



An **iceni** Briefing Note

May 2026 Housing Need

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New Affordability Ratio

Hot on the heels of the latest affordability ratios, the ONS has today (21st May 2026) released updated housing stock estimates, once again triggering revisions to housing need figures across England.

As the Standard Method links housing need directly to existing stock, even modest changes in stock levels translate into uplifts in assessed need. While this results in an increase across most areas, the underlying net additions to stock in some locations remain strikingly low.

At the national level, housing stock increased by 208,600 dwellings between 2024 and 2025. This falls well short of the 300,000 homes per annum required to deliver the Government’s 1.5 million home target over the course of this Parliament.

As a result, the annual delivery requirement for the remaining years continues to rise, even as assessed housing need itself edges upwards.

The latest data sees aggregate need increase from around 368,100 dwellings per annum to approximately 371,150 dpa.

Regional performance remains uneven. The East Midlands recorded the strongest growth, with housing stock increasing by around 1.0%, followed by both the East of England and London at 0.9%.

By comparison, the Standard Method assumes baseline growth of 0.8% per annum. On this basis, the northern regions – the North East, Yorkshire and the Humber, and the North West – are falling short of this benchmark, despite national delivery broadly aligning with it.

This pattern likely reflects a combination of weaker housing market conditions in parts of the North and the legacy of historically lower growth assumptions/targets, particularly those linked to subdued demographic projections.

Area	2024	2025	Change	% Change
North East	1,274,096	1,282,433	8,337	0.7%
Yorkshire and the Humber	2,535,722	2,553,817	18,095	0.7%
West Midlands	2,619,447	2,640,180	20,733	0.8%
South West	2,700,971	2,722,035	21,064	0.8%
East Midlands	2,226,697	2,248,311	21,614	1.0%
North West	3,441,161	3,466,356	25,195	0.7%
East of England	2,849,170	2,875,182	26,012	0.9%
London	3,821,916	3,854,594	32,678	0.9%
South East	4,148,571	4,183,443	34,872	0.8%
England	25,617,751	25,826,351	208,600	0.8%



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At a more local level, delivery is highly variable. The most significant stock increases between 2024 and 2025 were recorded in Tewkesbury (3.1%), Mid Suffolk (2.7%), South Cambridgeshire (2.4%) and Telford and Wrekin (2.2%).

However, other areas have experienced markedly lower changes, in some cases reflecting stock losses potentially associated with estate regeneration and redevelopment activity, although it may also reflect a market failure in others.

The accompanying map (right) highlights the spatial distribution of these changes, while the following table sets out updated Standard Method housing need figures for every local authority in England.

Notably, areas shown in green – indicating weaker stock growth – often correspond with locations subject to Green Belt constraints and/or National Park designations.

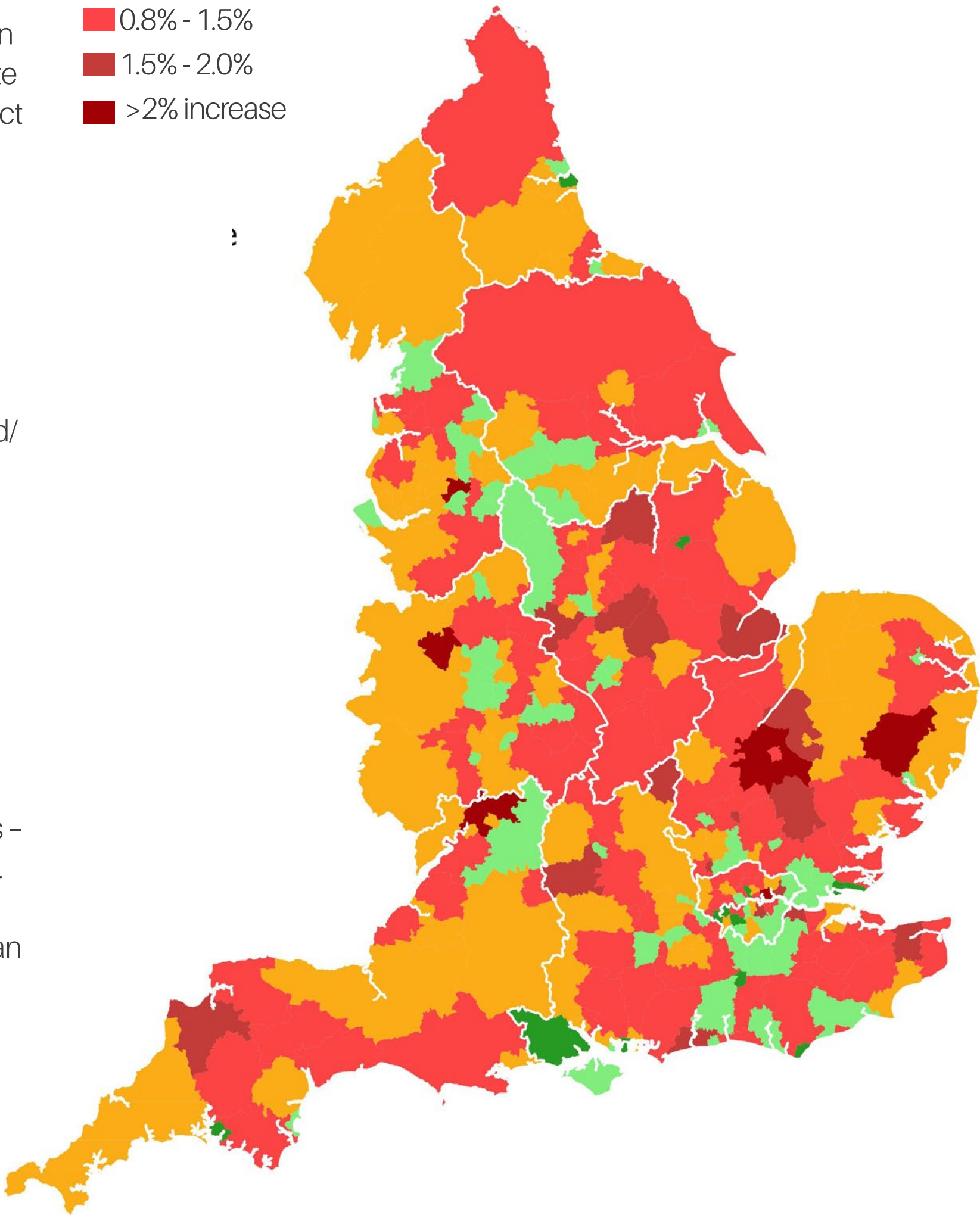
With recent shifts in national Green Belt policy, including a more permissive approach to development on “Grey Belt” areas, i.e., previously developed land and poorer-performing Green Belt areas, these areas may be better positioned to accelerate near-term delivery.

Looking ahead, housing need figures will next be updated in March 2027, following the publication of new affordability ratios. This provides local authorities with a limited window – around ten months – to assess the implications of the latest data and respond accordingly.

If you would like a digital copy or to discuss what these changes mean for your area or for a specific development opportunity, the Iceni Economics team would be pleased to assist.

Stock Increase (24-25)

- <0.25%
- 0.25% - 0.5%
- 0.5% - 0.8%
- 0.8% - 1.5%
- 1.5% - 2.0%
- >2% increase



Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
Adur	535	529	6	1.1%
Amber Valley	670	661	9	1.4%
Arun	1,470	1,447	23	1.6%
Ashfield	555	550	4	0.8%
Ashford	986	976	10	1.0%
Babergh	790	780	10	1.3%
BANES	1,518	1,510	8	0.6%
Barking & Dagenham	1,338	1,314	24	1.9%
Barnet	4,047	3,994	53	1.3%
Barnsley	970	965	5	0.5%
Basildon	1,289	1,284	5	0.4%
Basingstoke & Deane	1,166	1,156	10	0.9%
Bassetlaw	643	634	10	1.5%
BCP	2,959	2,942	17	0.6%
Bedford	1,251	1,242	9	0.7%
Bexley	1,898	1,890	8	0.4%
Birmingham	4,639	4,595	45	1.0%
Blaby	537	535	2	0.4%
Blackburn with Darwen	514	510	4	0.8%
Blackpool	589	587	2	0.3%
Bolsover	368	364	4	1.1%
Bolton	1,274	1,267	7	0.6%
Boston	357	353	4	1.0%
Bracknell Forest	788	782	6	0.7%
Bradford	1,870	1,860	11	0.6%
Braintree	1,132	1,117	15	1.3%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
Breckland	920	913	7	0.8%
Brent	3,047	3,024	23	0.8%
Brentwood	715	713	2	0.3%
Brighton & Hove	2,490	2,467	24	1.0%
Bristol	2,962	2,944	18	0.6%
Broadland	876	864	11	1.3%
Bromley	2,880	2,867	13	0.4%
Bromsgrove	717	712	4	0.6%
Broxbourne	776	771	5	0.7%
Broxtowe	658	653	5	0.8%
Buckinghamshire	4,344	4,318	27	0.6%
Burnley	344	342	2	0.6%
Bury	999	995	4	0.4%
Calderdale	852	848	4	0.5%
Cambridge	1,085	1,075	10	0.9%
Camden	2,934	2,908	26	0.9%
Cannock Chase	521	519	3	0.5%
Canterbury	1,199	1,178	21	1.8%
Castle Point	671	671	0	0.1%
Central Bedfordshire	2,210	2,184	27	1.2%
Charnwood	999	991	8	0.8%
Chelmsford	1,448	1,433	14	1.0%
Cheltenham	808	804	4	0.5%
Cherwell	1,131	1,119	12	1.1%
Cheshire East	2,530	2,504	26	1.0%
Cheshire West & Chester	1,929	1,915	14	0.7%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
Chesterfield	494	491	3	0.7%
Chichester	1,293	1,281	13	1.0%
Chorley	558	554	4	0.7%
City of London	157	157	0	0.1%
Colchester	1,276	1,266	10	0.8%
Cornwall	4,424	4,391	33	0.8%
Cotswold	1,054	1,050	4	0.4%
County Durham	2,035	2,021	14	0.7%
Coventry	1,393	1,387	7	0.5%
Crawley	641	640	1	0.1%
Croydon	2,843	2,828	15	0.5%
Cumberland	1,120	1,112	8	0.7%
Dacorum	1,401	1,391	10	0.7%
Darlington	453	449	3	0.8%
Dartford	756	743	12	1.6%
Derby	960	953	7	0.7%
Derbyshire Dales	570	567	3	0.5%
Doncaster	1,257	1,251	7	0.5%
Dorset	3,273	3,245	28	0.8%
Dover	772	763	9	1.1%
Dudley	1,514	1,507	7	0.5%
Ealing	3,276	3,242	34	1.1%
East Cambridgeshire	687	677	10	1.5%
East Devon	1,127	1,117	10	0.9%
East Hampshire	1,118	1,105	13	1.2%
East Hertfordshire	1,237	1,223	14	1.1%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
East Lindsey	1,048	1,040	8	0.7%
East Riding of Yorkshire	1,998	1,975	23	1.2%
East Staffordshire	628	622	6	1.0%
East Suffolk	1,658	1,648	10	0.6%
Eastbourne	691	690	1	0.2%
Eastleigh	921	912	8	0.9%
Elmbridge	1,586	1,573	13	0.8%
Enfield	2,639	2,617	22	0.8%
Epping Forest	1,244	1,233	10	0.8%
Epsom & Ewell	834	832	3	0.3%
Erewash	519	517	2	0.3%
Exeter	821	812	9	1.1%
Fareham	779	773	5	0.7%
Fenland	602	594	8	1.4%
Folkestone & Hythe	819	814	5	0.6%
Forest of Dean	598	593	5	0.8%
Fylde	416	413	3	0.7%
Gateshead	796	791	5	0.6%
Gedling	669	663	6	0.8%
Gloucester	706	702	4	0.6%
Gosport	440	438	1	0.3%
Gravesham	687	678	8	1.2%
Great Yarmouth	548	545	3	0.6%
Greenwich	2,492	2,461	31	1.3%
Guildford	1,151	1,142	9	0.8%
Hackney	2,474	2,458	16	0.6%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
Halton	485	482	3	0.7%
Hammersmith & Fulham	2,702	2,663	40	1.5%
Harborough	755	747	8	1.1%
Haringey	2,841	2,810	31	1.1%
Harlow	639	637	2	0.3%
Harrow	2,258	2,236	22	1.0%
Hart	804	800	3	0.4%
Hartlepool	370	366	4	1.0%
Hastings	686	680	6	0.9%
Havant	884	879	5	0.6%
Havering	1,947	1,938	9	0.5%
Herefordshire	1,372	1,364	8	0.6%
Hertsmere	975	970	5	0.5%
High Peak	580	577	3	0.5%
Hillingdon	2,339	2,326	13	0.6%
Hinckley & Bosworth	667	659	7	1.1%
Horsham	1,329	1,322	7	0.5%
Hounslow	2,086	2,058	28	1.4%
Hull	1,002	998	5	0.5%
Huntingdonshire	1,237	1,225	13	1.0%
Hyndburn	304	303	1	0.5%
Ipswich	715	711	3	0.4%
Isle of Wight	1,072	1,068	3	0.3%
Isles of Scilly	20	19	0	0.5%
Islington	2,362	2,357	5	0.2%
Kensington & Chelsea	4,525	4,505	20	0.5%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
King’s Lynn & West Norfolk	993	988	5	0.6%
Kingston upon Thames	1,551	1,541	10	0.6%
Kirklees	1,927	1,917	10	0.5%
Knowsley	631	627	4	0.6%
Lambeth	3,050	3,042	9	0.3%
Lancaster	639	637	2	0.3%
Leeds	3,965	3,920	45	1.2%
Leicester	1,631	1,623	8	0.5%
Lewes	855	851	4	0.5%
Lewisham	2,547	2,502	45	1.8%
Lichfield	769	758	11	1.4%
Lincoln	401	400	1	0.2%
Liverpool	1,875	1,864	12	0.6%
Luton	1,128	1,123	6	0.5%
Maidstone	1,373	1,361	12	0.9%
Maldon	586	579	8	1.3%
Malvern Hills	629	617	12	1.9%
Manchester	2,601	2,569	32	1.3%
Mansfield	491	489	3	0.6%
Medway	1,666	1,657	9	0.5%
Melton	371	366	6	1.6%
Merton	2,050	2,046	4	0.2%
Mid Devon	569	563	5	0.9%
Mid Suffolk	757	737	20	2.7%
Mid Sussex	1,343	1,327	15	1.2%
Middlesbrough	528	526	2	0.3%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
Milton Keynes	1,833	1,798	34	1.9%
Mole Valley	805	798	7	0.9%
New Forest	1,507	1,504	4	0.3%
Newark & Sherwood	697	691	7	1.0%
Newcastle upon Tyne	1,245	1,237	9	0.7%
Newcastle-under-Lyme	559	555	4	0.7%
Newham	2,277	2,230	46	2.1%
North Devon	789	783	6	0.8%
North East Derbyshire	608	601	7	1.1%
North East Lincolnshire	621	617	5	0.8%
North Hertfordshire	1,036	1,026	9	0.9%
North Kesteven	659	652	7	1.0%
North Lincolnshire	660	656	4	0.6%
North Norfolk	955	949	5	0.6%
North Northamptonshire	2,029	2,002	27	1.4%
North Somerset	1,581	1,567	13	0.8%
North Tyneside	982	977	5	0.5%
North Warwickshire	367	362	5	1.4%
North West Leicestershire	635	626	9	1.5%
North Yorkshire	4,173	4,136	36	0.9%
Northumberland	1,676	1,661	14	0.9%
Norwich	774	772	2	0.3%
Nottingham	1,347	1,329	18	1.4%
Nuneaton & Bedworth	760	750	10	1.4%
Oadby & Wigston	390	388	2	0.5%
Oldham	972	967	6	0.6%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
Oxford	1,079	1,074	4	0.4%
Pendle	335	334	1	0.3%
Peterborough	1,043	1,030	14	1.3%
Plymouth	1,282	1,280	2	0.2%
Portsmouth	1,022	1,022	1	0.1%
Preston	642	636	6	1.0%
Reading	987	975	12	1.2%
Redbridge	2,416	2,403	13	0.5%
Redcar & Cleveland	575	571	4	0.7%
Redditch	464	462	2	0.5%
Reigate & Banstead	1,281	1,276	5	0.4%
Ribble Valley	310	307	3	1.1%
Richmond upon Thames	2,464	2,462	2	0.1%
Rochdale	970	963	6	0.7%
Rochford	700	692	8	1.1%
Rossendale	331	330	1	0.4%
Rother	895	891	4	0.5%
Rotherham	1,152	1,145	7	0.6%
Rugby	643	635	8	1.3%
Runnymede	640	634	6	1.0%
Rushcliffe	890	877	13	1.5%
Rushmoor	612	605	7	1.2%
Rutland	268	266	2	0.8%
Salford	1,396	1,368	28	2.1%
Sandwell	1,417	1,411	6	0.4%
Sefton	1,404	1,394	10	0.7%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
Sevenoaks	1,166	1,163	3	0.3%
Sheffield	2,451	2,441	10	0.4%
Shropshire	2,046	2,030	16	0.8%
Slough	824	821	3	0.4%
Solihull	1,289	1,285	4	0.3%
Somerset	3,784	3,756	27	0.7%
South Cambridgeshire	1,205	1,179	26	2.2%
South Derbyshire	596	586	10	1.7%
South Gloucestershire	1,731	1,707	24	1.4%
South Hams	929	918	11	1.2%
South Holland	569	560	9	1.5%
South Kesteven	899	890	9	1.0%
South Norfolk	940	927	13	1.4%
South Oxfordshire	1,208	1,194	14	1.2%
South Ribble	515	511	5	0.9%
South Staffordshire	648	645	3	0.5%
South Tyneside	626	625	1	0.2%
Southampton	1,212	1,203	8	0.7%
Southend-on-Sea	1,409	1,405	3	0.2%
Southwark	2,806	2,794	11	0.4%
Spelthorne	795	792	4	0.4%
St Albans	1,653	1,643	10	0.6%
St. Helens	766	760	5	0.7%
Stafford	760	752	7	1.0%
Staffordshire Moorlands	501	498	4	0.7%
Stevenage	494	486	8	1.7%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
Stockport	1,901	1,896	5	0.3%
Stockton-on-Tees	778	771	6	0.8%
Stoke-on-Trent	955	951	4	0.4%
Stratford-on-Avon	1,084	1,069	14	1.3%
Stroud	869	861	8	1.0%
Sunderland	1,072	1,066	6	0.6%
Surrey Heath	700	696	3	0.5%
Sutton	1,651	1,645	6	0.4%
Swale	1,071	1,061	9	0.9%
Swindon	1,203	1,193	10	0.9%
Tameside	1,156	1,151	5	0.5%
Tamworth	437	435	3	0.6%
Tandridge	819	816	4	0.5%
Teignbridge	1,065	1,057	8	0.8%
Telford & Wrekin	921	900	20	2.2%
Tendring	1,069	1,057	12	1.1%
Test Valley	928	924	5	0.5%
Tewkesbury	645	625	20	3.1%
Thanet	1,106	1,093	13	1.2%
Three Rivers	752	745	7	1.0%
Thurrock	1,079	1,074	5	0.4%
Tonbridge & Malling	1,117	1,103	13	1.2%
Torbay	972	969	4	0.4%
Torridge	537	528	9	1.6%
Tower Hamlets	2,050	2,028	23	1.1%
Trafford	1,621	1,615	6	0.3%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
Tunbridge Wells	1,100	1,087	13	1.2%
Uttlesford	818	805	13	1.6%
Vale of White Horse	970	952	18	1.9%
Wakefield	1,573	1,565	8	0.5%
Walsall	1,215	1,208	7	0.5%
Waltham Forest	2,542	2,518	23	0.9%
Wandsworth	4,243	4,202	41	1.0%
Warrington	1,073	1,067	6	0.6%
Warwick	1,112	1,100	13	1.2%
Watford	817	805	13	1.6%
Waverley	1,418	1,402	16	1.2%
Wealden	1,465	1,444	21	1.5%
Welwyn Hatfield	821	818	4	0.4%
West Berkshire	1,079	1,073	6	0.6%
West Devon	427	422	5	1.2%
West Lancashire	589	583	6	1.1%
West Lindsey	515	509	6	1.2%
West Northamptonshire	2,536	2,512	24	1.0%
West Oxfordshire	901	896	5	0.6%
West Suffolk	1,185	1,176	9	0.8%
Westminster	4,151	4,132	19	0.5%
Westmorland & Furness	1,322	1,315	7	0.5%
Wigan	1,481	1,470	11	0.8%
Wiltshire	3,463	3,445	18	0.5%
Winchester	1,127	1,111	16	1.5%
Windsor & Maidenhead	1,407	1,398	9	0.7%

Area	March 2026 Housing Need	May 2025 Housing Need	Change	% Change
Wirral	1,630	1,624	6	0.4%
Woking	803	799	5	0.6%
Wokingham	1,317	1,305	12	0.9%
Wolverhampton	1,136	1,131	4	0.4%
Worcester	555	553	2	0.4%
Worthing	855	852	3	0.4%
Wychavon	965	957	8	0.8%
Wyre	612	605	7	1.2%
Wyre Forest	616	610	7	1.1%
York	1,227	1,219	9	0.7%



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