economic & construction MARKET REVIEW

NOVEMBER 2013

Economic Context
Major announcements and developments in the UK economy this month.

SKIP TO THIS SECTION

The Construction Sector
The main economic headlines in the construction industry this month.

SKIP TO THIS SECTION

Sectors in Detail
A closer look at changes in the major sectors within the industry this month.

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ABOUT US
SPECIALIST PROVIDER OF CONSTRUCTION INTELLIGENCE

Barbour ABI

Barbour ABI is a leading provider of construction intelligence services. With a team of in-house research specialists and a dedicated lead economist, it provides commercially relevant insight and unique analysis of trends and developments within the building and construction industry. Barbour ABI is the chosen provider of industry data and indicators for Government bodies including the Office for National Statistics and the UK Government's Construction and Infrastructure Pipeline, which outlines future construction and infrastructure projects where public funding is agreed. Barbour ABI also provides data for independent organisations, such as the Construction Products Association.

Barbour ABI is part of global events-led marketing services and communications company, UBM.

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Michael is Barbour ABI's Lead Economist specialising in construction and the built environment. He leads on Barbour ABI's research and outputs on the construction sector assessing the trends and developments which impact upon it. Prior to this Michael worked for GVA Grimley as a Principal Economist focussing on the commercial property sector.

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POSITIVE NEWS BUT DOWNSIDE RISKS TO GROWTH REMAIN

The latest growth figures for the UK economy showed that GDP increased by 0.8% in Quarter 3, with construction estimated to have grown by 1.7% in this period.

This growth supports prevailing sentiment in the economy, and in the construction sector specifically, that a more sustained period of economic growth is about to take hold after the poor performance in recent years. This month a series of studies and barometers detected an improving economic environment including:

- **The IMF raised its forecast for economic growth in the UK from 0.9% to 1.4% this year**
- **The Ernst & Young Item Club raised its forecast for economic growth from 1.4% to 2.4% in 2014**
- **The Bank of England reported that mortgage approvals in September 2013 were at their highest level since February 2008**

The official statistics, combined with wider indicators, provides a more positive economic outlook than recent months and years. However, it is worth noting that in the context of pre-recession levels of activity, the UK economy is still significantly below its capacity.

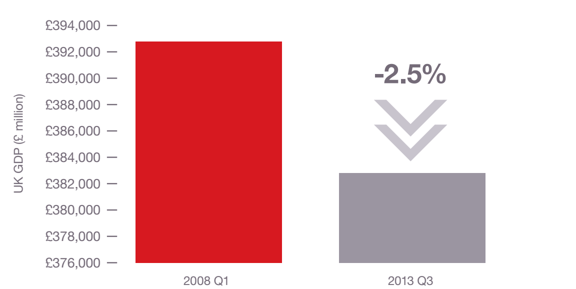

Fig. 1.1 **UK GDP** Source: ONS

As shown in Fig. 1.1 the current levels of GDP are 2.5% below those recorded at Q1 2008, prior to the start of the economic decline.

An analysis of the levels of unemployment provides another indicator of the current health of the UK economy (see Fig. 1.2). Unemployment fell from 7.7% to 7.6% between August and September 2013 with 2.47 million now unemployed in the UK. This compares to the January 2008 unemployment level of 1.52 million, 5.2% of the available workforce. The Bank of England's Forward Guidance has suggested raising interest rates when unemployment reaches 7%. Given the recent fall in unemployment the probability of that happening before the 2016 estimate originally set the by the Bank have increased.

The level of government debt as a percentage of GDP is also significantly different compared to pre-recession levels (see Fig. 1.3). Public Sector Net Debt stands at 75.9% of GDP in September 2013 whereas in January 2008 it was 35.5%.

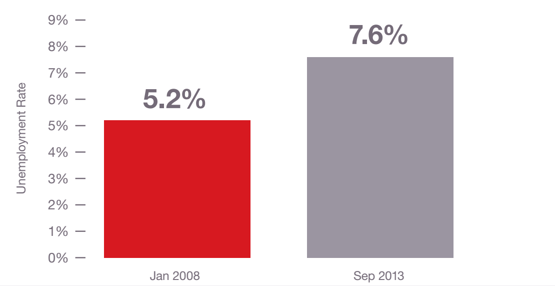

Fig. 1.2 **Unemployment Rate** Source: ONS

In summary, the UK economic outlook has certainly been more upbeat recently with output rising, unemployment falling and inflation remaining around its target level. However this has to be put in the context of the macroeconomic indicators which show the gap between current economic performance and pre-crisis performance. The downside risks from the Eurozone remain for the UK, with growth weak and the risk of deflation in some countries, remaining. In addition the consistent disagreements on the US budget as well as declining growth levels in China continue to act as external threats to UK economic recovery. Domestically, there is concern that the levels of productivity per worker will constrain the UK recovery and this remains a problem that will likely affect overall performance in the future. In addition the levels of UK economic debt and the continuation of austerity measures will also prove a strain on growth. It is Barbour ABI's view that while recent news has been positive the scale of future economic growth has still to be determined and the first half of 2014 will be critical in assessing long term growth potential.

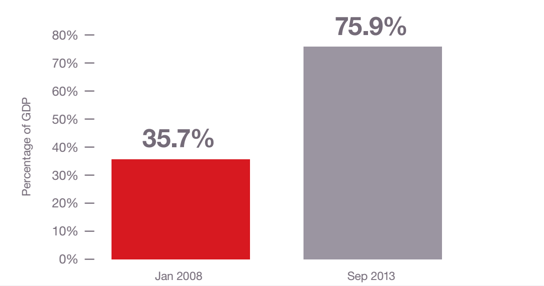

Fig. 1.3 **Government Debt** Source: ONS

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THE CONSTRUCTION SECTOR

ANOTHER GOOD MONTH FOR THE CONSTRUCTION INDUSTRY

The latest figures from the ONS show that the construction sector grew by 1.7% between Q2 and Q3 2013. This consisted of a strong July, a stable August and a lower September. Comparing output levels with the same period last year showed an increase of 4.1%.

It is clear that it is the housing and commercial sectors that are driving growth within the industry (see Fig. 2.1). Private Housing increased by 3.9% from the previous quarter and 15.6% from the corresponding quarter in 2012. Similarly, Private Commercial showed a 7% quarterly increase and 12.5% yearly change.

	% increase	
	Q3 2012 – Q3 2013	Q2 – Q3 2013
Total All Work	**4.1**	**1.7**
All New Work	**4.1**	**3.1**
Public Housing	8.4	0.5
Private Housing	15.6	3.9
Infrastructure	-3.7	-0.5
Public (ex Infrastructure)	-2.1	2.4
Private Industrial	-12.1	-6.4
Private Commercial	12.5	7.0
Repairs & Maintenance	**0.8**	**-0.6**
Public Housing	-12.9	-5.8
Private Housing	5.8	0.9
Non-Housing	2.6	0.2

Fig. 2.1 **Activity in the Construction Sector** Source: ONS

This suggests that Help to Buy continues to impact positively upon the Residential sector but it is even more encouraging that the Private Commercial sector is growing at similarly strong levels. Infrastructure remains challenged with growth in this sector vital for sustained growth prospects in the future.

However, a closer analysis of construction output shows that levels are still 13.3% below pre-recession peak indicating the difficult times endured by the sector in recent years (see Fig. 2.2).

The latest activity indices in the Construction sector show that the levels of contracts awarded rose in October. The CPA/Barbour ABI Index which measures the level of contracts awarded using

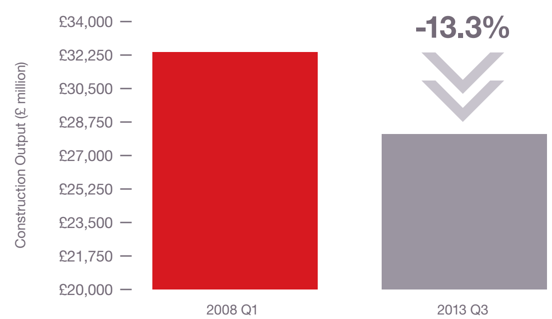

Fig. 2.2 **Construction Output** Source: ONS

January 2010 as its base month, recorded a reading of 127 for October, supporting the view that activity in the industry remains strong (see Fig. 2.3). As well as Private Housing, contracts awarded for factories and warehouses also rose significantly over the last three months suggesting a brighter outlook for the Private Industrial sector than current output levels suggest.

CPA Forecasts

The improving statistics and sentiment surrounding the construction industry has led to an upgrading in forecasts for its future performance by the CPA (see Fig. 2.4). The poor performance in the first quarter of this year is likely to hamper overall output levels but growth of 2.7% and 4.6% is forecast for 2014 and 2015, driven primarily by a continued increase in the levels of private house building.

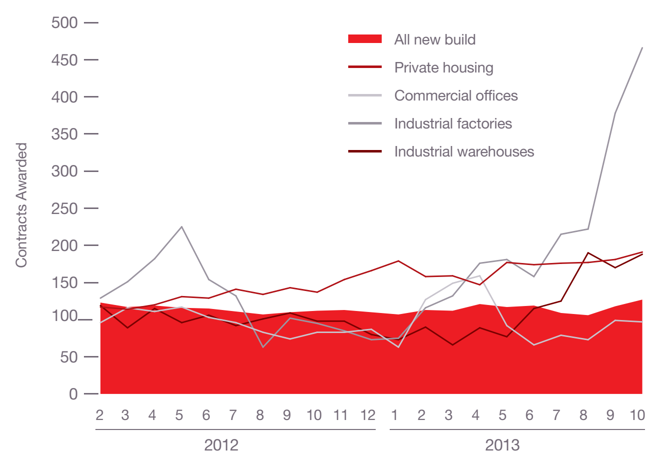

Fig. 2.3 **Contracts Awarded** Source: CPA/Barbour ABI

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About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
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While this is welcome news for the industry it is important to note that it will be 2017 before the industry exceeds the levels of activity occurring in 2007 before the recession took hold.

Construction Sector

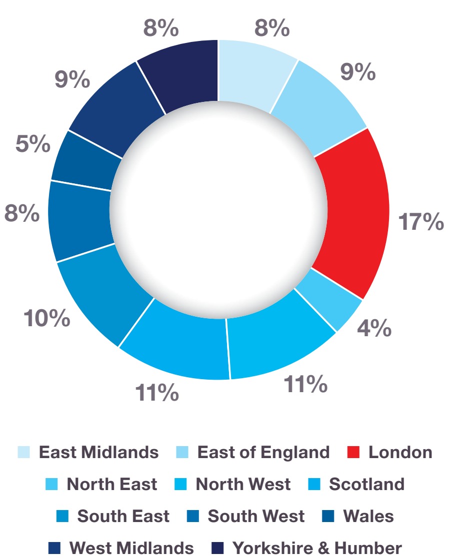
According to Barbour ABI data on all contract activity, October was a strong month for the construction industry with the value of new contracts awarded £5.7 billion, based on a three month rolling average (see Fig. 2.6). This is an increase of 9.7% on September and a 48.8% increase on the value recorded in October 2012, an indication of the upturn in activity in construction. The number of construction projects within the UK in October was 17.8% higher than September 2013 and 42.5% higher than October 2012.

The majority of the contracts awarded were in the London region with 17% of the UK total (see Fig. 2.5). Scotland and the North West were the next most prominent regions with 11% worth of contracts awarded in each. The South East was another strongly performing region with 10% of the total value of awards.

	Total Output		New Work Output		Repair & Maintenance	
	Output	Growth	Output	Growth	Output	Growth
2011	120,097	2.3%	76,778	2.5%	43,319	2.0%
2012	110,612	-7.9%	67,996	-11.4%	42,616	-1.6%
2013 (e)	110,092	-0.5%	67,535	-0.7%	42,556	-0.1%
2014 (f)	113,050	2.7%	69,637	3.1%	43,413	2.0%
2015 (f)	118,288	4.6%	73,698	5.8%	44,590	2.7%
2016 (p)	124,377	5.1%	78,590	6.6%	45,787	2.7%
2017 (p)	130,472	4.9%	83,288	6.0%	47,183	3.0%

Fig. 2.4 **Future Performance Forecasts** Source: Construction Products Association

> October was a strong month for the construction industry with the value of new contracts awarded £5.7 billion, based on a three month rolling average.



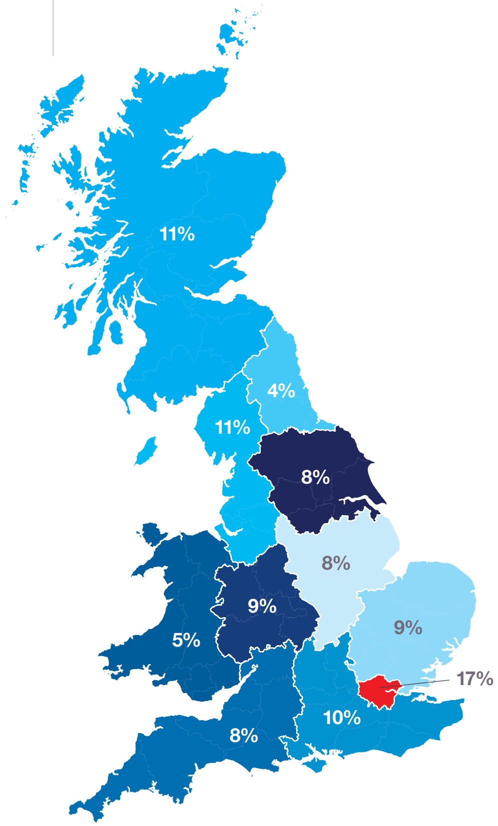


Fig. 2.5 **Locations of Contracts Awarded** Source: Barbour ABI

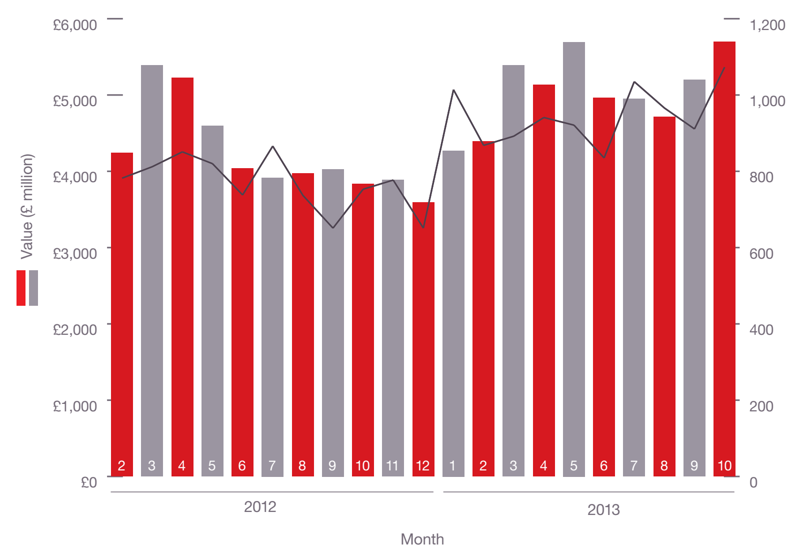


Fig. 2.6 **Construction Activity** Source: Barbour ABI

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NOVEMBER 2013

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Types of Project

Residential remains the dominant type of project by value in the UK accounting for 44% of the contracts awarded in October (see Fig. 2.7). Of the remaining sectors infrastructure was the most significant with 27% of the total value followed by Commercial & Retail (9%) and Education (8%).

> Residential remains the dominant type of project by value in the UK accounting for 44% of the contracts awarded in October.

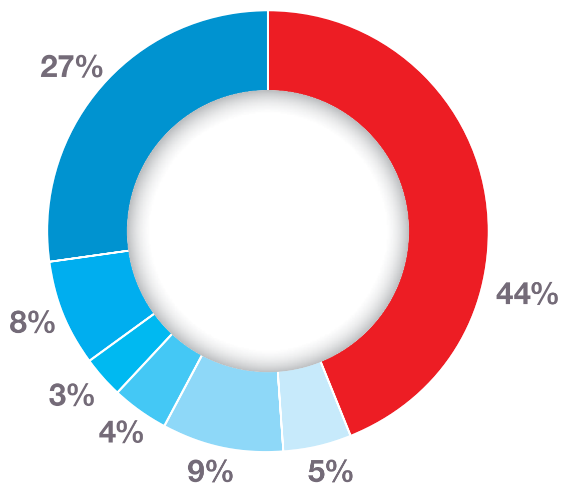

Fig. 2.7 **Types of Project** Source: Barbour ABI

PROJECTS IN FOCUS THIS MONTH

Take a look at these construction projects in focus this month. Click on one of the projects below to skip to that page.

Derwenthorpe Phases 2, 3 & 4

Kilworth Marina

St James Market Redevelopment – 8 Storey Office Building

Hotel – Whitehall Plaza

Dirft Ii Expansion Zone 3 – Sainsburys Distribution Centre

Cambridge Biomedical Campus – The Forum

College Lane Phase 2 – New Science Building

> The majority of the contracts awarded were in the London region with 17% of the UK total.

economic & construction MARKET REVIEW

NOVEMBER 2013

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RESIDENTIAL

STRONG PERFORMANCE IN OCTOBER

The residential sector continued its recent growth in the month of October and continues to be the main contributor to the rise in the new contract levels.

The residential sector experienced high levels of activity in October with a total value in orders of £1.9 billion, based on a three month rolling average (see Fig. 3.2). This is 16.1% higher than September but 89.1% higher than October 2012, a significant rise. The levels of contracts awarded in residential increased significantly in the first 6 months of this year, and while they dipped over July and August, the upward trajectory resumed in September and October.

Help to Buy Scheme

The Help to Buy Scheme is clearly having a strong impact on this sector and the second phase of the scheme has been brought forward from January 2014. Phase 1 offers an equity loan of up to 20% of the value of a new build home, interest free for the first five years. Phase 2 is the mortgage guarantee which allows the purchaser to take a mortgage of up to 95% with the government acting as guarantor to the lender. Importantly this second phase applies to existing and new homes. This scheme continues to attract much debate, with some fearing it could contribute to another house price bubble, whilst others view it as a boon to the house building industry. While its long term impact is the subject of conjecture, its short term impact on the levels of house building activity is clear.

Projects by region

As expected it is London and the South East that is the main location of activity in this sector, together accounting for around 33% of the value of contracts awarded this month (see Fig. 3.1 & 3.3). In London this decreased by 3% from October 2012 though the South East of England increased by 6.8% in the same period.

Outlook

The CPA Forecasts for the sector (see Fig. 3.4) shows that Private Housing is set to continue its growth levels – both for new build and repair and maintenance – this year and into 2014 and beyond. Public Housing is set to stay relatively stable but to increase slightly after 2014 once investment in the sector returns.

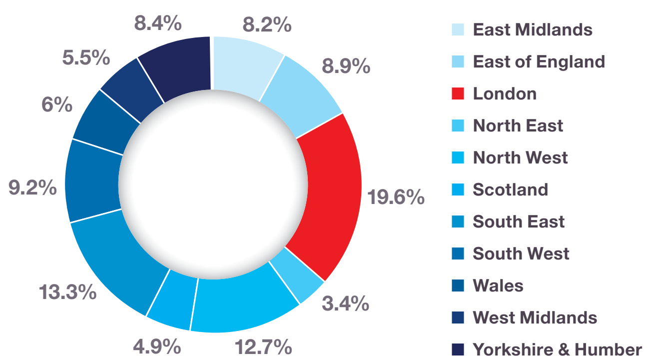

Fig. 3.1 **Value of Contracts by Region** Source: Barbour ABI

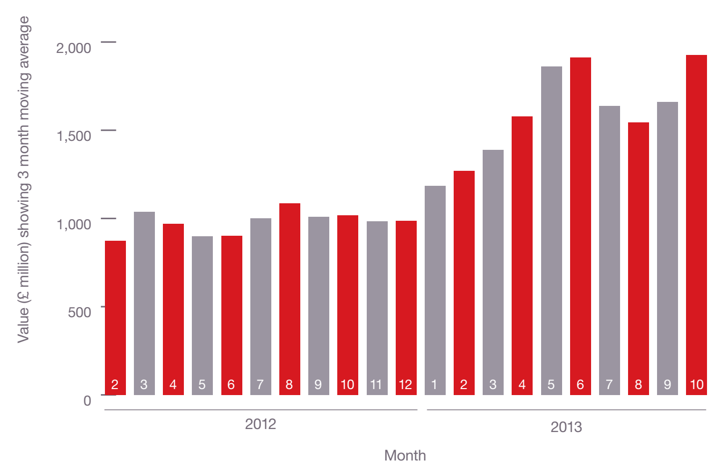

Fig. 3.2 **Project Value showing 3 month moving average** Source: Barbour ABI

> The residential sector experienced high levels of activity in October with a total value in orders of £1.9 billion, based on a three month rolling average.

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STRONG PERFORMANCE IN OCTOBER

PROJECT IN FOCUS

Derwenthorpe Phases 2, 3 & 4
£90,000,000

County	North Yorkshire
Primary Category Sector	Residential
Government Region	Yorkshire & Humber
Start Date	Fourth quarter 2013
End Date	Fourth quarter 2020
Contract Award Date	October 2013
Funding	Private
Stage	Contract / Detail Approval

The map and figures show how the activity has changed since October 2012

		-0.4%	Scotland
-1.0%	East Midlands	+6.8%	South East *HOTTEST REGION*
-0.3%	East of England	-4.7%	South West
-3.0%	London	+2.9%	Wales
+2.1%	North East	-0.3%	West Midlands
-0.8%	North West	-1.1%	Yorkshire & Humber

Fig. 3.3 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Private New Housing							
Output	16,186	15,646	16,741	17,913	19,167	21,084	22,770
Growth	9.1%	-3.3%	7.0%	7.0%	7.0%	10.0%	8.0%
Private Housing RM&I							
Output	14,538	13,698	13,972	14,465	15,044	15,646	16,428
Growth	0.9%	-5.8%	2.0%	3.5%	4.0%	4.0%	5.0%
Public New Housing							
Output	4,998	4,159	4,201	4,117	4,240	4,410	4,586
Growth	2.1%	-16.8%	1.0%	-2.0%	3.0%	4.0%	4.0%
Public Housing RM&I							
Output	7,227	7,290	6,926	7,020	7,154	7,195	7,227
Growth	-8.2%	0.9%	-5.0%	1.4%	1.9%	0.6%	0.4%

Fig. 3.4 **Sector Forecasts** Source: Construction Products Association

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NOVEMBER 2013

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TOP TEN Key Clients
October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Coalville, Leicestershire, LE67 1UF	01530 278278	01530 278279	163	2967
2	Taylor Wimpey	Gate House, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323		161	2939
3	Persimmon Homes Limited	Persimmon House, York, North Yorkshire, YO19 4FE	01904 642199	01904 610014	191	2419
4	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	01474 873849 (FPS)	50	981
5	Berkeley Group Plc / St James Group	Berkeley House, Cobham, Surrey, KT11 1JG	01932 868555		19	956
6	Bellway Plc	Seaton Burn House, Dudley Lane, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 / 678 9980	0191 236 6230 (FPS)	80	830
7	Redrow Group Plc	Redrow House, Deeside, Clwyd, CH5 3RX	01244 520044	01244 520580	46	483
8	Miller Construction Limited	Miller House, 2 Lockside View, Edinburgh, Lothian, EH12 9DH	0870 336 5000	0870 336 5315	38	458
9	Bloor Homes	Ashby Road, Swadlincote, Derbyshire, DE12 7JP	01530 270100	01530 271440	46	450
10	Homes & Communities Agency	Arpley House, Warrington, Cheshire, WA3 7QH	01925 651144	01925 644745	15	450

TOP TEN Key Architects
October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	020 7921 0101	8	974
2	RPS Group Plc	20 Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 438000	01235 864451 (FPS)	23	872
3	Barratt Homes	Barratt House, Cartwright Way, Coalville, Leicestershire, LE67 1UF	01530 278278	01530 278279	46	854
4	PRP Architects	Ferry Works, Thames Ditton, Surrey, KT7 0QJ	020 8339 3600	020 8481 8111	55	710
5	Persimmon Homes Limited	Persimmon House, York, North Yorkshire, YO19 4FE	01904 642199	01904 610014	60	639
6	Foster & Partners	Riverside, Battersea, London, SW11 4AN	020 7738 0455	020 7738 1107	2	450
7	Barton Willmore	Beansheaf House, Reading, Berkshire, RG31 7BW	0118 943 0000 (CTPS)	0118 943 0001	33	417
8	Simpson Architects	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000 (CTPS)	020 7490 5331 (FPS)	2	425
9	Vinoly Architects	11-29 Fashion Street, Tower Hamlets, London, E1 6PX	020 8206 6200	020 8206 6201	1	400
10	Thompson & Partners Limited	23-25 Great Sutton Street, City, London, EC1V 0DN	020 7017 1780	020 7017 1781	26	399

TOP TEN Key Contractors
October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Coalville, Leicestershire, LE67 1UF	01530 278278	01530 278279	183	3810
2	Taylor Wimpey	Gate House, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323		164	2842
3	Persimmon Homes Limited	Persimmon House, York, North Yorkshire, YO19 4FE	01904 642199	01904 610014	195	2216
4	Bellway Plc	Seaton Burn House, Dudley Lane, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 / 678 9980	0191 236 6230 (FPS)	81	1129
5	Berkeley Group Plc / St James Group	Berkeley House, Cobham, Surrey, KT11 1JG	01932 868555		16	827
6	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	39	719
7	Galliford Try Construction South	2 Cowley Business Park, Uxbridge, Middlesex, UB8 2AD	01895 855000	01895 855099	77	706
8	Countryside Properties (UK) Limited	Countryside House, The Drive, Brentwood, Essex, CM13 3AT	01277 260000	01277 697400 / 697498	33	703
9	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	01474 873849 (FPS)	49	659
10	Redrow Group Plc	Redrow House, Deeside, Clwyd, CH5 3RX	01244 520044	01244 520580	48	565

economic & construction MARKET REVIEW
NOVEMBER 2013

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INFRASTRUCTURE

OCTOBER STRONG FOR INFRASTRUCTURE ORDERS

The infrastructure sector continued its recent increase in the value of contracts this month indicating the potential for a strong end to 2013.

The value of contracts awarded in the infrastructure sector was £1.7 billion in October based on a three month rolling average (see Fig. 4.2). This is 17.8% higher than the previous month and 59.6% higher than October 2012. In the three months to October the total value of contract awards was £4.5 billion based on a three month rolling average. This is 30.8% higher than the previous three months and 35.5% higher than the same period of 2012. This indicates the stronger performance of the infrastructure sector this year and, as a major contributor to construction, is potentially good news for its future growth.

Projects by region

The main location of infrastructure projects this month was the West Midlands with 19.9% of the total value, an increase of 11.2% from October 2012 (see Fig. 4.1 & 4.3). Scotland was the other significant location with 18.1% of the value of projects – a 0.6% increase since October 2012. The South East experienced the biggest fall in activity levels this month with a decrease of 12.9% in the share of infrastructure projects compared to October 2012.

Outlook

The National Infrastructure Plan commits £28 billion in enhancements to main and local roads and to carry out a suite of rail projects such as HS2 and Crossrail. It has also committed to the development of major projects in the energy sector with the recent announcement of a strike price agreement at Hinkley Point, suggesting a more positive outlook for the sector in future years. Reflecting this, the CPA Forecasts for the sector (see Fig. 4.4) predict modest growth of 2.9% this year rising to 7.4% in 2014, largely in line with the expectations of further government investment in major infrastructure projects. The increase in new orders recorded by Barbour ABI so far in 2013 suggest growth rates of 7.4% and higher are possible in 2014.

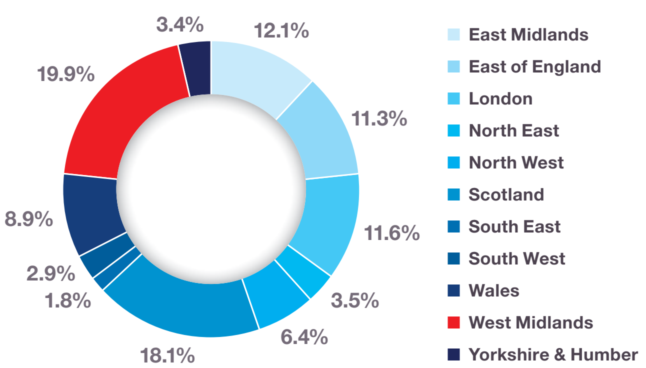

Fig. 4.1 **Value of Contracts by Region** Source: Barbour ABI

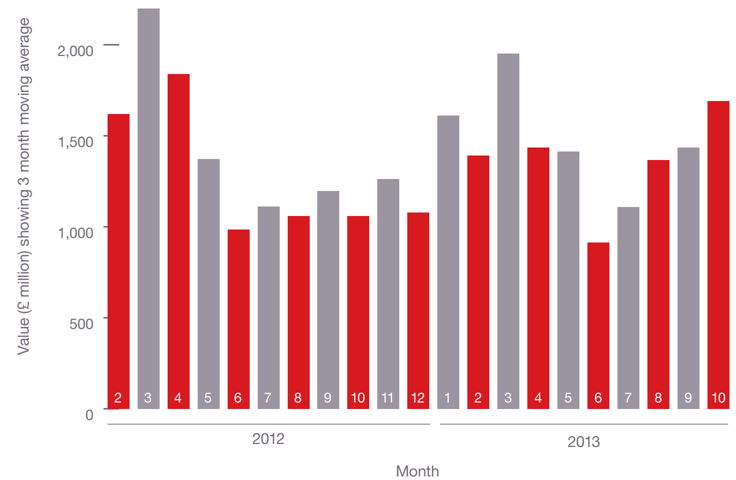

Fig. 4.2 **Project Value showing 3 month moving average** Source: Barbour ABI

> In the three months to October the total value of contract awards was £4.5 billion based on a three month rolling average.

economic & construction MARKET REVIEW

NOVEMBER 2013

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OCTOBER STRONG FOR INFRASTRUCTURE ORDERS

The map and figures show how the activity has changed since October 2012

+1.4%	East Midlands	+0.6%	Scotland
-1.7%	East of England	-12.9%	South East
+2.7%	London	-2.6%	South West
+0.4%	North East	+4.8%	Wales
+1.9%	North West	+11.2%	West Midlands *HOTTEST REGION*
		-5.7%	Yorkshire & Humber

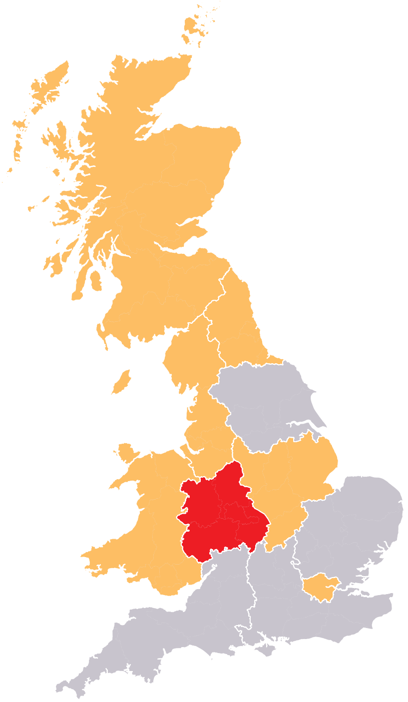

Fig. 4.3 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	14,705	12,832	13,198	14,171	15,352	16,822	18,123
Growth	8.6%	-12.7%	2.9%	7.4%	8.3%	9.6%	7.7%

Fig. 4.4 **Sector Forecasts** Source: Construction Products Association

PROJECT IN FOCUS

Kilworth Marina
£60,000,000 (est)

County	Leicestershire
Primary Category Sector	Infrastructure
Government Region	East Midlands
Start Date	April 2014
End Date	Unknown
Contract Award Date	October 2013
Funding	Private
Stage	Contract / Detail Approval

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NOVEMBER 2013

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TOP TEN Key Clients

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	EDF Energy	40 Grosvenor Place, Westminster, London, SW1X 7EN	020 7242 9050	020 7331 3108 (FPS)	6	4050
2	Network Rail Infrastructure Limited	Kings Place, Islington, London, N1 9AG	020 7557 8000	020 3356 9245 (FPS)	87	1465
3	Department for Transport (DfT)	Great Minster House, Westminster, London, SW1P 4DR	0300 330 3000		2	1120
4	Sellafield Limited (AMEC)	Sellafield Sites, Seascale, Cumbria, CA20 1PG	01946 728333 (CTPS)	01946 728987	1	935
5	Crossrail Limited	25 Canada Square, Poplar, London, E14 5LQ	020 3229 9100	020 7719 0955	10	859
6	Highways Agency	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	08459 55 65 75		56	790
7	E.ON Limited	Newstead Court, Little Oak Drive, Nottingham, Nottinghamshire, NG15 0DR	024 7618 1684	0115 906 2580	1	700
8	Transport for London	Albany House, Ninth Floor, Westminster, London, SW1H 9EA	020 7222 5600		10	484
9	Transport Scotland	Buchanan House, Glasgow, Central, G4 0HF	0141 272 7100		7	417
10	Prenergy Power Limited	17a Curzon Street, Westminster, London, W1J 5HS	020 7409 5400		1	400

TOP TEN Key Architects

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	HLN Architects	21-22 Neptune Court, Cardiff, South Glamorgan, CF24 5PJ	029 2039 8611	029 2037 4690 (FPS)	1	400
2	WA Fairhurst & Partners	225 Bath Street, Glasgow, Strathclyde, G2 4GZ	0141 204 8800	0141 204 8801	2	370
3	Wilkinson Eyre Architects	33 Bowling Green Lane, City, London, EC1R 0BJ	020 7608 7900	020 7608 7901	3	354
4	RPS Group Plc	20 Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 438000	01235 864451 (FPS)	6	229
5	Austin Smith Lord	Port Of Liverpool Building, Liverpool, Merseyside, L3 1BY	0151 227 1083	0151 258 1448	4	215
6	Fereday Pollard Architects	Second Floor, City, London, EC1V 0DX	020 7253 0303	020 7490 8530 (FPS)	3	201
7	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	020 7833 8400	1	200
8	URS Global	Scott House, Basingstoke, Hampshire, RG21 7PP	01256 310200	01256 310201 (FPS)	4	164
9	ADF Architects	23 Blythswood Square, Glasgow, Strathclyde, G2 4BG	0141 226 8010 (TPS)	0141 429 8773	1	154
10	Elevation Projects Limited	1st Floor, Hull, Humberside, HU2 8JU	01482 221155	01482 221105 (FPS)	1	150

TOP TEN Key Contractors

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Amey Group	The Sherard Building, Edmund Halley Road, Oxford, Oxfordshire, OX4 4DQ	01865 713100	01865 713300	14	1484
2	Morgan Sindall Plc	Kent House, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	24	1175
3	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	102	1123
4	Costain Limited	Vanwall Business Park, Maidenhead, Berkshire, SL6 4UB	01628 842444	01628 674477	18	893
5	Vestas Wind Systems	Hedeager 44, Denmark	0045 97300000	0045 97300001	5	746
6	Invensys Rail - Siemens	PO Box 85, Chippenham, Wiltshire, SN15 1RT	01249 441441	01249 441026 (FPS)	3	550
7	VolkerWessels UK Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	01992 305001	18	403
8	Alstom Hydro Limited	Newbold Road, Rugby, Warwickshire, CV21 2NH	01788 577111 (TPS)	01788 531 700 (FPS)	1	401
9	Vinci Construction UK Limited	Astral House, Watford, Hertfordshire, WD24 4WW	01923 233433		17	390
10	Lagan Group	21-23 Sydenham Road, Belfast, Northern Ireland, BT3 9HA	028 9026 1000	028 9026 1010	2	353

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NOVEMBER 2013

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COMMERCIAL & RETAIL

INCREASING VALUE OF CONTRACTS AWARDED

The Commercial & Retail sector performed well again this month after a fall in the values of contracts awarded over the summer, providing hope for a strong end to 2013.

The value of contracts awarded in the Commercial & Retail market was £719 million in October, a 17.2% increase from September and a 45.5% increase from the October 2012 figure increased (see Fig. 5.2). This was also 45.5% higher than the value of contracts awarded in October 2012. However, in the three months to October the value of contracts is 28.7% below those awarded in the previous three months, indicating that the strong start to the year has not been sustained. However, the increases in September and October point to a potentially strong finish.

Projects by region

The North West was the main location of activity in the sector this month with 24.4% of the value of all contracts awarded, an 18.2% increase since October 2012 (see Fig. 5.1 & 5.3). Scotland also had a strong month with 18.2% of the value of projects, a 13.5% increase. London is the next most prominent location with 15.7% of the value of contracts awarded, though this was a 20.3% fall from the same month last year.

Outlook

The CPA Forecasts for the sector (see Fig. 5.4) shows that after a poor year in 2013, where output is forecast to decline by 3.8%, a small increase in output is expected in 2014 with growth returning strongly in 2015 – with offices and retail set to expand significantly. It is Barbour ABI's view that levels of output may be revised upwards for the sector, as the levels of orders for commercial offices in particular have increased in recent months and this should have positive consequences next year and beyond.

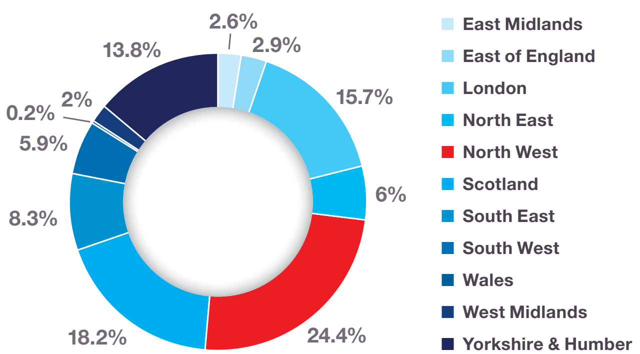

Fig. 5.1 **Value of Contracts by Region** Source: Barbour ABI

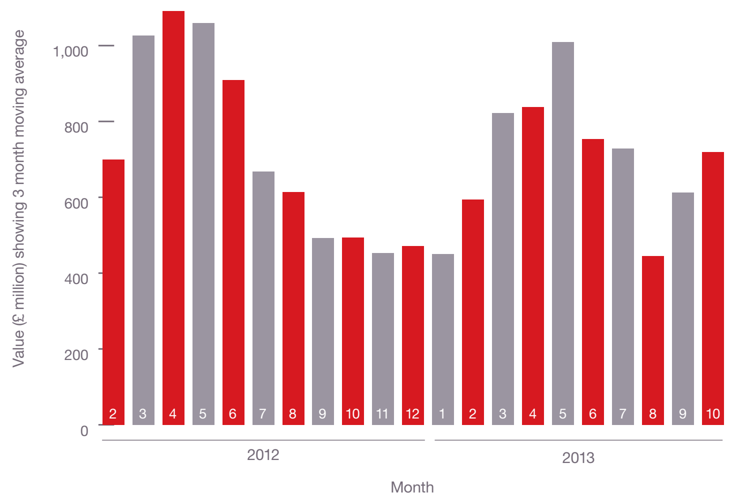

Fig. 5.2 **Project Value showing 3 month moving average** Source: Barbour ABI

> "The value of contracts awarded in the Commercial & Retail market was £719 million in October, a 17.2% increase from September and a 45.5% increase from the October 2012 figure.

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ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

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The map and figures show how the activity has changed since October 2012

+13.5%	Scotland	+1.3%	East Midlands
-11.2%	South East	-6.0%	East of England
-0.3%	South West	-20.3%	London
-2.7%	Wales	+5.8%	North East
-4.3%	West Midlands	+18.2%	North West *HOTTEST REGION*
+6.1%	Yorkshire & Humber		

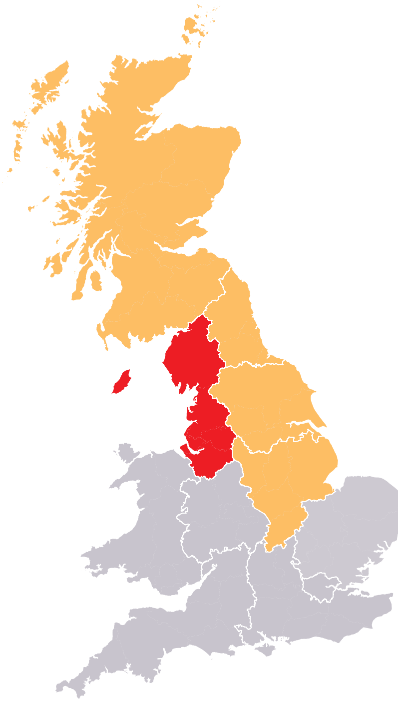

Fig. 5.3 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	24,296	21,474	20,659	20,742	21,922	22,878	23,999
Growth	2.5%	-11.6%	-3.8%	0.4%	5.7%	4.4%	4.9%

Fig. 5.4 **Sector Forecasts** Source: Construction Products Association

PROJECT IN FOCUS

St James Market Redevelopment – 8 Storey Office Building £80,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	September 2013
End Date	September 2015
Contract Award Date	October 2013
Funding	Private
Stage	Contract / Detail Approval

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INCREASING VALUE OF CONTRACTS AWARDED

TOP TEN Key Clients

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Land Securities Group	5 The Strand, Westminster, London, WC2N 5HR	020 7413 9000 (CTPS)	020 7024 5007	8	678
2	W R Berkley Insurance (Europe) Limited	2nd Floor, 40 Lime Street, City, London, EC3M 7AW	020 7280 9000	020 7280 9090 (FPS)	1	500
3	Oxford Properties	6 New Street Square, City, London, EC4A 3BF	020 7822 8300		3	356
4	Almacantar	3 Quebec Mews, City, London, W1H 7NX	020 7535 2900 (CTPS)		1	350
5	Brookfield Office Properties	Brookfield Place New York, New York, 10281, XX	001 212 417 7000		1	340
6	Westfield Shoppingtowns Limited	Level 6, Midcity Place, Westminster, London, WC1V 6EA	020 7061 1400	020 7061 1401 (FPS)	1	300
7	Google UK Limited	Belgrave House, Westminster, London, SW1W 9TQ	020 7031 3000 (TPS)	020 7031 3001	1	300
8	Tesco Stores Limited	New Tesco House, Waltham Cross, Hertfordshire, EN8 9SL	01992 632222	01992 644481	35	211
9	Crown Estate	16 New Burlington Place, Westminster, London, W1S 2HX	020 7851 5000		10	209
10	Sainsbury Plc	33 Holborn, City, London, EC1N 2HJ	020 7695 6000	020 7695 7610 (FPS)	26	160

TOP TEN Key Architects

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Kohn Pederson Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	020 7497 1175	3	502
2	Make Architects	55-65 Whitfield Street, Westminster, London, W1T 4HE	020 7636 5151	020 7636 5252 (FPS)	6	489
3	Allford Hall Monaghan Morris	2nd Floor, Block C, Morelands, City, London, EC1V 9HL	020 7251 5261	020 7251 5123 (FPS)	5	424
4	Mather Architects	123 Camden High Street, Camden Town, London, NW1 7JR	020 7284 1727 (TPS)	020 7267 7826 (FPS)	1	350
5	PLP Architecture	Carlow House, Camden Town, London, NW1 7LH	020 3006 3900	020 3006 3900	1	350
6	Conran & Partners	22 Shad Thames, Southwark, London, SE1 2YU	020 7403 8899	020 7357 0832 (FPS)	1	350
7	Hadfield Cawkwell Davidson	17 Broomgrove Road, Sheffield, South Yorkshire, S10 2LZ	0114 266 8181	0114 266 6246 (FPS)	10	330
8	Lynch Architects Limited	1 Amwell Street, Southwark, London, EC1R 1UL	020 7278 2553		2	310
9	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	020 7504 1701 (FPS)	4	218
10	Wilkinson Eyre Architects	33 Bowling Green Lane, City, London, EC1R 0BJ	020 7608 7900	020 7608 7901	6	180

TOP TEN Key Contractors

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Skanska UK	Maple Cross House, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	01923 423900 (FPS)	8	606
2	ISG	Aldgate House, City, London, EC3N 1AG	020 7247 1717	020 7247 8656 (FPS)	90	477
3	Brookfield Multiplex Construction Europe Limited	23 Hanover Square, Westminster, London, W1S 1JB	020 7659 3500	020 7659 3501	4	455
4	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	18	409
5	McAlpine Limited	Eaton Court, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	01442 243819 / 230024	7	383
6	Bowmer & Kirkland Limited	High Edge Court, Belper, Derbyshire, DE56 2BW	01773 853131	01773 856710	29	251
7	McLaren Construction Limited	McLaren House, Brentwood, Essex, CM14 4EA	01277 205800	01277 205900 (FPS)	9	231
8	Morgan Sindall Plc	Kent House, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	54	229
9	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	020 7375 1606	10	193
10	Kier Group PLC	Tempsford Hall, Sandy, Bedfordshire, SG19 2BD	01767 640111	01767 640002	18	130

economic & construction MARKET REVIEW

NOVEMBER 2013

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HOTEL, LEISURE & SPORT
SLIGHT FALL IN THE VALUE OF CONTRACTS AWARDED

The Hotel, Leisure & Sport sector continued its recent mixed performance with lower values of contracts awarded in October, but better performance overall compared to the previous quarter.

Contract award values in the Hotel, Leisure & Sport sector were £432 million in October, based on a three month rolling average (see Fig. 6.2). This was 2.6% lower than September 2012 but in the three months to October the value of contracts was 11.9% higher than the previous three months, indicating an upturn in activity in recent months. Overall levels of contract activity are marginally down by 2.9% in the three months to October compared to the same period in 2012 painting a mixed picture for the sector overall.

Projects by region

October was a particularly strong month in this sector for Yorkshire & Humberside which was the location of 36.3% of the value of contracts awarded, an increase of 25.5% on October 2012 (see Fig. 6.1 & 6.3). The South West also performed strongly with 15% of contracts awarded occurring in the region, a 12% increase on the same period last year.

Outlook

Reflecting the slow start to the year for the entire construction industry, the CPA Forecasts for the sector (see Fig. 6.4) shows that it will decline by 3.8% in 2013. A growth rate of 1.0% is forecast for 2014 with moderate growth of 3.0% per annum predicted to occur in 2016. Barbour ABI believes this forecast is likely to stay the same with some minor upwards revisions possible should wider economic growth increase.

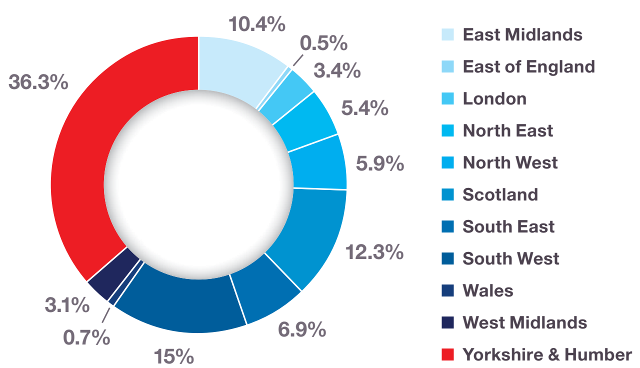

Fig. 6.1 **Value of Contracts by Region** Source: Barbour ABI

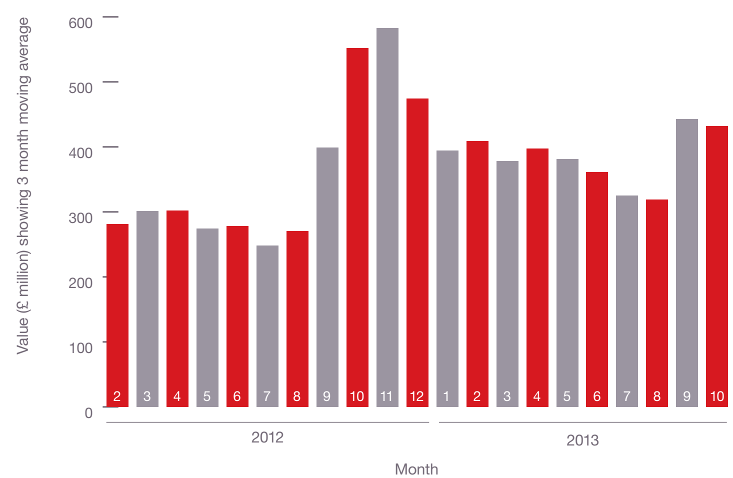

Fig. 6.2 **Project Value showing 3 month moving average** Source: Barbour ABI

> In the three months to October the value of contracts was 11.9% higher than the previous three months, indicating an upturn in activity in recent months.

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NOVEMBER 2013

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SLIGHT FALL IN THE VALUE OF CONTRACTS AWARDED

The map and figures show how the activity has changed since October 2012		
+4.0%	Scotland	
+9.5%	East Midlands	
+2.3%	South East	
-0.9%	East of England	
+12.0%	South West	
-8.0%	London	
-40.6%	Wales	
+0.9%	North East	
-2.2%	West Midlands	
-2.5%	North West	
+25.5%	Yorkshire & Humber	*HOTTEST REGION*

Fig. 6.3 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	4,636	3,908	3,760	3,797	3,889	4,006	4,132
Growth	-2.7%	-15.7%	-3.8%	1.0%	2.4%	3.0%	3.1%

Fig. 6.4 **Sectors Forecasts** Source: Construction Products Association

PROJECT IN FOCUS

Hotel – Whitehall Plaza
£30,000,000

County	West Yorkshire
Primary Category Sector	Hotel, Leisure & Sport
Government Region	Yorkshire & Humber
Start Date	Unknown
End Date	Unknown
Contract Award Date	October 2013
Funding	Private
Stage	Contract / Detail Approval / LIR

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NOVEMBER 2013

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SLIGHT FALL IN THE VALUE OF CONTRACTS AWARDED

TOP TEN
Key Clients
October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	London Legacy Development Corporation	Level 10, 1 Stratford Place, London, E20 1EJ	020 3288 1800		3	333
2	Cardiff County Council	County Hall, Cardiff, South Glamorgan, CF10 4UW	029 2087 2087	029 2087 3209	2	216
3	Warrington Borough Council	Newtown House, Warrington, Cheshire, WA1 2NH	01925 443322		4	202
4	Shelbourne Senior Living/Tiger Developments	9 Clifford Street, Westminster, London, W1S 2FT	020 7292 3626	01590 681657	1	150
5	National Exhibition Centre Limited	Bickenhill Lane, Birmingham, West Midlands, B40 1PQ	0121 780 4141	0121 780 4120	2	144
6	Whitbread PLC	Whitbread Court, Dunstable, Bedfordshire, LU5 5XE	01582 499499	01582 474259	30	143
7	Essex County Cricket Club	New Writtle Street, Chelmsford, Essex, CM2 0PG	01245 252420 (CTPS)	01245 254030 (FPS)	1	100
8	Prime Investors Capital Limited	33 St James Square, Westminster, London, SW1Y 4JS	020 3178 4660		1	100
9	London Borough of Bromley	Civic Centre, Bromley, Kent, BR1 3UH	020 8464 3333	020 8313 4639	1	90
10	AEG Europe	The Studio, Greenwich, London, SE10 0DX	020 8463 2300	020 8463 2301	1	65

TOP TEN
Key Architects
October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Scott Brownrigg Limited	St Catherines Court, Guildford, Surrey, GU2 4DU	01483 568686	01483 575830 (FPS)	3	251
2	Hole Architects	9th Floor, Croydon, Surrey, CR0 1JD	020 8662 4600		2	216
3	Comprehensive Design Architects	16 Moray Place, Edinburgh, Lothian, EH3 6DT	0131 225 1111 (CTPS) (TPS)	0131 220 0152	3	153
4	Sutherland Hussey Architects	122 Giles Street, Edinburgh, Lothian, EH6 6BZ	0131 553 4321 (CTPS)		1	150
5	Murphy Architects	The Breakfast Mission, Edinburgh, Lothian, EH1 1RW	0131 220 6125 (CTPS) (TPS)	0131 220 6781 (FPS)	1	150
6	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	020 7504 1701 (FPS)	2	125
7	Bennett LLP	One America Street, Southwark, London, SE1 0NE	020 7208 2000	020 7208 2024 (FPS)	3	123
8	Chetwood Associates	12-13 Clerkenwell Green, City, London, EC1R 0QJ	020 7490 2400	020 7250 1916 (FPS)	1	120
9	Benoy Limited	Handley House, Newark, Nottinghamshire, NG24 1EH	01636 672356	01636 707513 (FPS)	1	120
10	Blair Associate Architecture Limited	88 Golden Lane, City, London, EC1Y 0UA	020 7490 4666		3	112

TOP TEN
Key Contractors
October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Morgan Sindall Plc	Kent House, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	9	244
2	McLaren Construction Limited	McLaren House, Brentwood, Essex, CM14 4EA	01277 205800	01277 205900 (FPS)	8	209
3	Greenbank Partnership Limited	Greenbank House, Wigan, Lancashire, WN1 2LA	01942 740400		1	200
4	BAM Construction	Breakspear Park, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	01442 238301	11	180
5	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	10	167
6	Interserve Plc	Interserve House, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	0118 932 0206 (FPS)	5	164
7	Galliford Try Construction South	2 Cowley Business Park, Uxbridge, Middlesex, UB8 2AD	01895 855000	01895 855099	3	141
8	Donban Contracting Limited	New Cork Road, Co. Cork, Ireland	0035 3238878260		1	120
9	Kier Group PLC	Tempsford Hall, Sandy, Bedfordshire, SG19 2BD	01767 640111	01767 640002	3	107
10	Bowmer & Kirkland Limited	High Edge Court, Belper, Derbyshire, DE56 2BW	01773 853131	01773 856710	15	92

economic & construction MARKET REVIEW

NOVEMBER 2013

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INDUSTRIAL

GROWTH IN CONTRACTS AWARDED CONTINUES

The industrial sector continued its strong performance over recent months with monthly and yearly increases in contracts awarded. This should result in higher output in a sector which has experienced volatility in recent years.

Activity in the industrial sector continued its recent rise with the value of contracts awarded in October being £411 million, based on a rolling three month average (see Fig. 7.2). This is an increase of 17.4% on the value in September and 116.1% above the corresponding month in 2012. In the three months to October the total value of contracts was £1.1 billion which was 38.3% above the previous three months and 70.6% above the same quarter last year.

Projects by region

The South West is the region with the highest value of activity this month with 23.8% of the contracts awarded, an increase of 16.2% on October 2012 (see Fig. 7.1 & 7.3). The South East also experienced a high proportion of activity with 18.5% of contracts awarded, a 10.2% increase. Scotland experienced the sharpest drop in the levels of contracts awarded, with 5.4% of the total value – a decrease of 18.2%.

Outlook

The CPA Forecasts for the sector (see Fig. 7.4) shows that despite the poor performance in the ONS output figures, this year will see modest growth of 0.2%. The increase in new orders this year is demonstrated in the CPA Forecasts with strong growth of 5.4% predicted in 2014 and 6.5% in 2015. This is driven in equal measure by factories and warehouse growth, suggesting that recent demand for large warehousing facilities and high value manufacturing space will continue.

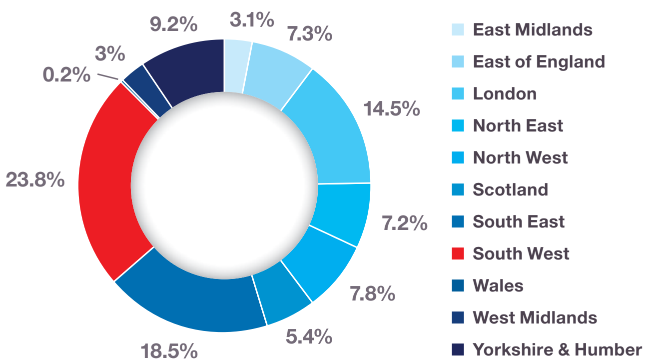

Fig. 7.1 **Value of Contracts by Region** Source: Barbour ABI

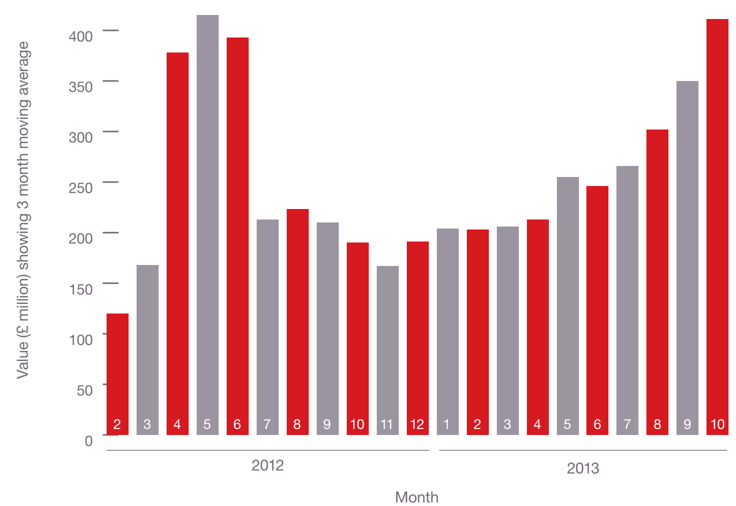

Fig. 7.2 **Project Value showing 3 month moving average** Source: Barbour ABI

" In the three months to October the total value of contracts was £1.1 billion which was 38.3% above the previous three months and 70.6% above the same quarter last year.

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NOVEMBER 2013

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The map and figures show how the activity has changed since October 2012

		-18.2%	Scotland
-7.0%	East Midlands	+10.2%	South East
+1.3%	East of England	+16.2%	South West *HOTTEST REGION*
-1.0%	London	-2.6%	Wales
+3.2%	North East	-8.6%	West Midlands
-0.2%	North West	+6.8%	Yorkshire & Humber

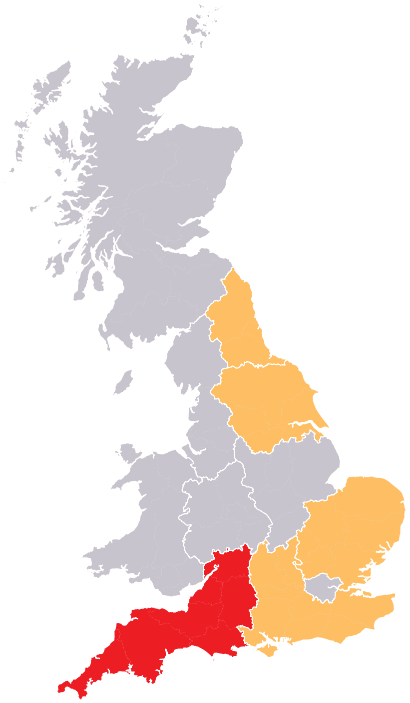

Fig. 7.3 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	3,209	3,409	3,415	3,600	3,834	4,036	4,247
Growth	-9.6%	6.2%	0.2%	5.4%	6.5%	5.3%	5.2%

Fig. 7.4 **Sector Forecasts** Source: Construction Products Association

PROJECT IN FOCUS

Dirft Ii Expansion Zone 3 – Sainsburys Distribution Centre £92,385,000

County	Warwickshire
Primary Category Sector	Industrial
Government Region	West Midlands
Start Date	September 2013
End Date	March 2015
Contract Award Date	October 2013
Funding	Private
Stage	Detail Approval / Subcontract Awarded

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TOP TEN

Key Clients

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Prologis Developments Limited	Prologis House, Solihull, West Midlands, B90 4FY	0121 224 8700	0121 733 8016	6	292
2	IM Properties PLC	IM House, Birmingham, West Midlands, B46 1DF	0121 730 8050	0121 730 8267	2	151
3	Nestle UK Limited	Marston Lane, Burton on Trent, Staffordshire, DE13 9LY	01283 816816		1	110
4	Roxhill Developments Limited	Lumonics House, Rugby, Warwickshire, CV21 1TQ	01788 422200	01788 422201	5	101
5	Jaguar Cars Limited	Chester Road, Birmingham, West Midlands, B35 7RA	0121 373 2141	024 7621 5955	2	93
6	Omega Warrington Limited	2 Miller House, Edinburgh, Lothian, EH12 9DH	Not Listed		4	92
7	Merchant Place Developments	The Studio, Newcastle Upon Tyne, Tyne And Wear, NE13 7DS	0191 236 1013		1	82
8	Goodman International	Nelson House, Solihull, West Midlands, B90 8BG	0121 506 8100	0121 506 8101	4	68
9	Henry Boot Developments Limited	Banner Cross Hall, Sheffield, South Yorkshire, S11 9PD	0114 255 5444	0114 255 5548	3	59
10	Aero Engine Controls	York Road, Birmingham, West Midlands, B28 8LN	0121 627 6600	0121 607 3975 (FPS)	1	50

TOP TEN

Key Architects

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND		0116 254 1095	7	235
2	Sparks Associates	11 Plato Place, Fulham, London, SW6 4TU	020 7736 6162	020 7736 3896 (FPS)	8	148
3	Darnton EGS	The Coach House, Leeds, West Yorkshire, LS25 5DU	01977 681001	01977 681006	1	110
4	Chetwood Associates	12-13 Clerkenwell Green, City, London, EC1R 0QJ	020 7490 2400	020 7250 1916 (FPS)	5	97
5	Ryder Architecture	Cooper Studios, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	0191 269 5455	2	90
6	Building Design Partnership	16 Brewhouse Yard, City, London, EC1V 4LJ	020 7812 8000	020 7812 8399	3	80
7	PHP Architects	The Old Rectory, Northampton, Northamptonshire, NN7 3AQ	01604 858916	01604 859123 (FPS)	5	74
8	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry, West Midlands, CV5 6UB	024 7625 3200	024 7625 3210 (FPS)	4	66
9	PRC Architects Limited	5 St Mary's Road, Surbiton, Surrey, KT6 4JG	020 8399 5188	020 8399 3863 (FPS)	2	62
10	Hasker Architects	1620 High Street, Solihull, West Midlands, B93 0JU	01564 778029	01564 778067 (FPS)	2	59

TOP TEN

Key Contractors

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	01604 671021 (FPS)	13	211
2	VolkerWessels UK Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	01992 305001	5	162
3	Buckingham Group Contracting Limited	Blackpit Farm, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	01280 812830 (FPS)	7	151
4	Sisk & Son Limited	1 Curo Park, St Albans, Hertfordshire, AL2 2DD	01727 875551	01727 875761	2	114
5	McLaren Construction Limited	McLaren House, Brentwood, Essex, CM14 4EA	01277 205800	01277 205900 (FPS)	4	96
6	Gallagher Group Limited	Leitrim House, Maidstone, Kent, ME20 7NS	01622 716543	01622 882366 (FPS)	2	86
7	BAM Construction	Breakspear Park, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	01442 238301	2	85
8	Morgan Sindall Plc	Kent House, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	8	84
9	Shepherd Construction Limited	Frederick House, York, North Yorkshire, YO10 4EA	01904 634431	01904 660242	1	82
10	Readie Construction Limited	Unit 15 Falcon Business Centre, Romford, Essex, RM3 8UR	01708 332800	01708 332801	4	77

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MEDICAL & HEALTH
CONTRACT VALUES FALL SLIGHTLY IN OCTOBER

The value of contracts awarded in the sector decreased in October to continue what has been a challenging year so far for Medical & Health.

Levels of activity in the Medical & Health sector were down by 15.5% in October 2013 compared to September 2013, with the total value of contracts awarded being £167 million based on a three month rolling average (see Fig. 8.2). This is 23.9% higher than the levels in October 2012 which was a particularly low month. In the three months to October value of contracts are down by 25.2% on the previous three months and 16.8% down on the same period in 2012 indicating the relatively poor year the sector has experienced.

Projects by region

London was the main location of development in the sector capturing 58.9% of activity – a substantial 53.1% increase from October 2012 (see Fig. 8.1 & 8.3). The East of England is the other notable location of activity for medical and health projects registering 15.4% of activity by value this month.

Outlook

The National Infrastructure Plan commits £4.6 billion to health and social care capital in 2014-2015 and £4.7 billion in 2015-2016, including investment of £1.4 billion in hospital upgrades and redevelopments – suggesting that this sector will improve in the medium term. This is reflected in the latest CPA Forecasts (see Fig. 8.4) which estimates a 4.2% contraction this year with a modest 0.4% increase in 2014. Moderate growth is forecast to return in 2015 and beyond.

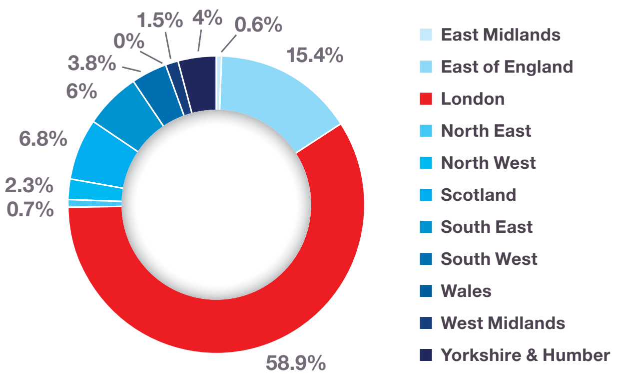

Fig. 8.1 **Value of Contracts by Region** Source: Barbour ABI

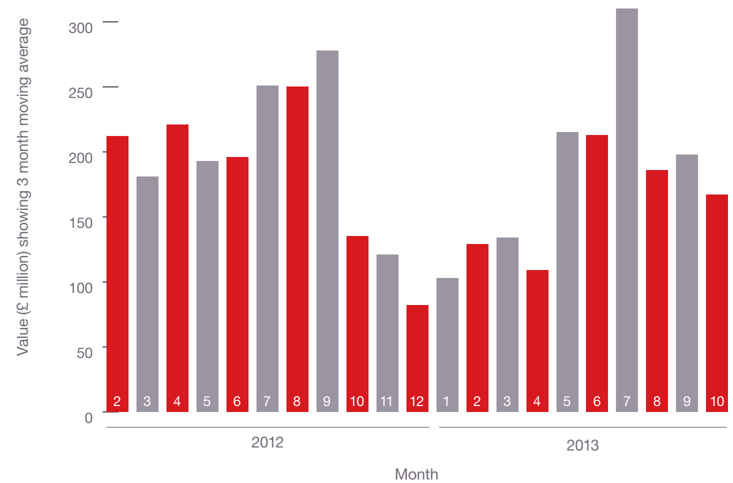

Fig. 8.2 **Project Value showing 3 month moving average** Source: Barbour ABI

> In the three months to October value of contracts are down by 25.2% on the previous three months and 16.8% down on the same period in 2012.

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The map and figures show how the activity has changed since October 2012

		-0.6%	Scotland
-3.8%	East Midlands	+3.6%	South East
+15.4%	East of England	-29.8%	South West
+53.1%	London *HOTTEST REGION*	-2.6%	Wales
-2.4%	North East	-21.5%	West Midlands
-10.9%	North West	-0.5%	Yorkshire & Humber

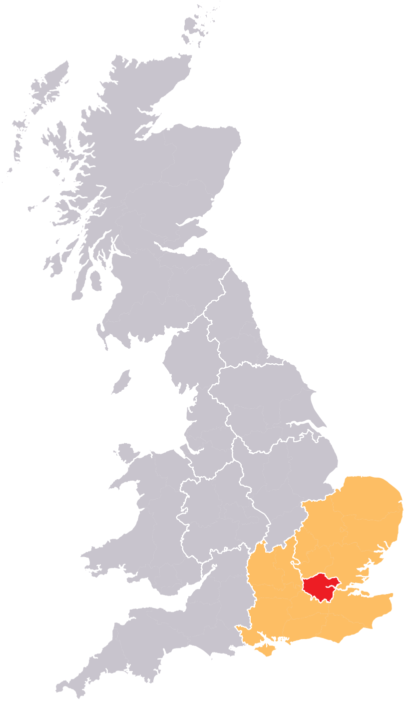

Fig. 8.3 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	3,294	3,059	2,931	2,944	3,008	3,095	3,174
Growth	-28.5%	-7.1%	-4.2%	0.4%	2.2%	2.9%	2.5%

Fig. 8.4 **Sector Forecasts** Source: Construction Products Association

PROJECT IN FOCUS

Cambridge Biomedical Campus – The Forum £120,000,000

County	Cambridgeshire
Primary Category Sector	Medical & Health
Government Region	East of England
Start Date	Third quarter 2014
End Date	Third quarter 2016
Contract Award Date	October 2013
Funding	Mixed
Stage	Contract

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NOVEMBER 2013

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TOP TEN Key Clients

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	West London Mental Health NHS Trust	Broadmoor Hospital, Crowthorne, Berkshire, RG45 7EG	01344 773111		1	285
2	Cambridge University Hospitals NHS Foundation Trust	Addenbrookes Hospital, Cambridge, Cambridgeshire, CB2 0QQ	01223 245151	01223 217220 (FPS)	5	124
3	Cwm Taff NHS Trust	Prince Charles Hospital, Merthyr Tydfil, Mid Glamorgan, CF47 9DT	01685 721721	01685 728128	1	120
4	NHS Lothian	Royal Edinburgh Hospital, Edinburgh, Lothian, EH10 5HF	0131 537 6000		1	42
5	Birmingham & Solihull Lift Limited	Unit 5, The Triangle, Worcester, Worcestershire, WR5 2QX	01782 222995	01782 287775	1	31
6	Bupa Limited	15-19 Bloomsbury Way, Westminster, London, WC1A 2BA	020 7656 2000	020 7656 2700	2	31
7	NHS Greater Glasgow and Clyde Health Board	Gartnavel Royal Hospital, Glasgow, Strathclyde, G12 0XH	0141 211 3600	0141 211 0224	3	29
8	Sheffield Children's Hospital (NHS)	Western Bank, Sheffield, South Yorkshire, S10 2TH	0114 271 7000	0114 272 1870 (FPS)	4	27
9	Montpelier Estates Limited	Middle Barn, Chilton Business Centre, Aylesbury, Buckinghamshire, HP18 9LS	01844 203500	01865 875502 (FPS)	1	25
10	Aintree University Hospitals NHS Foundation Trust	Aintree University Hospital, Liverpool, Merseyside, L9 7AL	0151 525 5980	0151 525 6086	3	25

TOP TEN Key Architects

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Oxford Architects Partnership	Bagley Croft, Oxford, Oxfordshire, OX1 5BS	01865 329100 (TPS)	01865 326822 (FPS)	1	285
2	Avanti Architects Limited	361-373 City Road, City, London, EC1V 1AS	020 7278 3060	020 7278 3366 (FPS)	6	74
3	Archial Group Plc	Tennyson House, Westminster, London, W1W 5PA		020 7580 6688	3	54
4	Boswell Mitchell & Johnston	The Hub, Glasgow, Strathclyde, G51 1DZ	0141 271 3200	0141 271 3201	3	42
5	One Creative Environment	5 The Triangle, Worcester, Worcestershire, WR5 2QX	01905 362300 (CTPS)	01905 362333	3	36
6	Aedas	Norwich Union House, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	01484 511207 (FPS)	4	36
7	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800		3	35
8	IBI Taylor Young	Chadsworth House, Wilmslow, Cheshire, SK9 3HP	01625 542200	01625 542250	9	33
9	Gilling Dod Architects	The Cruck Barn, Chorley, Lancashire, PR7 4AT	01257 260070	01257 260071 (FPS)	7	28
10	AFL Architects	1st Floor St Georges House, Manchester, Greater Manchester, M2 3NQ	0161 236 6263	0161 703 8548	5	24

TOP TEN Key Contractors

October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Sandy, Bedfordshire, SG19 2BD	01767 640111	01767 640002	28	335
2	Interserve Plc	Interserve House, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	0118 932 0206 (FPS)	17	169
3	Laing O Rourke	Bridge Place, Dartford, Kent, DA2 6SN	01322 296200	01283 817570	3	123
4	Galliford Try Construction South	2 Cowley Business Park, Uxbridge, Middlesex, UB8 2AD	01895 855000	01895 855099	12	111
5	BAM Construction	Breakspear Park, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	01442 238301	11	94
6	Willmott Dixon Construction Limited	Spirella 2, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	01462 681852 (FPS)	9	79
7	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	17	59
8	Vinci Construction UK Limited	Astral House, Watford, Hertfordshire, WD24 4WW	01923 233433		8	39
9	Morgan Sindall Plc	Kent House, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	10	37
10	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	020 7375 1606	1	30

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EDUCATION
SLIGHT INCREASE IN VALUE OF CONTRACTS

The Education sector had a good month in October with an increase in the value of contracts awarded continuing its strong year.

The value of contracts awarded in the Education sector was £536 million in October based on a three month rolling average, a 7.5% increase from September 2013 (see Fig. 9.2). This figure was 40.8% higher than October 2012 indicating the comparatively strong year this sector has had so far. While contract awards in the three months to October were 6.3% lower than the previous three months, they were 22.7% higher than the same period last year.

Projects by region

The main location of activity this month was the South East which accounted for 23.7% of the value of projects, a 16.7% increase from October 2012 (see Fig. 9.1 & 9.3). The other region which performed strongly this month was Scotland with 15% of education projects, a 5.5% increase from October 2012. The East of England saw falls in project activity of 13.4% and 10.2% respectively.

Outlook

The National Infrastructure Plan has committed up to £21 billion investment in schools over the next Parliament and this is reflected in the forecasts for the sector (see Fig. 9.4). In the near term, the levels of output in the sector are forecast to decline by 10.8% this year and 1.4% next year. However, the forecast for 2015 is for 1.3% growth, followed by 2.3% and 3.3% growth in 2016 and 2017. At present Barbour ABI do not expect any major revisions to these figures given that it is government investment that is most likely to drive growth in this sector in the future, and this is likely to remain constant for the foreseeable future.

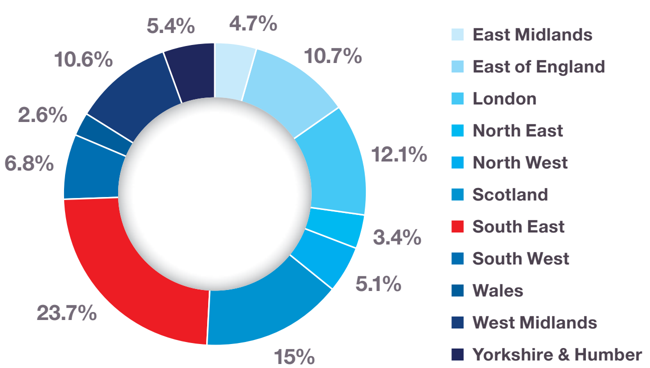

Fig. 9.1 **Value of Contracts by Region** Source: Barbour ABI

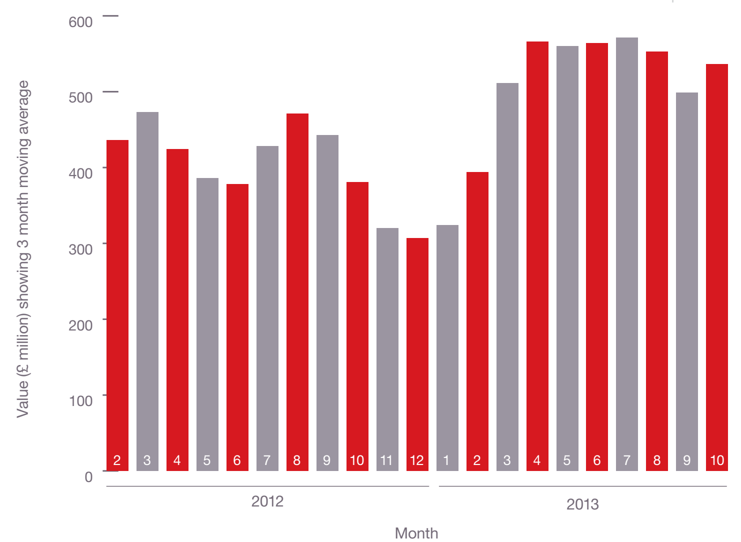

Fig. 9.2 **Project Value showing 3 month moving average** Source: Barbour ABI

> The value of contracts awarded in the Education sector was £536 million in October based on a three month rolling average, a 7.5% increase from September 2013.

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NOVEMBER 2013

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The map and figures show how the activity has changed since October 2012

		+5.5%	Scotland
+0.5%	East Midlands	+16.0%	South East *HOTTEST REGION*
-13.4%	East of England	-5.6%	South West
-10.2%	London	+2.5%	Wales
+3.0%	North East	+1.5%	West Midlands
-2.9%	North West	+3.2%	Yorkshire & Humber

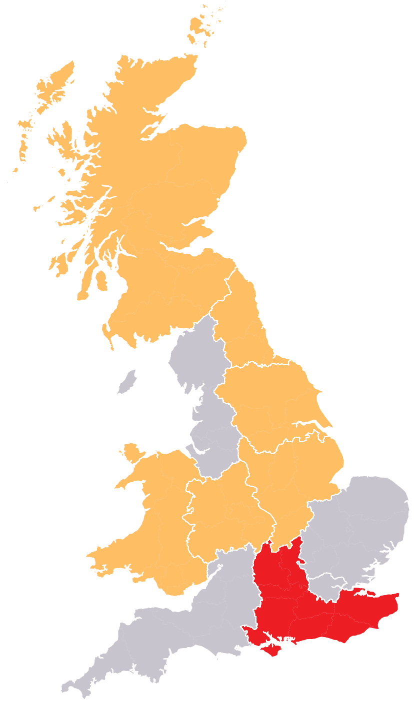
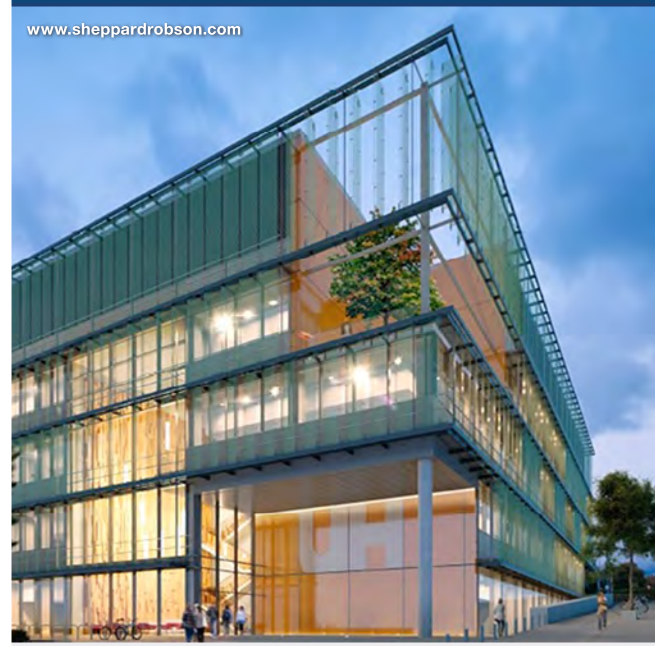


Fig. 9.3 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	9,876	8,047	7,179	7,076	7,170	7,337	7,579
Growth	-1.4%	-18.5%	-10.8%	-1.4%	1.3%	2.3%	3.3%

Fig. 9.4 **Sector Forecasts** Source: Construction Products Association

PROJECT IN FOCUS



College Lane Phase 2 – New Science Building
£32,500,000

County	Hertfordshire
Primary Category Sector	Education
Government Region	East of England
Start Date	October 2013
End Date	April 2015
Contract Award Date	October 2013
Funding	Public
Stage	Contract / Detail Approval / LIR

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NOVEMBER 2013

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SLIGHT INCREASE IN VALUE OF CONTRACTS

TOP TEN
Key Clients
October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Department For Education	Castle View House, Runcorn, Cheshire, WA7 2AA	0370 000 2288	01928 738248	41	361
2	City of Glasgow College	190 Cathedral Street, Glasgow, Strathclyde, G1 2TG	0141 552 3941		1	200
3	Swansea University	Singleton Park, Swansea, West Glamorgan, SA2 8PP	01792 205678 (TPS)	01792 295157 (FPS)	3	126
4	Department for Education & Skills	Caxton House, Westminster, London, SW1H 9NA	0370 000 2288		11	86
5	Aberdeenshire Council	Woodhill House, Aberdeen, Grampian, AB16 5GB	0845 608 1207	01224 664470 (FPS)	3	83
6	London Borough of Hillingdon	Civic Centre, Uxbridge, Middlesex, UB8 1UW	01895 250111 (CTPS)	01895 250619 (FPS)	18	69
7	City of Edinburgh Council	329 High Street, Edinburgh, Lothian, EH1 1PN	0131 200 2000		3	64
8	University of Nottingham	Estate Office, Nottingham, Nottinghamshire, NG7 2RD	0115 951 5151 (CTPS)	0115 951 5680	7	64
9	Coventry City Council	New Council House, Coventry, West Midlands, CV1 5RR	024 7683 3333	024 7683 2150 (FPS)	16	63
10	University of Sheffield	Western Bank, Sheffield, South Yorkshire, S10 2TN	0114 222 2000	0114 273 9826 (FPS)	5	62

TOP TEN
Key Architects
October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Reiach & Hall	6 Darnaway Street, Edinburgh, Lothian, EH3 6BG	0131 225 8444	0131 225 5079	3	239
2	Michael Laird Architects	5 Forres Street, Edinburgh, Lothian, EH3 6DE	0131 226 6991	0131 226 2771 (FPS)	1	200
3	Associated Architects	1 Severn Street Place, Birmingham, West Midlands, B1 1SE	0121 233 6600	0121 200 1564 (FPS)	28	168
4	Stride Treglown Limited	Promenade House, Bristol, Avon, BS8 3NE	0117 974 3271 (TPS)	0117 974 5207	22	152
5	Building Design Partnership	16 Brewhouse Yard, City, London, EC1V 4LJ	020 7812 8000	020 7812 8399	10	130
6	Ryder Architecture	Cooper Studios, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	0191 269 5455	13	115
7	Aedas	Norwich Union House, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	01484 511207 (FPS)	25	101
8	Morley Architects	18 Hatton Place, City, London, EC1N 8RU	020 7430 2444	020 7430 2443	2	101
9	Porphyrios Associates	Devon House, Westminster, London, W1W 5PQ	020 7580 9594 (TPS)	020 7580 9596 (FPS)	1	100
10	Bond Bryan Partnership	The Congregational Church, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	0114 268 7021	17	97

TOP TEN
Key Contractors
October – November

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Willmott Dixon Construction Limited	Spirella 2, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	01462 681852 (FPS)	90	542
2	McAlpine Limited	Eaton Court, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	01442 243819 / 230024	18	364
3	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	65	351
4	BAM Construction	Breakspear Park, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	01442 238301	41	350
5	Kier Group PLC	Tempsford Hall, Sandy, Bedfordshire, SG19 2BD	01767 640111	01767 640002	89	286
6	Morgan Sindall Plc	Kent House, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	60	246
7	Miller Construction Limited	Miller House, 2 Lockside View, Edinburgh, Lothian, EH12 9DH	0870 336 5000	0870 336 5315	27	211
8	Wates Construction Limited	Wates House, Leatherhead, Surrey, KT22 7SW	01372 861000		32	170
9	ISG	Aldgate House, City, London, EC3N 1AG	020 7247 1717	020 7247 8656 (FPS)	44	156
10	Galliford Try Construction South	2 Cowley Business Park, Uxbridge, Middlesex, UB8 2AD	01895 855000	01895 855099	19	133

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NOVEMBER 2013

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