economic & construction MARKET REVIEW

Barbour ABI | Building

MARCH 2014

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.

SKIP TO THIS SECTION

FULL VERSION – AVAILABLE TO BARBOUR ABI CUSTOMERS & BUILDING SUBSCRIBERS ONLY

economic & construction MARKET REVIEW

MARCH 2014

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ

T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

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.

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ

T: 0151 353 3500

E: info@barbour-abi.com

W: www.barbour-abi.com

@BarbourABI

Barbour ABI

UBM

UBM helps businesses do business, bringing the world's buyers and sellers together at events and online, as well as producing and distributing news and specialist content. Its 5,500 staff in more than 30 countries are organised into expert teams which serve commercial and professional communities, helping them to do business and their markets to work effectively and efficiently.

Ludgate House, 245 Blackfriars Road, London, SE1 9UY

T: 020 7921 5000

W: www.ubm.com

UBM

Michael Dall

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.

To contact Michael either:

T: 020 7560 4141

E: michael.dall@ubm.com

@MichaelGDall

Provider of the Government's Construction and Infrastructure Pipeline

HM Government

Chosen provider of Construction New Orders estimates to the ONS

Office for National Statistics

construction products association

DOWNLOAD THE DATA IN THIS PDF COMING SOON

DOWNLOAD METHODOLOGY CLICK HERE

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

MACROECONOMIC CONDITIONS MAINTAIN IMPROVEMENT

Sentiment and activity in the UK economy remained high in February with a series of macroeconomic indicators confirming the nascent recovery.

The UK economy continued its recent improvement in February with the three main sectors recording PMI readings of above 50, the level which marks expansionary activity (see Fig. 1.1).

Revised figures for UK GDP confirmed growth in 2013 was 1.8%, down 0.1% from its initial estimate (see Fig. 1.2). The detailed results showed that all three components of the economy improved in 2013 with growth in the dominant service sector 1.9% compared to 1.3% in 2012. Construction grew by 1.3% compared to a decline of 7.5% in 2012. While production declined by 0.3% in 2013 this was not as severe as the 2.5% decline in 2012.

Unemployment was up slightly in the three months to December (see Fig. 1.3), however at 7.2% is still below the peak level of 8.4% in recent years and expected to fall further in the coming months as general economic conditions improve.

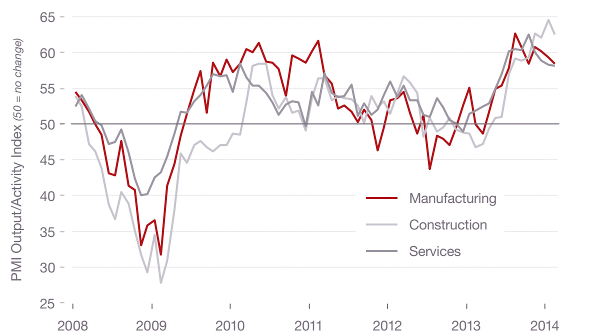


Fig. 1.1 **PMI Output/Activity Index** Source: ONS

However, the level of government debt as a percentage of GDP is still significantly higher than pre-recession levels (see Fig. 1.4). Public Sector Net Debt now stands at 74.6% of GDP in January 2014, whereas in January 2008 it was 35.7%.

These broad based improvements in economic performance have given confidence that the recovery will be sustained into 2014 and beyond. Other news of note this month on the UK economy includes:

- **Retail sales in the UK rose by 4.3% in January compared to the previous year**
- **Industry body the Society of Motor Manufacturers and Traders predict a boom in car manufacturing in 2014**
- **A CIPD survey expected the rate of employment growth to slow in 2014 after its recent rapid increase**

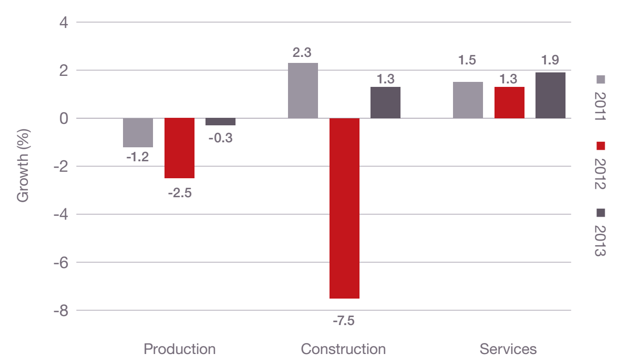


Fig. 1.2 **UK GDP** Source: ONS

With the continuing positive macroeconomic news the UK economy seems well placed to have a strong year. However, the challenges of underemployment, low business investment and low productivity increases still remain a drag on growth.

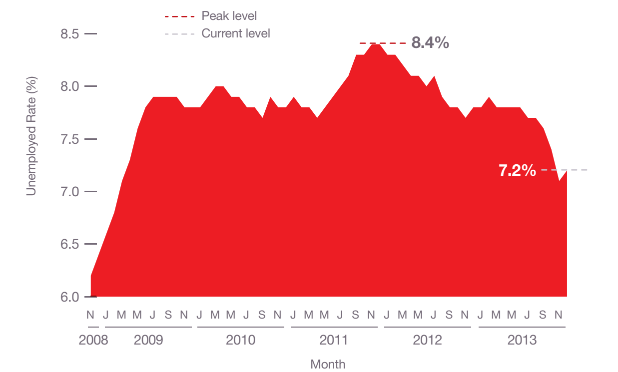


Fig. 1.3 **Unemployment Rate** Source: ONS

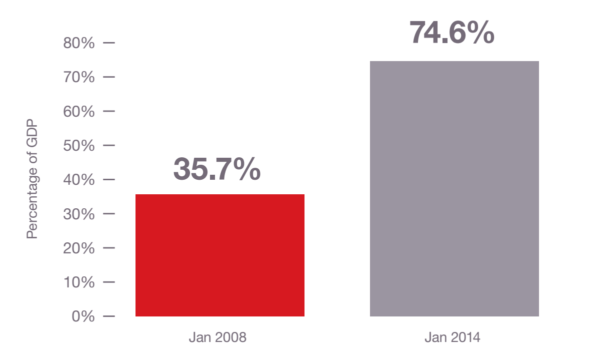


Fig. 1.4 **Government Debt** Source: ONS

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com
Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

THE CONSTRUCTION SECTOR

GROWTH OF 1.8% IN JANUARY MARKS A GOOD START TO 2014

The latest figures from the ONS show that the construction sector in the UK grew by 1.8% between December 2013 and January 2014.

Comparing output levels with January last year shows an increase of 5.4%, however, the ONS did revise their previous estimate of 0.2 growth in Q4 2013 downwards, to show a decline of 0.2%, meaning the industry lost some of its momentum towards the end of the year. Overall the figures provide further evidence of the improving performance of the industry over the longer term and its impact on wider economic growth.

	% change	
	Jan 2013 – Jan 2014	Dec 2013 – Jan 2014
Total All Work	**5.4**	**1.8**
All New Work	**5.9**	**0.8**
Public Housing	35.2	1.4
Private Housing	23.4	2.3
Infrastructure	-3.2	-2.3
Public (ex Infrastructure)	2.2	0.3
Private Industrial	-20.5	-4.5
Private Commercial	-0.2	2.4
Repair & Maintenance	**4.5**	**3.5**
Public Housing	-2.3	1.9
Private Housing	9.4	9.6
Non-Housing	3.8	0.2

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

It is clear that the housing sector is driving growth within the industry (see Fig. 2.1). New Private Housing increased by 2.3% between December 2013 and January 2014 and 23.4% from the corresponding month in 2013. New Public Housing was up by 1.4% and 35.2% in the same periods. There was also a sharp increase in the levels of Repair & Maintenance work in private housing which increased by 9.6% month on month and 9.4% year on year.

Private Commercial showed a 2.4% monthly increase but was down by 0.2% on a year earlier. There was also a notable fall in infrastructure between December and January of 2.3% and by 3.2% on January 2013.

The ONS/Barbour ABI New Orders Data for Q4 2013 showed that total order levels increased by 1.5% between Q3 and Q4 2013 but were 4% higher than a year ago (see Fig. 2.2). This was almost

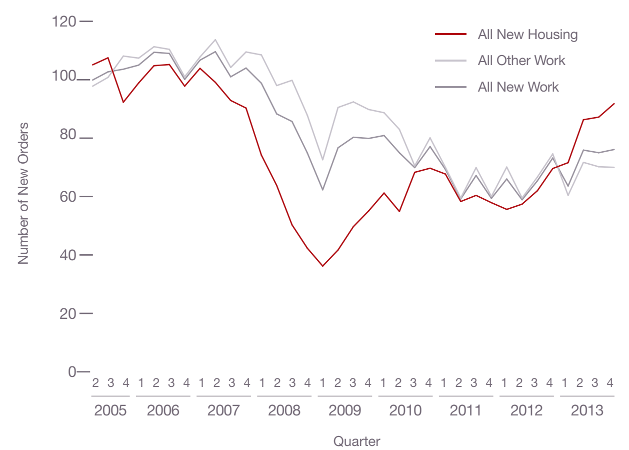


Fig. 2.2 **Construction New Orders** Source: Barbour ABI

entirely driven by the housing sector though there were slight increases in industrial and commercial. This data, combined with the latest ONS output figures, provide a further indication of the improving outlook for the construction sector.

The CPA/Barbour ABI Index

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month, recorded a reading of 109 for February supporting the view that activity in the industry remains strong (see Fig. 2.3). Private housing was down slightly in February at 191, albeit from a seven year high in January. Commercial offices rebounded in February but was still below 2010 levels, while commercial retail was still high, recording a level of 154.

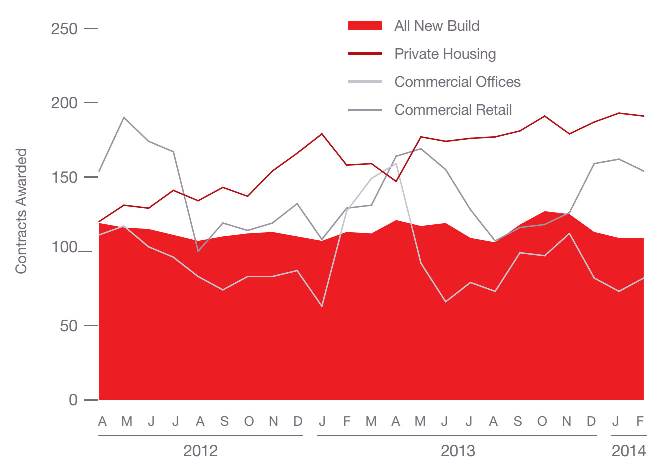


Fig. 2.3 **Contracts Awarded** Source: CPA/Barbour ABI

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

Construction Sector

According to Barbour ABI data on all contract activity, February witnessed a fall in construction levels with the value of new contracts awarded at £4.8 billion, based on a three month rolling average (see Fig. 2.5). This is a decrease of 13.5% from January but a 15.3% increase on the value recorded in February 2013, an indication of a significant upturn in construction activity in the UK in the past year. The number of construction projects within the UK in February was down 19.2% on last month, but this is 12% higher than February 2013.

The majority of the contracts awarded in February by value were in London (see Fig. 2.4), which accounted for 19% of the UK total. Two major commercial projects in the City of London, the International Press Centre redevelopment and the fit out of the UBS office on Broadgate are the main reasons for this. The South East was the next most prominent region with the construction of a data centre in Slough the major reason for this. The North West also recorded high levels of activity in February 2014 with a waste treatment project in Knowsley and a major residential project in Leigh awarded this month.

Type of Projects

Residential had the highest proportion of contracts awarded by value in February with 35% of the total (see Fig. 2.6). This demonstrates the continuing strength of the residential sector within the industry. Commercial & Retail (16%) and Infrastructure (15%) were the next highest sectors this month by value of contracts awarded.

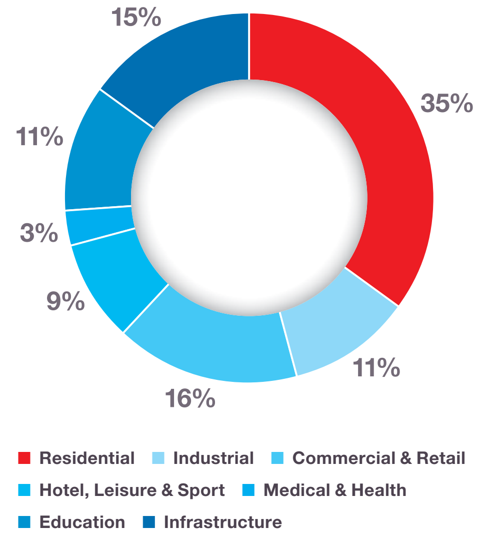
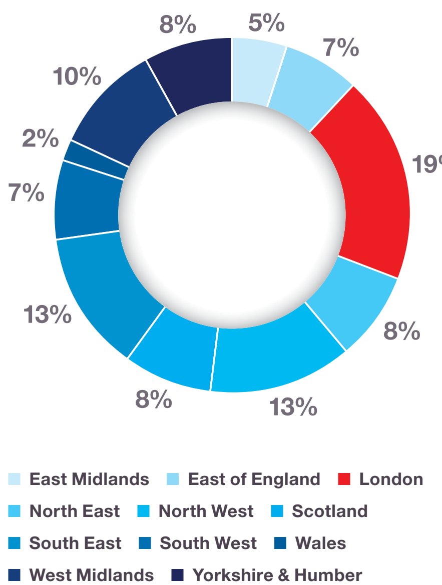


Fig. 2.6 **Type of Projects** Source: Barbour ABI



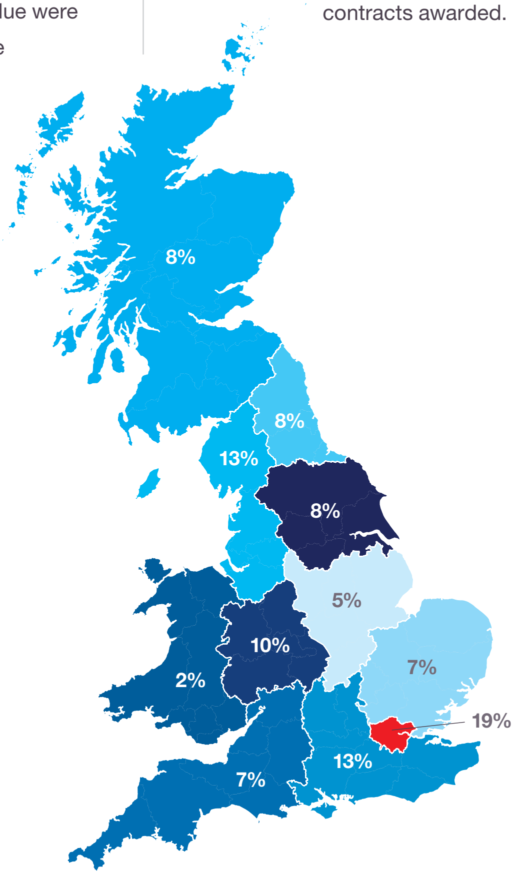


Fig. 2.4 **Locations of Contracts Awarded** Source: Barbour ABI

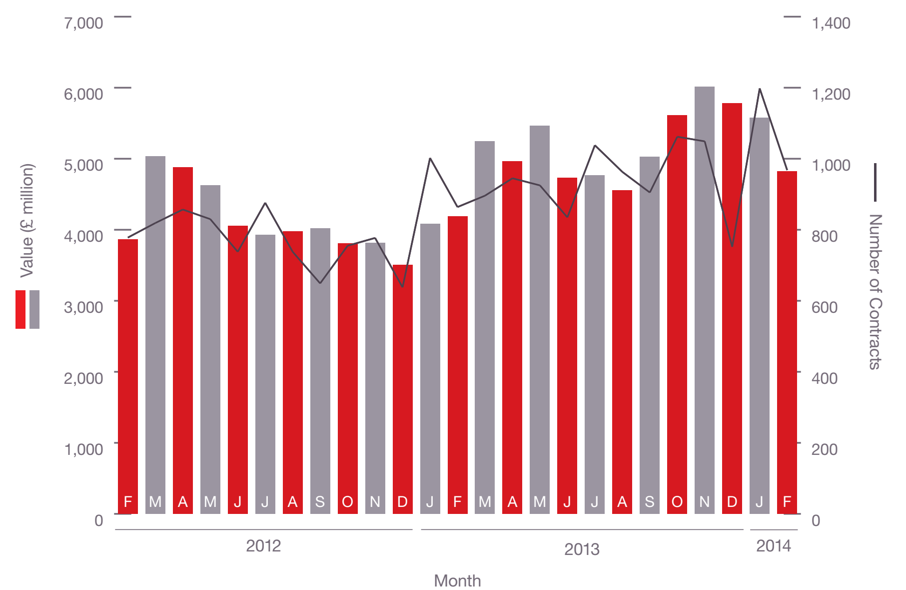


Fig. 2.5 **Construction Activity** Source: Barbour ABI

economic & construction MARKET REVIEW

MARCH 2014

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

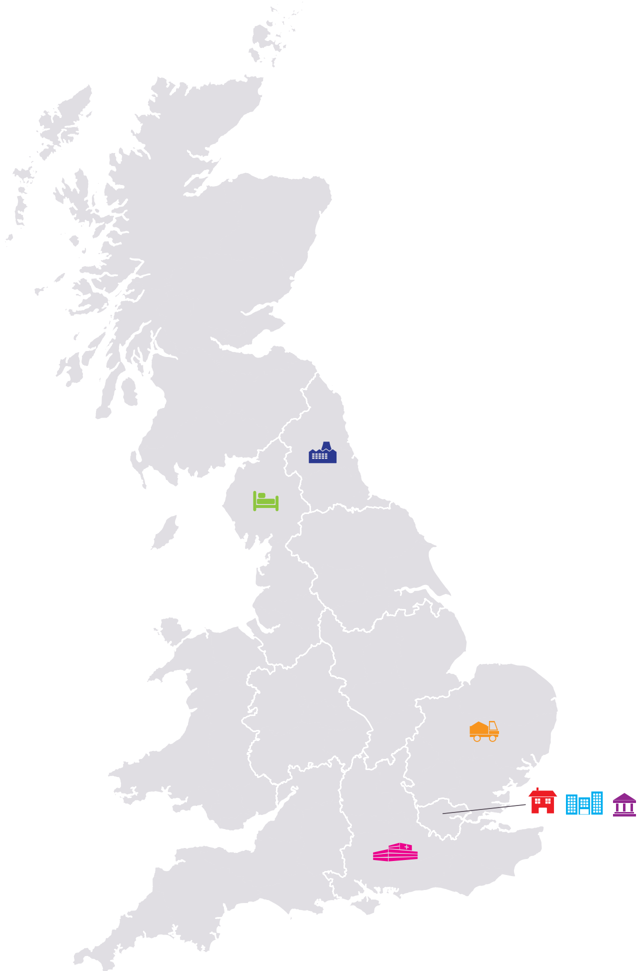
ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

A snippet of this month's regional activity

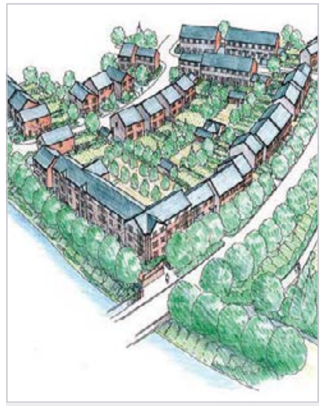
Take a look at what regions have had the most activity.



Residential
Industrial
Infrastructure
Medical & Health
Commercial & Retail
Education
Hotel, Leisure & Sport

PROJECTS IN FOCUS THIS MONTH

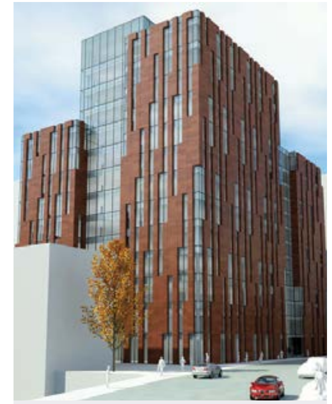
Take a look at these construction projects in focus this month.
Click on one of the projects below to skip to that page.



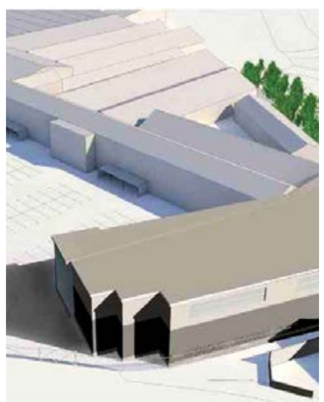
RESIDENTIAL
Deepcar – 367 Houses/32 Flats £40,000,000

INFRASTRUCTURE
Ilkeston Railway Station £15,000,000

COMMERCIAL & RETAIL
UBS Offices – 5 Broadgate – Fit Out £100,000,000



HOTEL, LEISURE & SPORT
New Bailey Street – Hotel/Retail £45,000,000



INDUSTRIAL
Unipart Engineering and Manufacturing Institute £32,000,000

MEDICAL & HEALTH
hub West Scotland – Maryhill Health Centre £11,500,000

EDUCATION
Edgbaston Central Campus Development – Library £37,000,000

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

RESIDENTIAL

RESIDENTIAL FALLS SLIGHTLY IN FEBRUARY

The residential sector experienced a slight fall in contract award values in February but are still significantly higher than last year.

Activity in the residential sector remained strong in February with a total value of contract awards at £1.83 billion, based on a three month rolling average (see Fig. 3.1). This is a decrease of 2.3% compared to January and is 72% higher than February 2013, indicating the sharp upturn activity experienced in the sector over the last 12 months. Importantly, the number of units associated with residential contracts awarded increased 1.8% between January and February 2014, based on a three month rolling average, and were 51.5% higher than February 2013, confirming the scale of the upturn in the market over the last year.

Sector Performance

A series of positive news stories demonstrates the continued improvement in the sectors performance with all the major house builders returning strong results in the past month. The star performer was Barratt Homes reporting a 162% increase in profit for the six months to the end of December 2013. Bovis and Taylor Wimpey both reported full year profit increases of 39% and Persimmon announced an increase of 49%.

Within these results the house builders acknowledged the role that stimulus packages such as Help to Buy have played in returning such strong results and while the debate continues over these schemes the evidence of increased profits is strong. The latest Halifax House Price Index highlighted the extent of the upturn in the housing market, with prices rising by 7.9% since February 2013, the fastest annual increase since October 2007.

Projects by region

As expected, it is London that is the main location of activity in this sector, accounting for 17.5% of the value of contracts awarded this month, a slight decrease of 1.4% from the same month last year (see Fig. 3.2 & 3.4). The North West was the other major location of residential development by value in February accounting for 16.1% of contracts awarded, a 7.5% increase from the corresponding month last year.

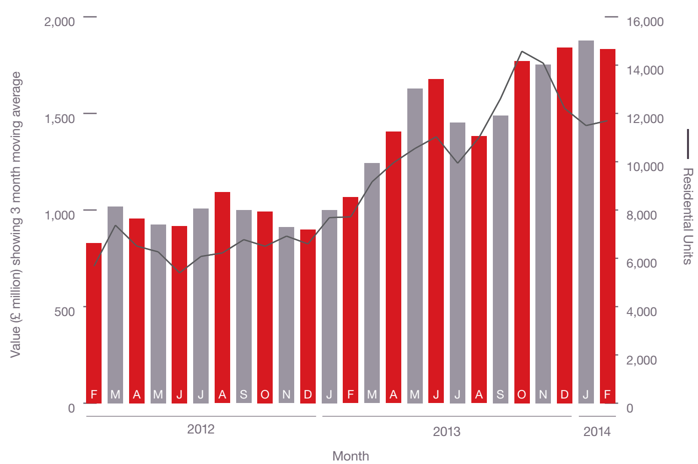


Fig. 3.1 **Project Value showing 3 month moving average** Source: Barbour ABI

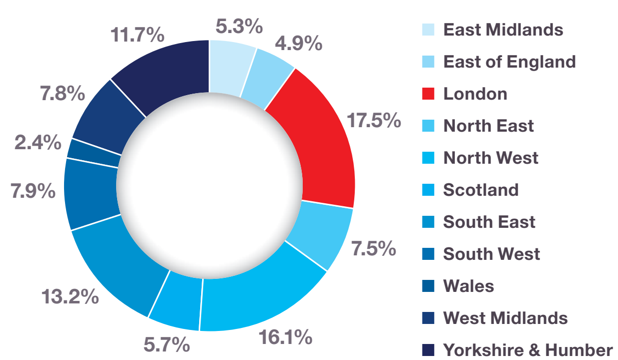


Fig. 3.2 **Value of Contracts by Region** Source: Barbour ABI

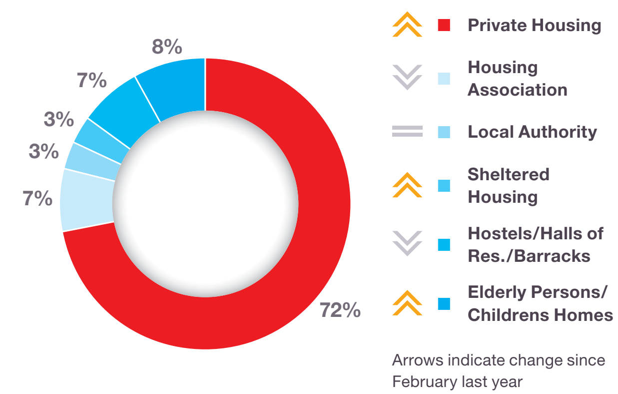


Fig. 3.3 **Type of Projects Awarded** Source: Barbour ABI

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com
Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

The map and figures show how the activity has changed since February 2013		+2.8%	Scotland
-1.2%	East Midlands	-10.5%	South East
-0.9%	East of England	-3.2%	South West
-1.4%	London	-1.9%	Wales
+4.7%	North East	-4.3%	West Midlands
+7.5%	North West	+8.5%	Yorkshire & Humber *HOTTEST REGION*

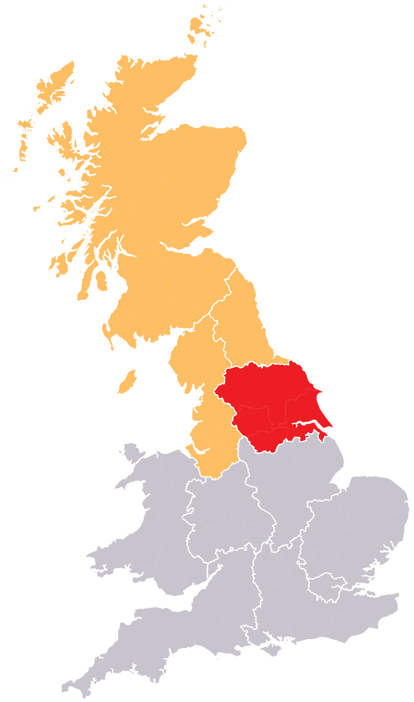


Fig. 3.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

Type of Projects

The types of projects awarded in the residential sector were dominated by private housing, which accounted for 72% of residential contracts, a 3% increase from the same month last year (see Fig. 3.3). Elderly Persons/Children's Homes was the next most prominent sector accounting for 8% of the contracts awarded, a 2% increase from last year. This was largely attributable to the Earlsden Park Retirement Village in Coventry which has a contract value of £30 million.

> "Importantly, the number of units associated with residential contracts awarded increased 1.8% between January and February 2014.

PROJECT IN FOCUS

www.dla-architects.net

Deepcar – 367 Houses/32 Flats £40,000,000

County	South Yorkshire
Primary Category Sector	Residential
Government Region	Yorkshire & Humber
Start Date	June 2014
End Date	June 2020
Contract Award Date	February 2014
Funding	Private
Stage	Detail Planning / Contract
Contractor	JS Bloor (Tamworth) Limited

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

TOP TEN Key Clients
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	196	3513
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	165	3224
3	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	173	2069
4	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	53	1030
5	St Modwen Developments Plc	Sir Stanley Clarke House, 7 Ridgeway, Quinton Business Park, Birmingham, West Midlands, B32 1AF	0121 222 9400 (CTPS)	15	938
6	Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG		19	926
7	Homes & Communities Agency	Arpley House, 110 Birchwood Boulevard, Birchwood, Warrington, Cheshire, WA3 7QH	0300 1234 500	15	915
8	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 / 678 9980	88	863
9	The Peel Group	Peel Management, Peel Dome, The Trafford Centre, Manchester, Greater Manchester, M17 8PL	0161 629 8200	4	821
10	Fairfield Partnership	Chells Manor, Chells Lane, Stevenage, Hertfordshire, SG2 7AA	01438 311411	2	753

TOP TEN Key Architects
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	7	1066
2	Simpson Architects	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000 (CTPS)	3	925
3	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	49	871
4	RPS Group Plc	20 Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 438000	17	850
5	5plus Architects	5th Floor Grange House, John Dalton Street, Manchester, Greater Manchester, M2 6FW	0161 228 0211	2	687
6	Aedas Architects Limited	5-8 Hardwick Street, City, London, EC1R 4RG	020 7837 9789	1	650
7	Foster & Partners	Riverside, 22 Hester Road, Battersea, London, SW11 4AN	020 7738 0455	2	650
8	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	10	613
9	Faulks Perry Culley & Rech	Lockington Hall, Lockington, Derby, Derbyshire, DE74 2RH	01509 672772	14	592
10	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	59	548

TOP TEN Key Contractors
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	219	3795
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	168	3060
3	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	180	1917
4	Galliford Try Construction South	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	84	950
5	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 / 678 9980	88	901
6	Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG		17	882
7	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	31	824
8	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	56	706
9	Redrow Group Plc	Redrow House, St David's Park, Hawarden, Deeside, Clwyd, CH5 3RX	01244 520044	56	676
10	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	49	611

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

INFRASTRUCTURE

FURTHER FALL IN INFRASTRUCTURE CONTRACT VALUES

The value of infrastructure contracts fell on a monthly and yearly basis but longer term trends are positive.

The drop in the value of contracts awarded in the infrastructure sector continued in February with the total value awarded at £1.1 billion based on a three month rolling average (see Fig. 4.1). This is 34.3% lower than the previous month and 19% lower than February 2013. In the three months to February, the total value of contract awards was £5 billion based on a three month rolling average. This is 1.5% lower than the previous three months but 23% higher than the same period of 2013. This indicates a longer term improvement in the infrastructure sector this year but the lower values recorded in February will be closely monitored to assess its potential in 2014.

Projects by region

The main location of infrastructure projects this month was the East of England with 17.7% of the total value, an increase of 13.4% from February 2013 (see Fig. 4.2 & 4.4). Scotland is the other major location of infrastructure projects this month accounting for 14.7% of projects awarded, a 6.7% increase from the corresponding month last year.

Type of Projects

Utilities projects dominate the infrastructure sector this month accounting for 45% of the total value of contracts awarded (see Fig. 4.3). The Merseyside Waste Treatment Plant and the West Coast Mainline Electrical Supply Upgrade are two projects contributing to this.

> “The drop in the value of contracts awarded in the infrastructure sector continued in February.

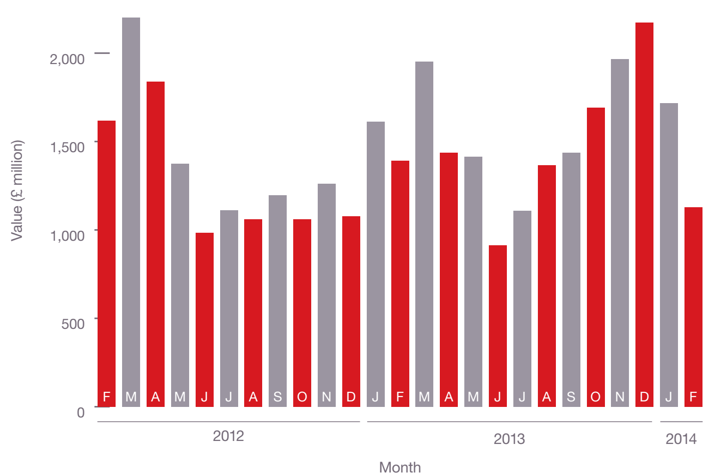


Fig. 4.1 **Project Values** Source: Barbour ABI

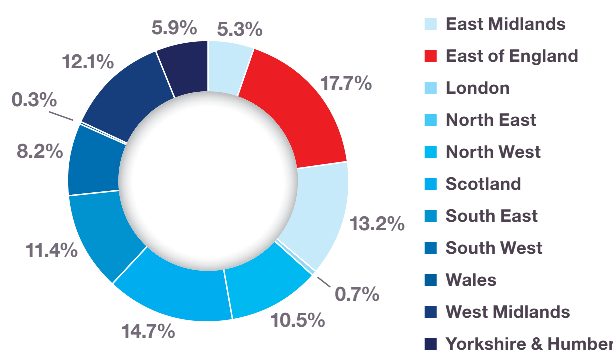


Fig. 4.2 **Value of Contracts by Region** Source: Barbour ABI

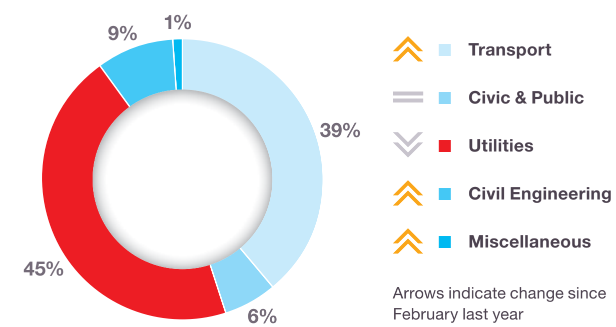


Fig. 4.3 **Type of Projects Awarded** Source: Barbour ABI

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

The map and figures show how the activity has changed since February 2013		+6.7%	Scotland
+2.5%	East Midlands	-2.9%	South East
+13.4%	East of England *HOTTEST REGION*	-1.0%	South West
-3.0%	London	-2.7%	Wales
-1.3%	North East	+9.8%	West Midlands
-24.4%	North West	+2.9%	Yorkshire & Humber

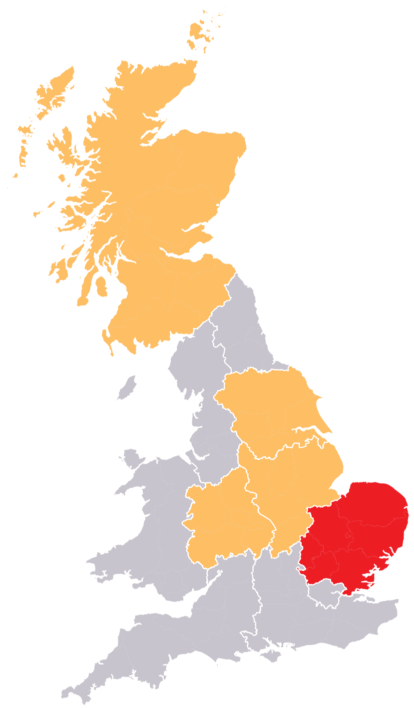


Fig. 4.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

Outlook

The National Infrastructure Plan updated the top 40 infrastructure projects within the UK and continues to provide a potential boost to the infrastructure sector. Most significant was the potential for private pension funds to help deliver infrastructure projects as well as a series of renewable energy deals and confirmation that the A14 project will now be publically funded. This suggests that the sector has the potential to grow over the coming years but it will be necessary to monitor the timescales attached to these projects to ensure they commence as planned.

> "The main location of infrastructure projects this month was the East of England with 17.7% of the total value, an increase of 13.4% from February 2013.

PROJECT IN FOCUS

Ilkeston Railway Station
£15,000,000

County	Nottinghamshire
Primary Category Sector	Infrastructure
Government Region	East Midlands
Start Date	July 2014
End Date	January 2015
Contract Award Date	February 2014
Funding	Mainly Public
Stage	Detail Approval/Contract
Contractor	Carillion Plc

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ

T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

FURTHER FALL IN INFRASTRUCTURE CONTRACT VALUES

TOP TEN Key Clients February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	69	962
2	Sellafield Limited (AMEC)	Sellafield Sites, Seascale, Cumbria, CA20 1PG	01946 728333 (CTPS)	1	935
3	Flintshire County Council	County Hall, Mold, Clwyd, CH7 6NB	01352 702121	1	800
4	Highways Agency	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	08459 55 65 75	54	761
5	E.ON Limited	Newstead Court, Little Oak Drive, Annesley, Nottingham, Nottinghamshire, NG15 0DR	024 7618 1684	1	700
6	Crossrail Limited	25 Canada Square, Canary Wharf, Poplar, London, E14 5LQ	020 3229 9100	7	657
7	Tidal Lagoon (Swansea Bay) plc	Unit 6, J Shed, Kings Road, Swansea, West Glamorgan, SA1 8PL	01242 224101 (TPS)	1	650
8	Intergen Limited	81 George Street, Edinburgh, Lothian, EH2 3ES	0131 624 7500	1	600
9	Gateway Energy Centre Limited	Manorway, Stanford Le Hope, Essex, SS17 9PD	0800 169 5290	1	600
10	Spalding Energy Expansion Limited	21 Holborn Viaduct, City, London, EC1A 2AT	01775 717500	1	500

TOP TEN Key Architects February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Studio E Architects Limited	Palace Wharf, Rainville Road, Chiswick, London, W6 9HN	020 7385 7126	3	865
2	HLN Architects	21-22 Neptune Court, Vanguard Way, Cardiff, South Glamorgan, CF24 5PJ	029 2039 8611	1	400
3	WA Fairhurst & Partners	225 Bath Street, Glasgow, Strathclyde, G2 4GZ	0141 204 8800	2	370
4	RPS Group Plc	20 Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 438000	3	266
5	Wilkinson Eyre Architects	33 Bowling Green Lane, City, London, EC1R 0BJ	020 7608 7900	1	248
6	Austin Smith Lord	Port Of Liverpool Building, Pier Head, Liverpool, Merseyside, L3 1BY	0151 227 1083	4	223
7	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	200
8	HB Architects	The Triforium, 17 Warwick Street, Rugby, Warwickshire, CV21 3DH	01788 576137	1	120
9	Architecture & Planning Solutions	10 Forest Drive, Keston Park, Keston, Kent, BR2 6EF	01689 852622 (TPS)	1	116
10	Stockport Metropolitan Borough Council	Town Hall, Edward Street, Stockport, Cheshire, SK1 3XE	0161 480 4949	1	100

TOP TEN Key Contractors February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	12	1,061
2	Costain Limited	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	13	746
3	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	28	601
4	Alstom Hydro Limited	Newbold Road, Rugby, Warwickshire, CV21 2NH	01788 577111 (TPS)	1	401
5	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	15	388
6	Burmeister & Wain Scandinavian Contractor A/S	Gydevang 35, PO Box 235, DK-3450, Allerod, Denmark	0045 48140022	3	380
7	Amey Group	The Sherard Building, Edmund Halley Road, Oxford Science Park, Oxford, Oxfordshire, OX4 4DQ	01865 713100	11	373
8	Lagan Group	21-23 Sydenham Road, Belfast, Northern Ireland, BT3 9HA	028 9026 1000	2	354
9	Ferrovial Agroman, S. A.	Calle Ribera del Loira 42 Campo de las Naciones, Madrid, Spain, 28042	0034 91 300 85 43	1	350
10	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	19	324

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

COMMERCIAL & RETAIL
SLIGHT FALL IN THE VALUE OF COMMERCIAL CONTRACTS

Contract values in the Commercial & Retail sector decreased this month but are higher than last year.

The value of contracts awarded in the Commercial & Retail market was £664 million in February based on a three month rolling average (see Fig. 5.1). This is a 1% decrease from January but an 11.7% rise from the February 2013 figure. In the three months to February the value of contracts was 7.2% below the previous three months but 28.8% higher than the same period in 2013. The fact that there has been a quarterly fall in the value of commercial projects awarded is concerning but the yearly increase means that the sector is still growing over the longer term.

Projects by region

London was the main location of activity in the sector this month with 43.8% of the value of all contracts awarded, a 7.7% decrease from February 2013 (see Fig. 5.2 & 5.4). This is largely attributable to the two major commercial office projects in the City of London at 5 Broadgate and 1 New Street Square. The South East was the next most significant location of activity accounting for 14.6% of contract value, a 1.4% decrease from the corresponding month last year. This was largely due to the data centre project in Slough awarded in February.

Type of Projects

Offices were the dominant type of project in the sector accounting for 71% of the value of contracts awarded in February 2014 (see Fig. 5.3), though this was an 8% decrease on February 2013. General retailing is the other significant sector with 15% of contract award value, which was unchanged from February 2013.

> London was the main location of activity in the sector this month with 43.8% of the value of all contracts awarded.

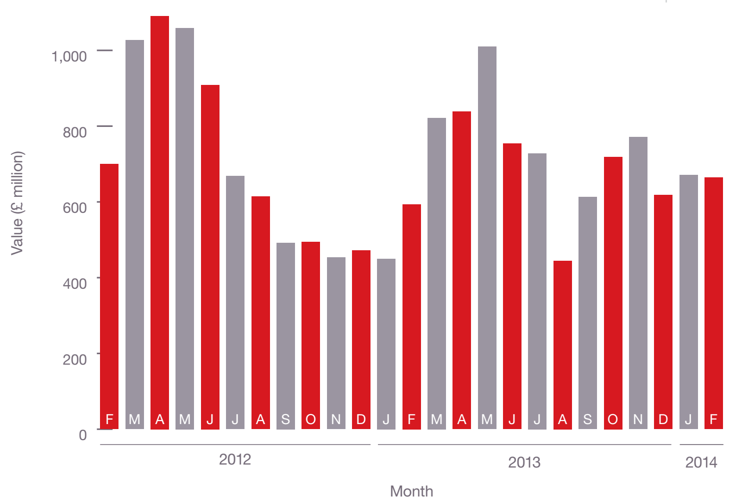


Fig. 5.1 **Project Values** Source: Barbour ABI

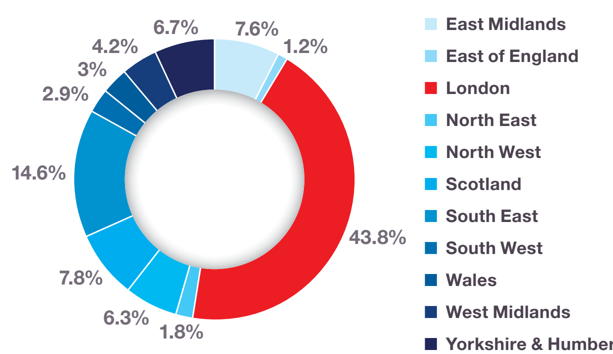


Fig. 5.2 **Value of Contracts by Region** Source: Barbour ABI

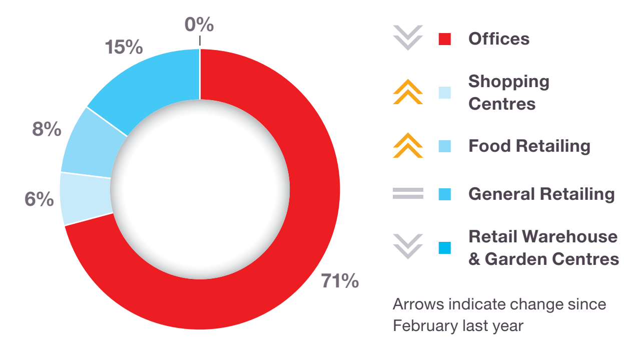


Fig. 5.3 **Type of Projects Awarded** Source: Barbour ABI

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

SLIGHT FALL IN THE VALUE OF COMMERCIAL CONTRACTS

The map and figures show how the activity has changed since February 2013

		+1.2%	Scotland
+1.7%	East Midlands	-1.4%	South East
-1.1%	East of England	-0.2%	South West
-7.7%	London	+2.2%	Wales *HOTTEST REGION*
+1.6%	North East	+1.3%	West Midlands
+0.4%	North West	+2.1%	Yorkshire & Humber

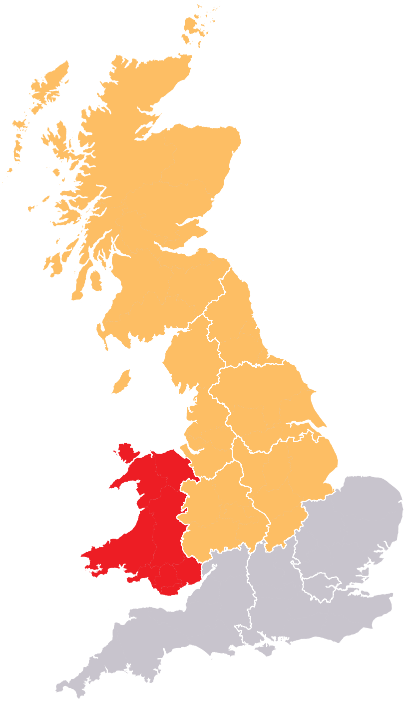


Fig. 5.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

"The value of contracts awarded in the Commercial & Retail market was £664 million in February based on a three month rolling average.

PROJECT IN FOCUS

UBS Offices – 5 Broadgate – Fit Out £100,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	Quarter 1 2015
End Date	April 2016
Contract Award Date	February 2014
Funding	Private
Stage	Contract
Contractor	ISG

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

Barbour ABI
www.barbour-abi.com
Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

SLIGHT FALL IN THE VALUE OF COMMERCIAL CONTRACTS

TOP TEN
Key Clients
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Land Securities Group	5 The Strand, Westminster, London, WC2N 5HR	020 7413 9000 (CTPS)	7	675
2	W R Berkley Insurance (Europe) Limited	2nd Floor, 40 Lime Street, City, London, EC3M 7AW	020 7280 9000	1	500
3	Oxford Properties	6 New Street Square, New Fetter Lane, Suite 1200, City, London, EC4A 3BF	020 7822 8300	2	350
4	Almacantar	3 Quebec Mews, City, London, W1H 7NX	020 7535 2900 (CTPS)	1	350
5	Brookfield Office Properties	Brookfield Place New York, 250 Vesey St, 15th Floor, New York, 10281	001 212 417 7000	1	340
6	Westfield Shoppingtowns Limited	Level 6, Midcity Place, 71 High Holburn, Westminster, London, WC1V 6EA	020 7061 1400	3	304
7	Google UK Limited	Belgrave House, 76 Buckingham Palace Road, Westminster, London, SW1W 9TQ	020 7031 3000 (TPS)	1	300
8	Capital & Counties Properties PLC	Covent Garden London, 4th Floor, Russell Chambers, The Piazza, Westminster, London, WC2E 8RA	020 7395 3765	1	240
9	Intu Group	40 Broadway, Westminster, London, SW1H 0BU	020 7887 4220 (CTPS)	1	240
10	Victoria Centre	222 Victoria Centre, Nottingham, Nottinghamshire, NG1 3QN	0115 912 1111	1	240

TOP TEN
Key Architects
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Make Architects	13 Fitzroy Street, Westminster, London, W1T 4BQ	020 7636 5151	6	538
2	Kohn Pederson Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	2	501
3	Allford Hall Monaghan Morris	2nd Floor, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	7	430
4	Conran & Partners	22 Shad Thames, Southwark, London, SE1 2YU	020 7403 8899	1	350
5	Mather Architects	123 Camden High Street, Camden Town, London, NW1 7JR	020 7284 1727 (TPS)	1	350
6	PLP Architecture	2 Seething Lane, London, EC3N 4AT	020 3006 3900	1	350
7	Lynch Architects Limited	1 Amwell Street, Pentonville, Southwark, London, EC1R 1UL	020 7278 2553	2	310
8	Hadfield Cawkwell Davidson	17 Broomgrove Road, Sheffield, South Yorkshire, S10 2LZ	0114 266 8181	8	310
9	AEW Architects & Designers Limited	The Zenith Building, Spring Gardens, Manchester, Greater Manchester, M2 1AB	0161 214 4370	10	254
10	Jones Architects	121 Great Portland Street, Westminster, London, W1W 6QL	020 7255 1150	4	251

TOP TEN
Key Contractors
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	8	606
2	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	11	524
3	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	73	483
4	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	6	477
5	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	13	345
6	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	26	315
7	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	34	288
8	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	11	267
9	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	11	248
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	52	234

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com
Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

HOTEL, LEISURE & SPORT

INCREASE IN CONTRACT VALUE IN FEBRUARY

The Hotel, Leisure & Sport sector showed monthly and yearly rises in contract value demonstrating a better overall performance.

Contract award levels in the Hotel, Leisure & Sport sector were £512 million in February, based on a three month rolling average (see Fig. 6.1). This was 1.8% higher than January and 25.3% higher than February 2013. In the three months to February the value of contracts was 3.8% higher than the previous three months. This was an increase of 5.9% compared to the same period in 2013 indicating an upturn in activity over the year.

Projects by region

February was a particularly strong month in this sector for the North West (see Fig. 6.2 & 6.4) which was the location of 35.6% of the value of contracts awarded, an increase of 28.8% from February 2013. This is mainly down to the award of a hotel project at City Wharf in Salford which was awarded this month at a value of £45 million and a hotel development in Albert Dock worth £42.5 million.

Type of Projects

The North West hotel contracts mean that hotels/motels are the highest proportion of contracts awarded this month at 55% of total value which is 32% higher than February 2013 (see Fig. 6.3). The other major type of project awarded this month was leisure centres which equated to 14% of the total value, a 2% increase from February 2013.

> In the three months to February the value of contracts was 3.8% higher than the previous three months.

Fig. 6.1 **Project Values** Source: Barbour ABI

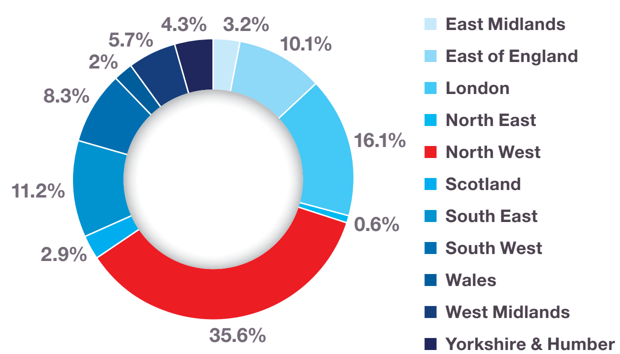


Fig. 6.2 **Value of Contracts by Region** Source: Barbour ABI

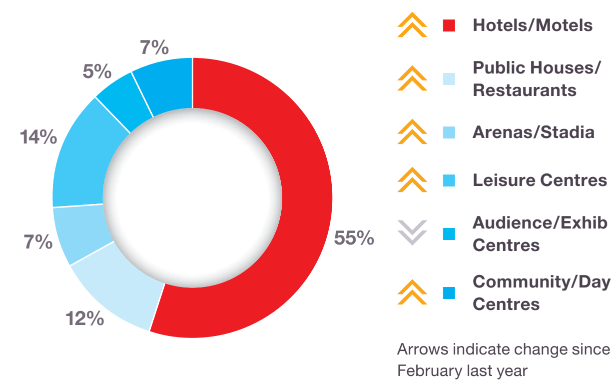


Fig. 6.3 **Type of Projects Awarded** Source: Barbour ABI

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

The map and figures show how the activity has changed since February 2013		-5.3%	Scotland
-0.2%	East Midlands	+5.7%	South East
+8.3%	East of England	+3.6%	South West
-16.8%	London	+1.7%	Wales
-1.0%	North East	-27.5%	West Midlands
+28.8%	North West *HOTTEST REGION*	+2.8%	Yorkshire & Humber

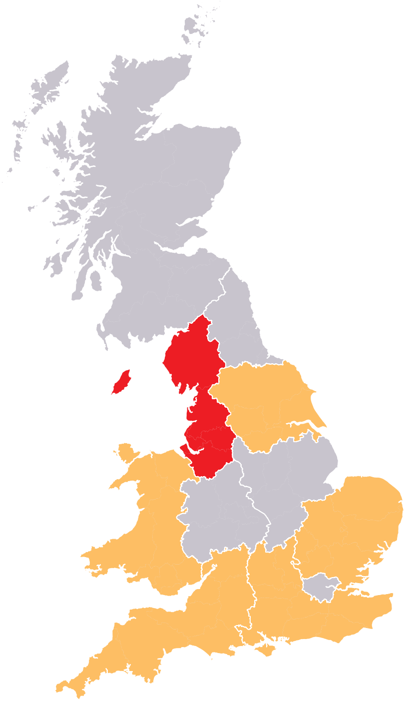
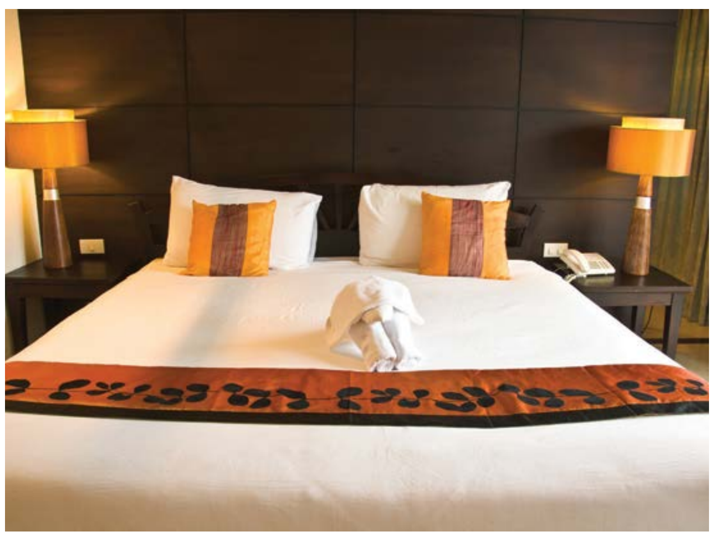


Fig. 6.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI



> The North West hotel contracts mean that hotels/motels are the highest proportion of contracts awarded this month at 55% of total value.

PROJECT IN FOCUS

New Bailey Street – Hotel/Retail
£45,000,000

County	Greater Manchester
Primary Category Sector	Hotel, Leisure & Sport
Government Region	North West
Start Date	Quarter 3 2014
End Date	Quarter 1 2016
Contract Award Date	February 2014
Funding	Private
Stage	Detail Approval/Contract
Contractor	McAleer & Rushe Limited

economic & construction MARKET REVIEW

MARCH 2014

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ

T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

INCREASE IN CONTRACT VALUE IN FEBRUARY

TOP TEN Key Clients
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	London Legacy Development Corporation	Level 10, 1 Stratford Place, Montfichet Road, Stratford, London, E20 1EJ	020 3288 1800	3	487
2	Cardiff County Council	County Hall, Atlantic Wharf, Cardiff, South Glamorgan, CF10 4UW	029 2087 2087	2	216
3	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499	32	175
4	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	3	165
5	London Borough of Newham	Third Floor, West Side, 1000 Dockside Road, Victoria Dock, London, E16 2QU	020 8430 2000	1	154
6	Olympic Delivery Authority (ODA)	23rd Floor, 1 Churchill Place, Canary Wharf, Poplar, London, E14 5LN	020 3201 2000	1	154
7	Shelbourne Senior Living	9 Clifford Street, Westminster, London, W1S 2FT	020 7292 3626	1	150
8	Essex County Cricket Club	New Writtle Street, Chelmsford, Essex, CM2 0PG	01245 252420 (CTPS)	1	100
9	Newport City Council	Civic Centre, Newport, Gwent, NP20 4UR	01633 656656 (CTPS)	1	100
10	Prime Investors Capital Limited	33 St James Square, Westminster, London, SW1Y 4JS	020 3178 4660	1	100

TOP TEN Key Architects
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Populous	14 Blades Court, Deodar Road, Putney, London, SW15 2NU	020 8874 7666	3	244
2	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	2	216
3	Hole Architects	9th Floor, 69 Park Lane, Croydon, Surrey, CR0 1JD	020 8662 4600	2	216
4	LDA Design	Worton Rectory Park, Oxford, Oxfordshire, OX29 4SX	01865 887050 (TPS)	1	154
5	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA		7	152
6	Murphy Architects	The Breakfast Mission, 15 Old Fishmarket Close, Edinburgh, Lothian, EH1 1RW	0131 220 6125 (CTPS) (TPS)	1	150
7	Sutherland Hussey Architects	122 Giles Street, Edinburgh, Lothian, EH6 6BZ	0131 553 4321 (CTPS)	1	150
8	Comprehensive Design Architects	16 Moray Place, Edinburgh, Lothian, EH3 6DT	0131 225 1111 (CTPS) (TPS)	1	150
9	Jones Architects	121 Great Portland Street, Westminster, London, W1W 6QL	020 7255 1150	3	135
10	Blair Associate Architecture Limited	88 Golden Lane, City, London, EC1Y 0UA	020 7490 4666	3	112

TOP TEN Key Contractors
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	7	304
2	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	20	226
3	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	8	224
4	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	11	200
5	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	9	150
6	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	8	112
7	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	11	109
8	Anglo-Holt Group Limited	150 Birmingham Road South, West Bromwich, West Midlands, B70 6QT	0121 525 6717	14	94
9	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	7	92
10	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	4	90

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com
Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

INDUSTRIAL

ACTIVITY FALLS BACK IN THE INDUSTRIAL SECTOR

The Industrial sector experienced a monthly fall in contract values but performance has improved since last year.

Activity in the industrial sector dropped in February with the value of contracts awarded at £299 million, based on a rolling three month average (see Fig. 7.1). This is a fall of 17.3% on the value in January but is 47.5% above the figure recorded this time last year. In the three months to February the total value of contracts was £1.01 billion which was 12.8% below the previous three months but 78.6% above the same quarter last year.

Projects by region

The North East is the region with the highest value of activity this month with 43.1% of the contracts awarded, an increase of 36.8% on February 2013 (see Fig. 7.2 & 7.4). This was principally due to the award of a contract for a chemical plant in Billingham worth £150 million. The West Midlands also experienced high value of contract awards this month with 19.6% of the total, an increase of 11.6%. Scotland was the other region with a significant proportion of contracts awarded with 11.9% of the value, a 1.5% decrease from last year.

Type of Projects

The types of project awarded in the sector were predominantly heavy industrial (see Fig. 7.3) which accounted for 62% of contract value in February 2014, a 45% increase on the corresponding month last year. This is largely due to the chemical plant in Billingham awarded this month. Light industrial projects are the next highest category of contract award with 18% of the total value, a 5% increase from February 2013. Warehouse/storage projects were 17% of the total value although this was a 29% decrease from the corresponding month last year.

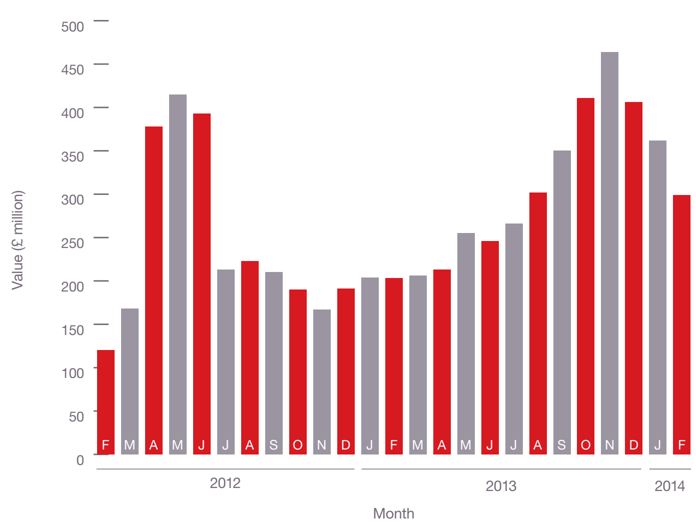


Fig. 7.1 **Project Values** Source: Barbour ABI

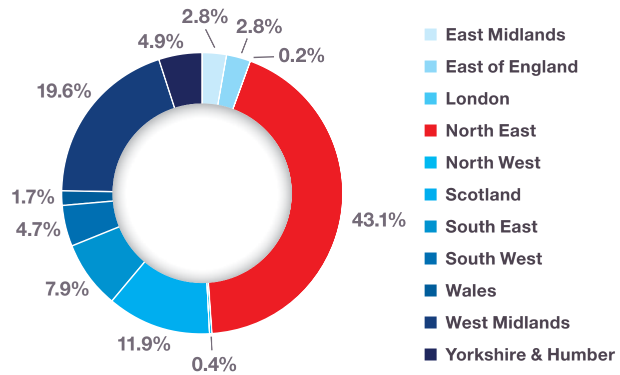


Fig. 7.2 **Value of Contracts by Region** Source: Barbour ABI

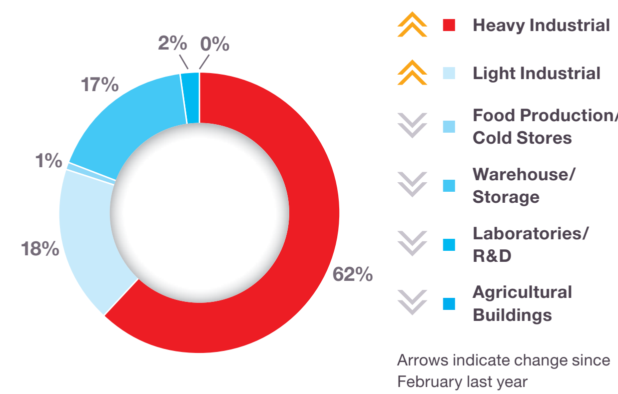


Fig. 7.3 **Type of Projects Awarded** Source: Barbour ABI

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ

T: 0151 353 3500

E: info@barbour-abi.com

@BarbourABI

ACTIVITY FALLS BACK IN THE INDUSTRIAL SECTOR

The map and figures show how the activity has changed since February 2013

		-1.5%	Scotland
-6.0%	East Midlands	-1.0%	South East
-3.7%	East of England	+3.7%	South West
+0.2%	London	+1.3%	Wales
+36.8%	North East *HOTTEST REGION*	+11.6%	West Midlands
-14.9%	North West	-26.4%	Yorkshire & Humber

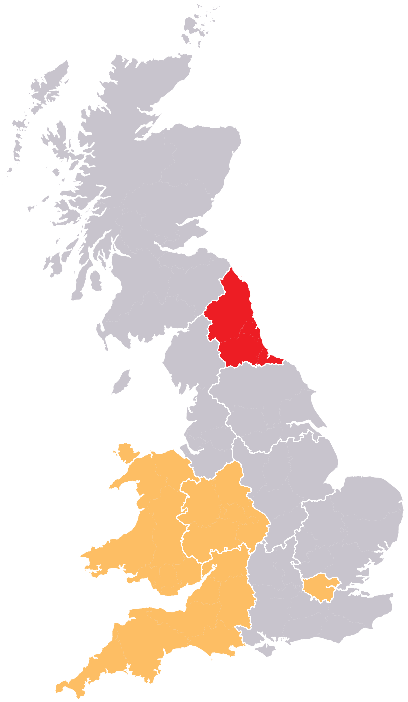


Fig. 7.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

PROJECT IN FOCUS

Unipart Engineering and Manufacturing Institute £32,000,000

County	West Midlands
Primary Category Sector	Industrial
Government Region	West Midlands
Start Date	February 2014
End Date	November 2014
Contract Award Date	February 2014
Funding	Private
Stage	Detail Approval/Contract
Contractor	Lindum Construction

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

ACTIVITY FALLS BACK IN THE INDUSTRIAL SECTOR

TOP TEN Key Clients

February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	The Peel Group	Peel Management, Peel Dome, The Trafford Centre, Manchester, Greater Manchester, M17 8PL	0161 629 8200	2	403
2	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	6	202
3	British Airways Plc	PO Box 365, Uxbridge, Middlesex, UB7 0GB	0844 493 0787	1	178
4	SNF Gas and Oil Limited	Solutions House, Ripley Close, Normanton Industrial Estate, Normanton, West Yorkshire, WF6 1TB	01924 311000	2	165
5	IM Properties PLC	IM House, South Drive, Coleshill, Birmingham, West Midlands, B46 1DF	0121 730 8050	2	151
6	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	6	120
7	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	4	100
8	BP Exploration Operating Company	Sullom Voe Terminal, Mossbank, Shetland, Islands, ZE2 9TU		1	100
9	Merchant Place Developments	The Studio, Sinclair Court, Darrell Street, Newcastle Upon Tyne, Tyne And Wear, NE13 7DS	0191 236 1013	1	82
10	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	8	70

TOP TEN Key Architects

February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	7	235
2	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	4	165
3	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	9	162
4	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	3	122
5	Chetwood Associates	12-13 Clerkenwell Green, City, London, EC1R 0QJ	020 7490 2400	4	111
6	Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	13	91
7	Cornish Architects	Peer House, 8-14 Verulam Street, Westminster, London, WC1X 8LZ	020 7400 2120	3	87
8	PRC Architects Limited	5 St Mary's Road, Surbiton, Surrey, KT6 4JG	020 8399 5188	3	81
9	Dalkin Scotton Partnership	305 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	2	73
10	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	2	68

TOP TEN Key Contractors

February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	17	228
2	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	4	227
3	VolkerWessels UK Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	6	156
4	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	4	131
5	Shepherd Construction Limited	Frederick House, Fulford Road, York, North Yorkshire, YO10 4EA	01904 634431	2	122
6	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	6	101
7	Jacobs Limited	Jacobs House, 427 London Road, Earley, Reading, Berkshire, RG6 1BL	01189 635 331	1	100
8	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	4	99
9	Henry Boot PLC	Banner Cross Hall, Ecclesall Road, Sheffield, South Yorkshire, S11 9PD	0114 255 5444	6	93
10	Gallagher Group Limited	Leitrim House, Coldharbour Lane, Aylesford, Maidstone, Kent, ME20 7NS	01622 716543	2	86

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com
Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

MEDICAL & HEALTH

INCREASE IN VALUE OF CONTRACTS IN FEBRUARY

The value of Medical & Health contracts increased in February month-on-month but are still below those recorded last year.

Levels of activity in the Medical & Health sector were up slightly by 2% in February 2014 compared to last month, with the total value of contracts awarded £90 million based on a three month rolling average (see Fig. 8.1). This is 29.9% lower than the levels in February 2013. In the three months to February the value of contracts are down by 37% on the previous three months but 6.5% up on the same period in 2013 indicating a modest longer term improvement in the sectors performance.

Projects by region

The South East was the main location of development in the sector this month capturing 33.6% of activity, a substantial 27.5% increase from February 2013 (see Fig. 8.2 & 8.4). The East of England was the other notable location of activity for medical and health projects, registering 14.1% of activity by value in February 2014, a 10.4% increase from last year.

Type of Projects

Public hospitals are the dominant types of contracts within the sector accounting for 77% of the value of contracts in February 2014, a 1% decrease from the same month last year (see Fig. 8.3). Surgeries, health & medical centres accounted for 9% of the value of contracts this month which was an 8% decrease from February 2013.

> The South East was the main location of development.

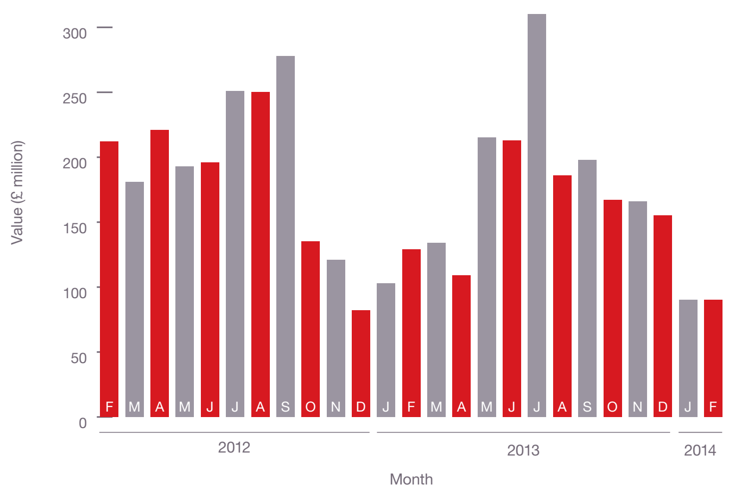


Fig. 8.1 **Project Values** Source: Barbour ABI

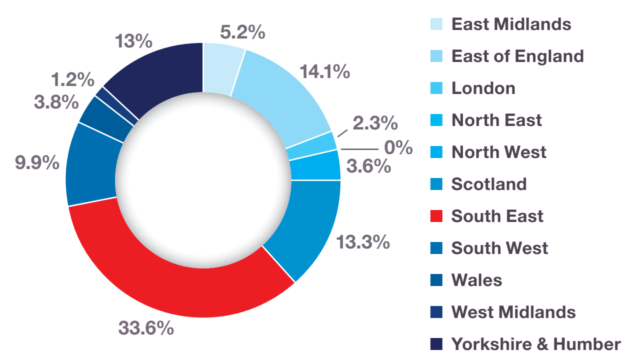


Fig. 8.2 **Value of Contracts by Region** Source: Barbour ABI

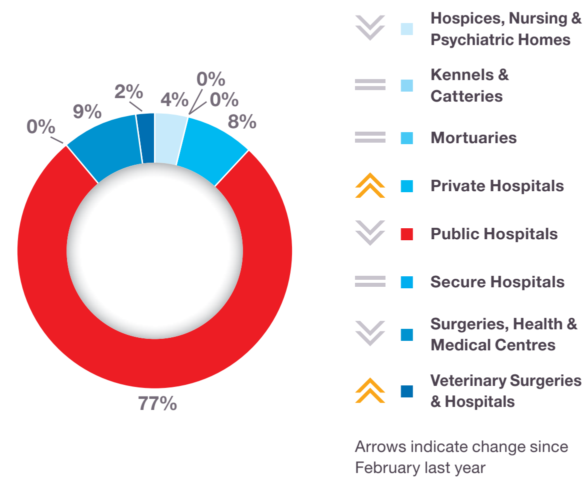


Fig. 8.3 **Type of Projects Awarded** Source: Barbour ABI

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ

T: 0151 353 3500

E: info@barbour-abi.com

@BarbourABI

INCREASE IN VALUE OF CONTRACTS IN FEBRUARY

The map and figures show how the activity has changed since February 2013

+10.1%	Scotland	-2.5%	East Midlands
+27.5%	South East *HOTTEST REGION*	+10.4%	East of England
+7.7%	South West	-24.5%	London
+3.4%	Wales	-1.5%	North East
-24.0%	West Midlands	-0.6%	North West
-6.0%	Yorkshire & Humber		

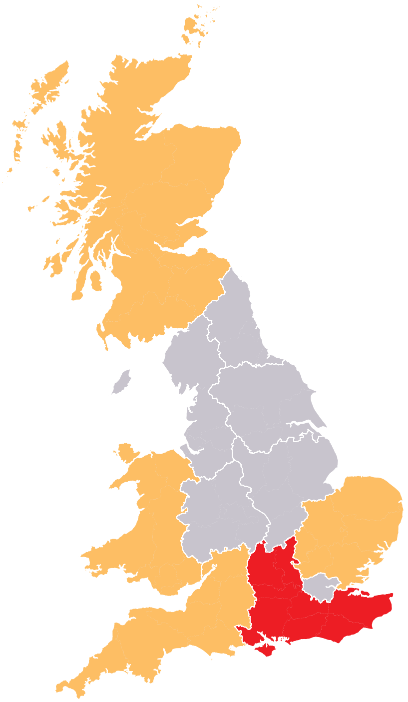


Fig. 8.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

Outlook

The National Infrastructure Plan 2012 commits £4.6 billion in 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 which suggests that this sector will improve in the medium term. The commitment to continue to protect health budgets was included in the latest Autumn Statement indicating this spending will occur.

> "Public hospitals are the dominant types of contracts.

PROJECT IN FOCUS

hub West Scotland – Maryhill Health Centre
£11,500,000

County	Strathclyde
Primary Category Sector	Medical & Health
Government Region	Scotland
Start Date	June 2014
End Date	December 2015
Contract Award Date	February 2014
Funding	Public
Stage	Detail Approval/Contract
Contractor	Morgan Sindall (Construction) Plc

economic & construction MARKET REVIEW

MARCH 2014

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

INCREASE IN VALUE OF CONTRACTS IN FEBRUARY

TOP TEN Key Clients
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Royal Liverpool and Broadgreen Hospital NHS Trust	Prescot Street, Liverpool, Merseyside, L7 8XP	0151 706 2000	2	336
2	Cwm Taff NHS Trust	Prince Charles Hospital, Gurnos, Merthyr Tydfil, Mid Glamorgan, CF47 9DT	01685 721721	1	120
3	West London Mental Health NHS Trust	Broadmoor Hospital, Crowthorne, Berkshire, RG45 7EG	01344 773111	1	115
4	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)	1	42
5	NHS Forth Valley	Stirling Community Hospital, Livilands Gate, Stirling, Stirlingshire, FK8 2AU	01786 434000	2	31
6	NHS Greater Glasgow and Clyde Health Board	Gartnavel Royal Hospital, 1055 Great Western Road, Glasgow, Strathclyde, G12 0XH	0141 211 3600	5	30
7	Benenden Hospital	Goddards Green Road, Benenden, Cranbrook, Kent, TN17 4AX	01580 240333	1	27
8	Darlington Memorial Hospital NHS Foundation	Darlington Memorial Hospital, Hollyhurst Road, Darlington, County Durham, DL3 6HX	01325 380100	3	26
9	Aintree University Hospitals NHS Foundation Trust	Aintree University Hospital, Lower Lane, Aintree, Liverpool, Merseyside, L9 7AL	0151 525 5980	2	24
10	Kings College Hospital NHS Trust	Kings College Hospital, Denmark Hill, Camberwell, London, SE5 9RS	020 3299 9000	4	23

TOP TEN Key Architects
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	NBBJ	The Clove Building, 4-6 Maguire Street, Greenwich, London, SE1 2NQ	020 7939 3700	1	335
2	HKS International Limited	82 Dean Street, Westminster, London, W1D 3SP	020 7292 9494 (TPS)	1	335
3	Oxford Architects Partnership	Bagley Croft, Hinksey Hill, Oxford, Oxfordshire, OX1 5BS	01865 329100 (TPS)	1	115
4	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA		5	57
5	P & HS Architects	The Old Station, Station Road, Stokesley, Middlesbrough, Cleveland, TS9 7AB	01642 712684	12	47
6	IBI Taylor Young	Chadsworth House, Wilmslow Road, Handforth, Wilmslow, Cheshire, SK9 3HP	01625 542200	7	42
7	Boswell Mitchell & Johnston	The Hub, 70 Pacific Quay, Glasgow, Strathclyde, G51 1DZ	0141 271 3200	3	42
8	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 652 1666	1	30
9	Vaughan Blundell Architects	3 Church Farm Way, Woodnesborough, Sandwich, Kent, CT13 0BJ	01304 612011	1	27
10	Carless & Adams Partnership	6 Progress Business Centre, Whittle Parkway, Bath Road, Slough, Berkshire, SL1 6DQ	01628 665131	3	24

TOP TEN Key Contractors
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	2	336
2	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	26	185
3	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	17	154
4	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	8	98
5	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	7	85
6	Galliford Try Construction South	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	11	58
7	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	8	47
8	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	8	44
9	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	1	30
10	Castle Oak Care Developments	Raglan House, Malthouse Avenue, Cardiff Gate Business Park, Cardiff, South Glamorgan, CF23 8BA	029 2054 8800	2	23

economic & construction MARKET REVIEW

MARCH 2014

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

EDUCATION
FALL IN THE VALUE OF CONTRACTS IN FEBRUARY

The Education sector was slightly down on the previous month but activity is still much higher than this time last year.

The value of contracts awarded in the Education sector was £566 million in February based on a three month rolling average, a 9.6% decrease from January (see Fig. 9.1). This figure was 43.8% higher than February 2013 indicating the sectors comparative improvement over a 12 month period. The values of contract awards in the three months to February were 12.8% higher than the previous three months and 78.7% higher than the same period last year.

Projects by region

The main location of activity this month was London which accounted for 21.2% of the value of projects, a 2.5% decrease from February 2013 (see Fig. 9.2 & 9.4). The West Midlands was the next most prominent region accounting for 15.1% of contracts awarded an increase of 10.6% from February 2013.

Type of Projects

State Primaries accounted for the highest proportion of contracts awarded in the education sector in February 2014 (see Fig. 9.3). This type of project was 40% of the total value awarded, which was a 26% increase on February 2013. Colleges/Universities were the other major type of project accounting for 26% of contract value although this was decrease of 6% on the corresponding month of 2013.

> “The main location of activity this month was London which accounted for 21.2% of the value of projects.

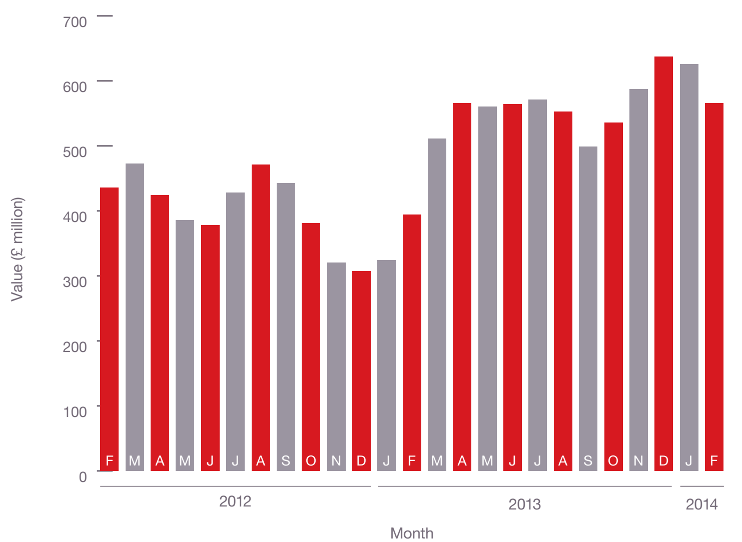


Fig. 9.1 **Project Values** Source: Barbour ABI

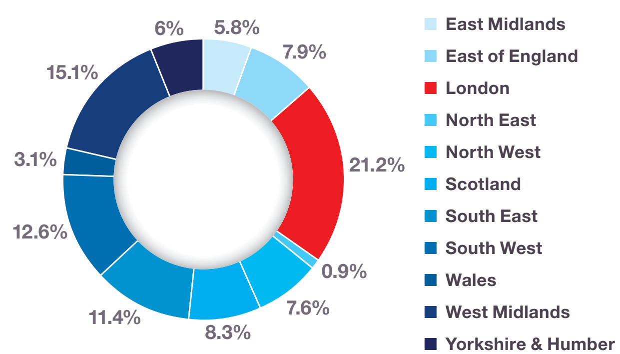


Fig. 9.2 **Value of Contracts by Region** Source: Barbour ABI

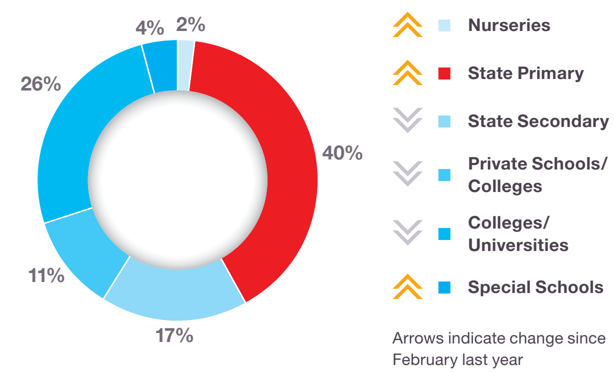


Fig. 9.3 **Type of Projects Awarded** Source: Barbour ABI

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

FALL IN THE VALUE OF CONTRACTS IN FEBRUARY

The map and figures show how the activity has changed since February 2013			+0.3%	Scotland	
-2.4%	East Midlands		-3.1%	South East	
+1.2%	East of England		+7.7%	South West	
-2.5%	London		-3.5%	Wales	
-1.5%	North East		+10.6%	West Midlands *HOTTEST REGION*	
-3.0%	North West		-4.0%	Yorkshire & Humber	

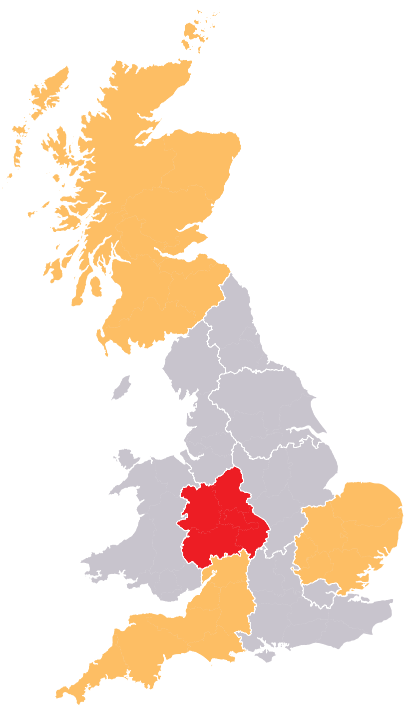


Fig. 9.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

Outlook

In the Autumn Statement the government announced it will remove controls on the number of students who can attend higher education institutions in 2015-2016 and that it will create an additional 30,000 student places at publicly funded institutions in 2014-15. It also committed £40 million to deliver 20,000 apprenticeships in the next two years. This is a potential boost to the levels of output in the sector in the coming years.

> The values of contract awards in the three months to February were 12.8% higher than the previous three months and 78.7% higher than the same period last year.

PROJECT IN FOCUS

Edgbaston Central Campus Development – Library £37,000,000

County	West Midlands
Primary Category Sector	Education
Government Region	West Midlands
Start Date	April 2014
End Date	October 2015
Contract Award Date	February 2014
Funding	Private
Stage	Detail Approval/Contract
Contractor	Carillion Plc

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ

T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

FALL IN THE VALUE OF CONTRACTS IN FEBRUARY

TOP TEN Key Clients
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Department For Education	Castle View House, East Lane, Runcorn, Cheshire, WA7 2AA	0370 000 2288	49	396
2	City of Glasgow College	190 Cathedral Street, Glasgow, Strathclyde, G1 2TG	0141 552 3941	1	200
3	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	6	131
4	Swansea University	Singleton Park, Swansea, West Glamorgan, SA2 8PP	01792 205678 (TPS)	3	126
5	Laing Plc	Allington House, 150 Victoria Street, Westminster, London, SW1E 5LB	020 7901 3200	2	121
6	Cambridge University Hospitals NHS Foundation Trust	Addenbrookes Hospital, Hills Road, Cambridge, Cambridgeshire, CB2 0QQ	01223 245151	1	120
7	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2DB	020 7589 5111 (CTPS)	6	107
8	The Welsh Government	Cardiff Bay, Cardiff, South Glamorgan, CF99 1NA	0845 010 3300 / 0300 061 5630	1	100
9	Department for Education & Skills	Caxton House, Tothill Street, Westminster, London, SW1H 9NA	0370 000 2288	11	91
10	Aberdeenshire Council	Woodhill House, Westburn Road, Aberdeen, Grampian, AB16 5GB	0845 608 1207	3	83

TOP TEN Key Architects
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Associated Architects	1 Severn Street Place, The Mailbox, Birmingham, West Midlands, B1 1SE	0121 233 6600	27	241
2	Reiach & Hall	6 Darnaway Street, Edinburgh, Lothian, EH3 6BG	0131 225 8444	3	202
3	Michael Laird Architects	5 Forres Street, Edinburgh, Lothian, EH3 6DE	0131 226 6991	1	200
4	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	13	164
5	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	16	152
6	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	7	143
7	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, Avon, BS8 3NE	0117 974 3271 (TPS)	17	142
8	Aedas	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	31	140
9	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 652 1666	7	135
10	AMEC Group PLC	76-78 Old Street, City, London, EC1V 9RU	020 3215 1700	1	121

TOP TEN Key Contractors
February – March

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	98	602
2	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	120	500
3	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	40	426
4	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	11	286
5	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	63	251
6	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	60	250
7	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	15	234
8	Miller Developments Limited	Miller House, 2 Lockside View, Edinburgh Park, Edinburgh, Lothian, EH12 9DH	0870 336 5000	22	156
9	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	47	150
10	Galliford Try Construction South	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	21	149

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com
Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

We report on every planning application in the UK, as well as tracking 20,000+ projects that do not require planning permission

At each stage, we add key intelligence:

- Individual contact data for involved companies
- Planned or estimated start and end dates
- Materials identified
- Detailed scheme and status information
- Subcontractor information

FIND OUT MORE ABOUT HOW BARBOUR ABI'S CONSTRUCTION INTELLIGENCE CAN TRANSFORM YOUR BUSINESS...

call: 0151 353 3500
email: info@barbour-abi.com
follow us: twitter.com/Barbourabi
and: facebook.com/BarbourABI

Barbour ABI
www.barbour-abi.com

HM Government
Provider of the Government's Construction and Infrastructure Pipeline

Office for National Statistics
Chosen provider of Construction New Orders estimates to the ONS

Building

bd

ecobuild the future

UBM

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI