economic & construction MARKET REVIEW

Barbour ABI | Building | bd

OCTOBER 2014

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

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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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www.barbour-abi.com

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

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

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

T: 0151 353 3500

E: info@barbour-abi.com

W: www.barbour-abi.com

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

T: 020 7921 5000

W: www.ubm.com

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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 and communal dwellings data

Office for National Statistics

construction products association

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REVISED FIGURES SHOW Q2 GROWTH WAS 0.9%

A major revision of UK GDP figures this month estimated that the economy had grown by 0.9% in Q2, revised upwards from 0.8%.

The figures also restated the depth of the recession in 2008/9, with the economy now estimated to have shrank by 6%, rather than the 7.2% previously estimated (see Fig. 1.1). The latest data also shows that the economy is now 2.7% above its pre-recession levels, compared to the previous estimate of 0.2%.

It is worth noting, however, that while these revisions lessen the severity of the recession it has still taken longer than previous downturns for output to return to peak levels. At this point after the 1990 recession, output levels were 15.7% above pre-recession peak (see Fig. 1.2).

Other macroeconomic indicators continue to point to improvement in the UK economy. The labour market maintained its recent strong performance as unemployment fell once again in the three months to August and now stands at 6%, which is the lowest rate since 2008 (see Fig. 1.3).

The rate of inflation also fell this month to 1.2%, its lowest level since September 2009 with lower import prices and falls in food prices and oil prices all contributing (see Fig. 1.4). These latest figures are likely to delay any decision to raise interest rates in the near term.

Other news of note this month on the UK economy includes:

- **The UK FTSE 100 experienced large falls on the back of fears of suppressed growth outlook in the Euro zone area**
- **The British Retail Consortium reported that retail sales fell in September by 0.8% compared to September 2013**
- **A survey by Deloitte showed there was a 5.6% rise in year-on-year car sales in September**

While the headline economic indicators continue to point to a strong UK outlook there is increasing evidence of a slowdown in the Eurozone with the normally resilient German economy showing signs of slowing growth. Having said that the IMF remains confident about the UK's economic prospects, predicting it will be fastest growing economy in the G8 this year. While output is growing and unemployment falling there are still a number of fundamentals that pose longer term problems for the economy, particularly low productivity growth and slow wage growth, which will provide a drag on future economic performance.

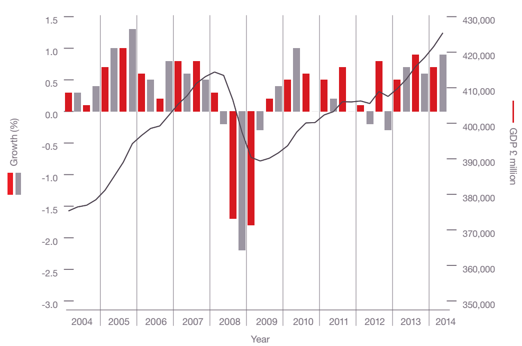

Fig. 1.1 **UK GDP** Source: ONS

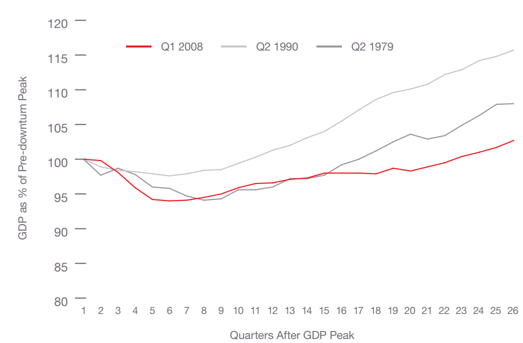

Fig. 1.2 **UK GDP as Percentage of Pre-downturn Peak** Source: ONS

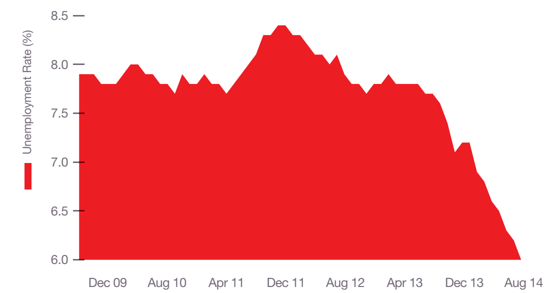

Fig. 1.3 **Unemployment Rate** Source: ONS

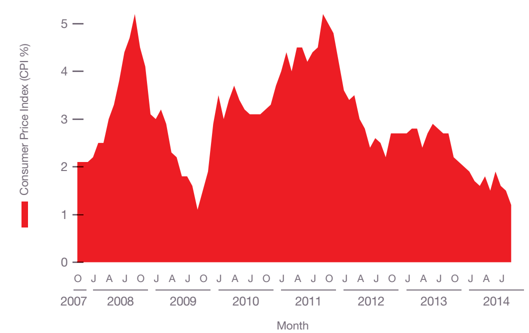

Fig. 1.4 **CPI Inflation** Source: ONS

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THE CONSTRUCTION SECTOR
OUTPUT FALLS BUT CONTRACT VALUES INCREASE IN SEPTEMBER

The latest figures from the ONS show that the construction sector in the UK shrank by 3.9% between July and August 2014.

Comparing output levels with August last year showed a decrease of 0.3%. It should be noted that there were significant upward revisions to previous datasets which was the main reason for the fall. However, it is evidence that the recent large increases in output are starting to moderate.

It is clear that the housing sector is the main component of growth within the industry over the longer term. While all sectors other than Public Housing declined in the month, Private Housing output increased by 13.0% from the corresponding month in 2013 (see Fig. 2.1). At the same time Public Housing output was 27.9% higher than last year. Output in the Private Commercial sector fell 8.0% year-on-year and Infrastructure decreased by 13.8%. This highlights that the growth patterns within the industry are currently reliant on housing and broader improvements are needed to ensure a robust recovery.

	% change	
	August 2013 – August 2014	July 2014 – August 2014
Total All Work	**-0.3**	**-3.9**
All New Work	**-0.6**	**-4.8**
Public Housing	27.9	0.7
Private Housing	13.0	-5.5
Infrastructure	-13.8	-6.5
Public (ex Infrastructure)	-6.0	-2.4
Private Industrial	7.6	-4.9
Private Commercial	-8.0	-5.6
Repair & Maintenance	**0.3**	**-2.5**
Public Housing	-3.3	-4.6
Private Housing	4.2	-1.5
Non-Housing	-1.0	-2.6

Fig. 2.1 **Construction Activity by Sector** *(chained volume measure)* Source: ONS

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 132 for September (see Fig. 2.2). This is a slight increase from last month and continues to support the view that overall activity in the industry remains strong. The readings for the three major sectors, Private Housing, Commercial Offices and Commercial Retail were all up this month. This indicates that, while output fell, the pipeline of work in the private sector remains strong.

Construction Sector

According to Barbour ABI data on all contract activity, September witnessed an increase in construction levels with the value of new contracts awarded £5.6 billion, based on a three month rolling average (see Fig. 2.4). This is a 5.8% increase from August and an 11.7% increase on the value recorded in September 2013, an indication of continued growth in the third quarter. The number of construction projects within the UK in September increased by 7.4% on August, and is 13.8 higher than September 2013.

The majority of the contracts awarded in September by value were in London, accounting for 24% of the UK total. (see Fig. 2.3) This is closely followed by Scotland with 21% of contracts awarded. The main reason for this was the £600 million Battersea Power Station Phase 2 contract which includes commercial, residential and leisure uses. There was also a significant hotel project awarded this

> Public Housing output was 27.9% higher than last year

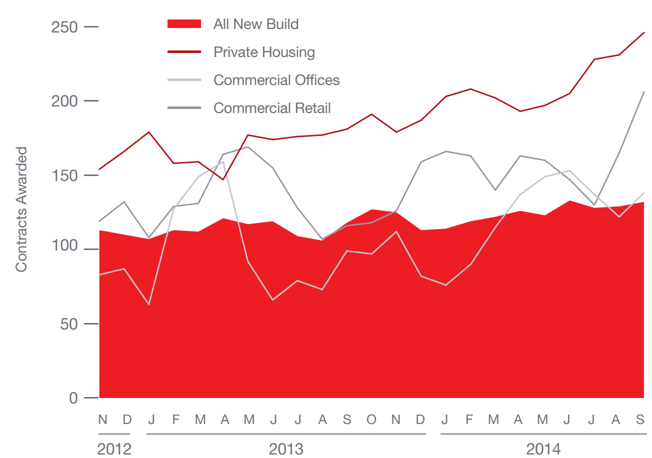

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

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E: info@barbour-abi.com
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month called the Poultry Hotel Project valued at £80 million and based in the City of London. In Scotland, two major infrastructure projects explain the strong performance in September. A new bypass to the west of Aberdeen was awarded this month at a value of £400 million and a £300 million on shore wind farm

> The majority of the contracts awarded by value were in London

based in the Highlands also reached contract award stage. In addition a major hospital contract was awarded in Scotland for the Dumfries and Galloway Royal Infirmary, a 350 bed hospital valued at £200 million. Other contracts of note this month are the £75 million Anfield Stadium expansion and the mixed residential/industrial project at Wellesbourne in Warwickshire also valued at £75 million.

Type of Projects

Residential had the highest proportion of contracts awarded by value in September with 24% of the total (see Fig. 2.5). The infrastructure sector also featured prominently this month accounting for 23% of the total value of all projects and commercial & retail accounted for 22%. This is more of an even split than in recent months where residential has tended to dominate the values recorded each month, perhaps indicating a widening of the increase in construction activity.

> The number of construction projects within the UK in September increased by 7.4% on August

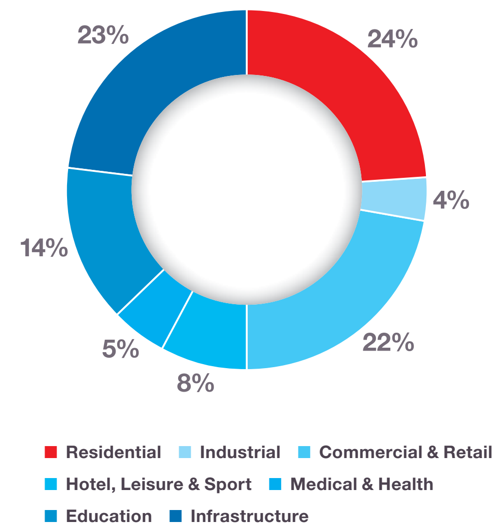
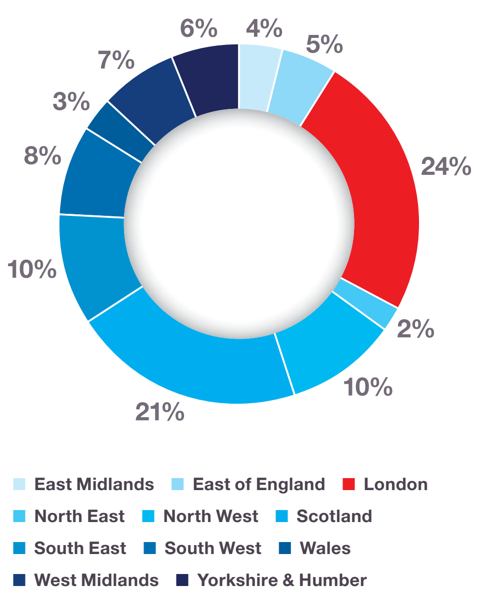


Fig. 2.5 **Type of Projects** Source: Barbour ABI



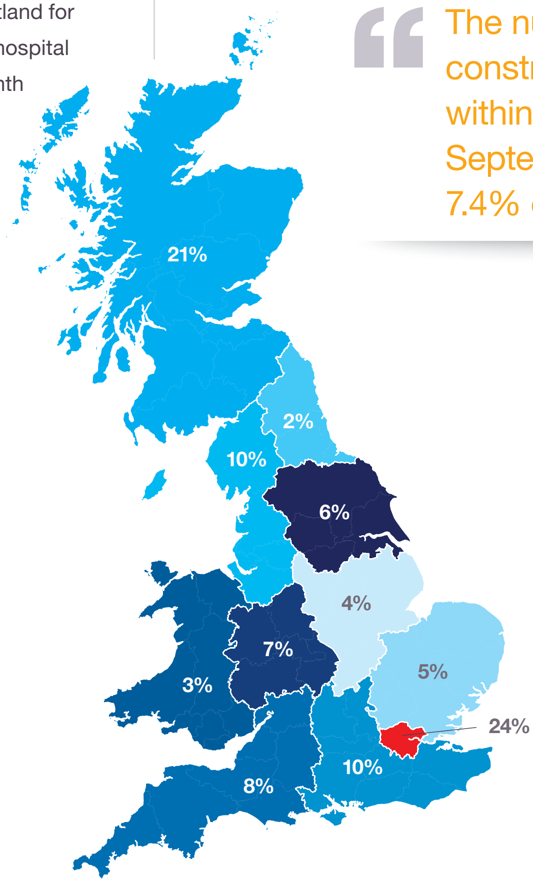


Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

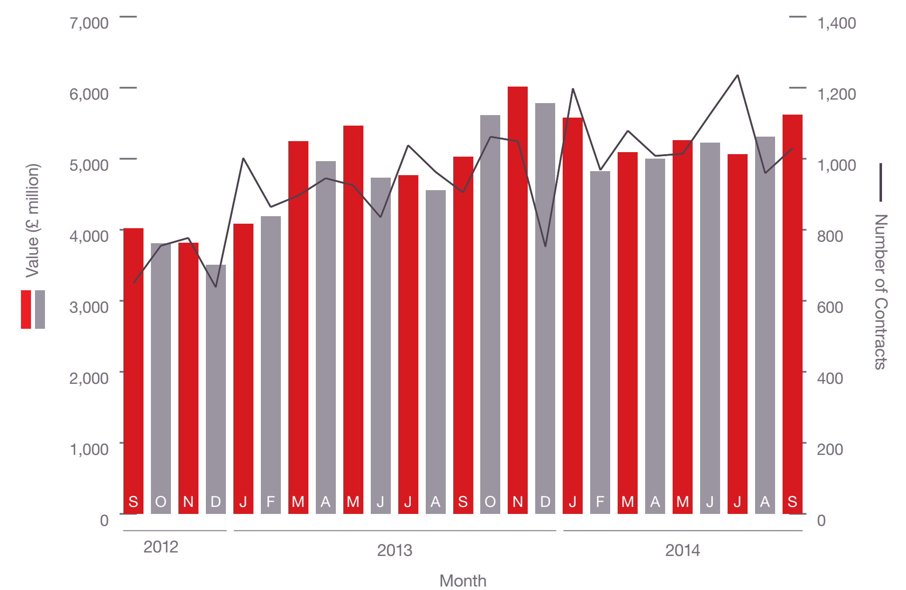


Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

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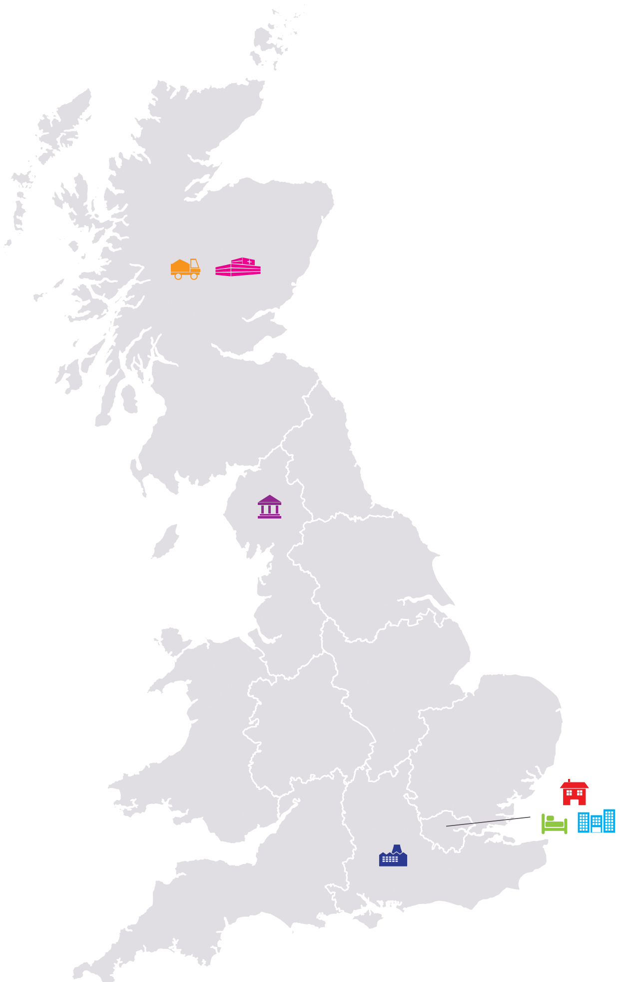
A snippet of this month's regional activity

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
Angelgate Development
£27,015,000

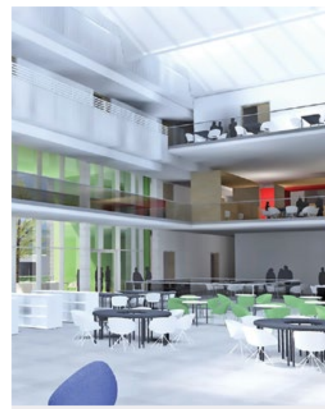
INFRASTRUCTURE
60MW Moy Wind Farm
£60,000,000

COMMERCIAL & RETAIL
Hurlingham Park Development
£60,000,000

HOTEL, LEISURE & SPORT
Liverpool Football Club – Anfield Stadium Expansion – Main Stand – Phase 1
£75,000,000

INDUSTRIAL
Pirbright Institute – BRF Facility
£20,050,000

MEDICAL & HEALTH
Dumfries And Galloway Royal Infirmary Hospital – Garroch Farm
£200,000,000



EDUCATION
New Boroughmuir High School
£30,000,000

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Cheshire Oaks, Cheshire,
CH65 9HQ

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

SLIGHT DECREASE IN VALUES IN SEPTEMBER

The residential sector experienced a decrease in contract award values in September but an increase on this time last year indicating a strong Q3.

Activity in the residential sector was slightly lower in September with the total value of contracts awarded £1.7 billion, based on a three month rolling average (see Fig. 3.1). This is a 1.6% decrease compared to August but is 12.2% higher than September 2013, indicating the longer term increase in the sector. The number of units associated with residential contracts awarded increased by 4.2% between August and September 2014, based on a three month rolling average, and were 37.8% higher than September 2013, confirming the longer term increase in activity in the sector.

Sector Performance

The latest house price indices for September from Nationwide showed that average house prices are rising at 9.4% annually, a fall from 11% last month. The Halifax reported annual house price rises recorded at 9.6% in September, down from 9.7% in August. However, there is now an increasing amount of evidence that suggests the market is cooling with the latest Bank of England Credit Conditions Survey reporting that mortgage availability had fallen to its lowest level since 2008. This was attributed to lower price rise expectations from lenders and the recent measures from the Financial Policy Committee on restricting lending on larger loans. The lenders did note that they expected mortgage availability to increase in the coming months as competition for market share increases. The latest RICS Residential Market Survey also detected a slowdown in the housing market and showed that new buyer inquiries fell for the third month in succession.

The Labour Party ramped up its pre-election rhetoric on the housing market by publishing the Lyons Review which made recommendations to boost supply in the UK. Among other things, the report recommends banning buy-to-let investors from purchasing new properties in London and designating new

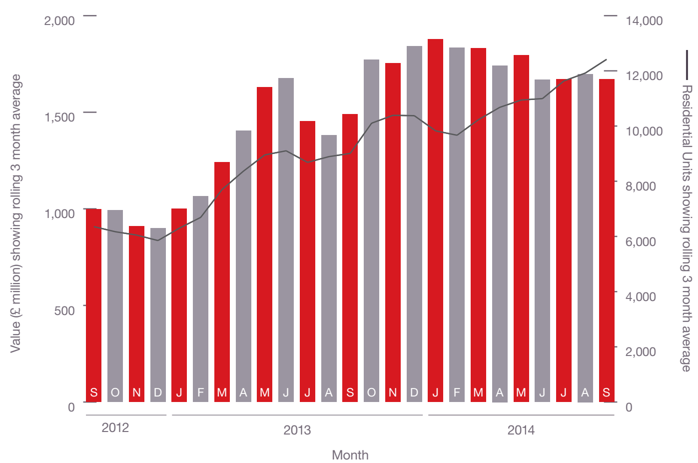


FIG. 3.1

Residential: **Project Value showing 3 month moving average** Source: Barbour ABI

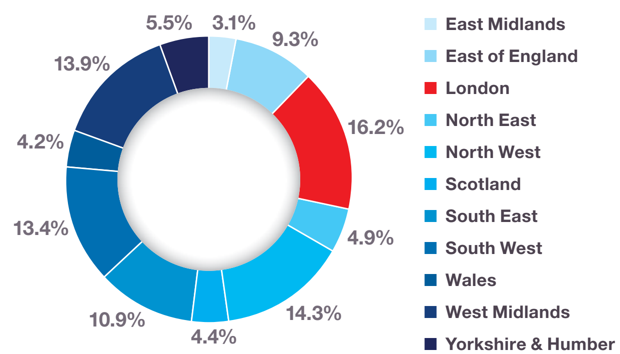
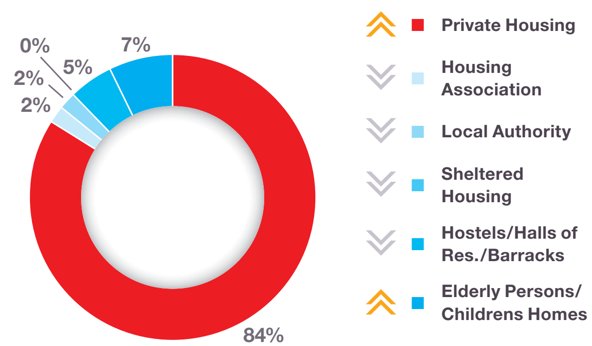


FIG. 3.2

Residential: **Value of Contracts by Region** Source: Barbour ABI



Arrows indicate change since September last year

FIG. 3.3

Residential: **Type of Projects Awarded** Source: Barbour ABI

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E: info@barbour-abi.com

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

-11.8%	East Midlands	+1.2%	Scotland
+4.3%	East of England	+3.5%	South East
-16.6%	London	-0.3%	South West
+2.8%	North East	+3.1%	Wales
+8.6%	North West *HOTTEST REGION*	+6.3%	West Midlands
		-1.0%	Yorkshire & Humber

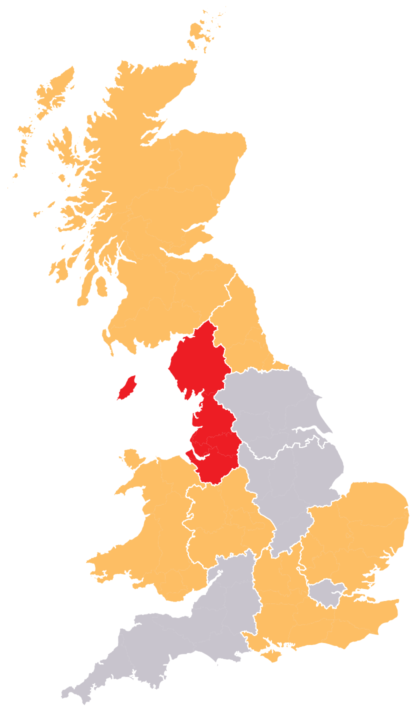

FIG. 3.4

Residential: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

"housing growth areas" which would prioritise first time buyers. It provides the details on how Labour will meet its target to build 200,000 homes by the year 2020.

Projects by region

London is the main location of activity in the residential sector this month, accounting for 16.2% of the value of contracts awarded, a decrease of 16.6% from the same month last year (see Fig. 3.2 & 3.4). London's prominence was primarily due to the award of a contract to develop 85 luxury flats in Camden worth £50 million. The North West, West Midlands and the South West were the next most popular locations for residential contracts this month accounting for 14.3%, 13.9% and 13.4% of contracts awarded respectively.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing this month (see Fig. 3.3). Private housing accounted for 84% of the value of contracts awarded this month, an increase of 4% from the corresponding month last year. The largest type of project other than private housing was the care residential projects for the elderly which accounted for 7% of the value awarded an increase of 3% from the corresponding month last year.

> London is the main location of activity this month

PROJECT IN FOCUS

www.angelgatemanchester.com

Angelgate Development
£27,015,000

County	Greater Manchester
Primary Category Sector	Residential
Government Region	North West
Start Date	January 2015
End Date	July 2017
Contract Award Date	September 2014
Funding	Private
Stage	Contract Awarded
Contractor	PHD1 Construction

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SLIGHT DECREASE IN VALUES IN SEPTEMBER

TOP TEN Key Clients

Oct 2013 – Sep 2014

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	3,109
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	186	2,437
3	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	198	2,085
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 / 678 9980	94	1,081
5	Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG		28	946
6	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	19	814
7	The Peel Group	Peel Management, Peel Dome, The Trafford Centre, Manchester, Greater Manchester, M17 8PL	0161 629 8200	2	750
8	St Modwen Developments Plc	Sir Stanley Clarke House, 7 Ridgeway,Quinton Business Park, Birmingham, West Midlands, B32 1AF	0121 222 9400	12	718
9	Homes & Communities Agency	Arpley House, 110 Birchwood Boulevard, Birchwood, Warrington, Cheshire, WA3 7QH	0300 1234 500	12	696
10	Redrow Homes (South Midlands) Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520 044	60	617

TOP TEN Key Architects

Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	87	897
2	Foster & Partners	Riverside, 22 Hester Road, Battersea, London, SW11 4AN	020 7738 0455	4	772
3	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	2	695
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	37	665
5	5plus Architects	4th Floor The Hive, 47 Lever Street, Manchester, Greater Manchester, M1 1FN	0161 228 0211	1	650
6	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	10	624
7	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	44	615
8	Faulks Perry Culley & Rech	Lockington Hall, Lockington, Derby, Derbyshire, DE74 2RH	01509 672772	20	566
9	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, Avon, BS8 3NE	0117 974 3271 (TPS)	15	498
10	LDA Design	Worton Rectory Park, Oxford, Oxfordshire, OX29 4SX	01865 887050 (TPS)	1	450

TOP TEN Key Contractors

Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	203	2,688
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	188	2,688
3	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	198	2,085
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 / 678 9980	96	1,105
5	Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG		23	874
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	92	850
7	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	5	815
8	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346620 (CTPS)	78	699
9	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	60	616
10	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	51	581

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INFRASTRUCTURE

CONTRACT VALUES INCREASE IN SEPTEMBER

The value of infrastructure contracts increased but there are still concerns over long term growth as the value of orders is below those seen last year.

The value of contracts awarded in the infrastructure sector increased in September with the total value awarded £1.1 billion based on a three month rolling average (see Fig. 4.1). This is 5.3% higher than the previous month but 20.1% lower than September 2013. In the three months to September the total value of contract awards was £3.3 billion based on a three month rolling average. This is the same as the previous three months but 15.7% lower than the same period of 2013. This indicates the continued challenges that the infrastructure sector faces with a longer term decline in the value of activity concerning given the size of the sector.

Projects by region

The main location of infrastructure projects this month was Scotland with 53.2% of the total value, an increase of 34.4% from September 2013 (see Fig. 4.2 & 4.4). This is due to the Aberdeen bypass project valued at £400 million and the Dorenell wind farm project in the Highlands valued at £300 million.

Type of Projects

The wind farm project in Scotland and two waste treatment projects in Yorkshire & the Humber and the South East mean that utilities are the major project type in infrastructure in September accounting for 51% of the total value of projects (see Fig. 4.3).

> In the three months to September the total value of contract awards was £3.3 billion

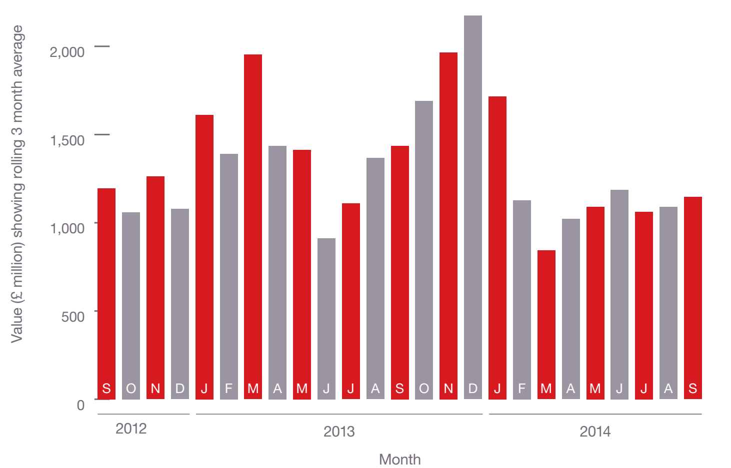

FIG. 4.1

Infrastructure: **Project Value showing 3 month moving average** Source: Barbour ABI

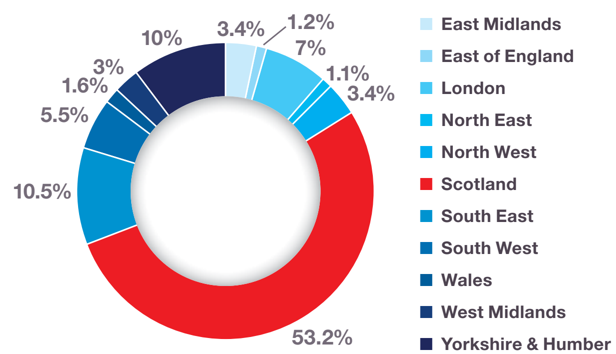

FIG. 4.2

Infrastructure: **Value of Contracts by Region** Source: Barbour ABI

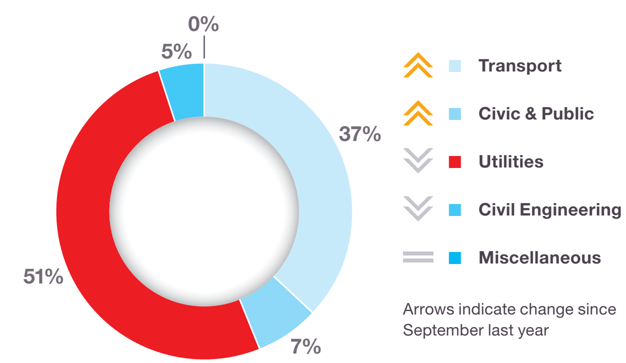

FIG. 4.3

Infrastructure: **Type of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since September 2013			
		+34.4%	Scotland *HOTTEST REGION*
+1.7%	East Midlands	+3.1%	South East
-12.4%	East of England	-3.7%	South West
-9.5%	London	-7.6%	Wales
-0.1%	North East	+1.5%	West Midlands
-0.4%	North West	-7.0%	Yorkshire & Humber

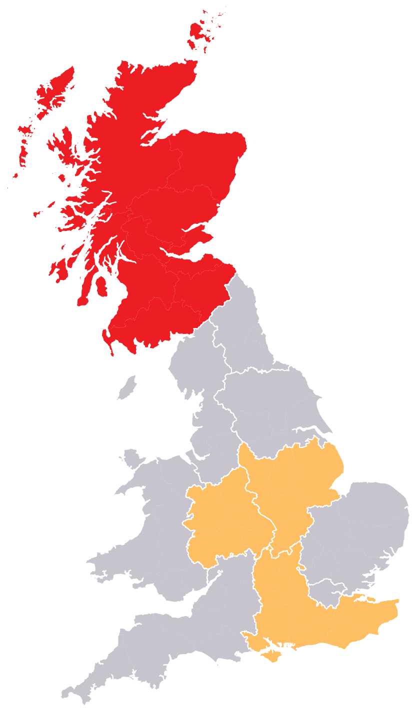

FIG. 4.4

Infrastructure: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

Outlook

Budget 2014 provided a financial update to the National Infrastructure Plan. It also announced a series of additional infrastructure projects that would receive funding this year including:

- **An extra £140 million of new funding to restore and repair flood defences**
- **An extra £200 million to set up a pothole challenges fund**
- **A £270 million guarantee to support the Mersey Gateway Bridge**
- **A £20 million scheme for repairs to cathedrals**
- **£100 million to Greater Cambridge until 2019-20 to support transport and infrastructure projects**

These projects should provide a boost to the infrastructure sector in the coming years.

PROJECT IN FOCUS

www.eneco.com

60MW Moy Wind Farm
£60,000,000

County	Highlands
Primary Category Sector	Infrastructure
Government Region	Scotland
Start Date	Quarter 3 2014
End Date	Quarter 1 2016
Contract Award Date	September 2014
Funding	Private
Stage	Subcontract Awarded
Contractor	Nordex

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TOP TEN Key Clients

Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	EDF Energy	40 Grosvenor Place, Victoria, Westminster, London, SW1X 7EN	020 7242 9050	4	1,037
2	Highways Agency	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	30	804
3	Transport Scotland	Buchanan House, 58 Port Dundas Road, Glasgow, Strathclyde, G4 0HF	0141 272 7100	5	777
4	Scottish Office	St Andrews House, Regent Road, Edinburgh, Lothian, EH1 3DG	0131 556 8400	2	750
5	Halton Borough Council	Municipal Building, Kingsway, Widnes, Cheshire, WA8 7QF	0151 424 2061	4	665
6	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	65	628
7	Intergen Limited	81 George Street, Edinburgh, Lothian, EH2 3ES	0131 624 7500	1	600
8	Gateway Energy Centre Limited	Manorway, Stanford Le Hope, Essex, SS17 9PD	0800 169 5290	1	600
9	Mersey Gateway Project Office	First Floor, Unit 15, Turnstone Business Park, Mulberry Avenue, Widnes, Cheshire, WA8 0WN	0151 495 4091	1	600
10	Crossrail Limited	25 Canada Square, Canary Wharf, Poplar, London, E14 5LQ	020 3229 9100	5	541

TOP TEN Key Architects

Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Studio E Architects Limited	Palace Wharf, Rainville Road, Chiswick, London, W6 9HN	020 7385 7126	2	615
2	WA Fairhurst & Partners	225 Bath Street, Glasgow, Strathclyde, G2 4GZ	0141 204 8800	2	370
3	Hyder Consulting UK Limited	Manning House, 22 Carlisle Place, Westminster, London, SW1P 1JA	020 3014 9000 (CTPS)	1	250
4	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	200
5	Aukett Swanke	25 Christopher Street, City, London, EC2A 2BS	020 7454 8200	1	200
6	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140	8	184
7	Artek Design House Limited	17 Topcliffe Way, Cambridge, Cambridgeshire, CB1 8SJ	01223 519086	1	170
8	Elevation Projects Limited	1st Floor, 16 Wright Street, Hull, Humberside, HU2 8JU	01482 221155	1	150
9	Stockport Metropolitan Borough Council	Town Hall, Edward Street, Stockport, Cheshire, SK1 3XE	0161 480 4949	1	100
10	Foster & Partners	Riverside, 22 Hester Road, Battersea, London, SW11 4AN	020 7738 0455	1	80

TOP TEN Key Contractors

Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	28	1,153
2	Costain Limited	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	16	729
3	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	10	701
4	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	27	555
5	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	25	446
6	Alstom Hydro Limited	Newbold Road, Rugby, Warwickshire, CV21 2NH	01788 577111 (TPS)	1	401
7	Ferrovial Agroman, S. A.	Calle Ribera del Loira 42 Campo de las Naciones, Madrid, Spain, 28042	0034 91 300 85 43	2	370
8	Lagan Group	21-23 Sydenham Road, Belfast, Northern Ireland, BT3 9HA	028 9026 1000	4	370
9	Amey Group	The Sherard Building, Edmund Halley Road, Oxford Science Park, Oxford, Oxfordshire, OX4 4DQ	01865 713100	3	355
10	Tolent Construction Limited	Ravensworth House, 5th Avenue Business Park, Team Valley, Gateshead, Tyne and Wear, NE11 0HF	0191 487 0505	3	257

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COMMERCIAL & RETAIL
SIGNIFICANT RISE IN CONTRACT VALUES

Contract values in the commercial & retail sector were higher this month compared to August and are significantly higher than September 2013.

The value of contracts awarded in the commercial & retail sector was £1.1 billion in September based on a three month rolling average (see Fig. 5.1). This is a 24.4% increase from August but a 76.6% increase from the September 2013 figure. In the three months to September the value of contracts was 6.6% above the previous three months and 50.1% higher than the same period in 2013.

Projects by region

London was the main location of activity in the sector this month with 64.9% of the value of all contracts awarded, and this was 17.4% higher than September 2013 (see Fig. 5.2 & 5.4). The major project in the commercial sector this month was Phase 2 of the Battersea Power Station development which is valued at £600 million.

Type of Projects

Offices were the dominant type of project in the sector accounting for 75% of the value of contracts awarded this month, which is the same level as September 2013 (see Fig. 5.3). General retailing is the other significant sector with 18% of contract award value, which was a 1% drop from the September 2013 figure.

> London was the main location of activity in the sector this month

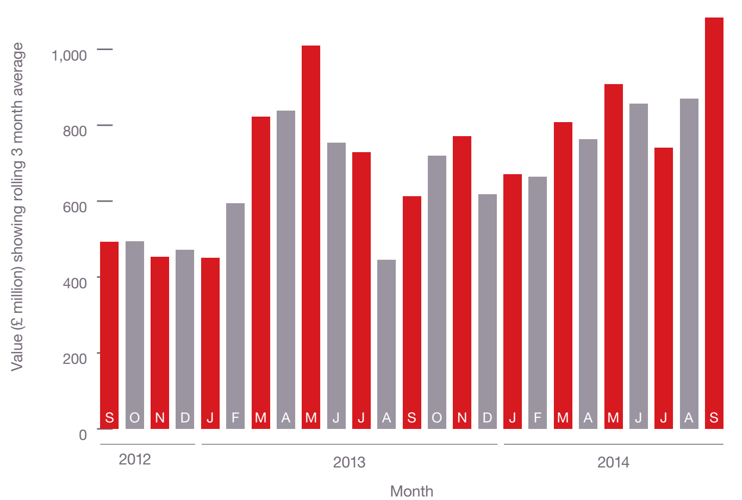

FIG. 5.1
Commercial & Retail: **Project Value showing 3 month moving average** Source: Barbour ABI

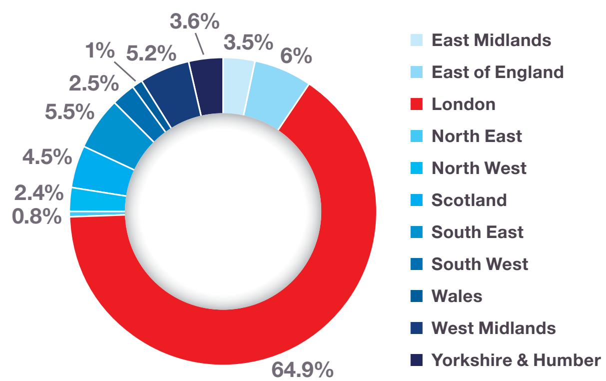

FIG. 5.2
Commercial & Retail: **Value of Contracts by Region** Source: Barbour ABI

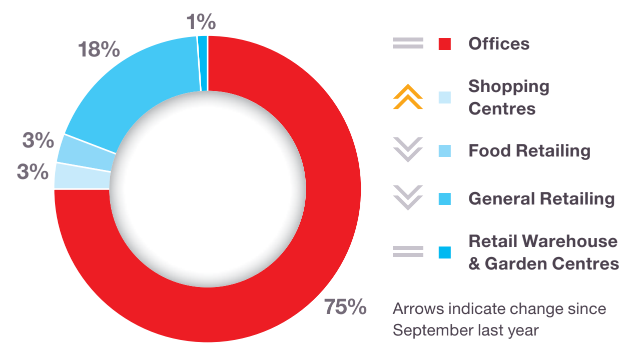

FIG. 5.3
Commercial & Retail: **Type of Projects Awarded** Source: Barbour ABI

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SIGNIFICANT RISE IN CONTRACT VALUES

The map and figures show how the activity has changed since September 2013		-0.6%	Scotland
-2.1%	East Midlands	-6.1%	South East
-0.1%	East of England	-1.2%	South West
+17.4%	London *HOTTEST REGION*	-0.3%	Wales
-8.8%	North East	+3.1%	West Midlands
-0.7%	North West	-0.4%	Yorkshire & Humber

FIG. 5.4

Commercial & Retail: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

"In the three months to September the value of contracts was 6.6% above the previous three months

PROJECT IN FOCUS

Hurlingham Park Development
£60,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	March 2014
End Date	March 2017
Contract Award Date	September 2014
Funding	Private
Stage	Contract Awarded
Contractor	Bouygues Construction

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TOP TEN Key Clients

Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Battersea Power Station Development Company	Battersea Power Station, 188 Kirtling Street, South Lambeth, London, SW8 5BN	020 7501 0688 (CTPS)	1	600
2	Saxon Land BV	117 Fenchurch Street, City, London, EC3M 5DY	020 7410 7300	1	420
3	Selfridges Limited	400 Oxford Street, Westminster, London, W1A 1AB	0800 123400	5	308
4	LXB Properties PLC	Grafton House, 2nd Floor, 2-3 Golden Square, Westminster, London, W1F 9HR	020 7432 7900	8	247
5	Great Portland Estates	33 Cavendish Street, Westminster, London, W1G 0PW	020 7647 3000	3	201
6	Roydhouse Investments Limited	Roydhouse Farm, Sharp Lane, Almondbury, Huddersfield, West Yorkshire, HD4 6SX		1	200
7	Helical Bar Plc	11-15 Farm Street, Westminster, London, W1J 5RS	020 7629 0113	4	182
8	Stoke-on-Trent City Council	Civic Centre, Glebe Street, Stoke on Trent, Staffordshire, ST4 1HH	01782 234567	2	171
9	Advantage West Midlands	3 Priestley Wharf, Holt Street, Aston Science Park, Birmingham, West Midlands, B7 4BN	0121 380 3500	1	170
10	St Modwen Developments Plc	Sir Stanley Clarke House, 7 Ridgeway,Quinton Business Park, Birmingham, West Midlands, B32 1AF	0121 222 9400	3	145

TOP TEN Key Architects

Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Wilkinson Eyre Architects	33 Bowling Green Lane, City, London, EC1R 0BJ	020 7608 7900	2	602
2	Make Architects	13 Fitzroy Street, Westminster, London, W1T 4BQ	020 7636 5151	9	423
3	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	1	420
4	Gensler Associates	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AH	020 7073 9600	8	321
5	DLA Design Group	55 St Pauls Street, Leeds, West Yorkshire, LS1 2TE	0113 887 3100	6	211
6	RHWL Partnership	Ivory House, St Katharine Docks, Tower Hamlets, London, E1W 1AT	020 7480 1500	4	210
7	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	6	210
8	Aukett Swanke	25 Christopher Street, City, London, EC2A 2BS	020 7454 8200	11	199
9	Jones Architects	121 Great Portland Street, Westminster, London, W1W 6QL	020 7255 1150	6	194
10	Allford Hall Monaghan Morris	2nd Floor, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	6	188

TOP TEN Key Contractors

Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	6	1,230
2	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	18	583
3	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	52	422
4	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	10	415
5	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	27	412
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	22	363
7	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861000	11	301
8	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	15	257
9	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	7	221
10	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	8	196

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HOTEL, LEISURE & SPORT

INCREASE IN CONTRACT VALUE IN SEPTEMBER

The hotel, leisure & sport sector showed monthly increases in contract values and over the quarter values have also increased.

Contract award levels in the hotel, leisure & sport sector were £411 million in September, based on a three month rolling average (see Fig. 6.1). This was 8.5% higher than August but 7.4% lower than September 2013. In the three months to September the value of contracts was 21.5% higher than the previous three months. This was an increase of 6% compared to the same period in 2013 indicating a longer term improvement in activity over the year.

Projects by region

London was the main location for activity in this sector accounting for 28.3% of the value of contracts awarded, which was 13.4% higher than at this time last year (see Fig. 6.2 & 6.4). The largest project in the London this month was the Poultry Hotel project in the City of London which is valued at £80 million which is a 255 bedroom hotel development.

Type of Projects

Hotels/motels are the highest proportion of contracts awarded this month at 45% of total value, which is 21% higher than September 2013 (see Fig. 6.3). Leisure centres accounted for 18% of the value of contracts which was a 3% increase from this time last year.

> Contract award levels were £411 million in September

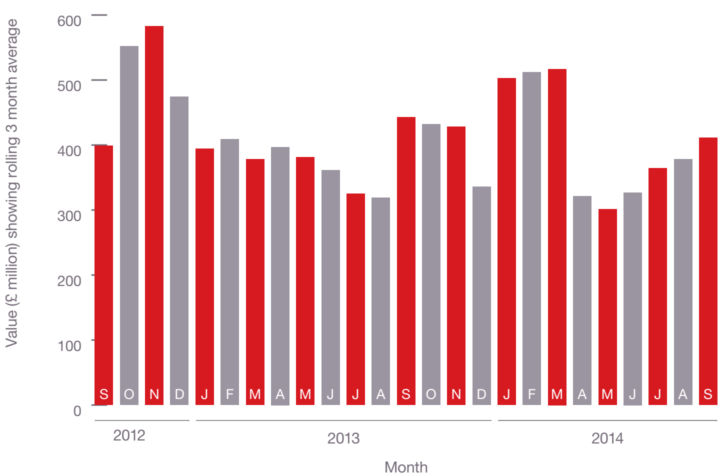

FIG. 6.1

Hotel, Leisure & Sport: **Project Value showing 3 month moving average** Source: Barbour ABI

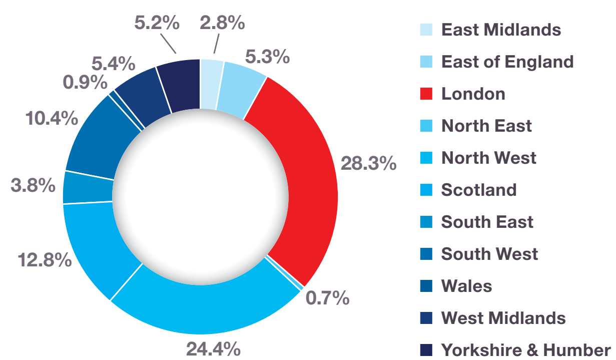

FIG. 6.2

Hotel, Leisure & Sport: **Value of Contracts by Region** Source: Barbour ABI

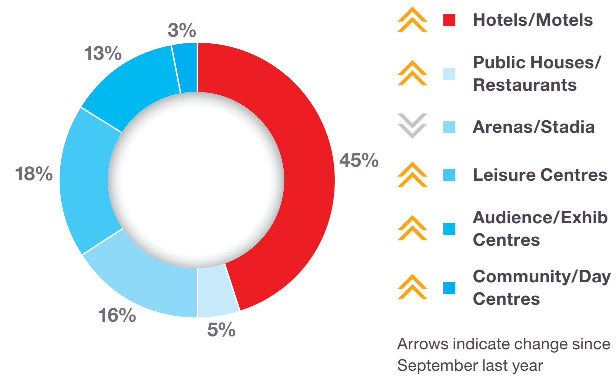

FIG. 6.3

Hotel, Leisure & Sport: **Type of Projects Awarded** Source: Barbour ABI

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INCREASE IN CONTRACT VALUE IN SEPTEMBER

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

		+11.1%	Scotland
+1.6%	East Midlands	-0.2%	South East
+3.0%	East of England	+1.0%	South West
+13.4%	London	-41.0%	Wales
-5.4%	North East	-4.9%	West Midlands
+23.3%	North West *HOTTEST REGION*	-1.9%	Yorkshire & Humber

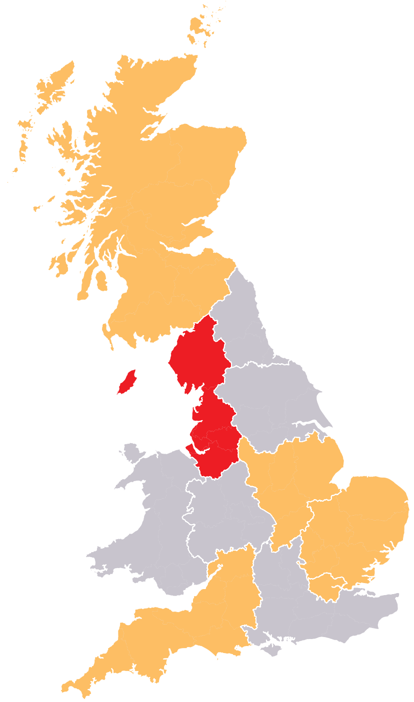

FIG. 6.4

Hotel, Leisure & Sport: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

> London was the main location for activity in this sector accounting for 28.3% of the value of contracts awarded

PROJECT IN FOCUS

Liverpool Football Club – Anfield Stadium Expansion – Main Stand – Phase 1

£75,000,000

County	Merseyside
Primary Category Sector	Hotel, Leisure & Sport
Government Region	North West
Start Date	January 2015
End Date	January 2016
Contract Award Date	September 2014
Funding	Private
Stage	Contract Awarded
Contractor	Carillion

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INCREASE IN CONTRACT VALUE IN SEPTEMBER

TOP TEN Key Clients
Oct 2013 – Sep 2014

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	2	164
2	London Borough of Newham	Third Floor, West Side, 1000 Dockside Road, Victoria Dock, London, E16 2QU	020 8430 2000	1	154
3	Olympic Delivery Authority (ODA)	23rd Floor, 1 Churchill Place, Canary Wharf, Poplar, London, E14 5HN	020 3201 2000	1	154
4	Galliard Homes Limited	Sterling House, Langston Road, Loughton, Essex, IG10 3TS	020 8418 1000	2	104
5	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499 / 01582 424200	24	103
6	McAleer & Rushe	100 George Street, London, W1U 8NU	020 7224 4900 (CTPS)	1	100
7	Cheshire West & Chester Council	HQ, 58 Nicholas Street, Chester, Cheshire, CH1 2NP	0300 123 8123	4	83
8	Capital Construction & Development Limited	Herschel House, 58 Herschel Street, Slough, Berkshire, SL1 1PG	Not listed	1	80
9	Soho House Limited	40 Greek Street, Westminster, London, W1D 4EB	020 7734 5188	1	80
10	Liverpool Football Club	Anfield Road, Liverpool, Merseyside, L4 0TH	0843 170 5555 / 0151 263 2361	2	76

TOP TEN Key Architects
Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Populous	14 Blades Court, Deodar Road, Putney, London, SW15 2NU	020 8874 7666	5	277
2	EPR Architects Limited	30 Millbank, Westminster, London, SW1P 4DU	020 7932 7600	4	199
3	LDA Design	Worton Rectory Park, Oxford, Oxfordshire, OX29 4SX	01865 887050 (TPS)	1	154
4	AFLS & P Architects Limited	The Cornerhouse, 91-93 Farringdon Road, City, London, EC1M 3LN	020 7831 8877	10	103
5	Swift Architecture	84 Middle Drive, Ponteland, Newcastle Upon Tyne, Tyne And Wear, NE20 9DN	07769 971 983	1	100
6	Leach Rhodes & Walker LLP	West Riverside, New Bailey Street, Manchester, Greater Manchester, M3 5AA	0161 833 0211	2	100
7	Broadway Malyan	3 Weybridge Business Park, Addlestone Road, Weybridge, Surrey, KT15 2BW	01932 845599 (TPS)	5	92
8	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269 (TPS)	24	90
9	Dexter Moren Associates	57d Jamestown Road, Camden Town, London, NW1 7DB	020 7267 4440	2	85
10	KSS Group Limited	1 James Street, Westminster, London, W1U 1DR	020 7907 2222	2	77

TOP TEN Key Contractors
Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	8	229
2	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	8	220
3	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	13	150
4	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	15	142
5	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	5	110
6	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	3	97
7	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	15	87
8	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	17	83
9	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	4	81
10	Ardmore Construction Limited	Byrne House, Jeffreys Road, Brimsdown, Enfield, Middlesex, EN3 7UB	020 8344 0300	1	80

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INDUSTRIAL

ACTIVITY DECREASES IN THE SECTOR THIS MONTH

The volatile industrial sector experienced a monthly and yearly decrease in contract values but shows quarterly increases.

Activity in the industrial sector decreased in September with the value of contracts awarded £323 million, based on a rolling three month average (see Fig. 7.1). This is a fall of 18.2% on the value in August and is 7.8% below the figure recorded this time last year. In the three months to September the total value of contracts was £1.1 billion which was 8.7% higher the previous three months and 18.8% higher than the same quarter last year.

Projects by region

The South East is the region with the highest value of activity this month with 29% of the contracts awarded, an increase of 19.3% on September 2013 (see Fig. 7.2 & 7.4). This was principally due to the award of two contracts valued at £20 million at the Pirbright Institute in Surrey and Phase 2 of the Magna Park Distribution Centre in Milton Keynes.

Type of Projects

The types of project awarded in the sector were predominantly in warehouse/storage which accounted for 36% of contract values, although this was a decrease of 11% September 2013 (see Fig. 7.3). Food production was the second most prominent type of contract accounting for 20% of value an increase of 11% in the corresponding month last year.

> “The South East has the highest value of activity this month

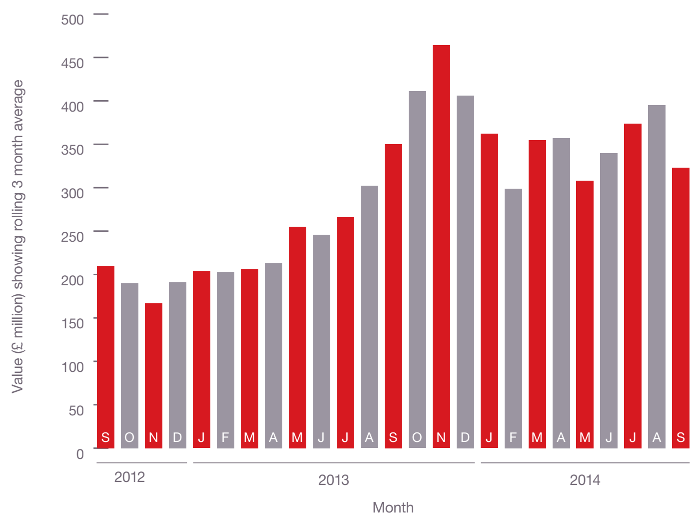

FIG. 7.1

Industrial: **Project Value showing 3 month moving average** Source: Barbour ABI

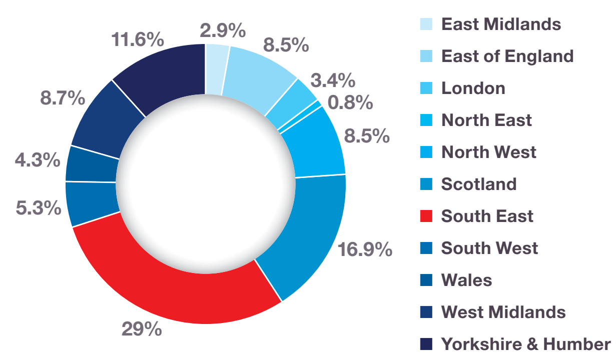

FIG. 7.2

Industrial: **Value of Contracts by Region** Source: Barbour ABI

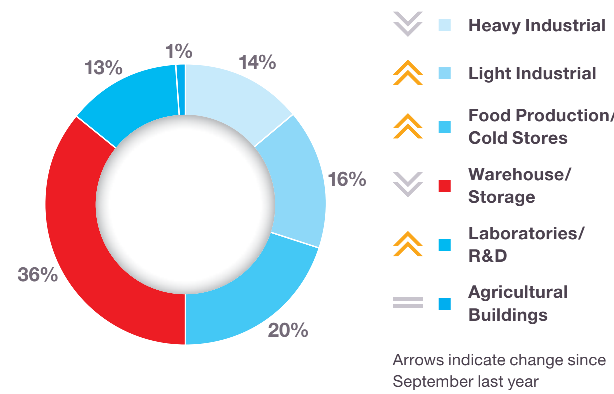

FIG. 7.3

Industrial: **Type of Projects Awarded** Source: Barbour ABI

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

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

		+3.7%	Scotland
+1.1%	East Midlands	+19.3%	South East *HOTTEST REGION*
-15.3%	East of England	+2.2%	South West
+2.0%	London	+0.2%	Wales
-4.0%	North East	-3.4%	West Midlands
+6.3%	North West	-12.2%	Yorkshire & Humber

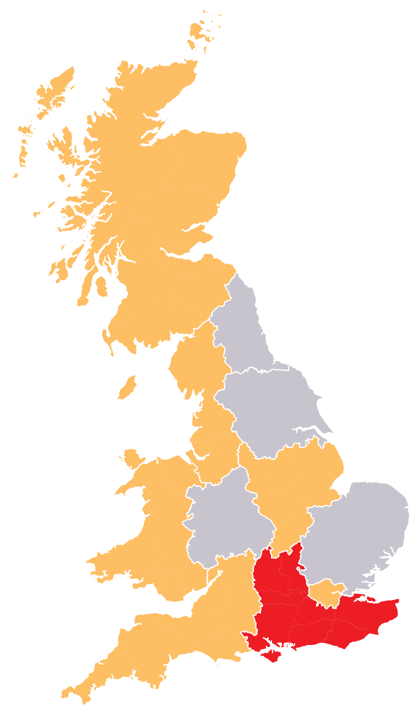

FIG. 7.4

Industrial: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

> "Activity in the industrial sector decreased in September with the value of contracts awarded £323 million

PROJECT IN FOCUS

Pirbright Institute – BRF Facility
£20,050,000

County	Surrey
Primary Category Sector	Industrial
Government Region	South East
Start Date	January 2015
End Date	January 2018
Contract Award Date	September 2014
Funding	Private
Stage	Contract Awarded
Contractor	Shepherd Consturction

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

TOP TEN
Key Clients
Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	8	200
2	British Airways Plc	PO Box 365, Uxbridge, Middlesex, UB7 0GB	0844 493 0787	1	178
3	SNF Gas and Oil Limited	Solutions House, Ripley Close, Normanton Industrial Estate, Normanton, West Yorkshire, WF6 1TB	01924 311000	2	165
4	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	8	164
5	Simons Construction Limited	991 Doddington Road, Lincoln, Lincolnshire, LN6 3AA	01522 505000	1	140
6	BP Exploration Operating Company	Sullom Voe Terminal, Mossbank, Shetland, Islands, ZE2 9TU		1	125
7	Institute Of Animal Health	Compton, Newbury, Berkshire, RG20 7NU	01635 578888	3	105
8	The Macallan Distillery	The Macallan Distillery, Craigellachie, Charlestown of Aberlour, Aberlour, Grampian, AB38 9RX	01340 871471	1	100
9	Edrington Group	2500 Great Western Road, Glasgow, Strathclyde, G15 6RW	0141 940 4000	1	100
10	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	3	100

TOP TEN
Key Architects
Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND		4	244
2	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	16	183
3	Chetwood Associates	12-13 Clerkenwell Green, City, London, EC1R 0QJ	020 7490 2400	3	135
4	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	12	130
5	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	4	125
6	Rogers Stirk Harbour and Partners	Thames Wharf Studios, Rainville Road, Hammersmith, London, W6 9HA	020 7385 1235	1	100
7	Smith Carter	1600 Buffalo Place, Winnipeg MB, Canada, XX	00 1 204 477 1260	2	90
8	PHP Architects	The Old Rectory, 31 Rectory Lane, Milton Malsor, Northampton, Northamptonshire, NN7 3AQ		6	88
9	Cornish Architects	Peer House, 8-14 Verulam Street, Westminster, London, WC1X 8LZ	020 7400 2120	3	88
10	Dalkin Scotton Partnership	305 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	3	76

TOP TEN
Key Contractors
Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	19	230
2	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	4	180
3	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	2	165
4	Robertson Construction	10 Perimeter Road, Pinefield Industrial Estate, Elgin, Grampian, IV30 6AE	01343 548621	6	133
5	Jacobs Limited	Jacobs House, 427 London Road, Earley, Reading, Berkshire, RG6 1BL	01189 635 331	3	128
6	Shepherd Construction Limited	Frederick House, Fulford Road, York, North Yorkshire, YO10 4EA	01904 634431	2	122
7	VolkerFitzpatrick	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	2	100
8	Gallagher Group Limited	Leitrim House, Coldharbour Lane, Aylesford, Maidstone, Kent, ME20 7NS	01622 716543	2	86
9	Sisk & Son Limited	1 Curo Park, Frogmore, St Albans, Hertfordshire, AL2 2DD	01727 875551	7	82
10	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	4	79

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MEDICAL & HEALTH

INCREASE IN VALUE OF CONTRACTS IN SEPTEMBER

The monthly value of medical & health contracts increased in September but declined on those recorded last year indicating a longer term fall in activity.

Levels of activity in the medical & health sector increased by 30.9% in September 2014 compared to last month, with the total value of contracts awarded £173 million based on a three month rolling average (see Fig. 8.1). This is 12.5% lower than the levels in September 2013. In the three months to September the value of contracts decreased by 35.6% on the previous three months, and was 36.5% down on the same period in 2013, indicating the longer term decline in the value of contracts awarded in the sector.

Projects by region

Scotland was the main location of development in the sector this month capturing 59% of activity, a substantial 34.4% increase from September 2013 (see Fig. 8.2 & 8.4). This is primarily due to the award for the contract to build the new Dumfries & Galloway Royal Infirmary which is valued at £200 million.

Type of Projects

This contract award means that public hospitals are the dominant sub-sector this month accounting for 71% of the value of contracts in September 2014, a 70% increase from the same month last year (see Fig. 8.3).

> Levels of activity increased by 30.9% in September

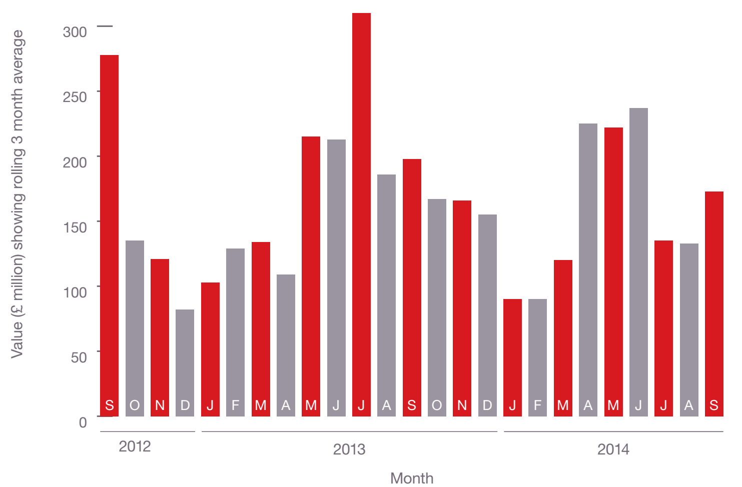

FIG. 8.1

Medical & Health: **Project Value showing 3 month moving average** Source: Barbour ABI

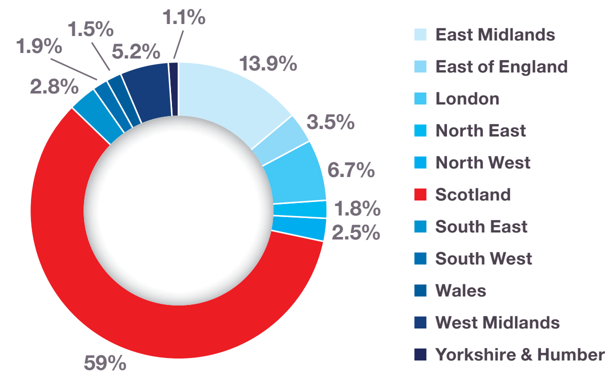

FIG. 8.2

Medical & Health: **Value of Contracts by Region** Source: Barbour ABI

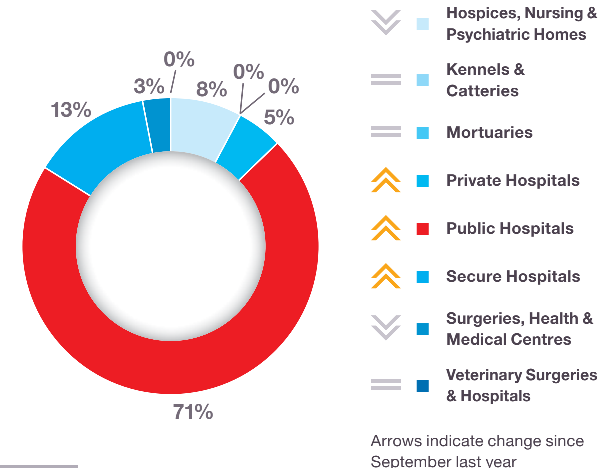

FIG. 8.3

Medical & Health: **Type of Projects Awarded** Source: Barbour ABI

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

		+34.4%	Scotland *HOTTEST REGION*
+9.2%	East Midlands	-3.7%	South East
+0.0%	East of England	-7.4%	South West
-8.8%	London	+0.1%	Wales
-1.9%	North East	-18.8%	West Midlands
-1.5%	North West	-1.6%	Yorkshire & Humber

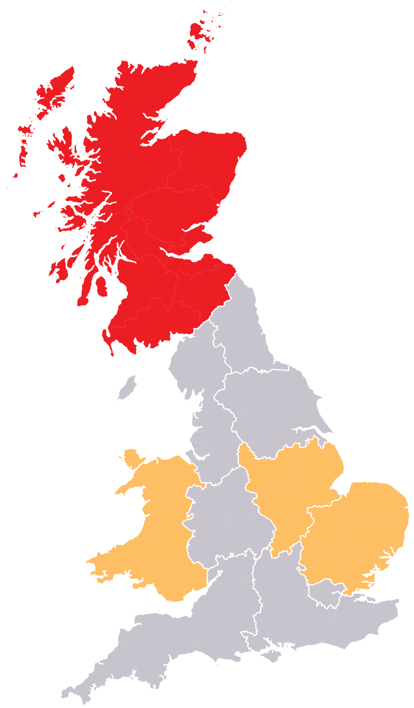


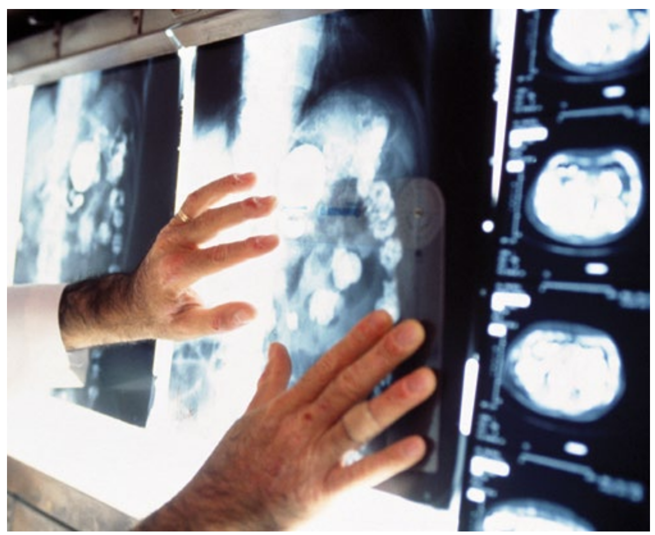
FIG. 8.4

Medical & Health: **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 Budget in March indicating this spending will occur.

> Public hospitals are the dominant sub-sector this month



PROJECT IN FOCUS

Dumfries And Galloway Royal Infirmary Hospital – Garroch Farm £200,000,000

County	Dumfries & Galloway
Primary Category Sector	Medical & Health
Government Region	Scotland
Start Date	Quarter 3 2015
End Date	Quarter 3 2018
Contract Award Date	September 2014
Funding	Mixed
Stage	Contract Awarded
Contractor	Laing O'Rourke

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INCREASE IN VALUE OF CONTRACTS IN SEPTEMBER

TOP TEN Key Clients

Oct 2013 – Sep 2014

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	3	355
2	Royal National Orthopaedic Hospital NHS Trust	Brockley Hill, Stanmore, Middlesex, HA7 4LP	020 8954 2300	1	263
3	Christie Hospital NHS Trust	Christie Hospital, 550 Wilmslow Road Withington, Manchester, Greater Manchester, M20 4BX	0161 446 3000	1	250
4	Dumfries & Galloway Health Board	Crichton Royal Hospital, Dumfries, Dumfries and Galloway, DG1 4TG	01387 244000	1	200
5	Aintree University Hospitals NHS Foundation Trust	Aintree University Hospital, Lower Lane, Aintree, Liverpool, Merseyside, L9 7AL	0151 525 5980	2	104
6	Royal Infirmary of Edinburgh NHS Trust	51 Little France Crescent, Old Dalkeith Road, Edinburgh, Lothian, EH16 4SA	0131 536 1000 (CTPS)	2	73
7	Great Ormond Street Hospital NHS Trust	Great Ormond Street, Westminster, London, WC1N 3JH	020 7405 9200 (CTPS)	1	60
8	The Trustees of the London Clinic	20 Devonshire Place, Westminster, London, W1G 6BW	020 7935 4444	1	55
9	St Andrews Healthcare	Billing Road, Northampton, Northamptonshire, NN1 5DG	01604 616000	3	52
10	University Hospitals of Leicester NHS Trust	Leicester Royal Infirmary, Infirmary Square, Leicester, Leicestershire, LE1 5WW	0300 303 1573	1	48

TOP TEN Key Architects

Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	HKS International Limited	82 Dean Street, Westminster, London, W1D 3SP	020 7292 9494 (TPS)	2	585
2	NBBJ	The Clove Building, 4-6 Maguire Street, Greenwich, London, SE1 2NQ	020 7549 3700	1	335
3	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	11	321
4	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	3	264
5	HOK International Limited	Qube, 90 Whitfield Street, Westminster, London, W1T 4EZ	020 7636 2006	2	263
6	P+HS Architects	The Old Station, Station Road, Stokesley, Middlesbrough, Cleveland, TS9 7AB	01642 712684	18	142
7	IBI Group	Chadsworth House, Wilmslow Road, Handforth, Wilmslow, Cheshire, SK9 3HP	01625 542200	6	110
8	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	2	81
9	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	72
10	Murphy Philipps Architects Limited	140 Old Street, City, London, EC1V 9BJ	020 7490 8008	4	65

TOP TEN Key Contractors

Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	3	340
2	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	15	337
3	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	3	207
4	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	7	84
5	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	9	76
6	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	5	66
7	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	3	61
8	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	9	56
9	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	7	55
10	Coffey Construction Limited	93-95 Greenford Road, Harrow, Middlesex, HA1 3QF	020 8426 4944 (CTPS)	1	55

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EDUCATION

INCREASE IN THE VALUE OF CONTRACTS IN SEPTEMBER

economic & construction MARKET REVIEW

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The education sector grew this month and activity is still much higher than this time last year indicating better long term performance in this sector.

The value of contracts awarded in the education sector was £811 million in September based on a three month rolling average, an 8.5% increase from August (see Fig. 9.1). This figure was 62.5% higher than September 2013 indicating the sectors improvement over the past year. The values of contract awards in the three months to September were 40.1% higher than the same period last year, showing the longer term growth in contracts awarded.

Projects by region

The main location of activity this month was the North West which accounted for 22% of the value of projects, which was an 11.5% increase from September 2013 (see Fig. 9.2 & 9.4). This is primarily due to the awards of a number of contracts from the Priority School Building Programme across the region, individually valued at £10 million.

Type of Projects

The plethora of Priority School Building projects mean that state primary and state secondary projects dominate the sector this month accounting for 60% of the total value of projects awarded in September (see Fig. 9.3).

> The North West accounted for 22% of the value of projects

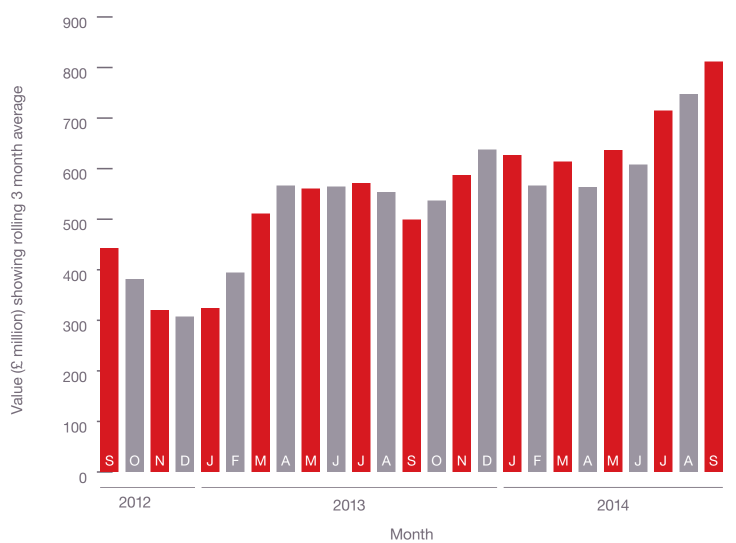

FIG. 9.1

Education: **Project Value showing 3 month moving average** Source: Barbour ABI

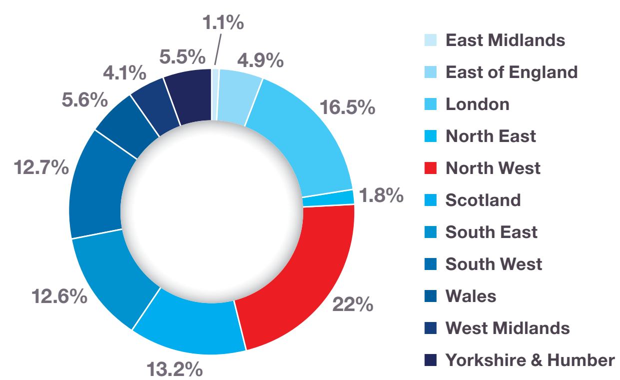

FIG. 9.2

Education: **Value of Contracts by Region** Source: Barbour ABI

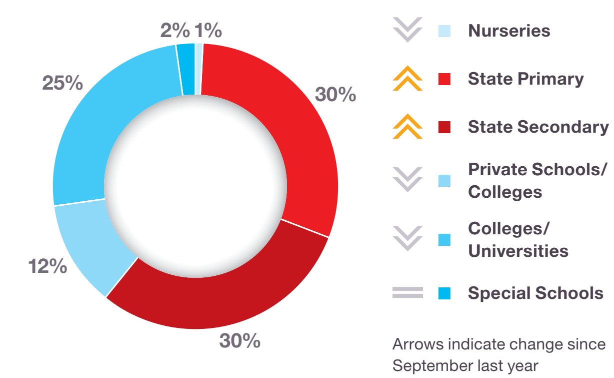

FIG. 9.3

Education: **Type of Projects Awarded** Source: Barbour ABI

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INCREASE IN THE VALUE OF CONTRACTS IN SEPTEMBER

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

		+10.9%	Scotland
-6.0%	East Midlands	+1.3%	South East
-9.3%	East of England	+4.4%	South West
-6.6%	London	+2.0%	Wales
-2.1%	North East	-7.3%	West Midlands
+11.5%	North West *HOTTEST REGION*	+1.2%	Yorkshire & Humber

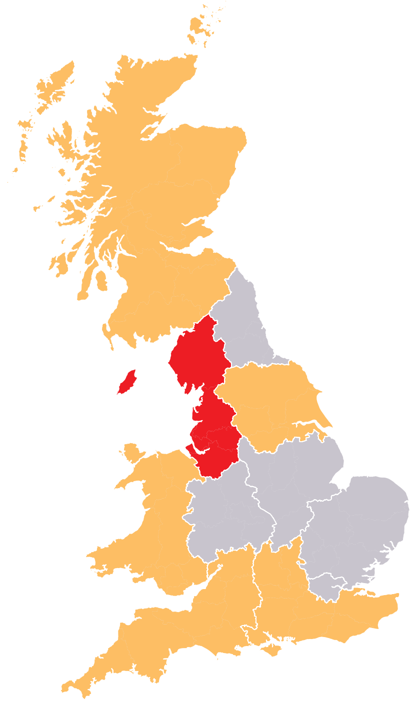


FIG. 9.4

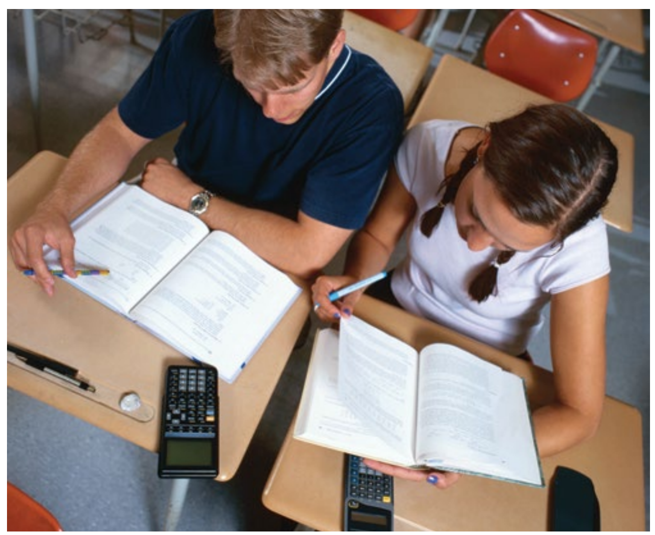
Education: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

Outlook

In the Budget 2014 the Government announced a series of measures that will impact the value of contracts awarded in the Education sector in the coming years. These included:

- **£106 million over 5 years to fund around 20 additional Centres for Doctoral Training**
- **An additional £85 million in 2014/15 and 2015/16 to extend the Apprenticeship Grant for Employers scheme**

> State primary and state secondary projects dominate this month



PROJECT IN FOCUS

New Boroughmuir High School
£30,000,000

County	Lothian
Primary Category Sector	Education
Government Region	Scotland
Start Date	October 2014
End Date	April 2016
Contract Award Date	September 2014
Funding	Public
Stage	Contract Awarded
Contractor	O'Hare & McGovern

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INCREASE IN THE VALUE OF CONTRACTS IN SEPTEMBER

TOP TEN
Key Clients
Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Department For Education	Castle View House, East Lane, Runcorn, Cheshire, WA7 2AA	0370 000 2288	107	929
2	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2DB	020 7589 5111	9	166
3	Kent County Council	County Hall, County Road, Maidstone, Kent, ME14 1XQ	03000 414141	38	144
4	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	2	123
5	Laing Plc	Allington House, 150 Victoria Street, Westminster, London, SW1E 5LB	020 7901 3200	1	120
6	Cambridge University Hospitals NHS Foundation Trust	Addenbrookes Hospital, Hills Road, Cambridge, Cambridgeshire, CB2 0QQ	01223 245151	1	120
7	Highland Council	Glenurquhart Road, Inverness, Highlands, IV3 5NX	01463 702000	5	102
8	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	7	96
9	University of Bath	Claverton Down Road, Claverton Down, Bath, Avon, BA2 7AU	01225 388388	8	80
10	Hertfordshire County Council	County Hall, Pegs Lane, Hertford, Hertfordshire, SG13 8DN	0300 123 4040	20	75

TOP TEN
Key Architects
Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	40	352
2	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	43	312
3	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, Avon, BS8 3NE	0117 974 3271 (TPS)	27	174
4	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	22	168
5	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	13	163
6	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 75800400	17	163
7	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	7	142
8	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 652 1666	7	141
9	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	11	130
10	Ellis Williams Architects	Wellfield, Chester Road, Preston Brook, Runcorn, Cheshire, WA7 3BA	01928 752200	24	128

TOP TEN
Key Contractors
Oct 2013 – Sep 2014

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	127	650
2	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	72	457
3	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	73	448
4	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	38	437
5	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	81	381
6	Miller Developments Limited	Miller House, 2 Lochside View, Edinburgh Park, Edinburgh, Lothian, EH12 9DH	0870 336 5000	27	373
7	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	14	284
8	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	44	242
9	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861000	32	209
10	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	23	170

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Barbour ABI
www.barbour-abi.com

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
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Donate your company's Christmas card budget to CRASH and help build a future for homeless people

CRASH
CONSTRUCTING A FUTURE FOR HOMELESS PEOPLE

Things are looking up, but there are still many people in the UK who are homeless. Do your bit this year by donating your Christmas card budget to the **2014 CRASH No Christmas Card Appeal.**

The money raised through this appeal will enable CRASH – your industry charity – to construct and improve the buildings that give homeless men and women the opportunity to get off the streets and start rebuilding their lives. In return for donations over £100 you'll get;

- **A CRASH animated Christmas e-card with your company logo.**

And if you donate £500 or more by 19th December, we'll include your company's name or logo in our special Thank You ads which we'll be running in the construction and property industry press in the New Year.

BIG SOCIETY AWARDS 2014

Presented by the Prime Minister

Please call Amy Hart on: 020 8742 0717
email: ahart@crash.org.uk
or visit: www.crash.org.uk

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