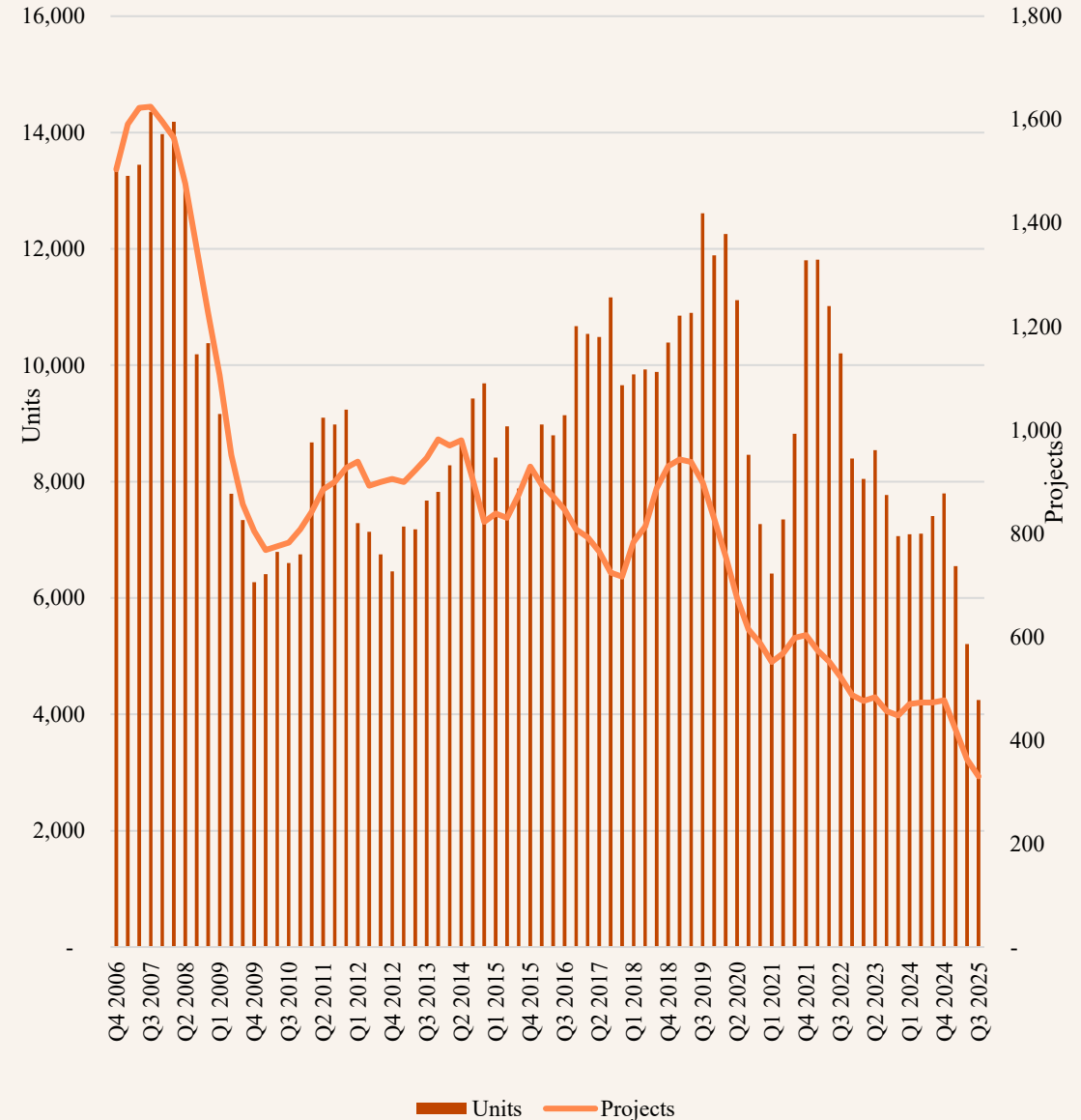
Laurence Thompson
Policy and Campaigns Officer
Home Builders Federation

Housing Pipeline

Released quarterly

- Tracks unit and project approvals – data goes back to 2006
- Latest figures: Number of residential units approved in Q1-3 2025 was 61% lower than the year before
- 4,246 units granted approval between October 2024 and September 2025 – roughly similar to current levels of supply
- www.hbf.co.uk/research-insight/new-housing-pipeline/

Rolling annual total of units and projects granted planning permission, 2006-Q3 2025



The home building industry's asks of the next Welsh Government

Deliver more homes

- Set a national all-tenure target for housing delivery.
- Support SME home builders.
- Provide additional funding for public bodies involved in the planning process.
- Issue standard templates for legal agreements, such as Section 106, to reduce inconsistencies and delays.
- Implement the Welsh Government's sustainable drainage systems (SuDS) review.
- Introduce a moratorium on new policy requirements that would further challenge viability.

Support builders and buyers

- Develop a roadmap for the talent pipeline needed to deliver low-carbon and energy-efficient new homes.
- Extend Help to Buy Wales beyond September 2026 to support first-time buyers.

Make the plan-led system work

- Ensure full coverage of up-to-date Local Development Plans (LDPs).
- Restore Technical Advice Note 1 (TAN 1), enabling sustainable, policy-compliant sites to come forward outside the plan-led system.
- Move to a stock-based approach for local assessments of housing need, addressing historic under-delivery.
- Ensure the four Strategic Development Plans (SDPs) are adopted before the end of this Senedd term.



The Social and Economic impact of home building in Wales – new HBF report

- The report highlights the contribution the home building industry makes to communities and the economy in Wales, and what could be achieved if housing supply increases over this Senedd term.
- The analysis draws on research and modelling undertaken by Lichfields on behalf of the Home Builders Federation (HBF), alongside Welsh Government and StatsWales data, as well as wider HBF research
- Due to be published on **17 June**

Building communities



New school building delivered by Persimmon in Llanedeyrn

Across Wales, new homes generate over £100 million of investment in local communities every year, helping ensure development supports both new and existing communities

Every year, on average, this includes:

- **£46 million** of direct private sector subsidy towards Affordable Housing
- **£14 million** for new and improved schools
- **£5 million** for open spaces and community sports facilities
- **£17 million** for infrastructure such as roads and public transport
- Almost **£20 million** of Community Infrastructure Levy contributions towards the wider area

Supporting economic development

The home building industry makes a significant contribution to the Welsh economy, supporting jobs, investment and economic growth across Wales.



David Wilson Homes South Wales

Every year, the industry supports:

- **£1.1 billion** of economic output and **£820 million** in Gross Value Added (GVA)
- Around **£150 million** in tax revenues to support public services
- Over **£140 million** of spending in local shops and high streets
- Around **£350 million** of spending with suppliers and subcontractors - supporting a wide range of businesses across the Welsh supply chain

Skills, jobs and the future workforce

The home building industry is a major employer, supporting **17,500 jobs** across sites, the supply chain and wider economic activity - equivalent to **3.5 jobs per dwelling**.

Home building also supports skills and workforce development through apprenticeships and training placements for new entrants.

More than 200 apprentices, graduates and trainees are supported every year.

However, meeting Wales' housing needs in this Senedd term will require around **12,000 additional recruits** - highlighting the scale of the skills challenge.

Delivering Affordable Housing

Recent years have seen:

- Almost 900 Affordable Homes delivered through developer contributions every year on average
- Around a third of all new Affordable Housing cross-subsidised by the private sector
- £46 million of direct subsidy every year

Affordable housing delivered by the private sector through planning agreements



Key messages to Welsh Government:

- Without market housing delivery, much of this supply would not come forward.
- Increasing the supply of market homes is vital to meeting Wales’ broader Affordable Housing ambitions and the 20,000 social homes target.

Sustainable new homes

In a nation with Europe's oldest housing stock, increasing the supply of modern, efficient homes can help tackle energy costs while supporting Wales' climate ambitions:

Around 92% of new build homes achieve an EPC A or B rating.

New build homes emit up to 74% less carbon than older properties, and can save households around £420 a year on energy bills compared to typical older homes.



What can be delivered in this Senedd term?

23,000 homes for market sale are needed by 2030

The Welsh Government's estimates of housing need show that an average of 5,700 homes for market sale are needed every year up to 2030 - almost 23,000 in total over this Senedd term.

This is before accounting for Affordable Housing delivery and the existing backlog of unmet need.

Delivering 23,000 new homes for market sale by 2030 could support:

- Thousands of new affordable homes, supported by over **£200 million** of private sector investment
- **£65 million** of funding for new and improved schools, creating capacity equivalent to 3,700 new school places
- Over **£20 million** of investment in open spaces, community sport and leisure, equivalent to 110 community games areas or 180 football pitches
- **£650 million** of additional spending in local shops and high streets
- Jobs and growth across Wales - generating over **£650 million** in tax revenue for public services and **£5.1 billion** of economic output

Upcoming HBF activity

Y Farchnad / The Marketplace

- 17 June
- HBF will meet new Members of the Senedd
- Launch of HBF's social and economic impact report



Upcoming HBF activity

HBF Wales Conference and Dinner

- 9 July - Leonardo Hotel, Cardiff
- Keynote speakers include:
 - **Sioned Davies**, Barrister, No.5 Chambers
 - **Craig Lawton**, Associate Director, Grasshopper Communications
 - **Nicola Bird**, COO, K W Bell Group
 - **Callum Parker**, Associate Director, Brookbanks
 - **Matthew Davies**, MD, Davies Homes (HBF Wales Chairman)
 - **Rhodri Williams**, Technical and Sustainability Director, HBF
 - **Mark Harris**, Planning and Policy Advisor for Wales, HBF
- Limited availability - please contact events@house-builder.co.uk.



Upcoming HBF activity



Social and economic impact campaign

- Follows on from our report
- Highlights case studies of community amenities, volunteering, donations and skills initiatives by the industry in Wales
- Social media campaign
- There will be an opportunity for members to be involved
- Please contact Rianna.fry@hbf.co.uk if you'd like to be involved



HBF resources for members

Key messages documents

- Key Messages and Home Building by Numbers Wales – updated every two months
- Overview of key industry messages to Government and the latest stats from HBF and Stats Wales



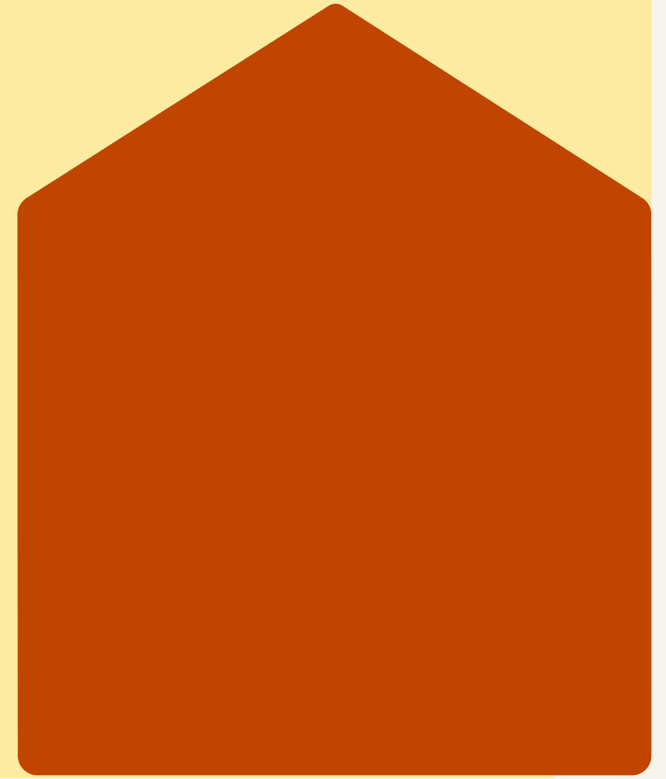
Opinion pieces

- *‘Ambitious housing policy needs to be at the forefront of the incoming Welsh Government agenda’*
- *‘What do the latest estimates of housing need mean for the next Welsh Government and the home building industry?’*
- Research and insight page on the HBF website

Industry News Summary

- Weekly news summary of latest Welsh Government announcements and media stories
- Sign up on website:
www.hbf.co.uk/account/myhbf/subscriptions

Questions



Thank you for joining us

- Follow us on LinkedIn:
the-home-builders-federation
- And X: **@HomeBuildersFed**
- Feedback on today's session and recommendations for future sessions:
comms@hbf.co.uk
- Scan the QR code to view future events

SCAN ME





The voice of the home building industry.

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