
Manchester City Council, Housing Needs Assessment Update 2026 – Executive Summary

Introduction

The Manchester Housing Need Assessment 2026 update provides the council with up-to-date evidence on housing need across all sections of the community over the period 2022 to 2039. The evidence will inform the update of the preparation of the Local Plan, other strategies, policies and decisions of the council and its partners.

The HNA has been prepared in accordance with the National Planning Policy Framework (NPPF) and associated Planning Practice Guidance (PPG).

Data have been produced at sub-area level where possible.

The HNA report complements the Places for Everyone planning policy document.

Dwelling stock

There are 257,629 dwellings and an estimated 235,624 households across the city in 2026. The vacancy rate is 2.3% which is somewhat smaller than the rate for England (2.9%). Most dwellings are houses (57.4%), 1.0% are bungalows and 41.6% are flats. 37.2% of households are owner occupiers, 32.5% privately rent and 30.2% live in affordable housing.

House prices and rents

In 2025, lower quartile prices were £175,000 (North West £145,000 and England £190,000) and median prices were £236,000 (North West £210,000 and England £288,000).

In 2025, lower quartile private rents were £1,096 each month (North West £823 and England £1,023) and median rents were £1,348 (North West £1,049 and England £1,551).

Future dwelling mix and development priorities

The HNA has carefully considered the future population and household projections over the period 2022 to 2039, the range of dwellings lived in by different households and their dwelling aspirations (likes) and expectations. This helps to determine an appropriate mix of dwellings to inform future development priorities to better reflect the housing needs of communities across Manchester.

For affordable housing tenures, the recommended mix has been updated from the 2023 Housing Needs Assessment methodology to reflect a more detailed understanding of current need. In particular, the analysis now blends demographic and household projection evidence with dwelling size requirements drawn from housing register data. This provides a more grounded view of the size and type of

affordable homes required by households seeking affordable housing, while still aligning with the wider assessment of future household growth and housing need across Manchester.

The Greater Manchester Places for Everyone plan sets a minimum annual net housing requirement for Manchester of 3,533 dwellings. Alongside this, the updated Housing Needs Assessment identifies a substantial net affordable housing need of **1,627** homes each year. This underlines the need for a robust affordable housing policy that maximises delivery through new development, subject to viability, and supports wider Council and partner-led interventions to address the scale of affordable housing need across the city.

When determining the overall affordable tenure split, the Council should be guided by the evidence in this HNA and the need to prioritise the delivery of affordable rented homes. For policy-making purposes, it is recommended that the affordable housing tenure split is 75% affordable rented housing and 25% affordable home ownership. This reflects the scale and nature of affordable housing need in Manchester, while retaining an appropriate role for affordable home ownership products as part of a balanced affordable housing offer.

The council's affordable housing policy will continue to support the ongoing delivery of affordable housing and diversify the affordable products available to local residents to reflect identified needs. The overall dwelling mix recommendations by tenure are set out in Table ES1 (Manchester) and Tables ES2 to 4 for sub-areas. It is also recommended that 10-15% of all new dwellings should be level-access, that is with all facilities on one floor).

Table ES1 Summary of overall dwelling mix by tenure: Manchester

Number of bedrooms	Market	Affordable Rented	Affordable home ownership	Overall range
1	5-10%	30-35%	10-15%	10-15%
2	35-40%	30-35%	30-35%	35-40%
3	35-40%	25-30%	40-45%	35-40%
4	15-20%	5-10%	5-10%	10-15%
Overall need for level-access dwellings	5-10%	20-25%	10-15%	10-15%

Table ES2 Summary of overall dwelling mix by tenure: City centre

Number of bedrooms	Market	Social/ Affordable Rented	Affordable Home Ownership	Total
1	5-10%	50-55%	5-10%	15-20%
2	45-50%	30-35%	50-55%	40-45%
3	30-35%	15-20%	40-45%	30-35%
4 or more	5-10%	0-2%	0-2%	5-10%
Overall need for level-access dwellings	2-5%	0-2%	0-2%	2-5%

Table ES3 Summary of overall dwelling mix by tenure : North and Central Manchester

Number of bedrooms	Market	Social/ Affordable Rented	Affordable Home Ownership	Total
1	10-15%	30-35%	20-25%	15-20%
2	30-35%	25-30%	15-20%	25-30%
3	35-40%	30-35%	40-45%	30-35%
4 or more	20-25%	5-10%	20-25%	15-20%
Overall need for level-access dwellings	10-15%	15-20%	10-15%	10-15%

Table ES4 Summary of overall dwelling mix by tenure : South Manchester

Number of bedrooms	Market	Social/ Affordable Rented	Affordable Home Ownership	Total
1	2-5%	35-40%	5-10%	10-15%
2	30-35%	35-40%	45-50%	35-40%
3	45-50%	20-25%	40-45%	40-45%
4 or more	15-20%	2-5%	0-2%	10-15%
Overall need for level-access dwellings	10-15%	30-35%	15-20%	15-20%

The needs of other groups

Particular needs which have been identified in the HNA are:

- Increasing and diversifying the supply of specialist housing for older people. There is a need for 2,431 more units of accommodation for older people by 2039. This includes sheltered/retirement, Extra Care, co-housing and residential care.
- Based on an assessment of additional needs and longer-term demographics, 3.6% of new dwellings (127 each year) should be built to M4(3) wheelchair accessible standard; and all other new dwellings should be built to M4(2) accessible and adaptable standard which would include bungalows/level access accommodation.

The main report provides further details of the additional groups referenced in the NPPF and PPG.

Note that there is overlap between affordable, specialist older person and M4(3) need, so for instance the development of an older person's level access, wheelchair accessible affordable dwelling would help address three aspects of housing need.

Summary of policy recommendations

Theme	Data	Action
Overall housing need	3,533 average each year 2022-2039, as set out in Policy JP-H3 of the Places for Everyone plan	Housing need figure to be noted.
Affordable housing need	Annual imbalance over the next 10 years of 1,627 which justifies need for robust affordable housing policy and delivery	Affordable housing policy to maximise delivery on market sites subject to viability and consider new ways of delivering affordable, particularly social rented housing.
	Broad mix of affordable dwelling sizes is required (15% 1-bedroom, 35% 2-bedroom, 37% 3-bedroom and 13% 4+ bedroom)	Range of dwelling sizes to be delivered. The Housing Strategy 2022-2032 seeks to deliver 3,000 larger affordable dwellings.
	Affordable tenure mix of 75% affordable rented housing and 25% affordable home ownership, reflecting the evidence in this HNA.	Development should prioritise the delivery of affordable rented homes, supported by an appropriate proportion of affordable home ownership products to provide a balanced affordable housing offer.
Needs of different groups	3.6% of new dwellings (128 each year) to be M4(3) wheelchair accessible All new affordable and market dwellings to be built to M4(2) standard in line with policy JP H3 of the Places for Everyone plan	Update relevant policies.
	2,431 additional units of accommodation for older people by 2039 including 510 residential care bedspaces. 353 Extra Care units and 1,568 other types of accommodation	Diversify range of older persons accommodation including sheltered/retirement and Extra Care leasehold and cohousing. Continue to review need for residential care. Strengthen policies to enable people to live in their own homes for longer with appropriate support and adaptation.
	Other needs groups	Ongoing review of need for specialist housing and build upon the needs evidence in this HNA.