



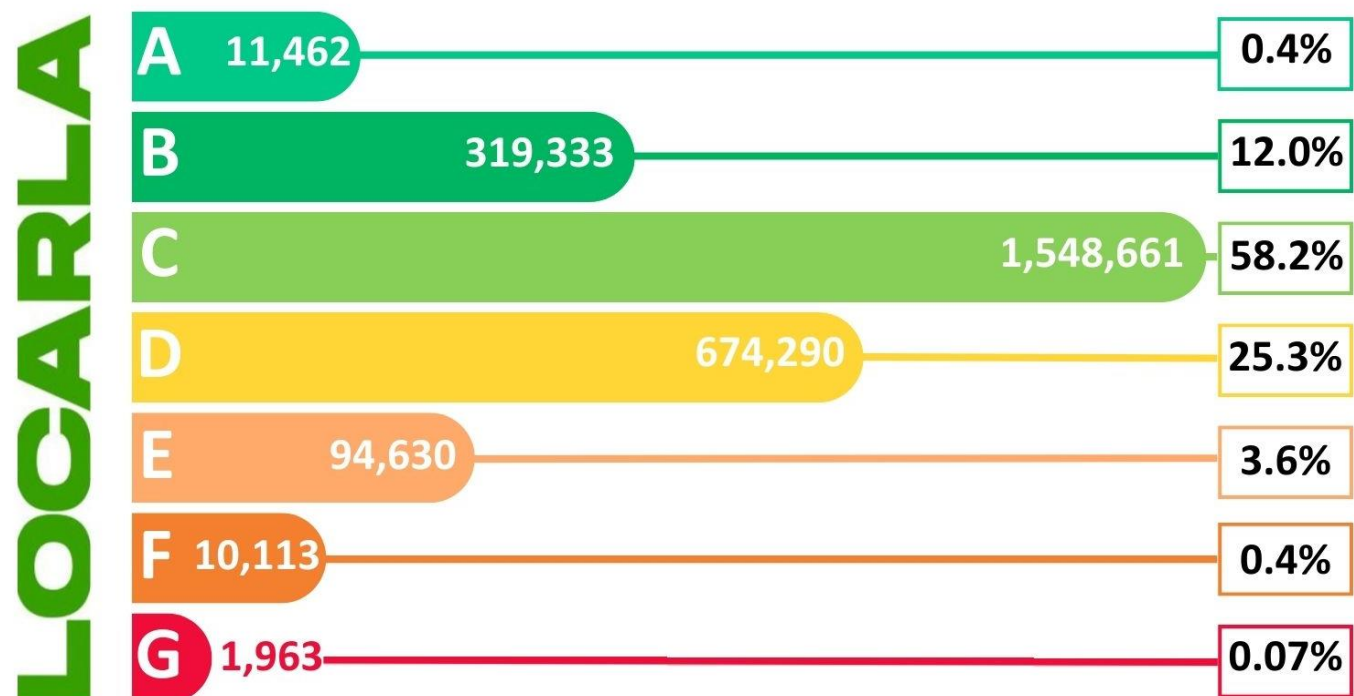
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Social Housing EPC Analysis

Distribution of EPC Rating across England & Wales Social Homes



*Expired EPC - 1,173,497 and No EPC - 1,033,426 are excluded

Key Insights:

1. Nearly 83% of social homes sit in EPC bands C and D, highlighting that most stock is not inefficient, but still falls short of higher energy performance.
2. Only 12.4% of homes reach EPC A or B, showing how limited high-performance housing currently is — despite growing net-zero ambitions.
3. EPC F and G homes make up less than 0.5%, suggesting that the most energy-inefficient stock has largely been addressed over time.
4. With 58% of homes already at EPC C, the challenge ahead is moving from “compliant” to “efficient”, not fixing failure.
5. Small improvements to the large EPC C and D cohort could deliver the biggest carbon, cost, and comfort benefits at scale.

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EPC Summary stats for YTD (Oct 2024 - Sep 2025)

LOCARLA

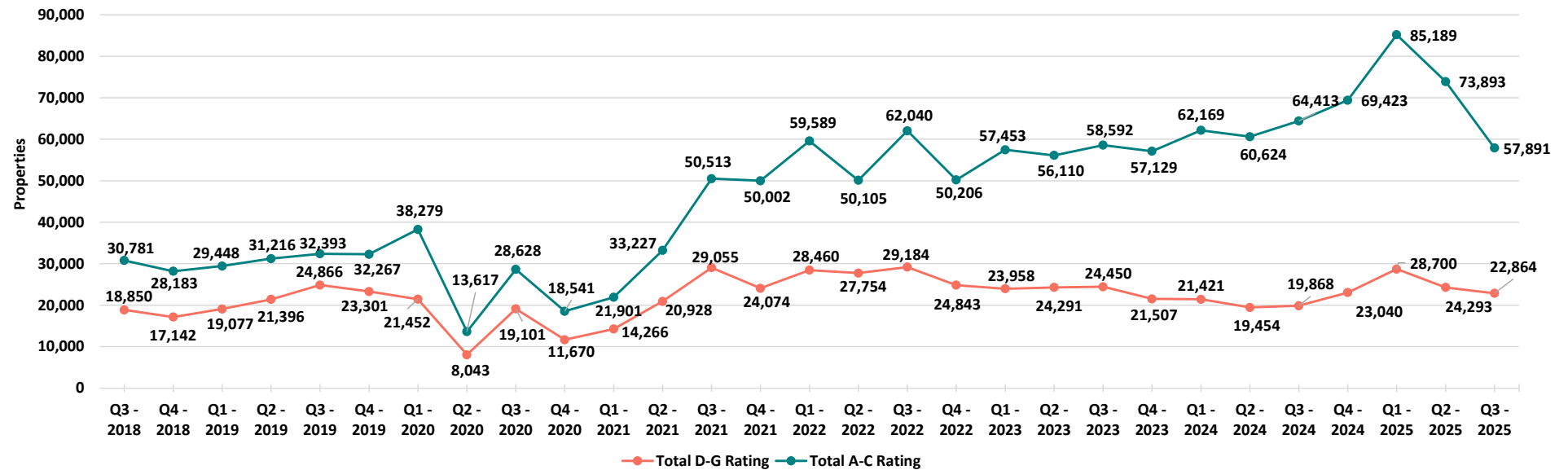
	YTD (October 2024 - September 2025)	Q3 - 2025
Number of EPC's carried out	385,293	80,755
Number of EPC's expired	250,172	59,236
Total EPC - A-C	286,396	57,891
Total EPC - D-G	98,897	22,864
Total EPC - C	255,802	53,200
Average Current Energy Efficiency	71.58 (SAP - C)	70.99 (SAP - C)

Average Metrics by Property Type -

	YTD (October 2024 - September 2025)
Energy Consumption Current - House	203.39 kWh/m ²
Energy Consumption Current - Flat	197.41 kWh/m ²
CO2 Emissions Current - House	2.60 tonnes/year
CO2 Emissions Current - Flat	1.81 tonnes/year
CO2 Emission Per Floor Area - House	35.79 kg/m ²
CO2 Emission Per Floor Area - Flat	33.96 kg/m ²

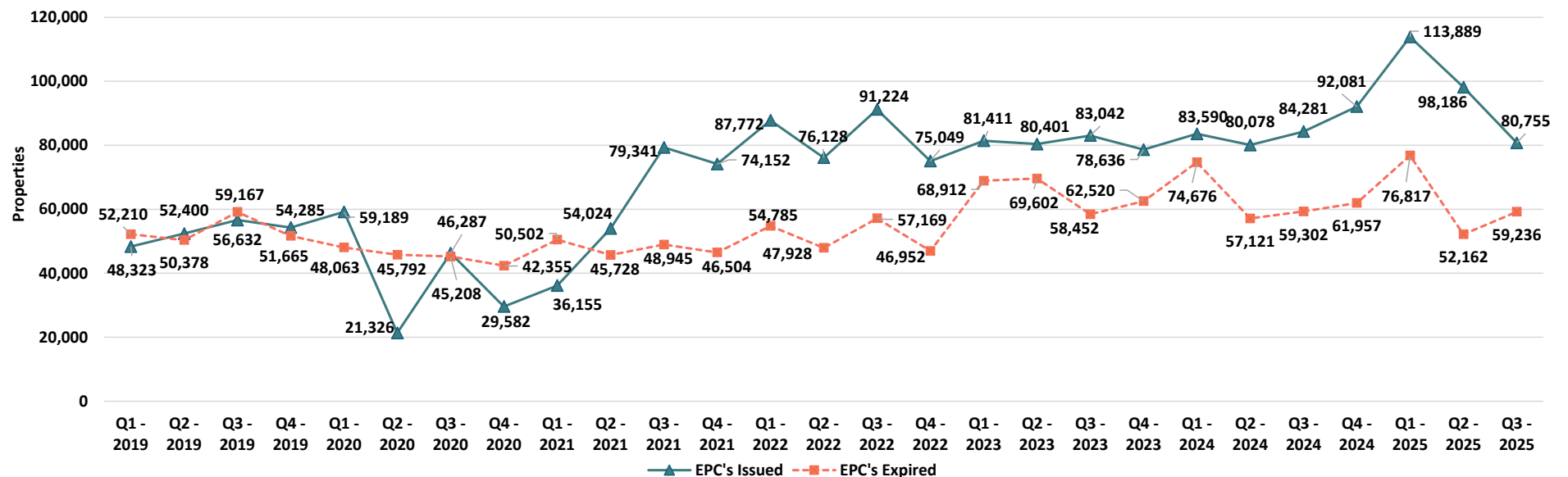
Energy Ratings Trend - Total Current A-C vs. D-G (2018 - 2025)										LOCARLA
	2018	2019	2020	2021	2022	2023	2024	Q1 - 2025	Q2 - 2025	Q3 - 2025
Total D-G Rating	72,739	88,640	60,266	88,323	110,241	94,206	84,025	28,700	24,293	22,864
Total A-C Rating	116,243	125,324	99,065	155,643	221,940	229,284	256,005	85,189	73,893	57,891

Energy Rating Trend – Total Current A-C vs. D-G (2018 - 2025)



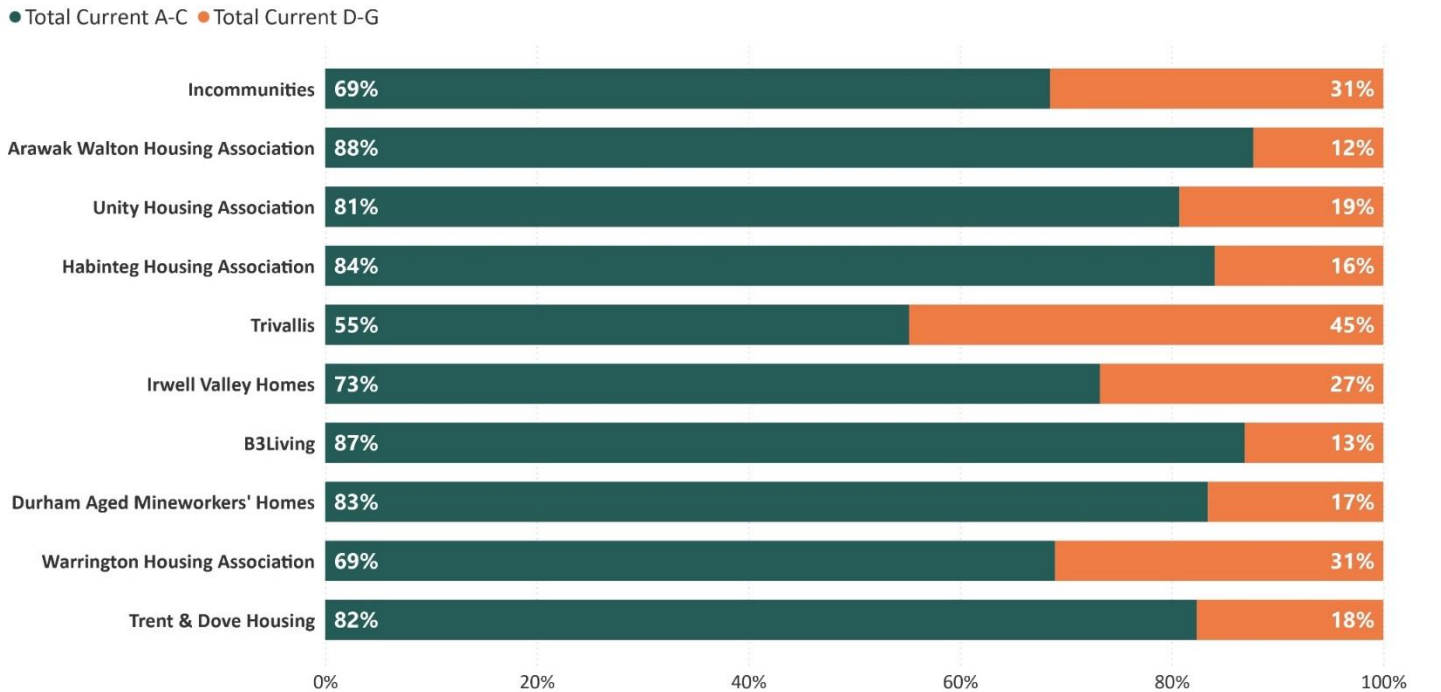
EPC's Issued vs. Expired (2019 - 2025)										LOCARLA	
	2019	2020	2021	2022	2023	2024	Q1 - 2025	Q2 - 2025	Q3 - 2025		
EPC's Issued	211,640	156,384	243,672	330,173	323,490	340,030	113,889	98,186	80,755		
EPC's Expired	213,420	181,418	191,679	206,834	259,486	253,056	76,817	52,162	59,236		

EPC's Issued vs. Expired (2019 - 2025)



EPC Rating Breakdown for Housing Associations Issuing the Most EPCs (October 2024 – September 2025)

Based on housing associations with housing stock over 1,000 homes and the highest EPC issuance as a percentage of stock.



Housing Association	Stock	EPC as % of Stock	A-C EPC Issued	D-G EPC Issued	Total EPCs Issued (Oct 2024 - Sep 2025)
Incommunities Ltd.	21,442	40.9%	6,013	2,765	8,778
Arawak Walton Housing Association Ltd.	1,114	30.7%	300	42	342
Unity Housing Association Ltd.	1,334	26.8%	289	69	358
Habinteg Housing Association Ltd.	3,323	25.3%	707	134	841
Trivallis	10,076	24.0%	1,335	1,084	2,419
Irwell Valley Homes	7,196	23.9%	1,261	461	1,722
B3Living	4,394	22.6%	862	130	992
Durham Aged Mineworkers' HA	1,819	22.5%	342	68	410
Warrington Housing Association Ltd.	1,320	20.8%	189	85	274
Trent & Dove Housing Ltd.	6,371	20.6%	1,079	231	1,310

Key Insights:

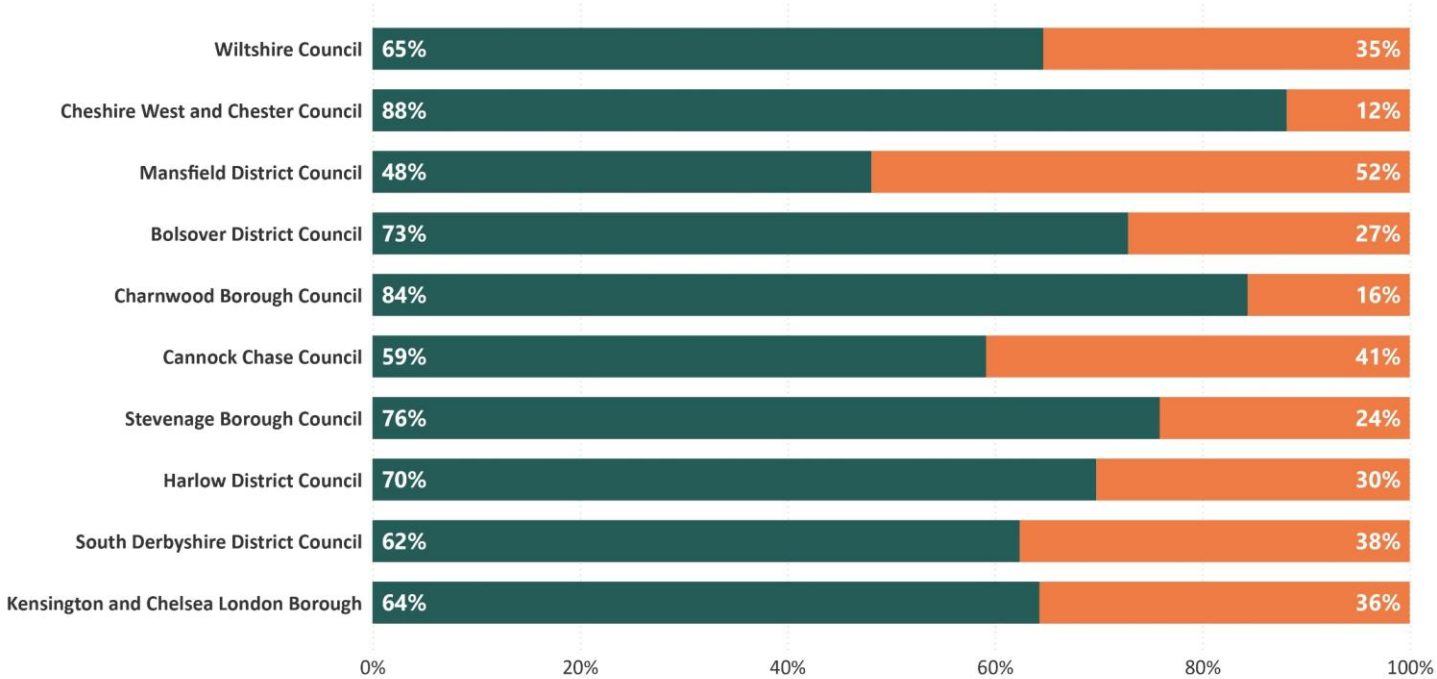
- Even among associations issuing EPCs at scale, the share of D–G homes ranges from 12% to 45%, showing very different starting positions.
- Trivallis stands out with 45% of stock rated D–G, suggesting a much earlier stage of improvement compared to peers.
- Providers with modest stock sizes (e.g. Arawak Walton) show higher A–C proportions, hinting at quicker progress cycles.

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EPC Rating Breakdown for Local Authorities Issuing the Most EPCs (October 2024 – September 2025)

Based on local authorities with housing stock over 1,000 homes and the highest EPC issuance as a percentage of stock.

● Total Current A-C ● Total Current D-G



Local Authority	Stock	EPC as % of Stock	A-C EPC Issued	D-G EPC Issued	Total EPCs Issued (Oct 2024 - Sep 2025)
Wiltshire Council	5,308	69.9%	1,895	706	2,601
Cheshire West and Chester Council	5,319	57.0%	1,366	943	2,309
Mansfield District Council	6,322	54.2%	2,203	408	2,611
Bolsover District Council	4,995	52.1%	2,671	359	3,030
Charnwood Borough Council	5,444	48.0%	2,425	1,050	3,475
Cannock Chase Council	5,032	45.9%	1,349	749	2,098
Stevenage Borough Council	7,754	40.8%	1,648	1,778	3,426
Harlow District Council	9,040	38.4%	589	355	944
South Derbyshire District Council	2,947	32.0%	2,398	762	3,160
Kensington and Chelsea London Borough	6,636	31.6%	2,398	1,310	3,708

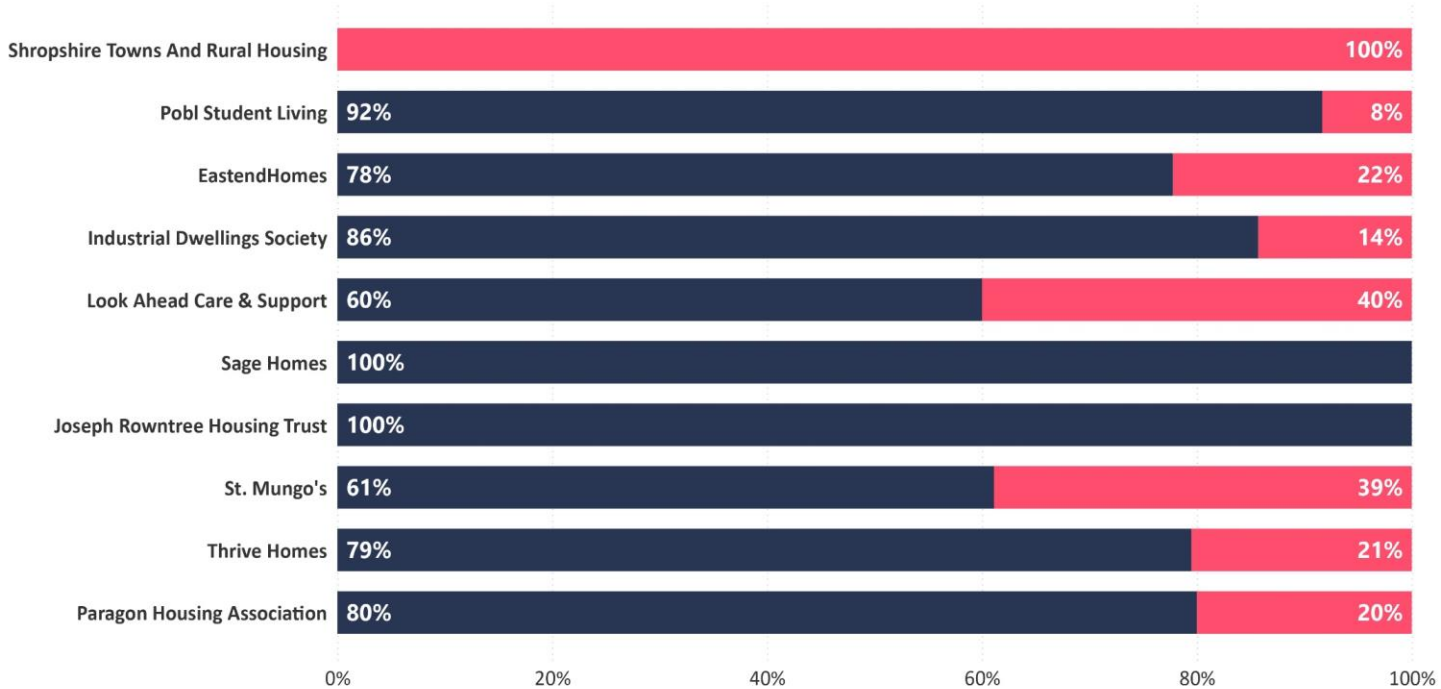
- Key Insights:
- The share of EPC D–G homes ranges from 12% to over 50%, showing very different stock conditions despite similar EPC activity levels.
 - Mansfield stands out with more than half of homes rated D–G, indicating a heavier remediation challenge than peers.
 - Most authorities cluster around 60–75% A–C, suggesting steady progress but substantial room for improvement.

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EPC Rating Breakdown for Housing Associations Issuing the Lowest EPCs (October 2024 – September 2025)

Based on housing associations with housing stock over 1,000 homes and the lowest EPC issuance as a percentage of stock.

● Total Current A-C ● Total Current D-G



Housing Association	Stock	EPC as % of Stock	A-C EPC Issued	D-G EPC Issued	Total EPCs Issued (Oct 2024 - Sep 2025)
Shropshire Towns And Rural Housing (STAR Housing)	3,941	0.03%	-	1	1
Pobl Student Living (formerly Gwalia Student Homes)	3,925	0.31%	11	1	12
EastendHomes Ltd.	2,322	0.39%	7	2	9
Industrial Dwellings Society Ltd. (IDS)	1,425	0.49%	6	1	7
Look Ahead Care & Support Ltd	1,727	0.58%	6	4	10
Sage Homes	4,095	0.65%	71	-	71
Joseph Rowntree Housing Trust	1,760	0.68%	12	-	12
St. Mungo's	2,281	0.79%	11	7	18
Thrive Homes	4,552	0.86%	31	8	39
Paragon Housing Association Ltd.	1,450	1.03%	12	3	15

Key Insights:

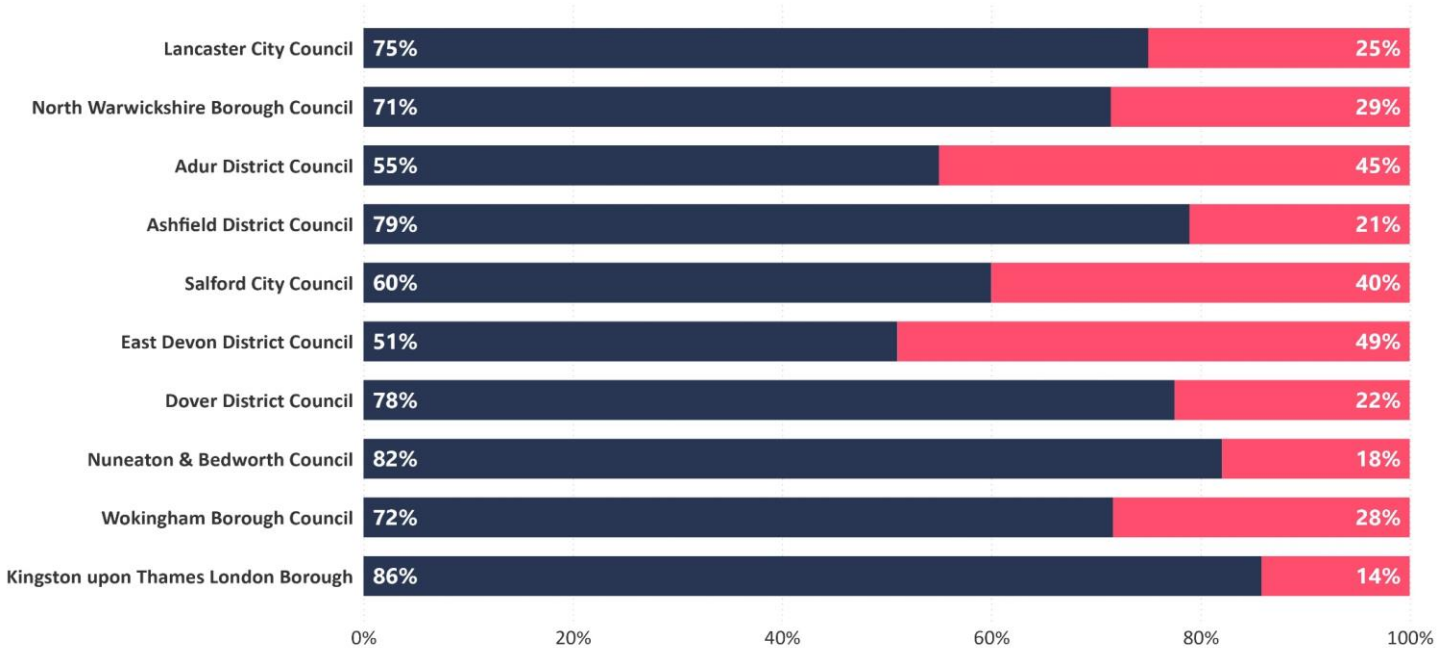
- 1. High A–C dominance among low issuers: Most housing associations in this cohort have 75–100% of issued EPCs rated A–C, indicating inspections are concentrated on better-performing homes.
- 2. Limited visibility of poorer stock: Several providers show 0–20% D–G ratings, suggesting that lower-performing homes may be under-represented in recent EPC activity.
- 3. Notable exceptions remain: A small number of associations (e.g. Look Ahead Care & Support, St. Mungo’s) still show material D–G shares (≈40%), even among low EPC issuers.
- 4. Issuance bias risk: Low EPC issuance combined with very high A–C shares may reflect selective compliance or transactional EPCs, rather than a full picture of stock performance.

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EPC Rating Breakdown for Local Authorities Issuing the Lowest EPCs (October 2024 – September 2025)

Based on local authorities with housing stock over 1,000 homes and the lowest EPC issuance as a percentage of stock.

● Total Current A-C ● Total Current D-G



Local Authority	Stock	EPC as % of Stock	A-C EPC Issued	D-G EPC Issued	Total EPCs Issued (Oct 2024 - Sep 2025)
Lancaster City Council	3,617	0.4%	11	9	20
North Warwickshire Borough Council	2,573	0.5%	45	12	57
Adur District Council	2,536	0.8%	69	20	89
Ashfield District Council	6,680	0.9%	25	24	49
Salford City Council	1,209	1.0%	103	17	120
East Devon District Council	4,150	1.2%	12	4	16
Dover District Council	4,404	2.0%	10	4	14
Nuneaton and Bedworth Borough Council	5,619	2.1%	96	21	117
Wokingham Borough Council	2,595	2.6%	9	6	15
Kingston upon Thames London Royal Borough	4,454	2.7%	48	19	67

Key Insights:

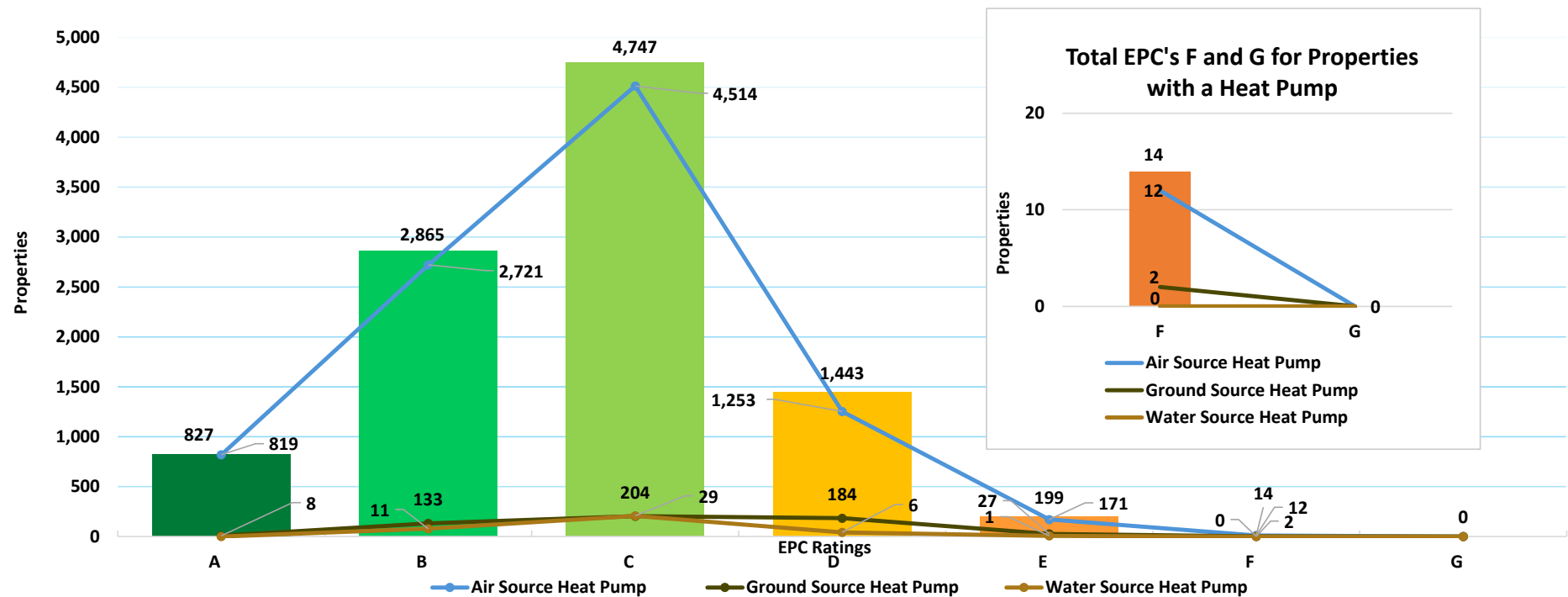
- High A–C dominance among low issuers: Most local authorities issuing the fewest EPCs show 70–85% of issued EPCs rated A–C, suggesting recent activity is concentrated on better-performing homes.
- Material D–G exposure in some councils: Adur DC, East Devon DC and Salford CC stand out, with 40–49% of issued EPCs still in D–G, despite low overall EPC coverage.
- Risk of selective coverage: Very high A–C shares combined with low issuance rates indicate potential under-assessment of poorer stock, rather than uniformly high performance.
- Wide variation despite similar issuance levels: The D–G share ranges from 14% to nearly 50%, highlighting significant differences in underlying stock condition or inspection focus.

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Total EPCs for Properties with a Heat Pump (October 2024 - September 2025) **LOCARLA**

Heat Pump Type	A	B	C	D	E	F	G	D-G as a % of total Properties with Heat Pumps
Air Source Heat Pump	819	2,721	4,514	1,253	171	12	0	15.13%
Ground Source Heat Pump	8	133	204	184	27	2	0	38.17%
Water Source Heat Pump	0	11	29	6	1	0	0	14.89%
Total	827	2,865	4,747	1,443	199	14	0	16.40%

Total EPCs for Properties with a Heat Pump (October 2024 - September 2025)



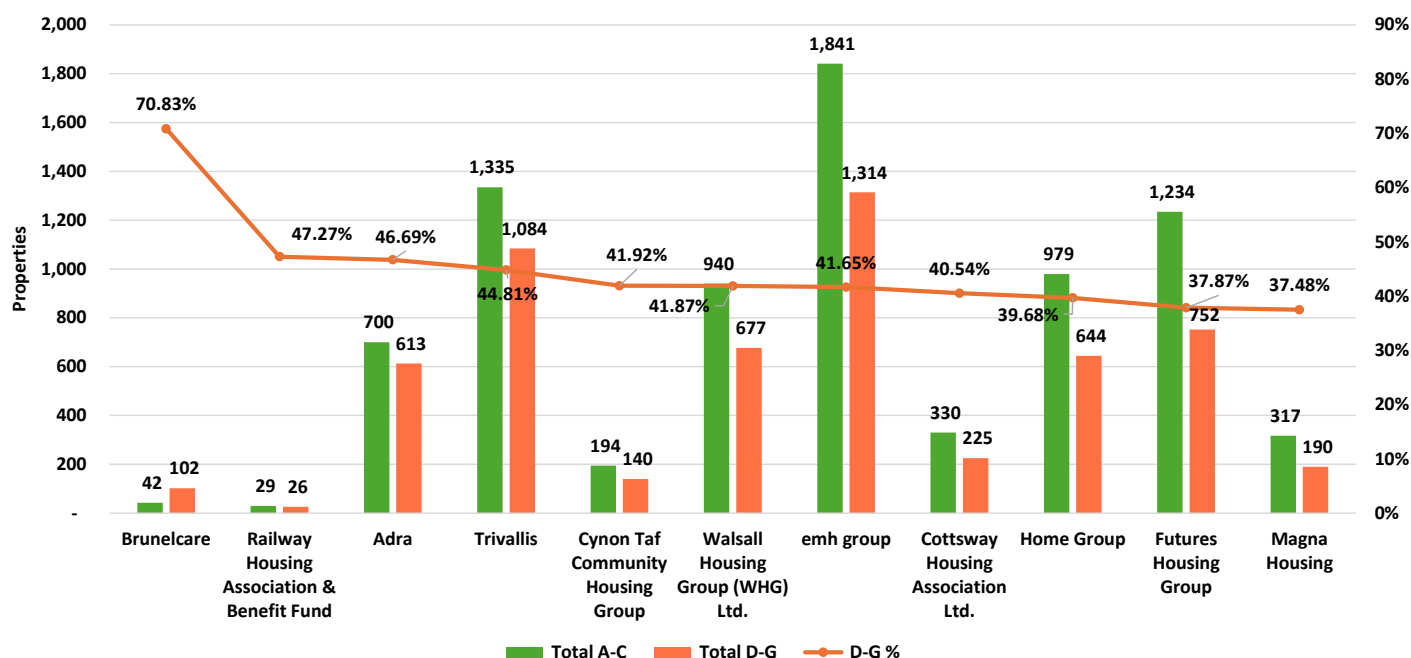
Housing Associations with highest DEFG to ABC (October 2024 - September 2025)

LOCARLA

Housing Association	Stock	Total A-C	Total D-G	Total EPCs Issued (October 2024 - September 2025)	A-C %	D-G %
Brunelcare	1,104	42	102	144	29.17%	70.83%
Railway Housing Association & Benefit Fund	1,558	29	26	55	52.73%	47.27%
Adra	7,041	700	613	1,313	53.31%	46.69%
Trivallis	10,076	1,335	1,084	2,419	55.19%	44.81%
Cynon Taf Community Housing Group	1,933	194	140	334	58.08%	41.92%
Walsall Housing Group (WHG) Ltd.	21,245	940	677	1,617	58.13%	41.87%
emh group	18,189	1,841	1,314	3,155	58.35%	41.65%
Cottsway Housing Association Ltd.	5,260	330	225	555	59.46%	40.54%
Home Group	49,202	979	644	1,623	60.32%	39.68%
Futures Housing Group	9,853	1,234	752	1,986	62.13%	37.87%
Magna Housing	8,251	317	190	507	62.52%	37.48%

Note: This analysis is based on housing associations with housing stock over 1,000 homes and more than 50 EPCs issued during the period.

Housing Associations with highest DEFG to ABC (October 2024 – September 2025)



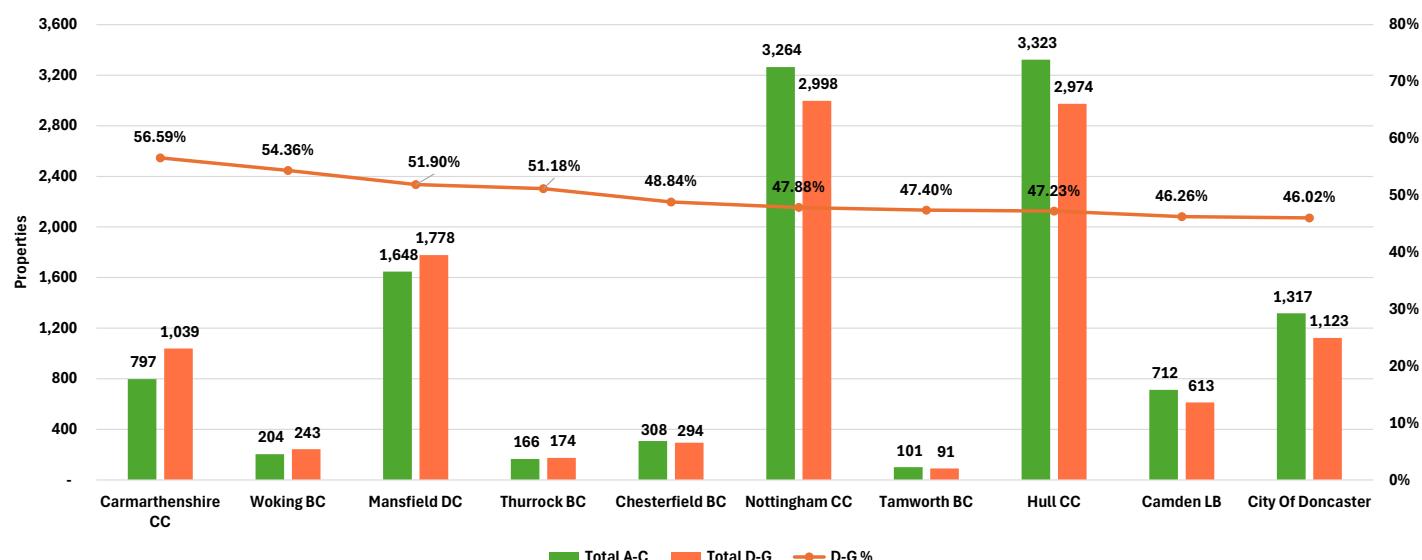
Local Authorities with highest DEFG to ABC (October 2024 - September 2025)

LOCARLA

Local Authority	Stock	Total A-C	Total D-G	Total EPCs Issued (October 2024 - September 2025)	A-C %	D-G %
Carmarthenshire County Council	9,311	797	1,039	1,836	43.41%	56.59%
Woking Borough Council	3,374	204	243	447	45.64%	54.36%
Mansfield District Council	6,322	1,648	1,778	3,426	48.10%	51.90%
Thurrock Borough Council	9,823	166	174	340	48.82%	51.18%
Chesterfield Borough Council	8,774	308	294	602	51.16%	48.84%
Nottingham City Council	24,676	3,264	2,998	6,262	52.12%	47.88%
Tamworth Borough Council	4,289	101	91	192	52.60%	47.40%
Hull City Council	22,961	3,323	2,974	6,297	52.77%	47.23%
Camden London Borough	22,753	712	613	1,325	53.74%	46.26%
City Of Doncaster Council	39,712	1,317	1,123	2,440	53.98%	46.02%

Note: This analysis is based on local authorities with housing stock over 1,000 homes and more than 50 EPCs issued during the period.

Local Authorities with highest DEFG to ABC (October 2024 – September 2025)



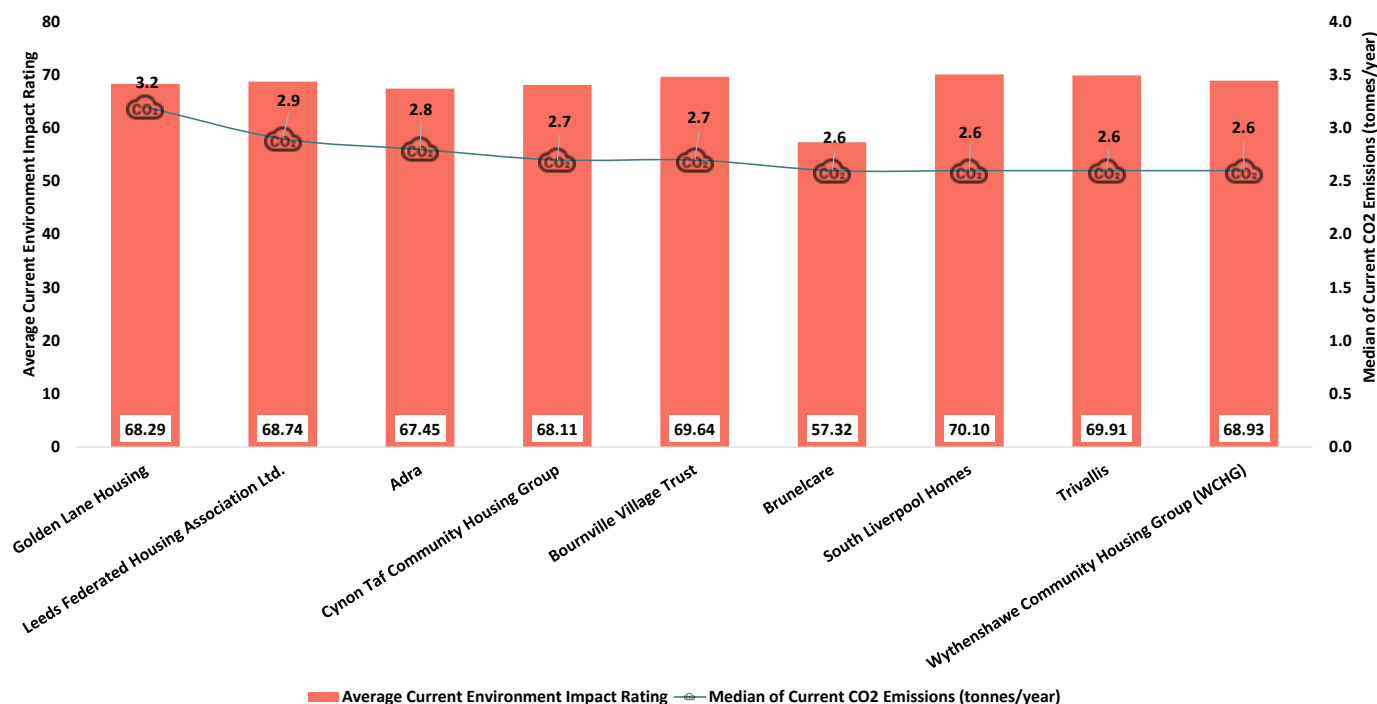
Housing Associations with the most CO₂ Emissions per year with Environmental Impact (October 2024 - September 2025)

LOCARLA

Housing Association	Stock	Median of Current CO ₂ Emissions (tonnes/year)	Average CO ₂ Emissions per square metre floor area per year (kg/m ²)	Average Current Environment Impact Rating
Golden Lane Housing	3,107	3.2	33.32	68.29
Leeds Federated Housing Association Ltd.	4,214	2.9	36.53	68.74
Adra	7,041	2.8	40.16	67.45
Cynon Taf Community Housing Group	1,933	2.7	41.50	68.11
Bournville Village Trust	4,004	2.7	37.62	69.64
Brunelcare	1,104	2.6	69.03	57.32
South Liverpool Homes	3,775	2.6	33.30	70.10
Trivallis	10,076	2.6	38.58	69.91
Wythenshawe Community Housing Group (WCHG)	13,481	2.6	36.63	68.93

Note: This analysis is based on housing associations with housing stock over 1,000 homes and more than 40 EPCs issued during the period.

Housing Associations with the most CO₂ Emission per year with Environmental Impact (October 2024 – September 2025)



Local Authorities with the most CO₂ Emissions per year with Environmental Impact (October 2024 - September 2025)

LOCARLA

Local Authority	Stock	Median of Current CO ₂ Emissions (tonnes/year)	Average CO ₂ Emissions per square metre floor area per year (kg/m ²)	Average Current Environment Impact Rating
Central Bedfordshire Council	5,564	2.8	39.55	68.55
Westmorland & Furness Council	2,509	2.8	37.01	69.90
East Suffolk Council	4,426	2.7	39.50	67.42
Mansfield District Council	6,322	2.7	44.59	66.40
South Derbyshire District Council	2,947	2.7	37.97	69.97
Bolsover District Council	4,995	2.6	39.57	69.32
Carmarthenshire County Council	9,311	2.6	42.00	66.51
City Of Doncaster Council	39,712	2.6	38.90	68.38
Darlington Borough Council	5,234	2.6	34.46	73.00
Dudley Metropolitan Borough Council	21,055	2.6	40.08	68.34
Hull City Council	22,961	2.6	37.85	68.51
North West Leicestershire District Council	4,102	2.6	36.01	70.99
Nottingham City Council	24,676	2.6	38.06	68.23
Oldham Metropolitan Borough Council	2,089	2.6	39.43	69.13
Stevenage Borough Council	7,754	2.6	37.49	69.98
Stoke-On-Trent City Council	17,287	2.6	38.52	70.63
Woking Borough Council	3,374	2.6	40.07	66.63

Note: This analysis is based on housing associations with housing stock over 1,000 homes and more than 40 EPCs issued during the period.

Local Authorities with the most CO₂ Emission per year with Environmental Impact (October 2024 – September 2025)

