economic & construction MARKET REVIEW

Barbour ABI | Building | bd

SEPTEMBER 2015

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.

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

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ABOUT US

SPECIALIST PROVIDER OF CONSTRUCTION INTELLIGENCE

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. Michael is also a regular contributor to Building magazine, sits on the current CPA Forecasting Panel as well as being frequently noted in construction trade and the national press.

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

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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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ECONOMIC CONTEXT

UNEMPLOYMENT FALLS TO 5.5% IN LATEST FIGURES

The second estimate of GDP confirmed that the UK economy grew by 0.7% in Q2 2015.

The second estimate of GDP confirmed that the UK economy grew by 0.7% in Q2 2015 (see Fig. 1.1). After a slowdown in the growth rate to 0.4% in the first quarter, this marked a return to the average growth rate since the end of 2012. Analysing the nature of GDP growth shows that consumer expenditure is the single biggest source, increasing by 2.1% on the same period a year ago. Fixed investment also increased, by 0.8% with net trade and government consumption adding 0.5% and 0.4% respectively.

The labour market continues to perform particularly strongly in the UK with the unemployment rate remaining stable over recent months. The rate of unemployment is currently 5.5% for those aged 16 and over, down from 5.6% in July 2015 (see Fig. 1.2).

The rate of inflation remained at 0% in August with the continued decline in oil, and a lower rise in clothes prices the main reasons for this (see Fig. 1.3). Most commentators expect inflation to start growing towards the end of the year as these falls will be factored in to the yearly change figures. However, the price of oil remains low and the impact of this may to be suppress the inflation rate for longer than originally anticipated.

Other news this month on the UK economy includes:

- **UK shares suffered on "Black Monday" which was driven by fears of a slowdown in economic growth in China**
- **A survey from the British Retail Consortium showed that like-for-like retail sales in the UK fell by 1.0% in August 2015**
- **Manufacturing trade body, the EEF, halved its forecast for sector growth in 2015 to 0.7% down from 1.7% at the start of the year.**

> "Analysing the nature of GDP growth shows that consumer expenditure is the single biggest source, increasing by 2.1% on the same period a year ago.

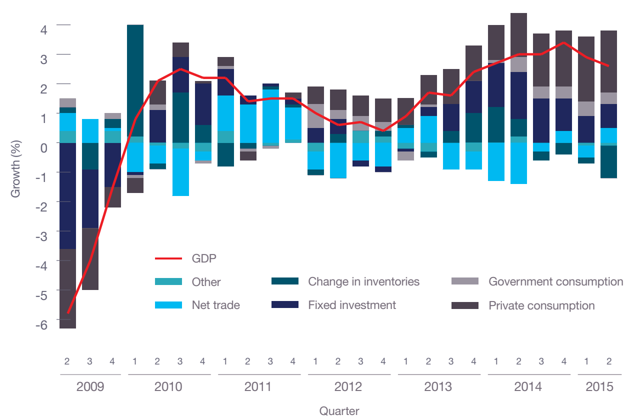

Fig. 1.1 **UK GDP** Source: ONS

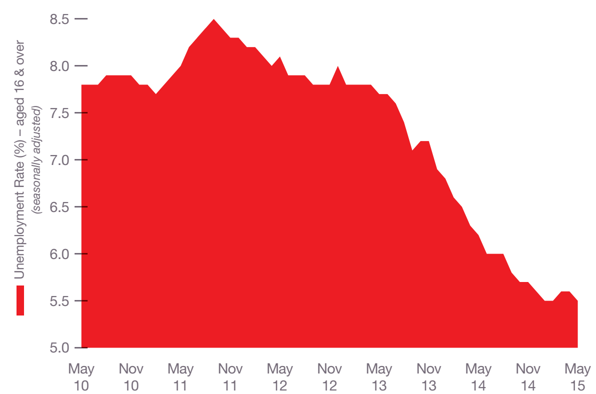

Fig. 1.2 **Unemployment Rate** Source: ONS

Fig. 1.3 **CPI (Inflation)** Source: ONS

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THE CONSTRUCTION SECTOR

DECLINE IN CONSTRUCTION OUTPUT FOR THE INDUSTRY

The latest figures from the ONS show that the construction sector in the UK shrank by 1% between June and July 2015.

Comparing output levels with July last year showed a decrease of 0.7% (see Fig. 2.1). The main reason for the monthly falls in output are declines in private housing output and private commercial. New Private Housing decreased by 2% between June and July 2015 but was 0.8% higher than the corresponding month in 2014. Output in the Private Commercial sector fell by 2.9% between June and July, and by 3.2% on July 2014. The decline in commercial is concerning for industry growth prospects but it should be noted that private housing output is still higher than this time in 2014. The performance of the infrastructure sector is encouraging however with output 17.4% higher in July 2015 compared to July 2014.

The ONS/Barbour ABI New Orders for Q2 2015 showed that total order levels decreased by 0.4% between Q1 and Q2 2015 but were 1.9% higher than a year ago. Yearly growth was recorded in the infrastructure, private housing and private industrial sectors indicating a broadening growth within the industry.

The CPA / Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 151 for August (see Fig. 2.3). This is an increase from the previous month and continues to support the view that overall activity in the industry remains strong. The readings for Private Housing remain high at 235. Commercial offices activity also increased in August, recording a figure of 123 up from 100 in July.

Construction Sector

According to Barbour ABI data on all contract activity, August witnessed a small decrease in construction activity levels with the value of new contracts awarded £6.4 billion, based on a three month rolling average. This represents a minor 0.3% decrease from July, although this is still a 22.4% increase on the value recorded in August 2014. The number of construction projects within the UK in August decreased by 6.6% on July, but was still 6.3% higher than August 2014.

	% change	
	July 2014 – July 2015	**June 2015 – July 2015**
Total All Work	**-0.7**	**-1.0**
All New Work	**1.0**	**-1.5**
Public Housing	-15.6	-5.8
Private Housing	0.8	-2.0
Infrastructure	17.3	2.7
Public (ex Infrastructure)	-3.4	-4.5
Private Industrial	4.9	6.6
Private Commercial	-3.2	-2.9
Repair & Maintenance	**-3.4**	**0.0**
Public Housing	-2.2	-2.6
Private Housing	-0.4	-0.8
Non-Housing	-5.8	1.4

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

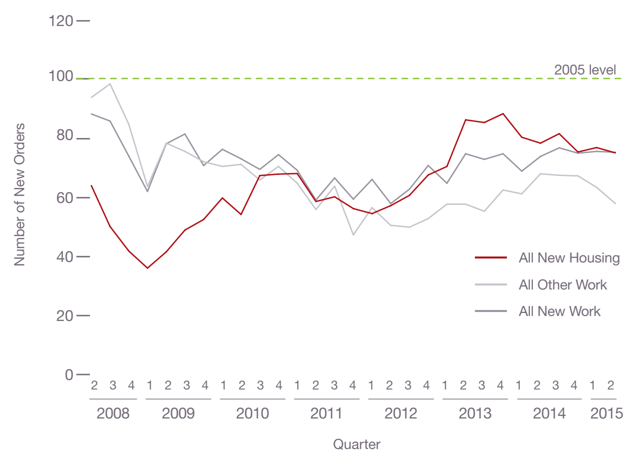

Fig. 2.2 **Construction New Orders** Source: CPA/Barbour ABI

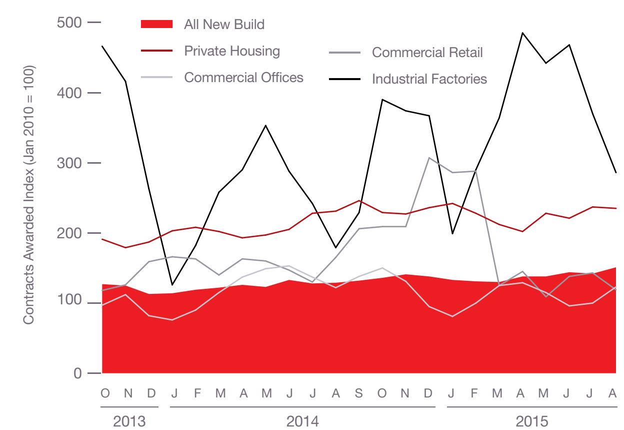

Fig. 2.3 **Contracts Awarded** Source: CPA/Barbour ABI

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Projects by Region

The majority of the contracts awarded in August by value were in London, accounting for 30% of the UK total (see Fig. 2.4). This is followed by the South East with 15%, with the remaining regions seeing a fairly even split. The strong performance of London is primarily due to the award of the £416 million contract for Lot 1 of the Thames Tideway Tunnel. A major office development at 1 Park Place at Canary Wharf also contributed £200 million to the regions total. The regeneration of London Road Industrial Estate in Newbury contributed £125 million toward the South East total.

Types of Project

The residential sector had the highest proportion of contracts awarded in August with 31% of the total value of projects awarded (see Fig. 2.6). An £80 million housing development at Wembley Park led the way. Infrastructure followed contributing 19% of the total value of projects awarded. As mentioned earlier the Thames Tideway Tunnel dominated but renewables performed well led by a £66 million wind farm in the Highlands of Scotland.

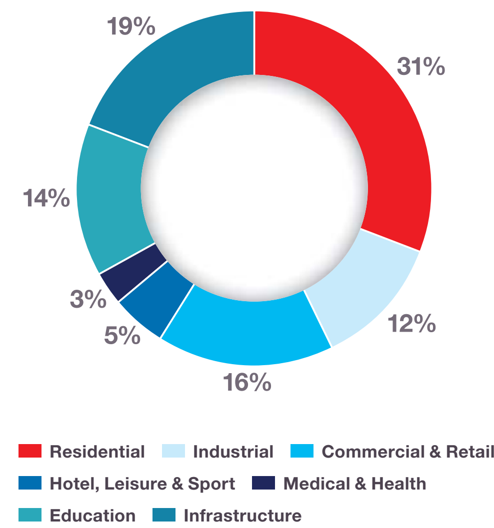

Fig. 2.6 **Type of Projects** Source: Barbour ABI

> The residential sector had the highest proportion of contracts awarded in August.

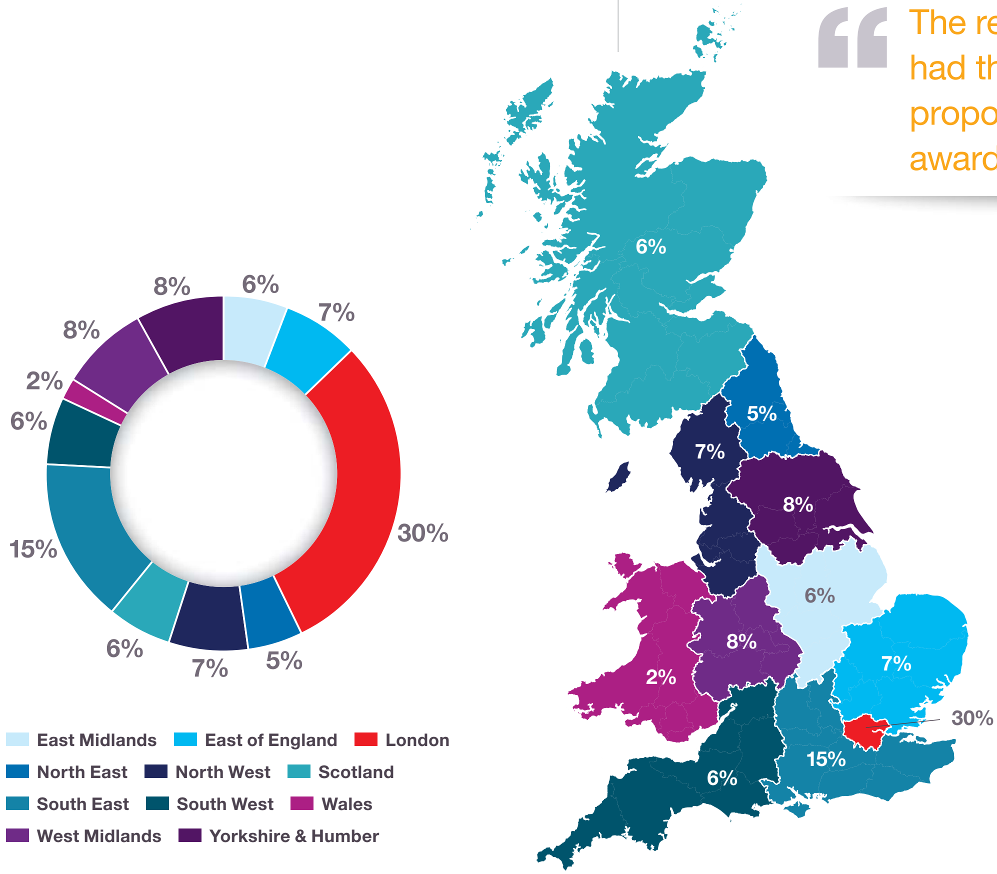

Fig. 2.4 **Locations of Contracts Awarded** Source: Barbour ABI

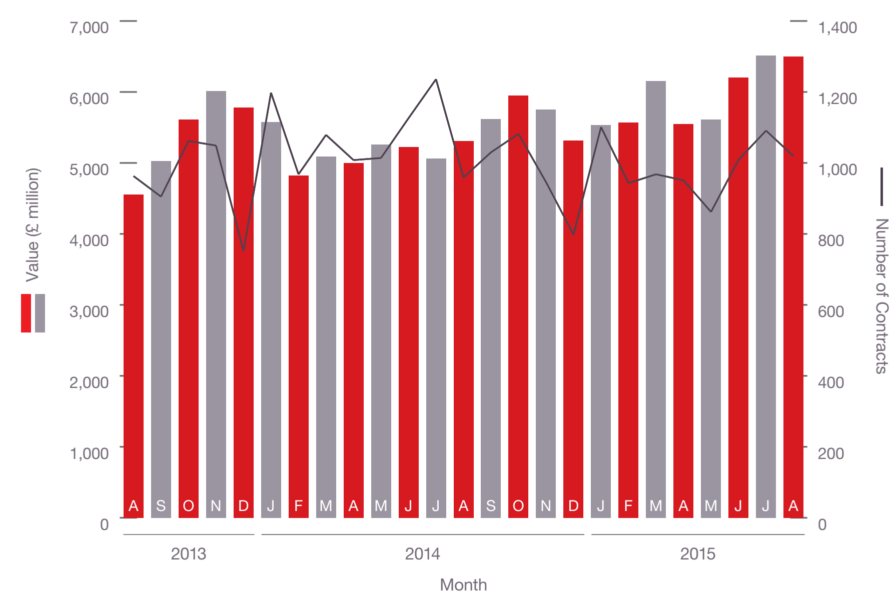

Fig. 2.5 **Construction Activity Trends** Source: Barbour ABI

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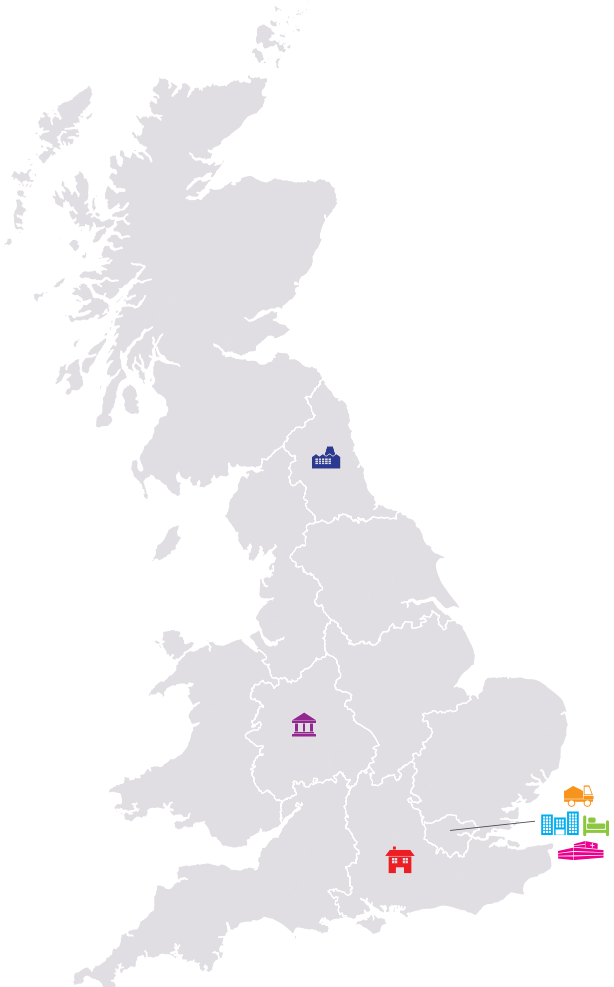
A snippet of this month's regional activity

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



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

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
Wembley Park – Alto
£80,000,000

INFRASTRUCTURE
Thames Tideway Tunnel – Lot 1/C405 Main Works West
£416,000,000

COMMERCIAL & RETAIL
1 Park Place – Canary Wharf Offices
£200,000,000

HOTEL, LEISURE & SPORT
Stratford City Plot N24 – Manhattan Loft Gardens
£50,000,000

INDUSTRIAL
Project Owl - Distribution Facility
£45,000,000

MEDICAL & HEALTH
Royal Free Hospital – Institute of Immunity & Transplantation
£42,000,000

EDUCATION
Brixton Campus Redevelopment – Trinity Academy
£35,000,000

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RESIDENTIAL

GROWTH FOR RESIDENTIAL REMAINS AT A HIGH LEVEL

Positive signs with a return to growth in August but residential contract values are still significantly lower than this time last year.

Activity in the residential sector returned to growth in August with the total of units awarded up to 10,730 based on a three month rolling average. This is a 1.7% increase on July but is 10% down on August 2014, a continued sign that growth in activity in the sector is slowing down, but remains at a high level. The value of projects associated with residential contracts increased by 11.4% (see Fig. 3.1) on the previous month based on a three month rolling average, although was down 10.1% on the corresponding month last year. A return to growth this month is a positive sign for the sector after concerns regarding skilled labour and material shortages in the last few months. Continued government help with housing, particularly with first time buyers points to a positive end to 2015 continuing into 2016.

Sector Performance

The latest house price indices for August from Nationwide showed that average house prices are growing at 3.2% annually, a decrease from 3.5% in July. The Halifax continued to show a more positive picture with annual house prices up 9% annually, an increase from 7.8% in July.

Further data from RICS shows that new buyer enquiries continue to grow whilst new instructions still show no signs of increased growth, pushing average stock levels to record lows. Signs here point to a continuation of house price increases into 2016.

> “The value of projects associated with residential contracts increased by 11.4% on the previous month.

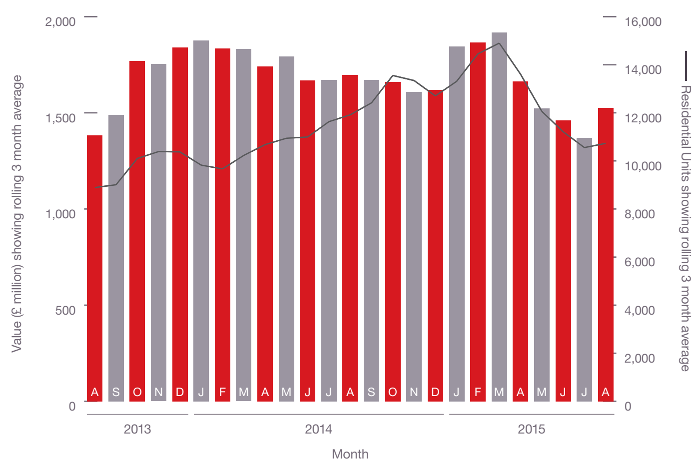

FIG. 3.1

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

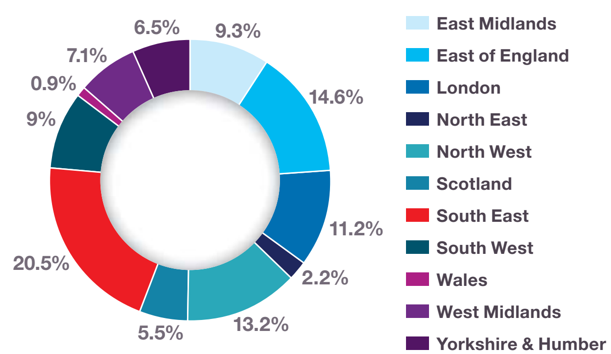

FIG. 3.2

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

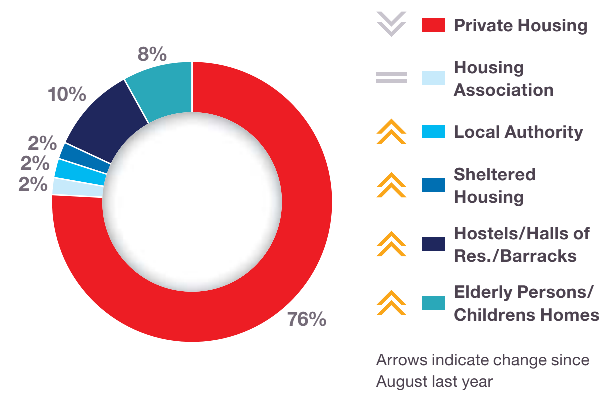

FIG. 3.3

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

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The map and figures show how the activity has changed since August 2014		-2.0%	Scotland
+2.4%	East Midlands	+10.2%	South East
+13.3%	East of England *HOTTEST REGION*	-3.3%	South West
-18.3%	London	-2.2%	Wales
-2.4%	North East	+4.4%	West Midlands
+1.1%	North West	-3.2%	Yorkshire & Humber

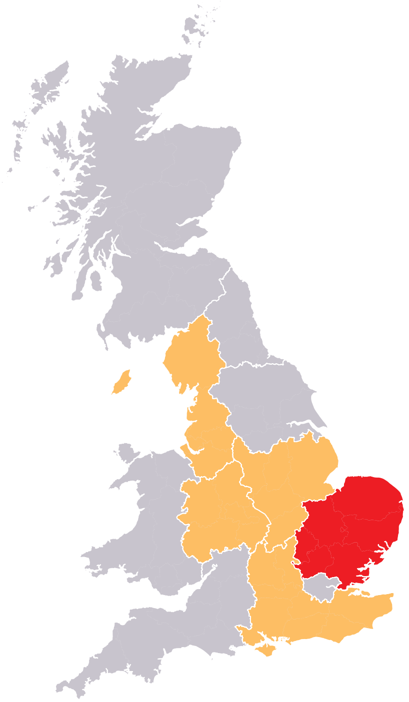

FIG. 3.4

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

Source: Barbour ABI

Projects by region

The South East is the main location of activity in the residential sector this month, accounting for 20.5% (see Fig. 3.2) of the value of contracts awarded, an increase of 10.2% (see Fig. 3.4) on the same month last year. A development of 500 houses at the former Louisburg Barracks in Hampshire contributed £60 million, whilst a 1,000 unit student accommodation scheme in Portsmouth has a value of £30 million.

Type of Projects

The type of projects awarded in the residential sector unsurprisingly continues to be dominated by private housing in August. Private housing accounted for 76% (see Fig. 3.3) of the total value of contracts awarded this month, a decrease of 9% from the corresponding month last year. After private housing, the next largest project type were hostels/halls of residence projects which accounted for 10% of the value awarded, an small increase of 1% from the corresponding month last year.

> The South East is the main location of activity in the residential sector this month, accounting for 20.5% of the value of contracts awarded, an increase of 10.2%

PROJECT IN FOCUS

Wembley Park – Alto
£80,000,000

County	Middlesex
Primary Category Sector	Residential
Government Region	Middlesex
Start Date	September 2015
End Date	September 2017
Funding	Private
Stage	Subcontract
Contractor	Wates Construction Limited

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GROWTH FOR RESIDENTIAL REMAINS AT A HIGH LEVEL

TOP TEN Key Clients
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	212	2,598
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	168	2,462
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	153	2,443
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	96	1,141
5	Redrow Homes (South Midlands) Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520 044	62	886
6	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	63	876
7	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	68	786
8	The Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	020 3675 1502	25	766
9	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	51	663
10	St Modwen Developments Plc	Sir Stanley Clarke House, 7 Ridgeway,Quinton Business Park, Birmingham, West Midlands, B32 1AF	0121 222 9400	14	535

TOP TEN Key Architects
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	90	1,020
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, Avon, BS8 3NE	0117 974 3271 (TPS)	17	715
3	Barton Willmore	The Blade, Abbey Square, Reading, Berkshire, RG1 3BE	0118 943 0000 (CTPS)	37	582
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	41	534
5	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	27	471
6	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	36	437
7	Glenn Howells Architects	321 Bradford Street, Digbeth, Birmingham, West Midlands, B5 6ET	0121 666 7640 (CTPS)	9	340
8	Tetlow King Planning	Unit 2 Eclipse Office Park, Staple Hill, Bristol, North Somerset, BS16 5EL	0117 9561916 (CTPS)	23	315
9	Pegasus Planning Group	Suite 4B, 113 Portland Street, Manchester, Greater Manchester, M1 6DW	0161 393 3399	19	313
10	Pollard Thomas & Edwards Architects	Diespeker Wharf, 38 Graham Street, Islington, London, N1 8JX	020 7336 7777	16	309

TOP TEN Key Contractors
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	216	2,634
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	172	2,631
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	155	1,994
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	99	1,175
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	97	1,010
6	Redrow Homes (South Midlands) Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520 044	62	837
7	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	59	661
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	51	646
9	The Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	020 3675 1502	24	631
10	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	44	608

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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INFRASTRUCTURE

CONTRACT VALUES DECREASE IN AUGUST

Even with a decrease in August, the figures are still almost 50 per cent higher than in 2014, with contract values of £5.3 billion.

The value of contracts awarded in the infrastructure sector decreased in August with the total value awarded down to £1.6 billion based on a three month rolling average (see Fig. 4.1). This is a 19.5% decrease from the previous month but still represents a total 48.1% higher than the same month last year. In the three months to August the total value of contract awards was £5.3 billion based on a three month rolling average. This is 7.2% higher than the previous three months and 59.3% higher than the same period in 2014. This represents a significant increase on last year's totals and if these awards can be translated to 'shovels in the ground' could have a significant impact on the construction sector as a whole.

Projects by region

London was the major contributor to the total values of contracts awarded, accounting for a significant 49.8% of the total (see Fig. 4.2). This was almost solely down to the award of the Thames Tideway Tunnel at a cost of £416 million. A Northern Roundabout improvement package at the Elephant & Castle also provided £25 million to the total. The rest of the contracts were shared across the regions with no other region accounting for more than 10% of the total.

> London was the major contributor to the total values of contracts awarded, accounting for a significant 49.8% of the total.

FIG. 4.1

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

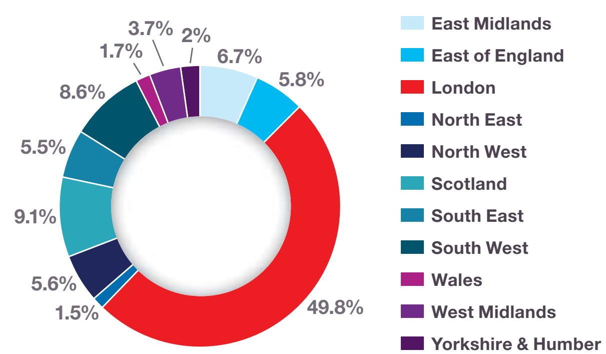

FIG. 4.2

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

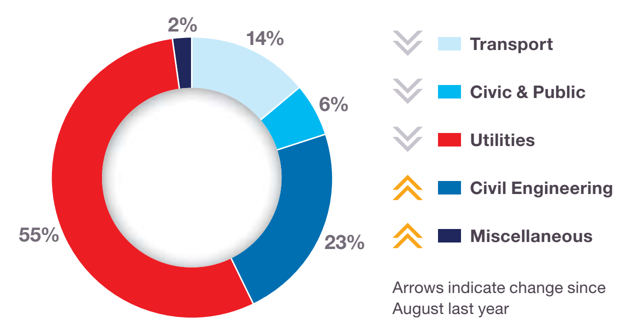

FIG. 4.3

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

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The map and figures show how the activity has changed since August 2014			+1.7%	Scotland	
-9.0%	East Midlands		-0.5%	South East	
+2.1%	East of England		+1.7%	South West	
+36.0%	London *HOTTEST REGION*		-1.3%	Wales	
-0.3%	North East		+2.0%	West Midlands	
-4.3%	North West		-28.1%	Yorkshire & Humber	

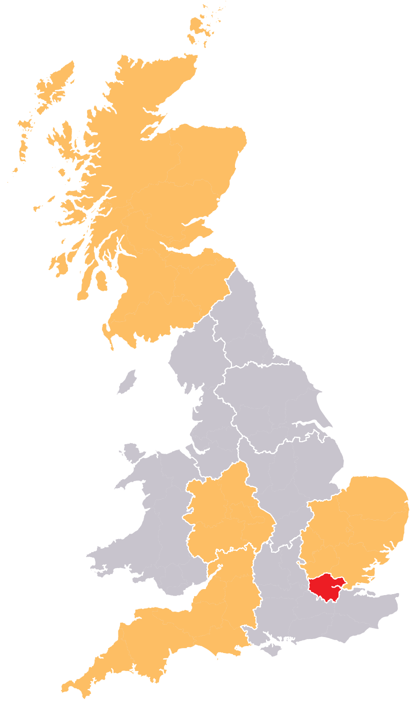

FIG. 4.4

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

Type of Projects

Civil Engineering dominated the sector splits in August thanks to the earlier named Thames Tideway Tunnel. Its £416 million total meant that the Civil Engineering sector represented a massive 55% (see Fig. 4.3) of total values of contracts awarded, up 46% on the same month last year. Utilities performed next best accounting for 23% of the total values of contract awarded, although this was 30% down on last year's contribution.

> Civil Engineering sector represented a massive 55% of total values of contracts awarded

Outlook

The Summer Budget 2015 announced that it will introduce a roads fund from the proceeds of Vehicle Excise Duty from the year 2020. This is to ensure sustained investment is made in road maintenance. It also committed to publishing a second Roads Investment Strategy for the years 2020-25. Other announcements included plans to extend devolution to the northern regions of England to build on the Northern Powerhouse concept and announced plans to establish Transport for the North (TFN) as a statutory body. Finally, the government plans to extend the Coastal Communities Fund by at least £90 million until 2020/21.

PROJECT IN FOCUS

Thames Tideway Tunnel – Lot 1/C405 Main Works West
£416,000,000

County	London
Primary Category Sector	Infrastructure
Government Region	London
Start Date	July 2016
End Date	July 2023
Contract Award Date	August 2015
Funding	Private
Stage	Contract
Contractor	BAM Nuttall, Balfour Beatty Group Limited, Morgan Sindall Plc

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CONTRACT VALUES DECREASE IN AUGUST

TOP TEN Key Clients

Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	86	1,763
2	E.ON Limited	Newstead Court, Little Oak Drive, Annesley, Nottingham, Nottinghamshire, NG15 0DR	024 7618 1684	3	1,326
3	Transport Scotland	Buchanan House, 58 Port Dundas Road, Glasgow, Strathclyde, G4 0HF	0141 272 7100	10	1,145
4	Aberdeen City Council	Town House, Broad Street, Aberdeen, Grampian, AB10 1AQ	01224 522000	6	1,072
5	Welsh Assembly Government	Cathays Park, Cardiff, South Glamorgan, CF10 3NQ	0300 060 3300	4	820
6	Battersea Power Station Development Company	Battersea Power Station, 188 Kirtling Street, South Lambeth, London, SW8 5BN	020 7501 0688 (CTPS)	1	600
7	Green Energy Parks Limited	Eco Innovation Centre, Peterscourt, Peterborough, Cambridgeshire, PE1 1SA	01733 348468	1	600
8	DONG Energy AVS	33 Grosvenor Place, Belgravia, Westminster, London, SW1X 7HY	020 7811 5200	3	592
9	Scottish Govenment	St Andrews House, Regent Road, Edinburgh, Lothian, EH1 3DG	0131 556 8400	1	530
10	Thames Water Utilities Limited	Clearwater Court, Vastern Road, Reading, Berkshire, RG1 8DB	020 3577 8000	3	423

TOP TEN Key Architects

Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140	12	622
2	Dickie Associates	Manor Barn, Wilsthorpe, Stamford, Lincolnshire, PE9 4PE	01778 560811	1	600
3	Weston Williamson + Partners	12 Valentine Place, Southwark, London, SE1 8QH	020 7401 8877	1	600
4	Garry Stewart Design Associates	Highland House, Office 101 165 The Broadway, Wimbledon, London, SW19 1NE	020 8544 8085	1	200
5	Acanthus LW Architects	Voysey House, Barley Mow Passage, Chiswick, London, W4 4PN	020 8994 2288	1	71
6	Race Cottam Associates Limited	3 Vincent House, Solly Street, Sheffield, South Yorkshire, S1 4BB	0114 273 7050 (TPS)	1	65
7	Stefan Zins Associates Limited	Bedford House, 69-79 Fulham High Street, Fulham, London, SW6 3JW	020 7471 8550	1	63
8	FOB Design	The Studio, 72a Water Lane, Wilmslow, Cheshire, SK9 5BB	01625 251644	1	60
9	Wardell Armstrong	2 The Avenue, Leigh, Lancashire, WN7 1ES	01942 260101 (TPS)	1	60
10	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	1	50

TOP TEN Key Contractors

Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Aberdeen Roads Limited	North Point, Exploration Drive, Bridge of Don, Aberdeen, Grampian, AB23 8GX	0800 058 8350	5	1,060
2	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	21	974
3	Costain/ Skanska JV	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444 / 01923 842444	3	890
4	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	40	824
5	KNM Group	15 Jalan Dagang SB4/1, Taman Sungai Besi Indah, 43300 Seri Kembangan, Malaysia	0060 389463000	1	600
6	Ferrovial Agroman Laing O'Rourke JV	10th Floor, BSI Building, 389 Chiswick High Road, Southwark, London, W4 4AL	020 8750 2100	1	600
7	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	20	498
8	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	9	487
9	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	309
10	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	14	290

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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COMMERCIAL & RETAIL

MAJOR INCREASE IN CONTRACT VALUES IN AUGUST

Commercial & retail experienced an increase of 71.6% compared to the same month last year, suggesting the increase in activity is long term.

The value of contracts awarded in the Commercial & Retail sector was £1.5 billion in August based on a three month rolling average (see Fig. 5.1). This is an 11.9% increase on July and a 71.6% increase on the same month last year. In the three months to August the value of contracts is 85.7% higher than the previous three months and 63.5% higher than the same period in 2014, indicating a significant increase in activity over the long term.

Projects by region

The award of a £150 million commercial development at 1 Park Place Canary Wharf meant that London was again the main location for commercial construction activity in August 2015. Further office developments at Marble Arch and the Old Bailey helped London account for 60.8% (see Fig. 5.2) of the value awarded in August, a 6.9% increase from August 2014 (see Fig. 5.4).

Type of Projects

Offices totally dominated the types of project in the sector for August, accounting for 84% (see Fig. 5.3) of the value of contracts awarded, 13% higher than August 2014.

> The £150 million commercial development at 1 Park Place Canary Wharf meant London was again the main location.

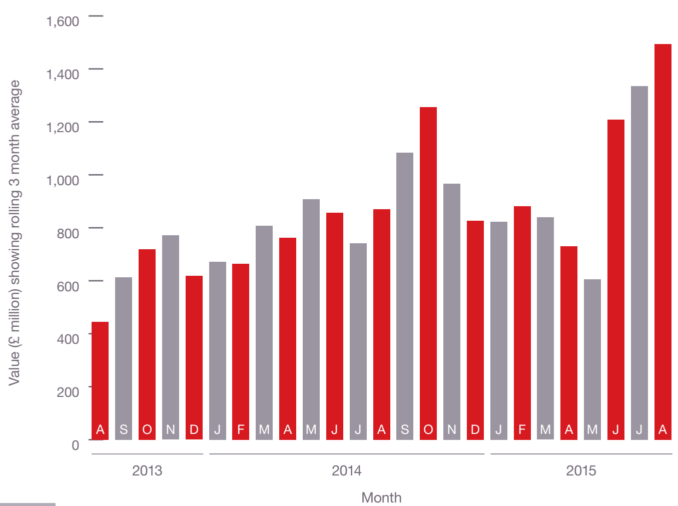

FIG. 5.1

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

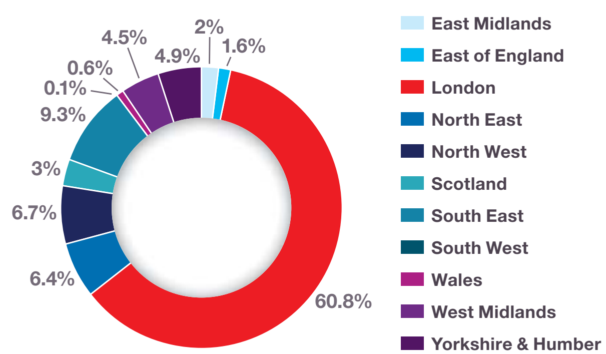

FIG. 5.2

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

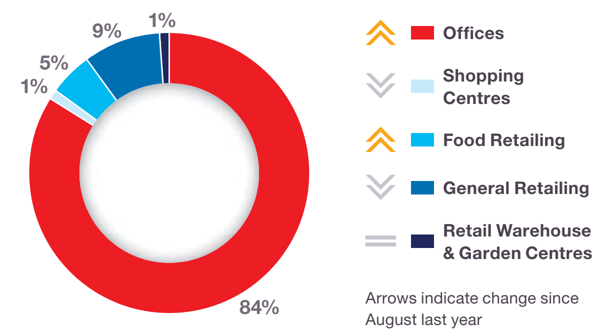

FIG. 5.3

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

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The map and figures show how the activity has changed since August 2014		+1.5%	Scotland
+1.6%	East Midlands	-3.7%	South East
-3.7%	East of England	-4.2%	South West
+6.9%	London *HOTTEST REGION*	-1.9%	Wales
+6.2%	North East	-10.6%	West Midlands
+3.5%	North West	+4.5%	Yorkshire & Humber

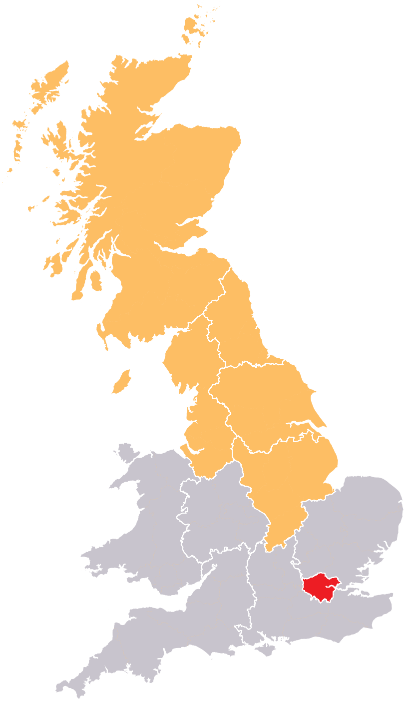
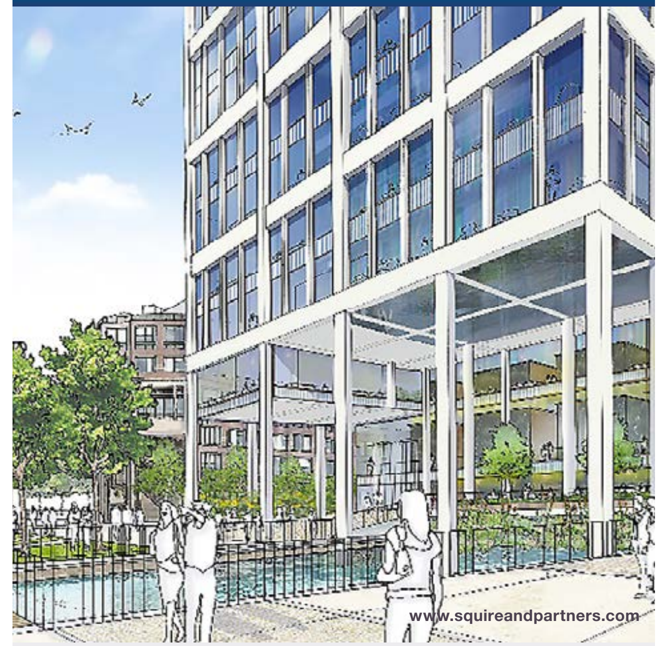


FIG. 5.4

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

PROJECT IN FOCUS



1 Park Place – Canary Wharf Offices £200,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	August 2015
End Date	August 2018
Contract Award Date	August 2015
Funding	Private
Stage	Subcontract
Contractor	Canary Wharf Contractors Limited

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MAJOR INCREASE IN CONTRACT VALUES IN AUGUST

TOP TEN Key Clients
Sep 2014 – Aug 2015

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)	2	601
2	The Crown Estate	16 New Burlington Place, Westminster, London, W1S 2HX	020 7851 5000 (CTPS)	4	451
3	British Waterways	Brindley Suite, Willow Grange, Church Road, Watford, Hertfordshire, WD17 4QA	01923 226422	1	388
4	Britel Fund Trustees Limited And Clerical Medical	Lloyd Chambers, 1 Portsoken Street, Tower Hamlets, London, E1 8PP	020 7702 0888	1	250
5	Stanhope Plc	Norfolk House, 31 St James Square, Westminster, London, SW1Y 4JR	020 7170 1700	2	246
6	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	201
7	Saxon Land BV	117 Fenchurch Street, City, London, EC3M 5DY	020 7410 7300	1	150
8	West London & Suburban Property Investments Limited	25 Savile Row, City, London, W1S 2ER	Not Listed	1	125
9	Abstract Securities Limited	Queens House, 34 Wellington Street, Leeds, West Yorkshire, LS1 2DE	0113 246 0060 (TPS)	2	121
10	Chelsfield Partners LLP	67 Brook Street, Westminster, London, W1K 4NJ	020 7290 2388	1	115

TOP TEN Key Architects
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Glenn Howells Architects	321 Bradford Street, Digbeth, Birmingham, West Midlands, B5 6ET	0121 666 7640 (CTPS)	2	690
2	Wilkinson Eyre Architects	33 Bowling Green Lane, City, London, EC1R 0BJ	020 7608 7900	3	613
3	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	8	537
4	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	2	490
5	Panter Hudspith Architects	4-8 Emerson Street, Southwark, London, SE1 9DU	020 7633 9425	1	440
6	Dixon Jones Limited	2-3 Hanover Yard, Noel Yard, Islington, London, N1 8YA	020 7483 8888	1	440
7	Pelli Clark Pelli Architects	1056 Chapel Street, New Haven, Connecticut, CT06510	00 1203 777 2515	1	388
8	Allford Hall Monaghan Morris	4 & 5th Floors, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	4	361
9	Make Architects	13 Fitzroy Street, Westminster, London, W1T 4BQ	020 7636 5151	4	307
10	TP Bennett LLP	One America Street, Southwark, London, SE1 0NE	020 7208 2000	17	287

TOP TEN Key Contractors
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	17	605
2	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	2	601
3	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	588
4	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	3	523
5	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	10	329
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	18	323
7	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	36	295
8	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	15	289
9	Carillion Plc	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	3	258
10	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	33	206

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

economic & construction MARKET REVIEW

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HOTEL, LEISURE & SPORT
DECREASE IN CONTRACT VALUES IN AUGUST

The hotel, leisure & sport sector showed monthly decreases in contract values and a considerable decline compared to the same time in 2014, indicating a subdued 2015 so far.

Contract award levels in the Hotel, Leisure & Sport sector were £271 million in August (see Fig. 6.1), based on a three month rolling average. This was 10.5% lower than July and a considerable 28.3% down on the same month last year. In the three months to August the value of contracts was £880 million, which was 22.2% down on July and 17.7% down on the corresponding month last year.

Projects by region

London was the main location for hotel, leisure & sport contracts this month, accounting for 45.6% (see Fig. 6.2) of the total value awarded, a significant 31% (see Fig. 6.4) higher than the same month last year. A Hotel led development at Stratford City costing £50 million pushed London to the position of major contributor for the sector.

Type of Projects

Hotels dominated the sector in August, accounting for 69% (see Fig. 6.3) of the total value awarded in August which represented a 27% increase on the corresponding month last year. The above mentioned Stratford City hotel development along with major hotels in Middlesex and Jersey contributed greatly.

> A Hotel led development at Stratford City costing £50 million pushed London to the position of major contributor for the sector

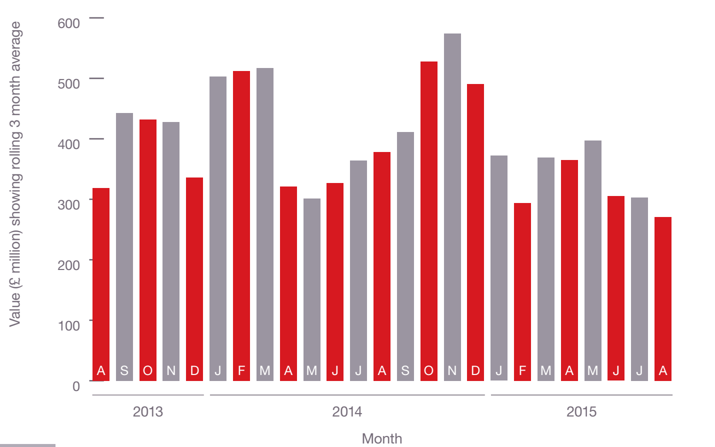

FIG. 6.1

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

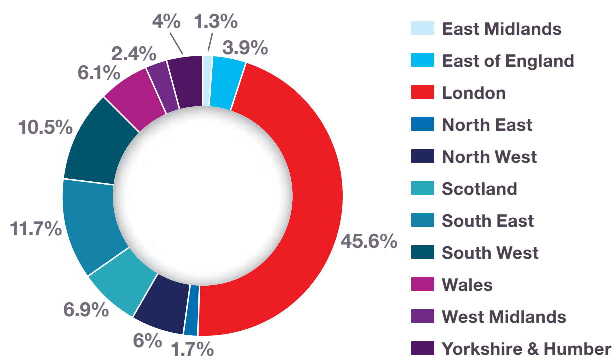

FIG. 6.2

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

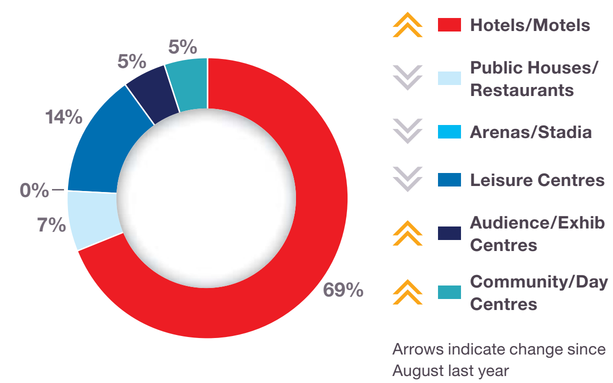

FIG. 6.3

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

economic & construction MARKET REVIEW

SEPTEMBER 2015

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DECREASE IN CONTRACT VALUES IN AUGUST

The map and figures show how the activity has changed since August 2014

		-0.8%	Scotland
-3.8%	East Midlands	+7.8%	South East
+0.9%	East of England	+4.9%	South West
+31.1%	London *HOTTEST REGION*	+4.6%	Wales
-33.1%	North East	-11.0%	West Midlands
-3.1%	North West	+2.5%	Yorkshire & Humber

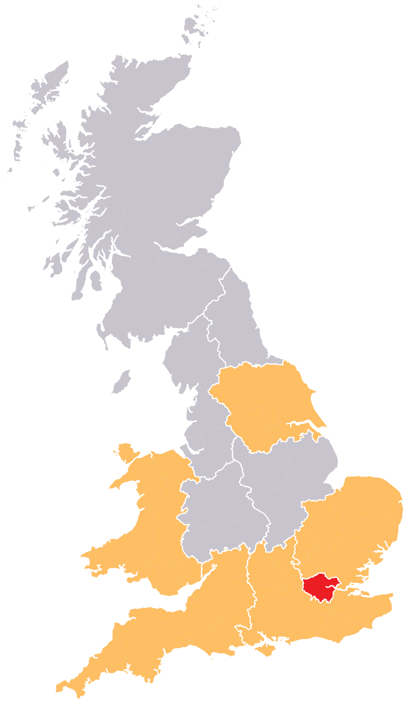

FIG. 6.4

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

> Hotels dominated the sector in August, accounting for 69% of the total value awarded

PROJECT IN FOCUS

Stratford City Plot N24 – Manhattan Loft Gardens
£50,000,000

County	London
Primary Category Sector	Hotel, Leisure & Sport
Government Region	London
Start Date	December 2014
End Date	December 2018
Contract Award Date	August 2015
Funding	Private
Stage	Contract
Contractor	Bouygues-UK

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DECREASE IN CONTRACT VALUES IN AUGUST

TOP TEN Key Clients

Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Radisson Edwardian Hotels Limited	140 Bath Road, Hayes, Middlesex, UB3 5AW	020 8759 6311	2	150
2	The All England Lawn Tennis and Croquet Club	Church Road, Wimbledon, London, SW19 5AE	020 8944 1066	1	150
3	The Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	020 3675 1502	2	142
4	Galliard Construction Limited	Sterling House, Langston Road, Loughton, Essex, IG10 3TS	020 8418 1000	2	104
5	Casey Group Limited	Rydings Road, Wardle, Rochdale, Lancashire, OL12 9PS	01706 341121	1	100
6	Premier Inn London Putney Bridge Hotel	3 Putney Bridge Approach, Fulham, London, SW6 3JD	0871 527 8674	37	94
7	Soho House Limited	40 Greek Street, Westminster, London, W1D 4EB	0207 851 2300	2	88
8	Capital Construction & Development Limited	Herschel House, 58 Herschel Street, Slough, Berkshire, SL1 1PG	Not Listed	1	80
9	Liverpool Football Club	Anfield Road, Liverpool, Merseyside, L4 0TH	0843 170 5555 / 0151 263 2361	1	75
10	4C Hotels	13 Wadham Gardens, City, London, NW3 3DN	020 7419 1839	1	60

TOP TEN Key Architects

Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	EPR Architects	21 Douglas Street, Barnet, London, SW1P4PE	020 7834 4411	5	214
2	Woods Bagot	46-48 Foley Street, Westminster, London, W1W 7TY	020 7637 6880 (CTPS)	2	170
3	Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	2	151
4	Simpson Architects	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000 (CTPS)	1	140
5	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269 (TPS)	36	118
6	Dexter Moren Associates	57d Jamestown Road, Camden Town, London, NW1 7DB	020 7267 4440	6	97
7	KSS Group Limited	1 James Street, Westminster, London, W1U 1DR	020 7907 2222	1	75
8	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	10	71
9	Holmes Miller	89 Minerva Street, Glasgow, Strathclyde, G3 8LE	0141 204 2080	3	59
10	Leach Rhodes & Walker LLP	West Riverside, New Bailey Street, Manchester, Greater Manchester, M3 5AA	0161 833 0211	3	57

TOP TEN Key Contractors

Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	1	140
2	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	14	117
3	Bay Construct Limited	64 Clerkenwell Road, Islington, London, EC1M 5PX	0203 714 7390	3	108
4	Casey Group Limited	Rydings Road, Wardle, Rochdale, Lancashire, OL12 9PS	01706 341121	1	100
5	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	13	85
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	7	80
7	Ardmore Construction Limited	Byrne House, Jeffreys Road, Brimsdown, Enfield, Middlesex, EN3 7UB	020 8344 0300	1	80
8	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	6	78
9	Carillion Plc	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	1	75
10	HOC UK Limited	Jubilee House, Townsend Lane, City, London, NW9 8TZ	020 8200 5873	3	74

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INDUSTRIAL
ACTIVITY INCREASES IN THE SECTOR THIS MONTH

The industrial sector experienced an increase in contract value awarded in August and the value of work significantly higher than the same time in 2014.

Activity in the industrial sector increased in August with the value of contracts awarded £751 million (see Fig. 7.1), based on a three month rolling average. This equates to an increase of 5.3% on July and 90.3% higher than the corresponding month last year. In the three months to August the total value of contracts was £2.2 billion which was 31.5% higher than the previous three months and 99.4% higher than the same quarter last year. This sector continues to grow at pace.

Projects by region

Major regeneration at the London Road Industrial Estate at a cost of £125 million meant the South East recorded the highest value of activity in August with 37.5% (see Fig. 7.2) of the contracts awarded, an increase of 7.4% (see Fig. 7.4) on August 2014. The North East had the next highest proportion of activity, accounting for 24.7% of contract award value, an increase of 21.5% on the corresponding month last year. A polyacride emulsion plant for SNF Gas & Oil in Cleveland, valued at £150 million was the major contributer to the contract value in the region.

Type of Projects

The types of project awarded in the sector were predominantly light industrial units which accounted for 42% (see Fig. 7.3) of contract values, an increase of 24% on the same month last year. Heavy industrial had the second highest proportion of contracts by value in August accounting for 35% of contract value, a 15% increase on the corresponding month last year.

> “In the three months to August the total value of contracts was £2.2 billion which was 31.5% higher than the previous three months.

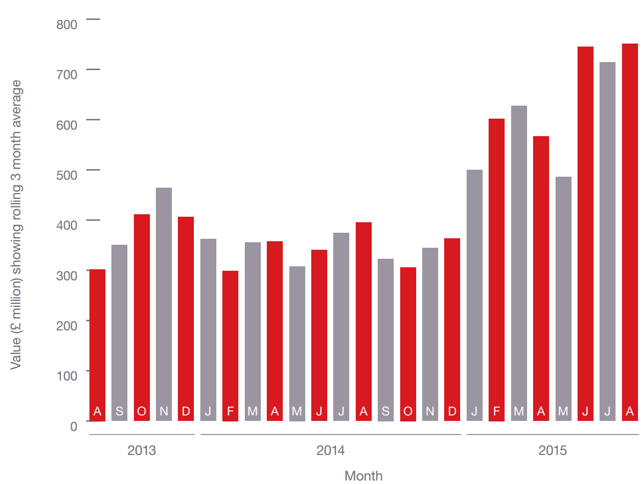

FIG. 7.1

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

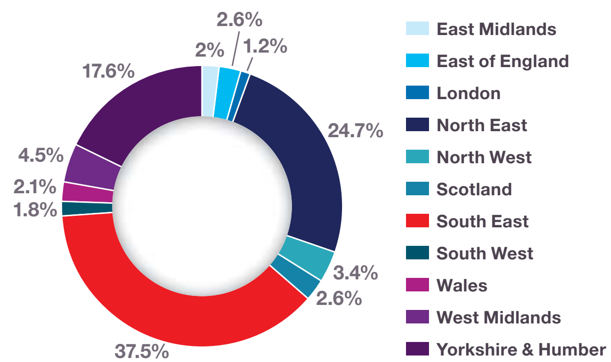

FIG. 7.2

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

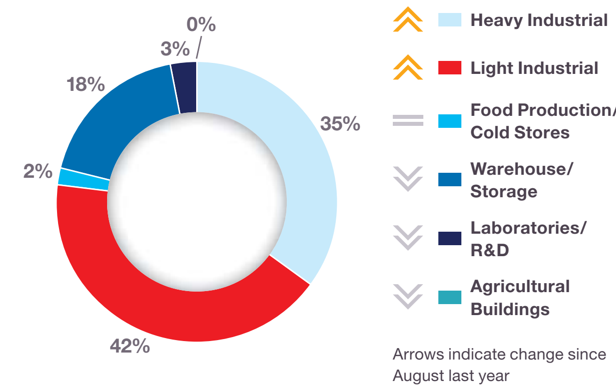

FIG. 7.3

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

economic & construction MARKET REVIEW

SEPTEMBER 2015

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The map and figures show how the activity has changed since August 2014

		-3.3%	Scotland
-5.7%	East Midlands	+7.4%	South East
-3.0%	East of England	-4.9%	South West
-2.4%	London	-5.3%	Wales
+21.5%	North East *HOTTEST REGION*	-2.9%	West Midlands
-5.6%	North West	+4.1%	Yorkshire & Humber

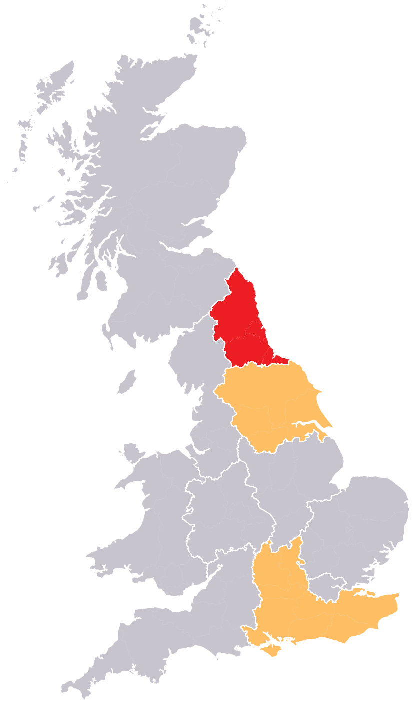

FIG. 7.4

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

> Light industrial units accounted for 42% of contract values, an increase of 24%.

PROJECT IN FOCUS

www.umcarchitects.com

Project Owl - Distribution Facility
£45,000,000

County	Hampshire
Primary Category Sector	Industrial
Government Region	South East
Start Date	June 2015
End Date	December 2016
Contract Award Date	August 2015
Funding	Private
Stage	Subcontract Awarded
Contractor	Winvic Construction

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ACTIVITY INCREASES IN THE SECTOR THIS MONTH

TOP TEN Key Clients
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BAE Systems Marine Limited	Bridge Road, Barrow in Furness, Cumbria, LA14 1AF	01229 823366	3	365
2	AstraZeneca	2 Kingdom Street, City, London, W2 6BD	020 7604 8000	1	300
3	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	3	200
4	Goodman International	Nelson House, Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG	0121 506 8100	10	194
5	SNF Gas and Oil Limited	Solutions House, Ripley Close, Normanton Industrial Estate, Normanton, West Yorkshire, WF6 1TB	01924 311000	1	150
6	The Peel Group	Peel Management, Peel Dome, The Trafford Centre, Manchester, Greater Manchester, M17 8PL	0161 629 8200	3	150
7	The London Taxi Company	Holyhead Road, Coventry, West Midlands, CV5 8JJ	024 7657 2000	1	150
8	Sellafield Limited	Hinton House, Birchwood Park Avenue, Warrington, Cheshire, WA3 6GR	01925 832000	1	150
9	West Berkshire Council	Council Offices, Market Street, Newbury, Berkshire, RG14 5LD	01635 424000	1	125
10	Barwood Developments Limited	Grange Park Court, Roman Way, Grange Park, Northampton, Northamptonshire, NN4 5EA	0870 167 7600	3	124

TOP TEN Key Architects
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	1	300
2	Herzog & de Meuron UK Limited	65 Clerkenwell Road, City, London, EC1R 5BL	020 7025 2960	1	300
3	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	12	245
4	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	11	243
5	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	3	200
6	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	13	154
7	BHP Design LLP	Suite 2f, St Georges Court, 1 Albion Street, Birmingham, West Midlands, B1 3AH	0121 314 6618	1	150
8	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	9	145
9	PHP Architects	The Old Rectory, 31 Rectory Lane, Milton Malsor, Northampton, Northamptonshire, NN7 3AQ	01604 858916	6	140
10	Chetwood Associates	12-13 Clerkenwell Green, City, London, EC1R 0QJ	020 7490 2400	6	131

TOP TEN Key Contractors
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	20	562
2	Petrofac	Bridge View, 1 North Esplanade West, Aberdeen, Aberdeenshire, AB11 5QF	01224 247000 (TPS)	1	500
3	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	1	300
4	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	12	277
5	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	4	248
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	6	195
7	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	10	188
8	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	2	150
9	M & W UK	Unit A2, Metheun South, Bath Road, Chippenham, Wiltshire, SN14 0GT	01249 455150	1	150
10	St Modwen	Park Point, 17 High Street, Longbridge, Birmingham, West Midlands, B31 2UQ	0121 647 1000	1	125

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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MEDICAL & HEALTH
SLIGHT INCREASE IN VALUE OF CONTRACTS IN AUGUST

In the three months to August the value of contracts significantly decreased, indicating a longer term decrease in the value of contracts awarded in this sector.

Levels of activity in the Medical & Health sector increased by 3.8% in August 2015 compared to July, with the total value of contracts awarded £129 million (see Fig. 8.1) based on a three month rolling average. This is however 2.8% lower than the same month last year. In the three months to August the value of contracts decreased by 22.2% on the previous three months, and was 18.4% lower than the corresponding quarter last year indicating a longer term decrease in the value of contracts awarded in this sector.

Projects by region

London was the main location of development in this sector this month capturing 45.4% (see Fig. 8.2) of activity, an increase of 32.9% (see Fig. 8.4) from August 2014. A £42 million project at the Royal Free Hospital in London. Vinci Construction will carry out the works due to commence this month and be on site for two years. Yorkshire & Humber followed with 24.1%.

Type of Projects

Public hospitals accounted for 67% (see Fig. 8.3) of the contracts awarded in August 2015, an increase of its 18% on the same month last year. Surgeries, health and medical centres accounted for 20% of the total value awarded, although this was 8% down on the corresponding month in 2014.

> In the three months to August the value of contracts decreased by 22.2% on the previous three months

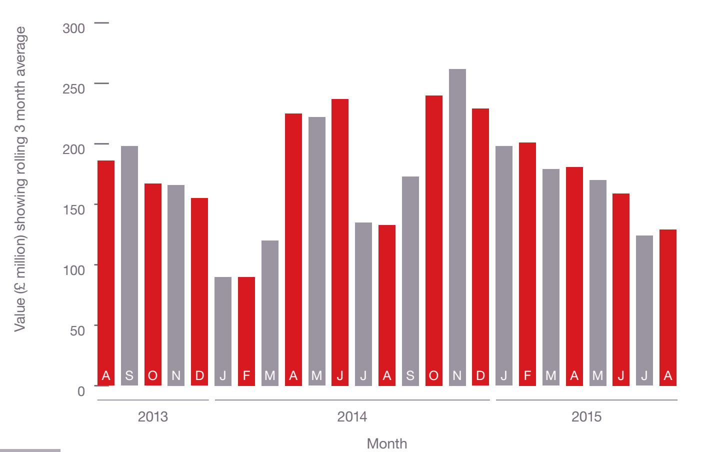

FIG. 8.1
Medical & Health: **Project Value showing 3 month moving average** Source: Barbour ABI

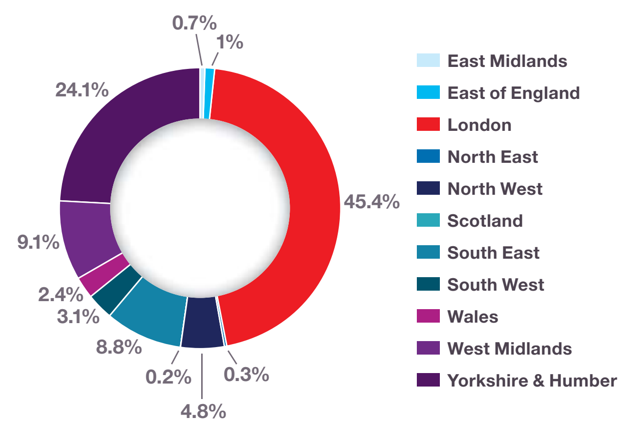

FIG. 8.2
Medical & Health: **Value of Contracts by Region** Source: Barbour ABI

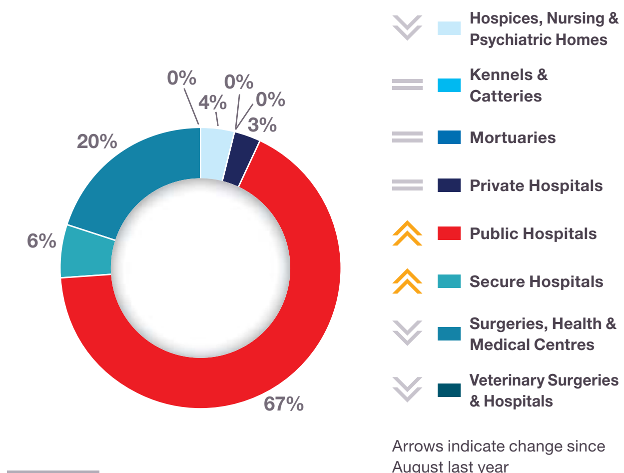

FIG. 8.3
Medical & Health: **Type of Projects Awarded** Source: Barbour ABI

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SLIGHT INCREASE IN VALUE OF CONTRACTS IN AUGUST

The map and figures show how the activity has changed since August 2014

0.0%	East Midlands	-9.9%	Scotland
-12.9%	East of England	+5.5%	South East
+32.9%	London *HOTTEST REGION*	-5.6%	South West
+0.3%	North East	+1.7%	Wales
-25.4%	North West	+4.0%	West Midlands
		+9.5%	Yorkshire & Humber

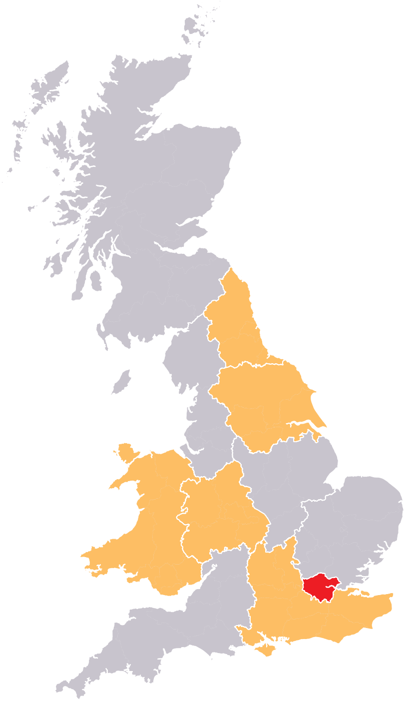

FIG. 8.4
Medical & Health: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

PROJECT IN FOCUS

Royal Free Hospital – Institute of Immunity & Transplantation £42,000,000

County	London
Primary Category Sector	Medical & Health
Government Region	London
Start Date	September 2015
End Date	September 2017
Contract Award Date	August 2015
Funding	Public
Stage	Contract
Contractor	Vinci Construction UK Limited

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SLIGHT INCREASE IN VALUE OF CONTRACTS IN AUGUST

TOP TEN Key Clients
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Dumfries & Galloway Health Board	Crichton Royal Hospital, Dumfries, Dumfries and Galloway, DG1 4TG	01387 244000	1	200
2	Aneurin Bevan Health Board	Mamhilad House, Block A, Mamhilad Park Estate, Pontypool, Gwent, NP4 0YP	01873 732732 (CTPS)	1	180
3	Royal Infirmary of Edinburgh NHS Trust	51 Little France Crescent, Old Dalkeith Road, Edinburgh, Lothian, EH16 4SA	0131 536 1000 (CTPS)	2	151
4	Papworth Hospital NHS Trust	Papworth Hospital, Papworth Everard, Cambridge, Cambridgeshire, CB23 3RE	01480 830541	1	140
5	Royal Liverpool and Broadgreen Hospital NHS Trust	Prescot Street, Liverpool, Merseyside, L7 8XP	0151 706 2000	6	117
6	Spire Healthcare Limited	PO Box 62647, 120 Holborn, City, London, EC1P 1JH	0800 169 1777	3	88
7	University of Glasgow	Gilbert Scott Building, University Avenue, Glasgow, Strathclyde, G12 8QQ	0141 330 2000 (TPS)	2	76
8	Birmingham Women's NHS Foundation Trust	Metchley Park Road, Edgbaston, Birmingham, West Midlands, B15 2TG	0121 472 1377	1	75
9	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)	2	72
10	Royal Free Hospital	Pond Street, Hampstead, London, NW3 2QG	020 7794 0500	4	69

TOP TEN Key Architects
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	1	200
2	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	3	186
3	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	6	180
4	IBI Group	Princes Manor Barn, Reading Road, Harwell, Oxford, Oxfordshire, OX11 0LU	01235 820222 (TPS)	12	160
5	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	150
6	HOK International Limited	Qube, 90 Whitfield Street, Westminster, London, W1T 4EZ	020 7636 2006	1	140
7	P & HS Architects	The Old Station, Station Road, Stokesley, Middlesbrough, Cleveland, TS9 7AB	01642 712684	13	115
8	Gilling Dod Architects	The Cruck Barn, Duxbury Park, Chorley, Lancashire, PR7 4AT	01257 260070	11	83
9	Halliday Meecham Partnership	111 Piccadilly, Manchester, Greater Manchester, M1 2HY	0161 661 5566	2	81
10	Boswell Mitchell & Johnston	The Hub, 70 Pacific Quay, Glasgow, Strathclyde, G51 1DZ	0141 271 3200	2	76

TOP TEN Key Contractors
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	8	472
2	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	25	273
3	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	7	165
4	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	9	149
5	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	3	141
6	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	10	127
7	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	7	123
8	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	6	116
9	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	20	104
10	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	1	45

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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EDUCATION

SLIGHT INCREASE IN THE VALUE OF CONTRACTS

Contract values in the education sector for August were slightly lower than at the same time in 2014, with little change in the last 12 months.

The value of contracts awarded in the Education sector was £713 million in August (see Fig. 9.1) based on a three month rolling average, a .1% increase from July. This figure was 4.6% lower than August 2014 indicating a slight decrease in activity compared to the same time last year. The values of contract awards in the three months to July were up 6.3% on the previous three months, but remained 3.3% down on the same period last year.

Projects by region

London accounted for the largest proportion of contracts awarded in August, with 23.9% (see Fig. 9.2) of the value awarded. This was a 3.4% decrease on the equivalent month in 2014. A contract to redevelop the Brixton Academy at Trinity Academy was the major contributor to London's total. The scheme will cost £35 million in total. The West Midlands was close behind accounting for 22.2% of contracts awarded in August, a 15.6% (see Fig. 9.4) increase from last year. Six contracts awarded under the latest Priority Schools Building Programme totalled £113 million.

> "The values of contract awards in the three months to July were up 6.3% on the previous three months, but remained 3.3% down on the same period last year.

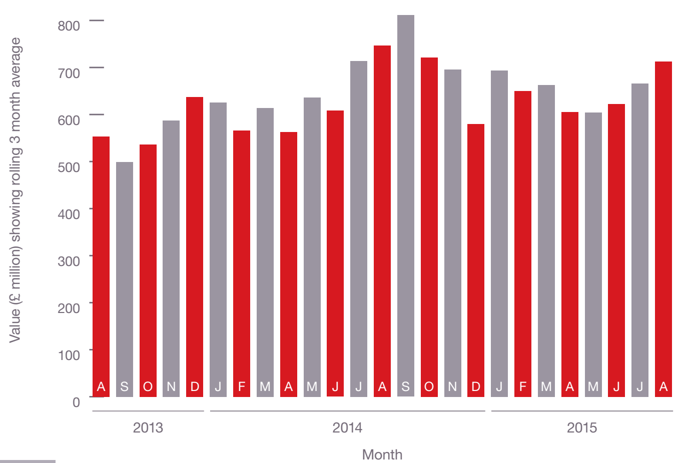

FIG. 9.1
Education: **Project Value showing 3 month moving average** Source: Barbour ABI

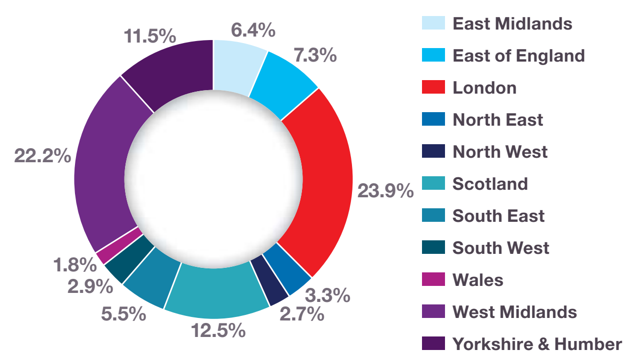

FIG. 9.2
Education: **Value of Contracts by Region** Source: Barbour ABI

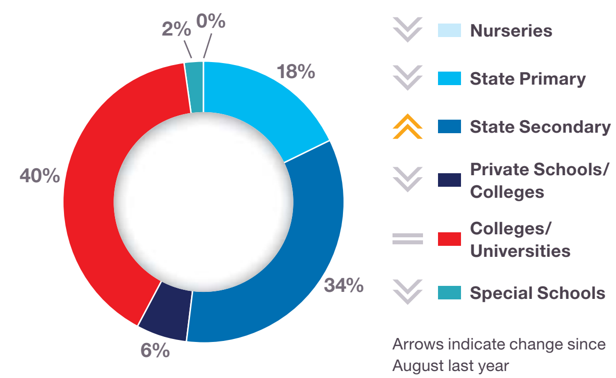

FIG. 9.3
Education: **Type of Projects Awarded** Source: Barbour ABI

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SLIGHT INCREASE IN THE VALUE OF CONTRACTS

The map and figures show how the activity has changed since August 2014

+3.8%	East Midlands	+7.0%	Scotland
-4.7%	East of England	-10.7%	South East
-3.4%	London	+0.3%	South West
-13.7%	North East	+1.1%	Wales
-4.7%	North West	+15.6%	West Midlands *HOTTEST REGION*
		+9.4%	Yorkshire & Humber

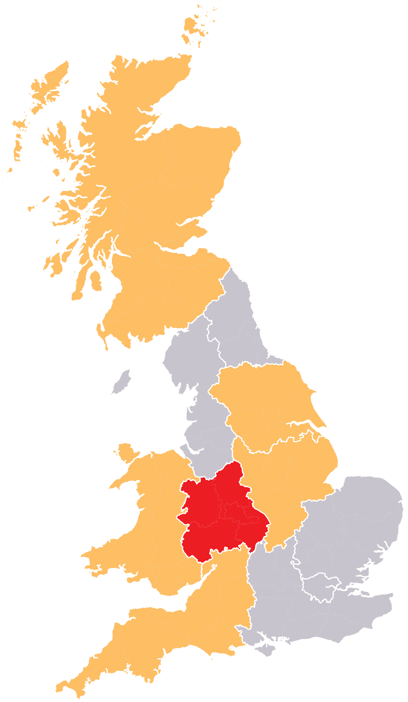

FIG. 9.4

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

Type of Projects

State Secondary schools were the main contributor in August, accounting for 34% (see Fig. 9.3) of the total value awarded. This was up 12% on the corresponding quarter of 2014.

> Six contracts awarded under the latest Priority Schools Building Programme totalled £113 million.

PROJECT IN FOCUS

www.jesticowhiles.com

Brixton Campus Redevelopment – Trinity Academy
£35,000,000

County	London
Primary Category Sector	Education
Government Region	London
Start Date	TBC
End Date	TBC
Contract Award Date	August 2015
Funding	Public
Stage	Contract
Contractor	Bowmer & Kirkland Limited

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SLIGHT INCREASE IN THE VALUE OF CONTRACTS

TOP TEN Key Clients
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Department For Education	Castle View House, East Lane, Runcorn, Cheshire, WA7 2AA	0370 000 2288	87	905
2	University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	14	267
3	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2DB	020 7589 5111 (CTPS)	2	151
4	University of Cambridge	74 Trumpington Street, Cambridge, Cambridgeshire, CB2 1RW	01223 337770 (CTPS)	12	100
5	Kent County Council	County Hall, County Road, Maidstone, Kent, ME14 1XQ	03000 414141	28	90
6	Dumfries & Galloway Council	Militia House, English Street, Dumfries, Dumfries and Galloway, DG1 2HR	0303 333 3000	7	86
7	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	10	77
8	Cambridgeshire County Council	Castle Court, Shire Hall, Castle Hill, Cambridge, Cambridgeshire, CB3 0AP	0345 045 5200	10	74
9	University of Leeds	Woodhouse Lane, Leeds, West Yorkshire, LS2 9JT	0113 243 1751	12	73
10	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	9	62

TOP TEN Key Architects
Sep 2014 – Aug 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140	31	294
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, Avon, BS8 3NE	0117 974 3271 (TPS)	34	277
3	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	3	252
4	Mecanoo Architecten	Oude Delft 203, 2611 HD Delft, Holland	+31 15 2798100	1	225
5	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	28	174
6	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	12	164
7	PLP Architecture	2 Seething Lane, City, London, EC3N 4AT	020 3006 3900	1	150
8	Aukett Swanke	25 Christopher Street, City, London, EC2A 2BS	020 7454 8200	1	150
9	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	40	143
10	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	12	138

TOP TEN Key Contractors
Sep 2014 – Aug 2015

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	85	486
2	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	87	470
3	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	63	408
4	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	56	384
5	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	43	379
6	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	29	371
7	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	16	315
8	Carillion Plc	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	29	181
9	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	12	143
10	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	19	122

The ranking tables are compiled from Barbour ABI database and are based on the total value of contracts awarded over the previous 12 month period. The values represent the construction cost of each project.

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NOVEMBER 2015

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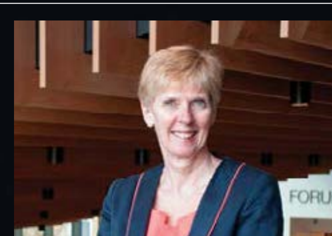
CEO, Old Oak and Park Royal Development Corporation



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