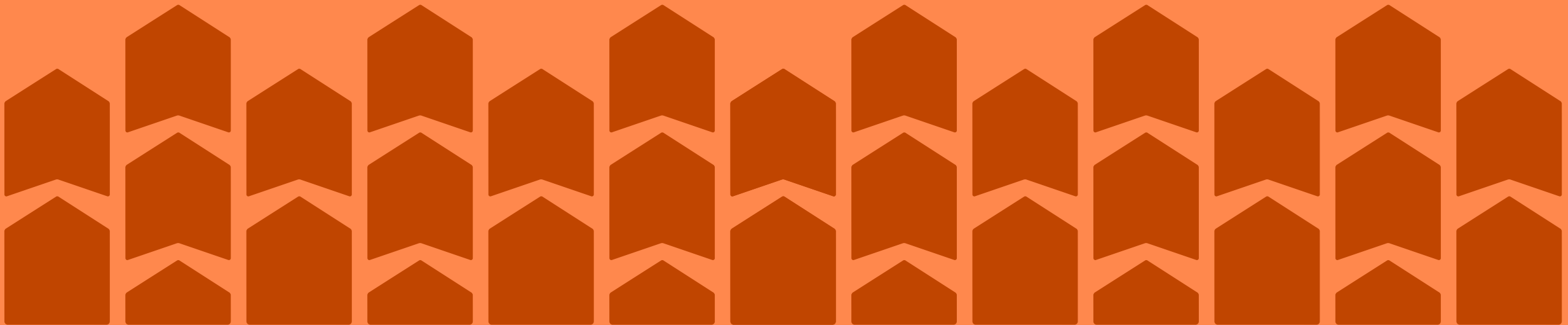


HBF Wales Conference 2025





Cymru | Wales

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Technical

Increased challenges in the technical & construction process, including increased regulations, standards, increased costs, SuDS and lengthy adoption delays, are consistently cited as top constraints for delivering housing in Wales.

Challenges & Opportunities for SME's



- Over half (51%) of home builders report waiting over a year to obtain planning permission
- 56% of SME home builders report a 30% uplift in the cost of obtaining planning permission
- Home builders face new challenges. NBB (BNG in England) is cited by 90% of SME's as a barrier to growth due to delays in gaining agreements with just 4% believing local authorities have the resources or capacity to help them achieve a 10% net gain.



Technical Issues in Wales

- **Building Safety Bill (Wales) 07 July 2025**
LABC as Building Safety Authority BSA (BSR in England) responsible for all HRB's (18m/7st).
3 categories of residential premises with basic fire safety duties to be imposed on 1/2/3 storey apartments in Wales.
- **174 residential HRB's in Wales.** Significantly less than in England at circa 12,500.
- **Building Safety Levy** – Wont be introduced in Wales. (£3.5b at £3500/£4000/plot in England).
- **Part S – EVCP.** Consultation closed November 2024. 7kW charger. (England 2022)
- **Timber Industrial Strategy-Welsh**
Government consultation April 2025. New Wales timber industry. Welsh timber frame housing, 30 yr strategic tree planting, Welsh Gov subsidies, BNG offsetting. Housing is perfectly placed to respond to timber frame construction.
- **Part B Fire Safety;** Fire Sprinklers introduced in 2016. Changes consulted upon last year come into effect December 2025.



Technical Issues in Wales

- **Part L 2021** (+34% Wales / +31% in England).
- **Part L FHS** (+75%-80% uplift 2013 regs).
Welsh Government consultation launched 26 August. 100% electric. Zero carbon ready homes.
- **HEM / SAP 10.3**
- **Welsh Water Infrastructure Charges** – Water & Sewerage from 01 April 2025 increase to £541 each (+11% 2024 £487).
- **Welsh Water Income offset** removed 01 April 2025 for provision of new infrastructure.
- **Nutrient Neutrality** – NRW & WW taken a more pragmatic approach in Wales. Nitrates are again occurring as an issue in Lougher Estuary & North Wales.
- **Schedule 3 Flood & Water Management Act 2010** introduced in 2019. Significant Commuted Sums in Wales. England looking to follow recommendations via the Cunliffe Review July 2025. Updated National Drainage Standards in England introduced June 2025.
- **Part G Water Efficiency** - Wales 110 lpppd (England Consultation later in 2025). Regional demands 90/80 lpppd.





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