



# New Housing Pipeline

## Q1 2013 report

Published May 2013



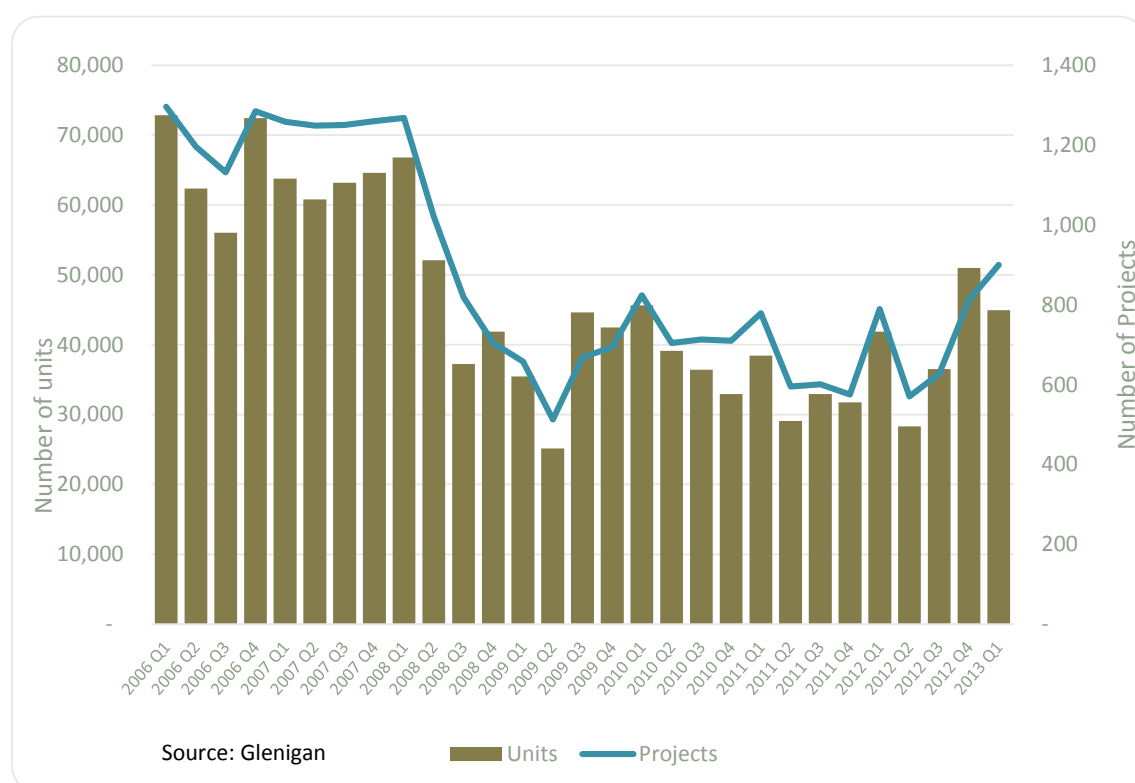
Analysis of market conditions and prospects  
prepared by Glenigan.

# New Housing Pipeline

The flow of residential planning approvals dipped during the first quarter of 2013 after the strong fourth quarter finish to 2012. Nevertheless the number of residential units granted planning approval was 7% higher than a year ago. The recent strengthening in social housing approvals continued during the first three months of 2013. The number of private sector projects securing approval rose during the quarter, but a scarcity of larger residential schemes prompted the number of units approved to fall against the preceding three months.

Glenigan recorded the approval of 45,000 residential units<sup>1</sup> during the first quarter of this year; a 7% increase against the same period of 2012, but 12% fewer units than during the three months to December 2012.

Chart 1: Residential planning approvals (Great Britain)

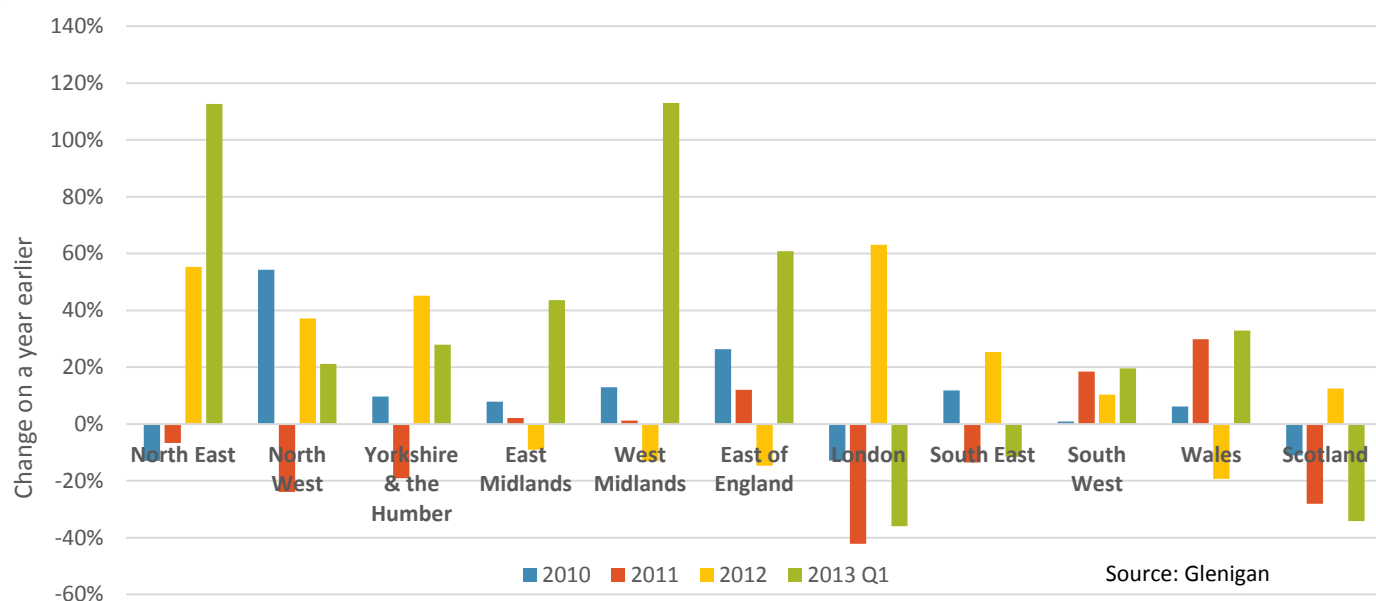


The number of units granted planning permission on private sector projects dropped back by 15% against the buoyant performance seen during the final three months of 2012. However, the drop was despite a 4% increase in the number of projects approved during the quarter. The decline in unit numbers can be attributed to few larger schemes of 250 or more units being approved during the quarter. The number of units approved was 1% up on a strong performance in the first quarter of 2012.

The second half of 2012 saw a strengthening in social housing approvals that helped lift the number of units approved during the year to 22,000, a 16% rise on 2011. The first quarter of 2013 saw a further strengthening in the smaller social housing sector. At nearly 8,000 units, approvals on social housing projects were 12% up on the preceding quarter and 45% higher than a year ago.

<sup>1</sup> Projects involving 10 or more residential units

Chart 2: Residential planning approvals by region (No. of units)



Regionally, the North of England and the Midlands recorded a marked strengthening in unit approvals during the first quarter of 2013. The rise in the North of England sustains last year's positive trend. In contrast the rise in approvals in the Midlands reverses the drop in planning approvals endured in 2012. Similarly, following last year's poor performance, Welsh approvals in the first quarter were up by a third. Approvals in southern England were held back by a fewer unit approvals in London and the South East.

Table 1: Number of residential units approved

	England				Wales	Scotland	Great Britain
	North of England	Midlands	Southern England	All			
2008	40,892	25,290	102,377	168,559	6,894	22,541	197,994
2009	27,598	19,334	79,078	126,010	3,894	17,800	147,704
2010	33,714	21,389	79,040	134,143	4,134	15,836	154,113
2011	27,137	21,730	66,545	115,412	5,366	11,400	132,178
2012	38,872	19,282	82,401	140,555	4,330	12,828	157,713
2013 Q1	12,405	7,602	20,626	40,633	1,828	2,463	44,924
<i>Change on a year earlier</i>							
2008	-38%	-33%	-6%	-21%	-36%	-23%	-22%
2009	-33%	-24%	-23%	-25%	-44%	-21%	-25%
2010	22%	11%	0%	6%	6%	-11%	4%
2011	-20%	2%	-16%	-14%	30%	-28%	-14%
2012	43%	-11%	24%	22%	-19%	13%	19%
2013 Q1	38%	71%	-12%	11%	33%	-34%	7%

N.B. Projects involving 10 or more residential units.

## Notes:

This report is based upon an analysis of housing projects being tracked by Glenigan and held on its database of construction projects. The following restrictions and filters apply to the analysis:

1. Projects included are 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. In addition mixed used developments involving 10 or more residential units are also included in the analysis.
4. Elderly people's homes, Hostels and student accommodation have been excluded from the analysis.
5. 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.

## Housing Approvals

The tables provide a regional breakdown of new building planning approvals since 2007

**Table 2: Number of housing units 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
<b>Q1 2007</b>	2,615	11,034	5,154	4,749	4,758	5,460	7,175	8,914	5,607	55,466	1,353	6,940	<b>63,759</b>
<b>Q2 2007</b>	2,488	7,121	7,328	4,782	4,759	4,457	8,521	6,245	5,653	51,354	2,730	6,690	<b>60,774</b>
<b>Q3 2007</b>	3,722	7,352	3,871	3,975	5,007	4,860	9,960	7,179	5,727	51,653	4,874	6,670	<b>63,197</b>
<b>Q4 2007</b>	3,183	7,150	4,627	4,041	5,542	5,825	10,243	7,150	6,233	53,994	1,808	8,809	<b>64,611</b>
<b>Q1 2008</b>	2,366	10,980	5,975	3,730	3,987	5,217	11,397	7,904	6,888	58,444	2,102	6,256	<b>66,802</b>
<b>Q2 2008</b>	1,315	3,870	3,202	3,238	3,521	4,733	9,271	8,307	4,649	42,106	1,503	8,469	<b>52,078</b>
<b>Q3 2008</b>	963	3,788	1,794	3,100	3,388	3,059	7,826	4,375	3,793	32,086	1,555	3,599	<b>37,240</b>
<b>Q4 2008</b>	875	2,484	3,280	2,816	1,510	3,394	12,110	6,431	3,023	35,923	1,734	4,217	<b>41,874</b>
<b>Q1 2009</b>	1,082	3,136	1,898	1,754	2,293	2,423	9,871	4,263	3,805	30,525	987	3,950	<b>35,462</b>
<b>Q2 2009</b>	1,235	2,626	1,434	2,061	710	2,474	5,248	3,538	2,506	21,832	439	2,891	<b>25,162</b>
<b>Q3 2009</b>	929	2,454	3,900	2,907	1,487	3,000	17,778	4,133	3,555	40,143	1,298	3,182	<b>44,623</b>
<b>Q4 2009</b>	2,678	2,499	3,727	2,291	5,831	2,408	5,247	5,124	3,705	33,510	1,170	7,777	<b>42,457</b>
<b>Q1 2010</b>	2,859	4,851	3,852	2,098	3,548	3,085	12,667	3,483	4,010	40,453	1,069	4,098	<b>45,620</b>
<b>Q2 2010</b>	1,010	3,592	2,911	2,080	3,203	4,268	7,017	5,260	3,409	32,750	1,019	5,360	<b>39,129</b>
<b>Q3 2010</b>	624	3,923	2,325	2,737	2,173	3,141	8,193	4,865	3,572	31,553	771	4,087	<b>36,411</b>
<b>Q4 2010</b>	664	4,168	2,935	2,812	2,738	2,528	5,373	5,466	2,703	29,387	1,275	2,291	<b>32,953</b>
<b>Q1 2011</b>	696	4,168	3,319	2,364	3,565	3,393	6,860	4,733	4,352	33,450	2,099	2,871	<b>38,420</b>
<b>Q2 2011</b>	2,032	2,157	2,215	2,249	1,692	3,530	2,692	3,576	5,028	25,171	1,320	2,607	<b>29,098</b>
<b>Q3 2011</b>	611	3,640	2,240	1,877	2,073	5,310	5,177	3,908	4,223	29,059	963	2,906	<b>32,928</b>
<b>Q4 2011</b>	1,473	2,624	1,962	3,441	4,469	2,363	4,498	4,275	2,627	27,732	984	3,016	<b>31,732</b>
<b>Q1 2012</b>	1,327	3,335	4,330	2,671	1,769	2,756	12,923	3,968	3,682	36,761	1,376	3,737	<b>41,874</b>
<b>Q2 2012</b>	1,442	3,635	2,611	2,496	1,930	2,376	2,836	3,864	3,682	24,872	1,131	2,307	<b>28,310</b>
<b>Q3 2012</b>	2,899	3,938	3,003	1,453	2,338	2,536	5,838	6,235	5,641	33,881	586	2,058	<b>36,525</b>
<b>Q4 2012</b>	1,807	6,356	4,189	2,412	4,213	4,796	9,762	6,607	4,899	45,041	1,237	4,726	<b>51,004</b>
<b>Q1 2013</b>	2,822	4,042	5,541	3,835	3,767	4,432	8,279	3,510	4,405	40,633	1,828	2,463	<b>44,924</b>

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

	North of England			Midlands		Southern England							
	North East	North West	Yorkshire & the Humber	East Midlands	West Midlands	East of England	London	South East	South West	England	Wales	Scotland	Great Britain
<b>Q1 2008</b>	51	150	138	86	99	118	118	172	165	1,097	48	123	<b>1,268</b>
<b>Q2 2008</b>	37	93	84	67	76	103	103	170	122	855	40	126	<b>1,021</b>
<b>Q3 2008</b>	31	91	49	69	62	74	87	114	120	697	34	88	<b>819</b>
<b>Q4 2008</b>	19	68	74	48	43	68	86	96	74	576	34	94	<b>704</b>
<b>Q1 2009</b>	25	69	51	48	44	64	76	73	100	550	29	79	<b>658</b>
<b>Q2 2009</b>	19	54	37	37	28	58	58	67	69	427	19	67	<b>513</b>
<b>Q3 2009</b>	20	56	60	47	38	78	85	86	94	564	37	67	<b>668</b>
<b>Q4 2009</b>	23	64	56	56	49	60	75	88	104	575	24	95	<b>694</b>
<b>Q1 2010</b>	45	99	77	57	57	69	109	93	101	707	29	88	<b>824</b>
<b>Q2 2010</b>	18	74	54	58	51	79	70	119	82	605	17	82	<b>704</b>
<b>Q3 2010</b>	19	89	68	53	50	67	91	104	81	622	20	71	<b>713</b>
<b>Q4 2010</b>	19	89	64	50	64	64	88	110	71	619	26	65	<b>710</b>
<b>Q1 2011</b>	20	92	84	54	57	82	98	104	89	680	27	72	<b>779</b>
<b>Q2 2011</b>	19	59	50	42	45	72	67	84	79	517	26	52	<b>595</b>
<b>Q3 2011</b>	12	60	46	42	52	70	73	88	65	508	26	67	<b>601</b>
<b>Q4 2011</b>	19	69	35	47	62	54	59	97	70	512	24	39	<b>575</b>
<b>Q1 2012</b>	22	77	69	47	45	64	173	96	84	677	29	84	<b>790</b>
<b>Q2 2012</b>	30	77	53	45	35	62	30	86	71	489	17	64	<b>570</b>
<b>Q3 2012</b>	38	74	60	46	46	49	53	104	86	556	22	49	<b>627</b>
<b>Q4 2012</b>	27	101	57	38	79	75	98	132	114	721	26	65	<b>812</b>
<b>Q1 2013</b>	50	100	98	75	93	81	111	99	100	807	39	54	<b>900</b>

## Social Housing Approvals

This table provides a regional breakdown of new social house building planning approvals since 2007

Table 4: Number of social housing projects securing detailed planning approval by region & country

	North of England			Midlands		East of England	Southern England			England	Wales	Scotland	Great Britain
	North East	North West	Yorkshire & the Humber	East Midlands	West Midlands		London	South East	South West				
Q1 2007	266	3,253	657	431	335	780	2,035	1,674	576	10,007	207	1,433	11,647
Q2 2007	105	635	461	189	719	481	2,384	374	524	5,872	668	1,169	7,709
Q3 2007	446	599	344	293	210	573	2,145	1,463	744	6,817	146	1,073	8,036
Q4 2007	215	538	649	574	472	790	1,929	868	681	6,716	73	1,787	8,576
Q1 2008	768	520	860	286	555	1,150	3,227	688	969	9,023	156	794	9,973
Q2 2008	264	549	48	68	623	284	1,986	2,434	902	7,158	232	2,966	10,356
Q3 2008	326	316	262	157	371	1,197	2,210	1,386	487	6,712	136	1,105	7,953
Q4 2008	249	530	543	289	395	462	4,236	729	270	7,703	163	1,116	8,982
Q1 2009	292	878	587	716	796	734	3,986	1,913	689	10,591	380	1,704	12,675
Q2 2009	273	236	230	168	62	667	2,340	353	367	4,696	156	1,204	6,056
Q3 2009	241	401	463	430	454	733	5,449	482	731	9,384	194	1,798	11,376
Q4 2009	322	541	414	402	4,244	531	1,557	1,364	911	10,286	320	1,012	11,618
Q1 2010	1,118	820	848	448	567	317	6,046	1,111	793	12,068	258	1,349	13,675
Q2 2010	54	687	306	118	1,148	478	1,757	969	281	5,798	73	892	6,763
Q3 2010	105	507	616	83	740	325	2,491	1,941	401	7,209	177	1,659	9,045
Q4 2010	203	425	159	260	323	359	1,662	1,013	385	4,789	112	554	5,455
Q1 2011	168	653	705	231	285	610	1,857	948	526	5,983	144	718	6,845
Q2 2011	786	37	184	156	159	308	517	298	190	2,635	84	517	3,236
Q3 2011	53	174	38	42	303	1,322	368	363	586	3,249	64	460	3,773
Q4 2011	633	481	174	624	535	430	1,148	324	118	4,467	76	579	5,122
Q1 2012	33	658	448	123	140	296	1,717	344	554	4,313	386	767	5,466
Q2 2012	30	365	286	177	206	582	702	301	69	2,718	107	421	3,246
Q3 2013	166	515	480	147	612	33	1,093	1,114	1,453	5,613	36	522	6,171
Q4 2012	232	449	418	109	734	599	2,672	705	319	6,237	134	744	7,115
Q1 2013	246	837	940	254	795	355	2,576	665	648	7,316	214	422	7,952
	<b>Q1 2012 % Change</b>												
Q4 2012	6%	86%	125%	133%	8%	-41%	-4%	-6%	103%	17%	60%	-43%	12%
Q1 2012	645%	27%	110%	107%	468%	20%	50%	93%	17%	70%	-45%	-45%	45%

## About HBF

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

### Contact us

Home Builders Federation Ltd  
1st Floor Byron House  
7-9 St James's Street  
London SW1A 1EE  
Tel: 020 7960 1620

Fax: 020 7960 1601  
Email: [info@hbf.co.uk](mailto:info@hbf.co.uk)  
Website: [www.hbf.co.uk](http://www.hbf.co.uk)



## About Glenigan

Glenigan provide the most up-to-date and detailed UK construction contract sales leads and analysis to help companies win more contracts.

### Do you spend hours looking for new business?

*Glenigan provides you with a constant supply of leads so you can quickly find the right projects to target.*

### Do you struggle to find the right contacts?

*Glenigan provides you with the names, email addresses and phone numbers of decision makers.*

### Do you need to track the construction market?

*Glenigan has comprehensive construction market data, analysis, forecasts and league tables. Use our custom research and analysis services to evaluate specific market opportunities and inform your strategic decisions.*

Website: [www.glenigan.com](http://www.glenigan.com)  
Tel: 01202 432121  
Email: [info@glenigan.emap.com](mailto:info@glenigan.emap.com)

