MIGRATION WATCH

ANALYSIS OF ONS POPULATION PROJECTIONS, MAY 2026

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Migration Watch Analysis of Office for National Statistics National Population Projections Report

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Introduction

On 28 April 2026, the Office for National Statistics (ONS) published its 2024-based National Population Projections[1], a 100-year modelling projection covering the UK and its constituent countries.

While of course any projections for such an extended period of time are highly speculative, the immediate projection for the next 10 to 30 years are instructive: should migration continue on the trajectory of recent years, Britain's population is set to explode to 70 million by 2033.

This is a possibility about which Migration Watch has warned since the late-2000s. Indeed, in 2008[2], we pointed out that "It is quite clear that the [Points-Based System] in its present form will not, of itself, be remotely enough to keep the population of the UK below 70 million." Likewise, in 2010[3], we argued that "currently projected levels of immigration will cause the population of the UK to reach 70 million shortly after 2031 and then go on growing."

This paper analyses the key findings, with particular attention to what the data reveals about the role of migration in future population change, and what the headline figures conceal.

Key Findings

i) The UK's natural population is already in decline

ii) The three scenarios diverge immediately and never converge

iii) The "High" migration scenario is conservative relative to recent reality

iv) Net zero migration produces accelerating population loss

v) The term "net migration" underplays the true scale of population churn because it does not take into account the difficulty of integrating new arrivals, or the children born to migrants.

1 *National Population Projections: 2024-Based, 2026*

https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/nationalpopulationprojections/2024based

2 *Population Out Of Control: Why Present Policies Cannot Keep Our Population Even To 70 Million, 2008*

www.migrationwatchuk.org/population-out-of-control-why-present-policies-cannot-keep-our-population-even-to-70-million/

3 *Only Severe Cuts To Immigration Will Stop Population Hitting 70 Million Well Within 25 Years, 2010*

www.migrationwatchuk.org/only-severe-cuts-to-immigration-will-stop-population-hitting-70-million-well-within-25-years-migration-watch-uk/

Natural Change: A Country Already in Demographic Decline

The most significant finding in the ONS data is not the headline population trajectory but the underlying balance of births and deaths. The ONS projects that deaths will exceed births in the UK from mid-2026, with mid-2025 the last year in which births are slightly higher. Over the first decade of the projection period, there are expected to be around 450,000 more deaths than births.

This is not a temporary trend. Natural population change is projected to remain negative throughout the projection window under all scenarios. Under the High migration variant, the implied natural increase falls continuously from the late 2020s, reaching zero around 2090–2100 before turning negative. Under the Low and Zero scenarios, natural change is effectively negative from the outset.

Migration is replacing organic population growth. This is a structural shift that persists regardless of which migration scenario one considers.

The Three Migration Scenarios: Divergence

The ONS presents three migration variants: High, Principal (230,000 net per year from mid-2027), and Low/Zero. All begin from the same base of approximately 69.3 million in mid-2024, but they separate immediately and widen throughout the century-long window.

By 2100, the gap between the High and Zero trajectories is approximately 44.6 million people. This is larger than the population of England outside London. Critically, the divergence never plateaus: there is no point at which the scenarios stabilise relative to each other. The implication is that migration policy decisions taken now carry compounding long-term consequences.

The High variant assumes sustained net migration of 451,000 per year. The 2024 actual figure was approximately 845,000; the most recently recorded figure (2025) was around 384,000. On either basis, the High scenario models something close to or below recent experience, not an upper bound. Even so, it produces a UK population approaching 92 million by 2124.

The ONS principal projection, which assumes 230,000 net per year from mid-2027, projects the UK reaching 70 million by mid-2028 and peaking at 72.5 million in mid-2054 before declining.

The Zero net migration scenario does not produce a gradual, manageable reduction. Annual population losses increase from approximately 17,000 in 2025 to over 460,000 per year by the 2090s. This acceleration reflects the compounding effect: stopping inflows removes not only migrants themselves but their future children and descendants, widening the deficit with each generation. The population continues to fall at pace in 2124 with no natural floor in sight.

Behind the Net Figure: Gross Flows and Population Churn

The net migration figure that dominates policy debate is the residual of two much larger flows moving in opposite directions. Under the High scenario, 1,379,000 people arrive in the UK each year while 928,000 leave, a 1.49:1 ratio. This would result in a combined annual movement of over 2.3 million people. Under the Low scenario the figures are smaller but proportionately identical: 318,000 arrivals and 214,000 departures, a 1.49:1 ratio.

A country in which net population growth is achieved through 100,000 arrivals and no departures is fundamentally different from one in which the same net result arises from 1.4 million arrivals and 928,000 departures. The former reflects organic growth; the latter reflects a continuous and large-scale turnover in the resident population that is concentrated in specific cities and labour markets. Thus, generating sustained pressure on housing, public services, and community stability regardless of what the net figure shows.

This churn has direct consequences for integration. Integration is not instantaneous: it takes years for newcomers to acquire language, build networks, and participate fully in civic and economic life. It also takes years for receiving communities to adapt and for schools, GP surgeries, and housing markets to absorb new demand. When gross flows operate at the scale the data reveals, communities may not have time to consolidate around one cohort before the next arrives. The 2025 data reinforces this: emigration nearly doubled in a single year, from 189,000 to 286,000, accounting for much of the apparent fall in the headline net figure while the underlying dynamics remained largely unchanged.

This is why net migration targets, however understandable as a political commitment, are an inadequate policy framework. Reducing net migration to zero through equal and opposite gross flows - 700,000 arrivals against 700,000 departures - would leave the underlying churn entirely intact. An adequate framework would need to address gross inflows directly.

Regional Distribution

The ONS data also reveals a pronounced geographic imbalance in how migration is distributed across the UK's constituent nations.

England absorbs approximately 90% of gross immigration under both the High and Low scenarios (around 1,244,000 of the 1,379,000 annual arrivals under High, and 287,000 of 318,000 under Low). In net terms, England alone sees 1,244,000 arriving and 827,000 departing each year under the High scenario. The devolved nations receive comparatively marginal shares in absolute terms.

The picture differs in proportional terms. Scotland and Wales are more dependent on migration as a share of their smaller populations, meaning that a shift to the Low scenario would have a sharper demographic impact on them relative to their size than the national figures suggest. Scotland's population is projected to peak at 5.6 million in mid-2033 and decline from mid-2033 onwards; Wales peaks at 3.2 million in mid-2035; Northern Ireland at 1.9 million in mid-2031.

Conclusion

The ONS 2024-based projections, read carefully, present a picture considerably more serious than the headline figures suggest.

Three findings stand out.

First, the UK's natural population is already in long-term decline: from mid-2026, deaths are projected to exceed births every year, and migration has ceased to be a supplement to organic growth and become its substitute.

Second, the scale of gross flows, i.e., immigration - over 2.3 million individual movements per year under the High scenario - means that the practical conditions for integration are very difficult to meet. Communities cannot consolidate around a population that is continuously turning over.

Third, the metric at the centre of public debate, "*Net Migration*", is structurally ill-suited to capturing any of this; while it is important for understanding population growth numerically when set aside birth and death rates, an over-emphasis on Net Migration obscures the population churn that high immigration and emigration creates.

The regional data adds a further dimension: this is overwhelmingly England's burden in absolute terms, concentrated in its cities and labour markets, while the devolved nations face their own distinct pressures. The projections describe a process already underway, compounding with each year, while policy discussion remains focused on the wrong number.

Fundamentally, Britain's population is due to grow exponentially, entirely as a result of migration. If net migration continues at the scale we have seen in recent years, our population will far outstrip our current infrastructure capacity to support;

unless a cap is introduced on annual migration, our population will balloon to an unsustainable level. Meanwhile, the proportion of the native British population will continue to decline to less than 50% by the mid-2060s, as David Coleman forecast 16 years ago. This was echoed more recently by Matt Goodwin. Moreover, this will happen much sooner with younger age groups.