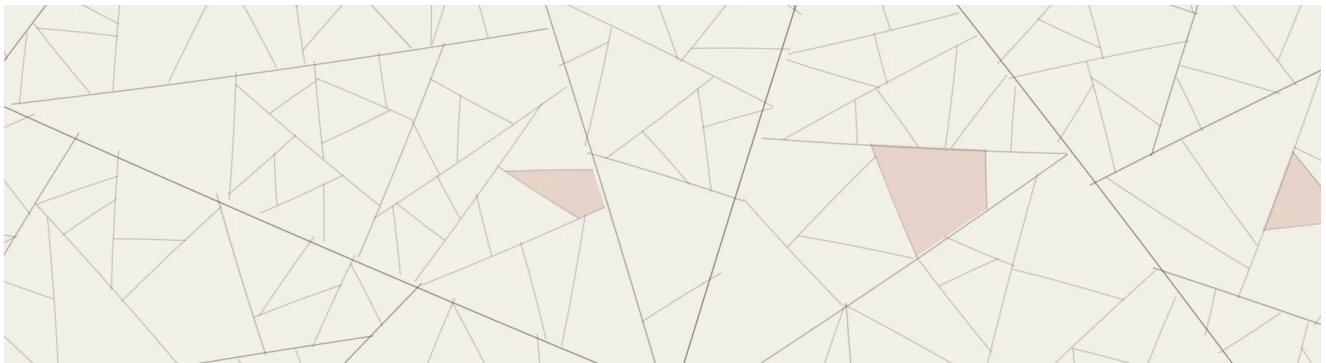


— THE SYSTEM

Four counts of one housing pipeline, and why they *disagree*.

Councils in England decided 1,026 applications for major housing development between April and June 2026, the fewest in any quarter on record, which begins in 1979. In the same quarter building control returns recorded 35,910 new homes started (seasonally adjusted), 20% more than a year earlier, while counts from the National House Building Council and Glenigan fell. The government's own release says the rise in starts is in part due to one regulator. This is what each count measures, and what the house builders' federation and the government have each said about the pipeline.

The Editor



Ground Level, generated

On 24 September 2026 the Ministry of Housing, Communities and Local Government (MHCLG) published two statistical releases at 9:30am. One counted decisions by councils in England on applications for major housing development. That means 10 or more homes, a site of half a hectare or more where the number is not given, or a smaller scheme on a site of one hectare or more. There were 1,026 between April and June, the fewest in any quarter since the quarterly returns began in April

1979. We reported that in the fewest major housing decisions since 1979.

The other counted new homes on which building work had begun. For the same three months it gave 35,910, after adjusting for the time of year. That was 20% more than a year earlier.

35,910

New homes on which building work started in England, April to June 2026, seasonally adjusted, according to building control returns. Up 20% on the same quarter of 2025.

SOURCE · MHCLG, HOUSING SUPPLY: INDICATORS OF NEW SUPPLY, ENGLAND: APRIL TO JUNE 2026, SECTION 2.2, PUBLISHED 24 SEPTEMBER 2026

Both releases cover England and the same quarter, and both are accredited official statistics, though the department says its figures on homes granted permission are not. Other publishers count the same pipeline. This piece sets out what each count measures, and where the publishers' own notes show the counts part company.

Four counts, three of them falling.

A new home passes through stages. An applicant asks for permission, the council decides, building starts and the home is completed. Together those stages are the pipeline, and each has its own count.

The National House Building Council (NHBC) counts homes registered for its ten-year warranty. It describes itself as the UK's largest provider of new home warranties, and calls its figures a lead indicator of house building. Glenigan, which sells information on construction projects, publishes a monthly index of the value of work starting on site, covering projects under £100 million.

COUNT	PLACE	APRIL TO JUNE 2026	JULY TO SEPTEMBER 2026
Decisions on major housing applications (MHCLG)	England	1,026, down 2%	Due December 2026
New homes started (MHCLG, building control)	England	35,910, up 20%	Due December 2026 or January 2027 (provisional)
New homes registered for warranty (NHBC)	UK	29,162, down 4%	26,231, down 13%
Residential construction starts (Glenigan)	UK	Down 33%	Down 33%

Percentage changes are against the same quarter a year earlier. Glenigan's April to June figure is its latest estimate; its first was a fall of 52%. Sources: MHCLG, 24 September 2026; NHBC, 28 July and 26 October 2026; Glenigan, 6 July and 2 October 2026.

Only one of the four is rising, and it is the department's count of starts. The Home Builders Federation, the representative body of the home building industry in England and Wales, counts permissions in homes rather than decisions. Its Housing Pipeline report of 30 September found 45,315 homes given planning permission in England in April to June, the lowest quarterly total since 2012.

One regulator's 5,758.

Building control is the system for checking building work against the building regulations. The department's starts come from returns by four kinds of body: councils, private building control approvers, NHBC and the Building

Safety Regulator. The release says the last of them accounts for part of the rise.

Its opening notes say the higher number of starts in the last three quarters is "in part due to" the regulator. They give the regulator's own counts: 7,089 starts in October to December 2025, 6,276 in January to March 2026 and 5,758 in April to June. Before October 2025 the most it had reported in a quarter was 1,206.

5,758

Starts reported by the Building Safety Regulator in England, April to June 2026. It reported 7,089 in October to December 2025 and 6,276 in January to March 2026. Before October 2025 its highest quarter was 1,206.

SOURCE · MHCLG, HOUSING SUPPLY: INDICATORS OF NEW SUPPLY, ENGLAND: APRIL TO JUNE 2026, RELEASE NOTE 1.1 AND TECHNICAL NOTES SECTION 5.3, PUBLISHED 24 SEPTEMBER 2026

The regulator is the building control authority for what the release calls higher-risk buildings. These are new residential buildings of at least 18 metres or 7 storeys with at least 2 homes, and hospitals and care homes of that height. It took on that role on 1 October 2023. Its first starts in the department's series came in April to June 2025. In the six quarters from October 2023 to March 2025 it reported none.

The release says the regulator's higher counts follow "reforms at the Building Safety Regulator to accelerate housebuilding announced in June 2025". The government's announcement of those reforms on 30 June 2025 said that "Delays to building new high-rise homes will be unblocked". The regulator's guidance says a client must have building control approval before starting construction of a new higher-risk

building. The release does not say how much of the regulator's total is work that had been waiting for that approval.

How starts are counted matters here. A home counts as started when foundation work begins, and when work begins on a block of flats every home in the block counts at once. The regulator's 5,758 came from 13 local authority areas, led by Manchester with 1,737 and Greenwich with 1,127.

The department's headline figure is seasonally adjusted, which removes the usual rise and fall across the year. Its adjusted tables do not separate the regulator's figures, so the comparison below uses its unadjusted table.

QUARTER	ALL STARTS	REPORTED BY THE REGULATOR	ALL OTHER STARTS	ALL OTHER STARTS AGAINST A YEAR EARLIER
July to September 2025	31,630	1,206	30,424	Down 2%
October to December 2025	31,750	7,089	24,661	Down 5%
January to March 2026	34,440	6,276	28,164	Down 5%
April to June 2026	38,510	5,758	32,752	Up 6%

Sources: MHCLG, Live Table 213 and the figure data tables for the release of 24 September 2026. The last two columns are our subtraction and arithmetic.

On this unadjusted table, all recorded starts in April to June 2026 were 21% above a year earlier, against the seasonally adjusted headline of 20%. Without the regulator's they were 6% above. The regulator's own count rose by 4,618 on the year, which is 70% of the 6,610 rise in all

starts. In the three quarters before, starts outside its figures were lower than a year earlier.

These are homes on which building began. The table shows how much of the rise comes from one source. Between January to March and April to June the regulator's figure fell, from 6,276 to 5,758, while the total rose. The regulator reported no completions in April to June. Completions overall were 35,800, seasonally adjusted, 1% more than a year earlier.

Why the counts differ.

Each publisher's technical notes explain its count. Four kinds of difference show up in them.

What is counted. The department's note says its planning figures count applications and decisions "rather than the number of housing units included in each application". A start is a home on which foundation work has begun. NHBC counts homes registered for its warranty. It also supplies the department with building control data, so it appears in both series. Glenigan measures "the value of underlying work starting on-site", which it defines as projects under £100 million.

Even the permissions count has two versions. The department and the federation both use Glenigan's data. Their notes describe different rules and their totals differ, and neither says why. The department leaves out units on a site that already had permission in the previous twelve months. Where details are approved in stages after an outline permission, the federation uses the earliest approval date. For the year to June 2026 the department's provisional figure is 212,000 homes granted permission, down

12%. It says the latest quarter tends to be revised upwards. The federation has 214,515 homes, down 8%.

When. The department's two counts are for April to June. NHBC and Glenigan have also reported July to September, and the department's figures for that quarter are due in December 2026 or January 2027, provisionally.

Time lags in building matter as well. The department says "many permissions do not result in a home being delivered" and that "time lags in building can affect the number of homes built in a particular period". Changes in the rules can move starts between quarters. The department says many builders "may have chosen to bring forward the start of project works" before the transition to new building standards ended on 15 June 2023. Seasonally adjusted starts were 68,328 in April to June 2023 and 20,929 in July to September.

Where. The department's counts are for England. NHBC's and Glenigan's are for the UK, and the Office for National Statistics (ONS) combines the four nations' figures. The ONS table of 23 October has 44,700 starts across the UK in April to June, up 14% on a year earlier. England's rose 21%. Wales fell 17%, Scotland 3% and Northern Ireland 33%.

No count covers everything. The department says building control data provides "information on about 80% of house building in England". NHBC says it "provides warranties on 70%+ of new homes built in the UK".

Returns do not all arrive, either. In April to June, 92% of councils and 79% of private approvers sent one, and the department estimates

the missing ones. NHBC and the regulator each supply a complete return.

Large schemes make single quarters uneven. In July NHBC said registration volumes in London are "often more volatile than elsewhere in the country, with large developments frequently registered over short periods rather than evenly throughout the year".

Revisions. Each of the four counts is revised after it is published. The department revises its planning figures for the previous seven quarters and its building control data for the previous two years, and it marks the latest quarter provisional. Its March release put seasonally adjusted starts in October to December 2025 at 37,300. The latest release has 36,660.

NHBC's release of 11 November 2025 put registrations in July to September 2025 at 30,643. Its release of 26 October 2026 gives 30,279 for the same quarter. NHBC's notes say "Changes in historical data can occur".

Glenigan's page for the three months to June, last updated on 6 July, put residential starts 52% below a year earlier. Its table updated on 2 October puts the same quarter 33% below. Glenigan says recent periods are "subject to provisional weighting to reflect reporting lags".

Two readings of the counts.

The Home Builders Federation, in a release about permissions, reads the squeeze on the pipeline as a problem of demand and cost.

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The continued deterioration of housing supply reflects weak effective demand, constrained access to affordable mortgage lending and subdued market conditions, which limit confidence and reduce home builders' ability to invest in new sites. At the same time, rising construction costs, taxes, levies and policy requirements are putting further pressure on development viability.

Home Builders Federation, news release on its Housing Pipeline report · Ground Level, 30 September 2026

The same release estimated that delivering a new house now costs on average £76,000 more than in 2020. It said 36% of the small and medium builders in its survey were already delaying, redesigning or cancelling schemes in anticipation of the Building Safety Levy.

In January the government read the rise in starts then reported, for the year to September 2025, as the early effect of its reforms, with more to come.

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These figures show the government's overhaul of the planning system, alongside other pro-supply measures, begin to take effect and the impact of reforms will continue to feed into higher levels of delivery in the later years of this Parliament.

Ministry of Housing, Communities and Local Government, press office, on the housing supply figures to September 2025 · Ground Level, 15 January 2026

The housing and planning minister, Matthew Pennycook, told the Commons Housing, Communities and Local Government Committee on 7 July that there were "some incredibly encouraging green shoots". Starts, he said, were up 15% in the year to March 2026. He also said "Effective demand has been hit badly and building material costs are up".

The department's revised table now puts starts in the year to March 2026 at 129,720, 14% more than the year before. The regulator reported 15,711 of them, against none the year before. Without the regulator's starts, the year's total was 0.1% higher. Those starts follow the reforms to the regulator that the government announced in June 2025. Of the measures he had described, he said "those foundations will ensure that we will have high and sustainable rates of house building in the years ahead".

Both accounts name demand and cost. They draw on different counts, with the federation's release about permissions and the government's statements citing applications and starts.

What comes next.

The department's count of net additional dwellings for 2025 to 2026 is provisionally due on 26 November 2026 at 9:30am. The department calls it the "primary and most comprehensive measure" of housing supply. It covers new build, conversions, changes of use and demolitions in the year to 31 March 2026. Its estimate for the same year from energy performance certificates is 196,900 net additional homes, and it says the outturn "is likely to differ to some

extent". The figure for 2024 to 2025 was 208,600.

The department's figures for July to September are due later: planning decisions in December 2026, and starts provisionally between December 2026 and January 2027. That is the quarter NHBC and Glenigan have already counted. All four counts are then expected to cover July to September, and the regulator's figure for the quarter is expected to be in the release.

How we counted.

The starts in the second table are from the department's Live Table 213 and from its table of the regulator's starts. Live Table 213 is not seasonally adjusted and is rounded to the nearest 10. The regulator's table is exact. The "all other" columns and the 21%, 6% and 70% are our arithmetic. So is the 0.1% for the year to March 2026, from the same table's financial-year rows and the regulator's quarterly table. The seasonally adjusted figures for 2023 are from the department's figure data tables. So are the 2% fall in decisions, from Live Table P120A, and the percentage changes for the UK and the four nations. The ONS table behind those is rounded to the nearest 10.

The 1,026 decisions and the comparison with 1979 come from the department's open data on district planning applications, as in our earlier piece. The NHBC and Glenigan figures are as each published them, and we read them on their websites on 26 October. NHBC had not linked a data booklet for July to September when we read its release.

