economic & construction MARKET REVIEW

Barbour ABI   Building   bd

OCTOBER 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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Designed as the next level of analysis to our monthly Economic & Construction Market Review, this fully interactive quarterly tool allows you to compare sector and regional construction data easily and effectively. This tool gives you deeper analysis and intelligence on the construction market, allowing you and your company to forecast trends and aid in your business planning.

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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

UK ECONOMIC GROWTH FORECAST TO SLOW IN Q3

Sentiment surveys for the UK economy in Q3 2015 suggest a slight softening of growth in the UK.

Markit report that the PMI sentiment indicator for the whole economy fell to 53.9, its lowest reading since April 2013. Markit predict that the UK economy will have grown by 0.5% in Q3 compared to 0.7% in Q2. The National Institute of Economic and Social Research also predict that growth in Q3 will soften to 0.5% (see Fig. 1.1).

The labour market continues to perform particularly strongly in the UK with the unemployment rate declining again, to its lowest level in seven years. Unemployment stands at 5.4% in the three months to the end of August compared to a peak in 2011 of 8.9% (see Fig. 1.2).

The rate of inflation fell once again into negative territory to -0.1% in September with the continued decline in oil and other commodity prices as well as lower domestic food prices contributing to 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 be to suppress the inflation rate for longer than originally anticipated.

Other news this month on the UK economy includes:

- **The IMF forecasts for the UK economy were upgraded to 2.5% with the recovery in the UK and the US described as "advanced"**
- **A survey by Visa showed that consumer spending over the summer months of 2015 was the strongest in the 6 years it had been tracking the data**
- **The FTSE 100 recorded its biggest weekly rise in almost four years on the back of optimism that central banks will prop up weaker global economies.**

> "The labour market continues to perform particularly strongly in the UK with the unemployment rate declining again, to its lowest level in seven years

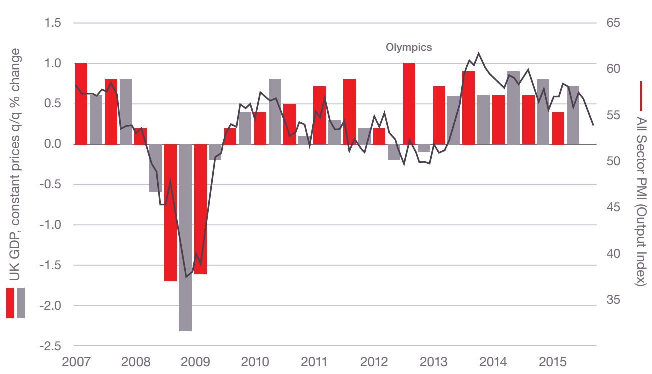

Fig. 1.1 **UK Economic Growth and the PMI** Source: ONS, Markit, CIPS

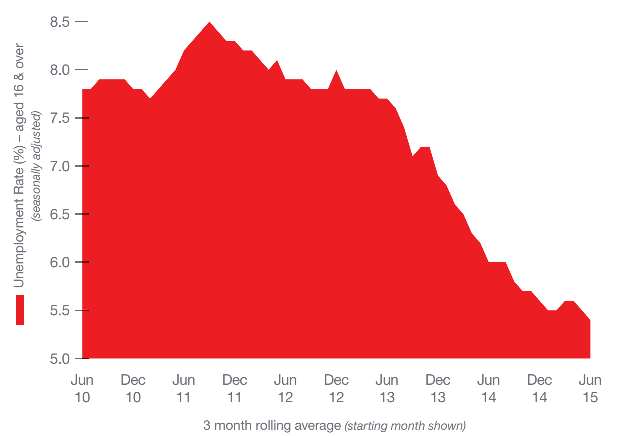

Fig. 1.2 **Unemployment Rate** Source: ONS

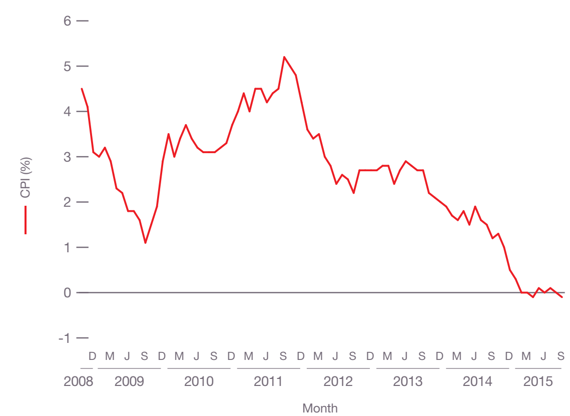

Fig. 1.3 **CPI (Inflation)** Source: ONS

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CONTRACT AWARD ACTIVITY BOOSTED BY MAJOR PROJECTS

A number of large infrastructure projects were awarded in September boosting contract award values and continuing the strong performance seen in recent months.

The latest figures from the ONS show that the construction sector decreased by 4.3% between July and August, and when you compare output levels with August last year, this shows a decrease of 1.3%.

Every individual sector saw falls month on month, with the biggest drop being housing with 9.9%. This was also significantly down by 28.9% on the same month last year. Private Housing was slightly down 1.6% on the previous month and only 0.2% down on August 2014. Output remains at a high level in Private Housing. Private Commercial was down slightly at 1.8% but was still 1.1% up on August 2014. Encouragingly Infrastructure was 31.6% up on the same month last year (see Fig. 2.1).

	% change	
	August 2014 – August 2015	**July 2015 – August 2015**
Total All Work	**-1.3**	**-4.3**
All New Work	**-3.6**	**-1.8**
Public Housing	-28.9	-9.9
Private Housing	-0.2	-1.6
Infrastructure	31.6	-6.5
Public (ex Infrastructure)	-7.6	-4.1
Private Industrial	4.8	-4.1
Private Commercial	1.1	-1.8
Repair & Maintenance	**-8.6**	**-5.6**
Public Housing	-6.8	-7.0
Private Housing	-5.2	-4.4
Non-Housing	-11.6	-6.0

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

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month, recorded a reading of 157 for September. 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 242. Commercial offices activity also increased in September, recording a figure of 139 up from 123 in August (see Fig. 2.2).

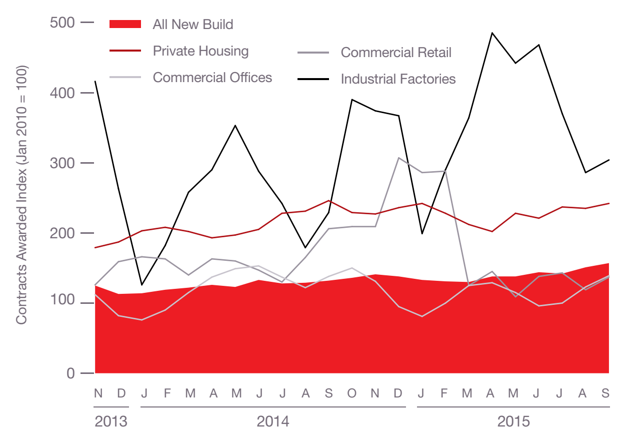

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

Construction Sector

According to Barbour ABI data on all contract activity, September witnessed an increase in construction activity levels with the value of new contracts awarded at £7 billion, based on a three month rolling average (see Fig. 2.4). This is a 7.9% increase from August and a 24.8% increase on the value recorded in September 2014. The number of construction projects within the UK in September increased by 8.1% on August, and were 4.4% higher than September 2014.

Projects by Region

The majority of the contracts awarded in September by value were in the East Midlands, accounting 35% of the UK total. This is followed by London with 25% of contract value (see Fig. 2.3). The strong performance of the East Midlands is primarily due to the award of the £3 billion contract to develop the Race Bank offshore wind farm. It is another sign of the continued growth in these types of projects in the UK and this is the largest single project awarded by value that has been recorded by Barbour ABI. London also had a major infrastructure contract awarded in September which accounts for a large proportion of its 25% contract value share. The Thames Tideway Tunnel Main Works were awarded at a value of £746 million and are set to be carried out over the next seven years boosting the infrastructure sector within the capital.

> September witnessed an increase in construction activity levels

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Types of Project

Infrastructure had the highest proportion of contracts awarded by value in September with 59% of the total value of projects awarded (see Fig. 2.5). In line with its strong performance in recent months, renewable energy projects were the main factor in its strong performance with the Race Bank offshore wind farm worth £3 billion and the Teesside renewable energy plant in Cleveland valued at £150 million. The residential sector had the next highest share of contract value, accounting for 15% of all contracts awarded in September.

> Infrastructure had the highest proportion of contracts awarded

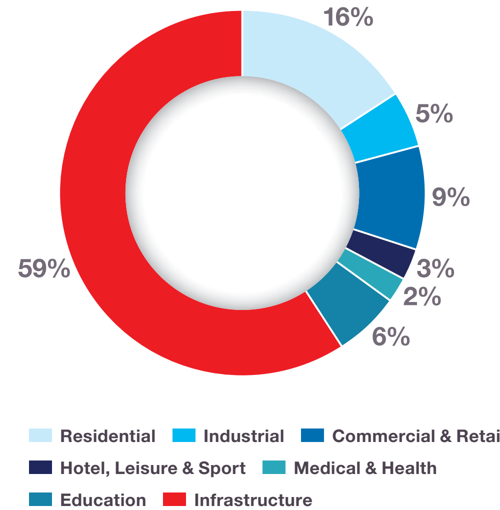

Fig. 2.5 **Type of Projects** Source: Barbour ABI

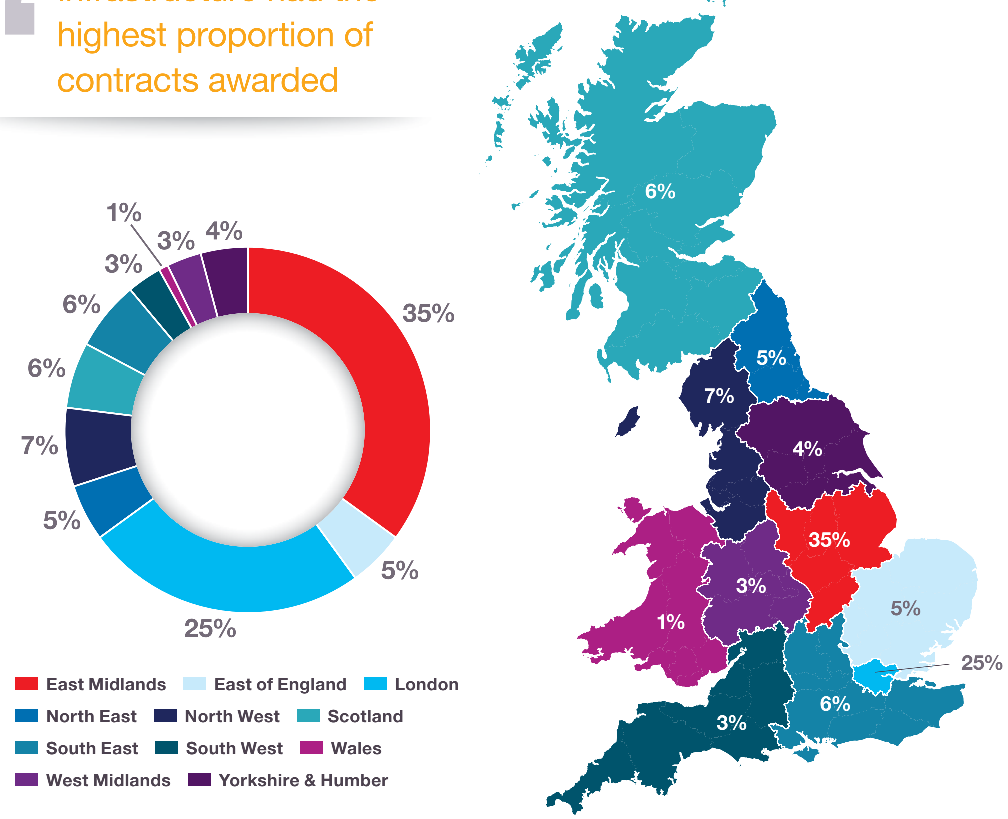

Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

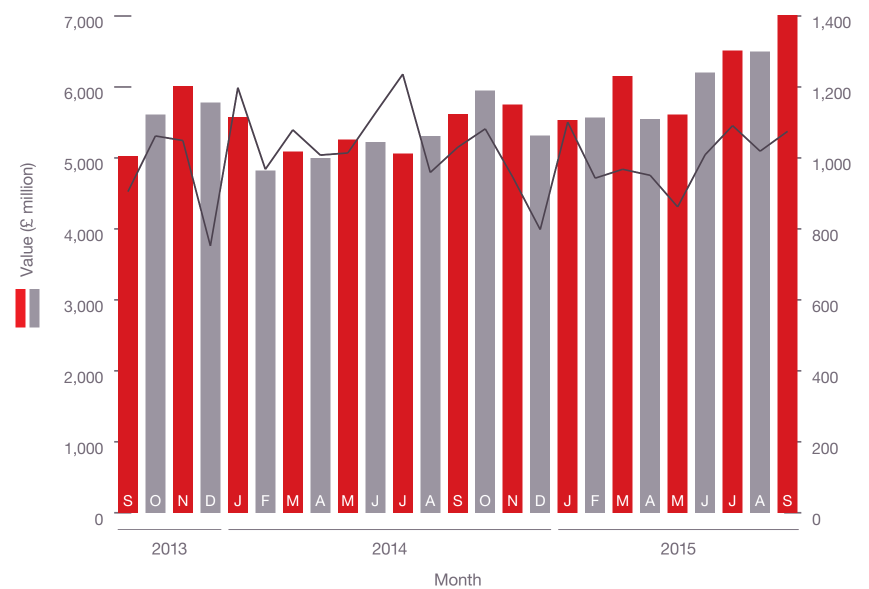

Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

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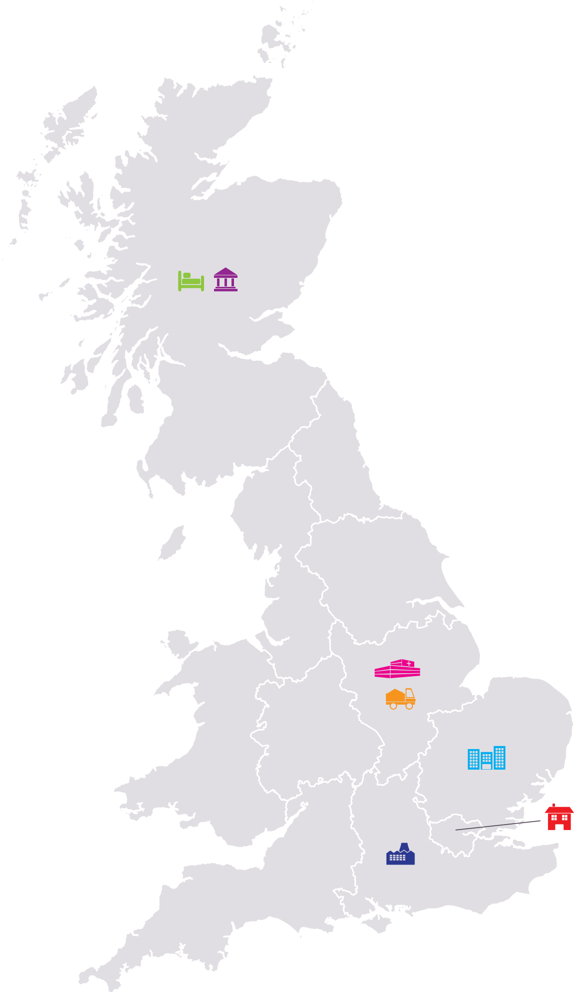
A snippet of this month's regional activity

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



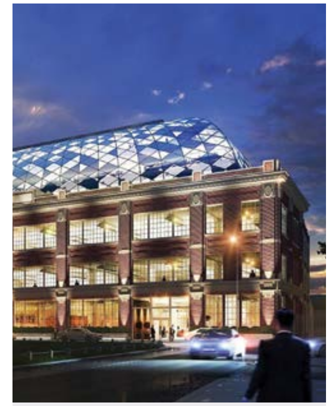
- Residential
- Infrastructure
- Commercial & Retail
- Hotel, Leisure & Sport
- Industrial
- Medical & Health
- Education

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
Noma Plot L – Angel Gardens – 458 Flats/Offices
£90,000,000

INFRASTRUCTURE
Teeside Renewable Energy Plant
£150,000,000



COMMERCIAL & RETAIL
Access Self Storage Redevelopment
£20,000,000

HOTEL, LEISURE & SPORT
Motel One Hotel – Glasgow
£18,000,000

INDUSTRIAL
Green Port Alexandra Dock – Turbine Maintenance Buildings
£15,000,000

MEDICAL & HEALTH
Defence & National Rehabilitation Centre – Defence Rehabilitation Establishment
£200,000,000

EDUCATION
Gowanbank Campus
£21,000,000

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RESIDENTIAL UNITS RISE SLIGHTLY IN SEPTEMBER

September heralded a slight increase in residential units awarded but levels are still below the comparable period of 2014.

Activity in the residential sector increased in September with the total number of units awarded being 11,255, based on a three month rolling average (see Fig. 3.1). This is a 4.9% increase compared to August and is 9.3% lower than September 2014, indicating that new contract activity in the residential sector is lessening in the latter part of 2015. The value of projects associated with residential contracts awarded increased by 0.9% between August and September based on a three month rolling average, and is 7.8% lower than September 2014. Taken together these statistics suggest a slowdown in recent months in the sector after its strong performance recently. Given that the long term fundamentals that have been driving growth, in particular help for first time buyers, are set to continue it is perhaps indicative that house builders are concentrating on building out existing pipelines rather than adding projects to them.

Sector Performance

The latest house price indices for September from Nationwide showed that average house prices are increasing at 3.8% annually, an increase from 3.2% in August. This compares to a figure of 9.4% this time last year which shows the softening in the residential market over recent months. In contrast, the Halifax reported annual house price rises of 8% in the three months to September, a decrease from 9% in August.

Further strong results from housebuilders point to the health of the house building industry with Galliford Try reporting a pre-tax profit increase of 20% compared to 2014. Within its house building arm, Linden Homes, was the largest contributor to this figure. There are also plans for the retirement home specialists McCarthy & Stone to re-float on the stock market on the back of a 40% increase in pre-tax profit.

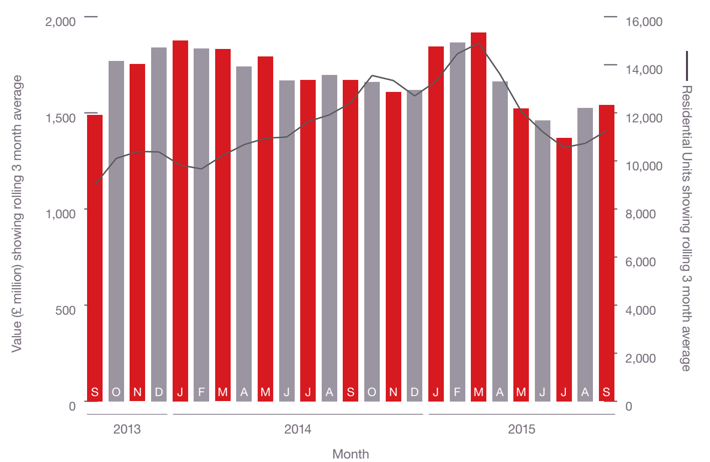

FIG. 3.1

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

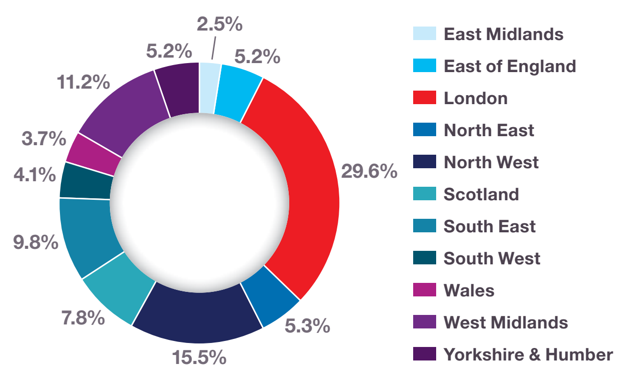

FIG. 3.2

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

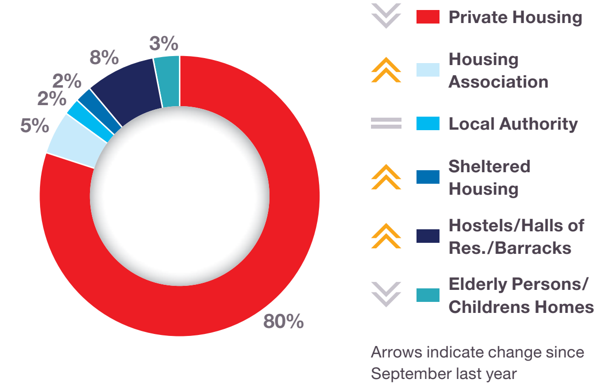

FIG. 3.3

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

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RESIDENTIAL UNITS RISE SLIGHTLY IN SEPTEMBER

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

		+0.2%	Scotland
-0.3%	East Midlands	-0.6%	South East
+3.9%	East of England	-8.2%	South West
+0.2%	London	+0.7%	Wales
+0.7%	North East	+8.5%	West Midlands *HOTTEST REGION*
+3.4%	North West	-4.4%	Yorkshire & Humber

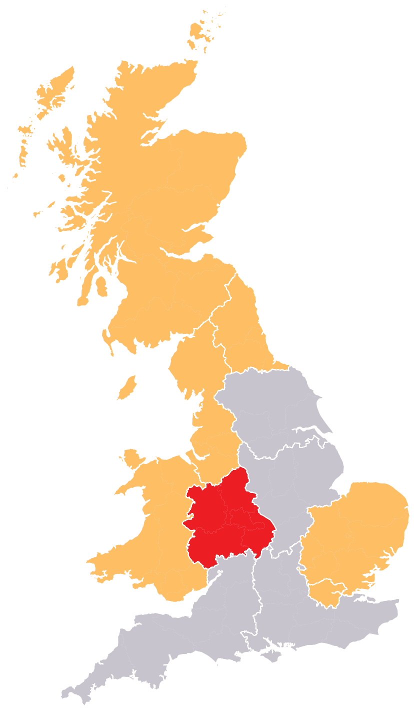

FIG. 3.4

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

Projects by region

London was the main location of activity in the residential sector this month, accounting for 29.6% of the value of contracts awarded, an increase of 0.2% from the same month last year (see Fig. 3.2 & 3.4). Contracts such as Eileen House in Elephant & Castle which is set to deliver 329 flats at an estimated value of £150 million contribute to the regions share this month. Another contract to deliver 73 homes at One Palace Street adjacent to Buckingham Palace was awarded at a value of £90 million.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing in September. Private housing accounted for 80% of the value of contracts awarded this month, a decrease of 3% from the corresponding month last year. After private housing, the next largest project type were hostels/halls of residence projects which accounted for 8% of the value awarded, an increase of 4% from the corresponding month last year (see Fig. 3.3).

> London was the main location of activity in the residential sector this month, accounting for 29.6% of the value of contracts awarded

PROJECT IN FOCUS

Noma Plot L – Angel Gardens – 458 Flats/Offices £90,000,000

County	Greater Manchester
Primary Category Sector	Residential
Government Region	North West
Start Date	November 2015
End Date	January 2018
Contract Award Date	September 2015
Funding	Mixed
Stage	Contract
Contractor	BAM Construction

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RESIDENTIAL UNITS RISE SLIGHTLY IN SEPTEMBER

TOP TEN Key Clients
Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	214	2,607
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	152	2,460
3	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	162	2,398
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	95	1,097
5	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	60	887
6	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	64	882
7	The Berkeley Group Plc/St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	020 3675 1502	26	779
8	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	69	778
9	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	52	655
10	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	44	563

TOP TEN Key Architects
Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	94	1,040
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	20	781
3	Barton Willmore	The Blade, Abbey Square, Reading, Berkshire, RG1 3BE	0118 943 0000 (CTPS)	37	576
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	45	571
5	Patel Taylor Architects	48 Rawstorne Street, City, London, EC1V 7ND	020 7278 2323	6	530
6	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	31	524
7	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555 (TPS)	7	515
8	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GH	020 7880 6400	4	456
9	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	35	418
10	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	8	361

TOP TEN Key Contractors
Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	220	2,681
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	168	2,635
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	155	2,017
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	99	1,140
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	105	1,021
6	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	64	832
7	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	59	685
8	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	50	669
9	The Berkeley Group Plc/St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	020 3675 1502	25	644
10	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	52	639

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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CONTRACT VALUES ROCKET IN SEPTEMBER

A major offshore wind project awarded in September saw the value of infrastructure contracts increase, with values significantly higher than this time in 2014.

The value of contracts awarded in the infrastructure sector increased in September with the total value awarded at £2.8 billion based on a three month rolling average (see Fig. 4.1). This is a 75.8% increase from the previous month and is 147.3% higher than September 2014. In the three months to September the total value of contract awarded was £6.5 billion based on a three month rolling average. This is 27.5% higher than the previous three months and 95.6% higher than the same period in 2014. This indicates a significant improvement on last year's performance and is potentially a boost to overall growth in the construction industry should it continue.

Projects by region

The East Midlands dominated infrastructure contracts in September, accounting for 52.5% of the value awarded, a 49% increase on September 2014 (see Fig. 4.2 & 4.4). One contract in particular contributes to the East Midlands proportion in September, the Race Bank offshore wind farm which is valued at £3 billion. It is the largest renewable energy contract ever recorded by Barbour ABI by value and clearly has a large impact on the overall level of infrastructure contracts as well as the East Midlands in particular.

> In the three months to September the total value of contract awards was £6.5 billion based on a three month rolling average

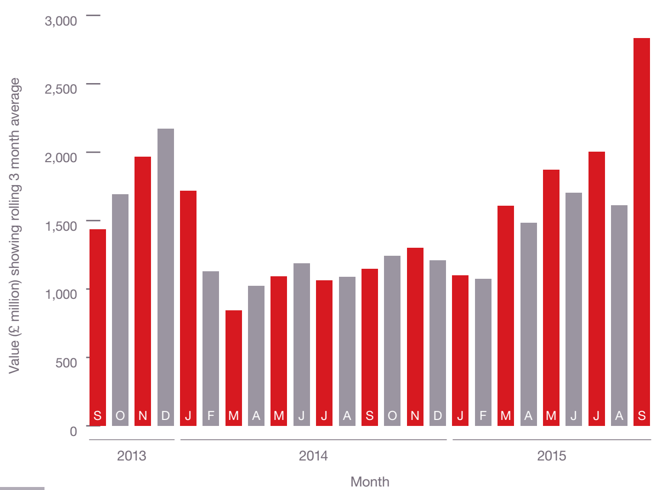

FIG. 4.1

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

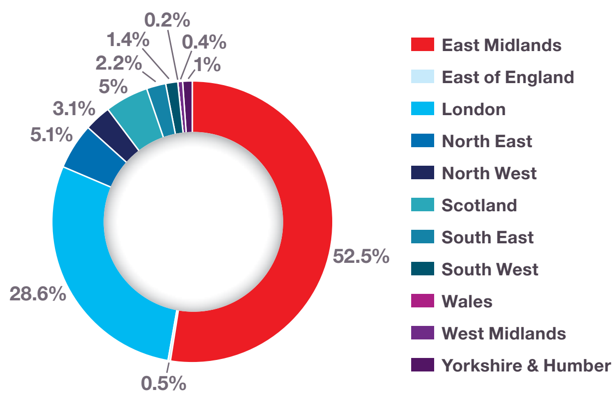

FIG. 4.2

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

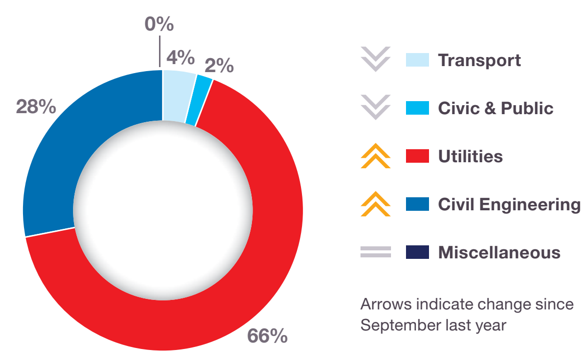

FIG. 4.3

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

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

+49.0%	East Midlands *HOTTEST REGION*	-48.2%	Scotland
-0.7%	East of England	-8.3%	South East
+21.6%	London	-4.1%	South West
+4.0%	North East	-1.5%	Wales
-0.3%	North West	-2.6%	West Midlands
		-9.0%	Yorkshire & Humber

FIG. 4.4

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

Source: Barbour ABI

Type of Projects

The Offshore wind farm contract at Race Bank, alongside other renewable energy contracts awarded this month, means that utilities is the sub sector with the highest share of contracts awarded. Utilities accounted for 66% of the value of contracts awarded in September, an increase of 1% from September 2014 (see Fig. 4.3). This is now the dominant sub-sector within infrastructure with both new orders and ONS output showing large increases in activity.

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. In addition the Government also announced plans to scale back subsidies for renewable energy projects which, given the prominence of these types of projects in recent months, could impact the future growth of these contract types.

> Utilities accounted for 66% of the value of contracts awarded

PROJECT IN FOCUS

www.umcarchitects.com

Teeside Renewable Energy Plant
£150,000,000

County	Cleveland
Primary Category Sector	Infrastructure
Government Region	North East
Start Date	October 2015
End Date	April 2018
Contract Award Date	September 2015
Funding	Private
Stage	Subcontract
Contractor	Babcock & Wilcox Volund

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TOP TEN Key Clients Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Dong Energy Power (UK) Limited	City Point 33rd Floor, 1 Ropemaker Street, City, London, EC2Y	020 7811 5200	3	3,016
2	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	90	1,493
3	E.ON Limited	Newstead Court, Little Oak Drive, Annesley, Nottingham, Nottinghamshire, NG15 0DR	024 7618 1684	3	1,326
4	Thames Water Utilities Limited	Clearwater Court, Vastern Road, Reading, Berkshire, RG1 8DB	020 3577 8000	4	1,169
5	Transport for London	55 Broadway, Westminster, London, SW1 0BD	03432 220000	18	967
6	Welsh Assembly Government	Cathays Park, Cardiff, South Glamorgan, CF10 3NQ	0300 060 3300	4	820
7	Transport Scotland	Buchanan House, 58 Port Dundas Road, Glasgow, Strathclyde, G4 0HF	0141 272 7100	9	615
8	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	101	603
9	Battersea Power Station Development Company	Battersea Power Station, 188 Kirtling Street, South Lambeth, London, SW8 5BN	020 7501 0688 (CTPS)	1	600
10	Green Energy Parks Limited	Eco Innovation Centre, Peterscourt, Peterborough, Cambridgeshire, PE1 1SA	01733 348468	1	600

TOP TEN Key Architects Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140 (TPS)	12	621
2	John 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	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	4	167
6	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	1	150
7	WA Fairhurst & Partners	225 Bath Street, Glasgow, Strathclyde, G2 4GZ	0141 204 8800	1	138
8	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	2	129
9	Pascall & Watson Architects	5 Carlson Court, 116 Putney Bridge Road, Putney, London, SW15 2NQ	020 8874 1311(TPS)	14	104
10	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	7	80

TOP TEN Key Contractors Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Siemens Limited	Brunel House, Sir William Siemens Square, Frimley, Camberley, Surrey, GU16 8QD	01276 690000 (CTPS)	2	3,050
2	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	7	1,091
3	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	50	957
4	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	23	920
5	Thales Transportation	The Quadrant, 4 Thomas More Square, Thomas More Street, City, London, E1W 1YW	020 3300 6000	4	760
6	Ferrovial Agroman, S.A.	Calle Ribera del Loira 42 Campo de las Naciones, Madrid, Spain, 28042	0034 91 300 85 43	1	746
7	Costain/Skanska JV	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444 / 01923 842444	2	600
8	KNM Group	15 Jalan Dagang SB4/1, Taman Sungai Besi Indah, 43300 Seri Kembangan, Malaysia	0060 389463000	1	600
9	Ferrovial Agroman Laing O'Rourke JV	10th Floor, BSI Building, 389 Chiswick High Road, Southwark, London, W4 4AL	020 8750 2100	1	600
10	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	23	531

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
DECREASE IN CONTRACT VALUES IN SEPTEMBER

Contract values in the commercial & retail sector were lower in September but this follows a record month in August.

The value of contracts awarded in the commercial and retail sector was £894 million in September based on a three month rolling average (see Fig. 5.1). This is a 40.1% decrease from August and a 17.4% decrease from the September 2014 figure. In the three months to September the value of contracts was 46.3% higher than the previous three months and 38.1% higher than the same period in 2014, indicating a significant increase in activity over the longer term despite the monthly fall.

Projects by region

The award of the commercial contract for the University of Cambridge's exam board, Cambridge Assessment, valued at £100 million means the East of England was the main location for commercial construction activity in September 2015. The region accounted for 31.6% of contract value, a 25.6% increase from September 2014 (see Fig. 5.2 & 5.4).

Type of Projects

The Cambridge Assessment contract also means that offices were the dominant type of project in the sector accounting for 69% of the value of contracts awarded this month, which is 6% lower than September 2014 (see Fig. 5.3).

> "In the three months to September the value of contracts was 46.3% higher than the previous three months

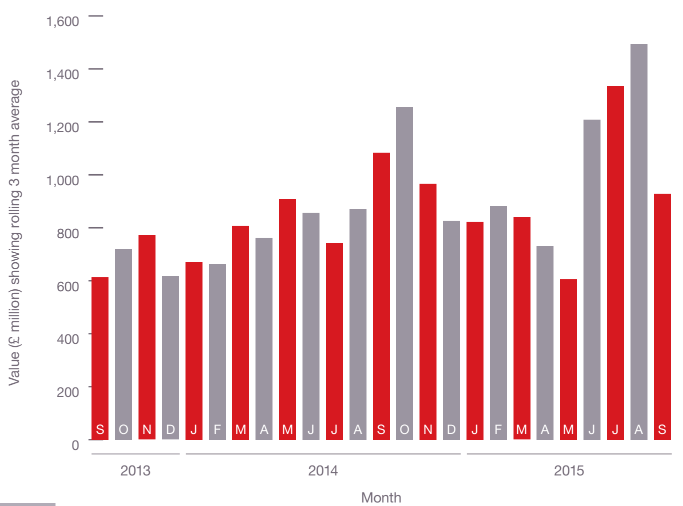

FIG. 5.1

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

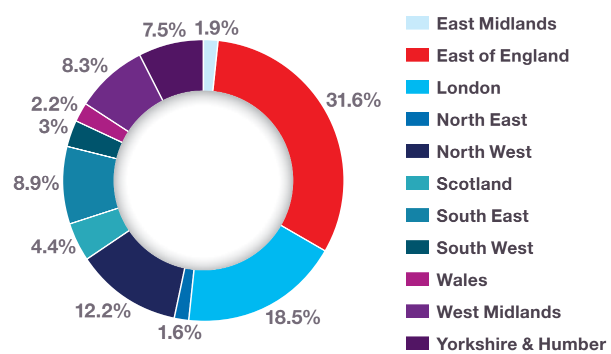

FIG. 5.2

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

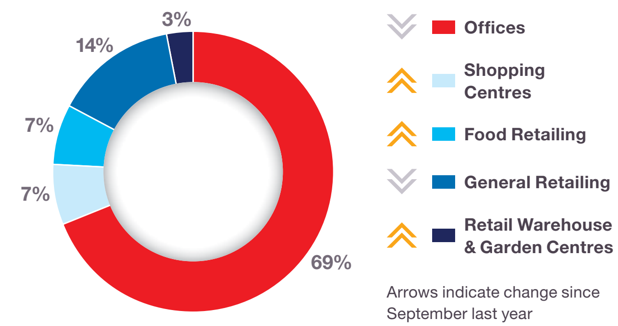

FIG. 5.3

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

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DECREASE IN CONTRACT VALUES IN SEPTEMBER

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

-1.6%	East Midlands		-0.1%	Scotland
+25.6%	East of England *HOTTEST REGION*		+3.3%	South East
-46.4%	London		+0.5%	South West
+0.7%	North East		+1.2%	Wales
+9.8%	North West		+3.1%	West Midlands
			+3.9%	Yorkshire & Humber

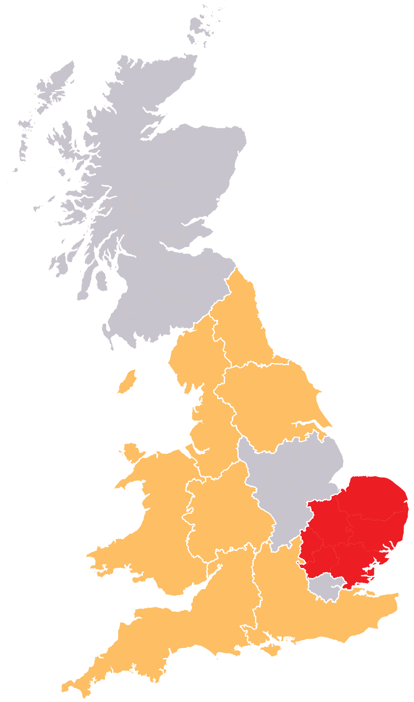

FIG. 5.4

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

PROJECT IN FOCUS

Access Self Storage Redevelopment £20,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	TBC
End Date	TBC
Contract Award Date	September 2015
Funding	Private
Stage	Contract
Contractor	McLaren Construction Limited

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DECREASE IN CONTRACT VALUES IN SEPTEMBER

TOP TEN Key Clients
Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	The Crown Estate	16 New Burlington Place, Westminster, London, W1S 2HX	020 7851 5000 (CTPS)	5	455
2	British Waterways	Brindley Suite, Willow Grange, Church Road, Watford, Hertfordshire, WD17 4QA	01923 226422	1	388
3	Britel Fund Trustees Limited And Clerical Medical	Lloyd Chambers, 1 Portsoken Street, Tower Hamlets, London, E1 8PP	020 7702 0888	1	250
4	Stanhope Plc	Norfolk House, 31 St James Square, Westminster, London, SW1Y 4JR	020 7170 1700	2	246
5	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	201
6	Cambridge Assessment	1 Hills Road, Cambridge, Cambridgeshire, CB1 2EU	01223 553311	1	200
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	British Land Corporation Plc	York House, 45 Seymour Street, Westminster, London, W1H 7LX	020 7486 4466 (CTPS)	10	123
10	Abstract Securities Limited	Queens House, 34 Wellington Street, Leeds, West Yorkshire, LS1 2DE	0113 246 0060 (TPS)	2	121

TOP TEN Key Architects
Oct 2014 – Sep 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)	3	704
2	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	10	539
3	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	2	490
4	Panter Hudspith Architects	4-8 Emerson Street, Southwark, London, SE1 9DU	020 7633 9425	1	440
5	Dixon Jones Limited	2-3 Hanover Yard, Noel Yard, Islington, London, N1 8YA	020 7483 8888	1	440
6	Pelli Clark Pelli Architects	1056 Chapel Street, New Haven, Connecticut, CT06510	00 1203 777 2515	1	388
7	Allford Hall Monaghan Morris	4 & 5th Floors, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	4	361
8	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	2	350
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
Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	16	616
2	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	588
3	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	573
4	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	9	337
5	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	14	330
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	17	283
7	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	11	262
8	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	35	252
9	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	9	229
10	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	37	225

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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HOTEL, LEISURE & SPORT

SLIGHT DECREASE IN CONTRACT VALUE IN SEPTEMBER

The hotel, leisure & sport sector showed monthly decreases in contract values and there are declines over the longer term indicating a subdued 2015 so far.

Contract award levels in the hotel, leisure & sport sector were £253 million in September, based on a three month rolling average (see Fig. 6.1). This was 6.7% lower than August and 38.4% lower than September 2014. In the three months to September the value of contracts was £827 million, which was 22.5% lower than the previous three months. This was a decrease of 28.2% compared to the same period in 2014, indicating a longer term decline over the past year.

Projects by region

Scotland dominated the hotel, leisure & sport sector accounting for 26.6% of total levels of contracts awarded. A proposed hotel development in Glasgow by Motel One valued at £18 million contributed most of this total. The South West had the next highest proportion of contracts at 20.2%, a 9.8% increase from September 2014.

Type of Projects

Hotels/motels dominated the sector accounting for 54% of overall levels of contracts awarded. Leisure centres were next with 21% of the value awarded (see Fig. 6.3).

> “Contract award levels were £253 million in September, based on a three month rolling average

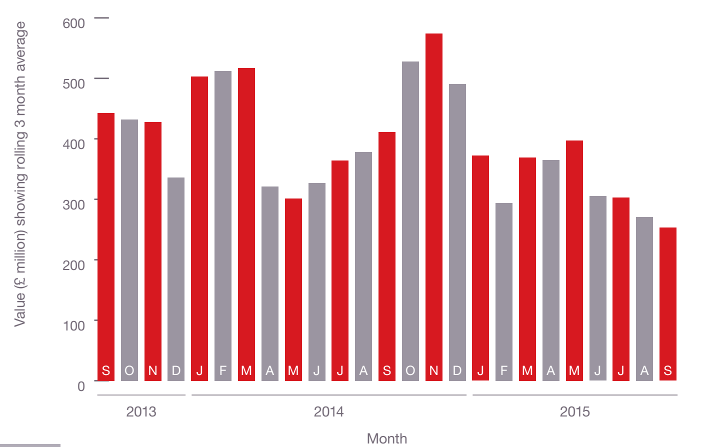

FIG. 6.1

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

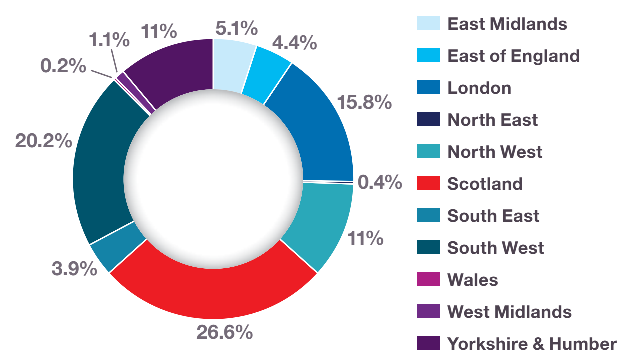

FIG. 6.2

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

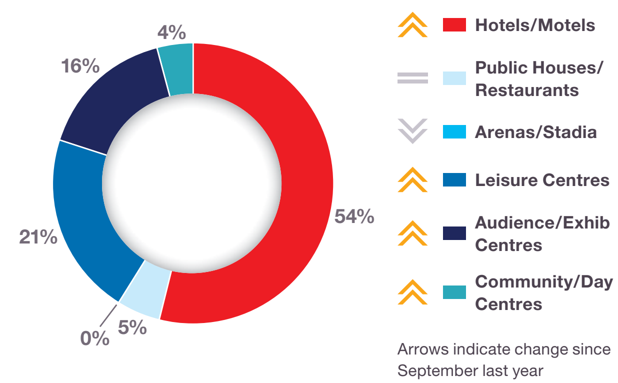

FIG. 6.3

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

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SLIGHT DECREASE IN CONTRACT VALUE IN SEPTEMBER

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

		+13.8%	Scotland *HOTTEST REGION*
+2.3%	East Midlands	+0.1%	South East
-0.8%	East of England	+9.8%	South West
-12.5%	London	-0.6%	Wales
-0.3%	North East	-4.2%	West Midlands
-13.4%	North West	+5.8%	Yorkshire & Humber

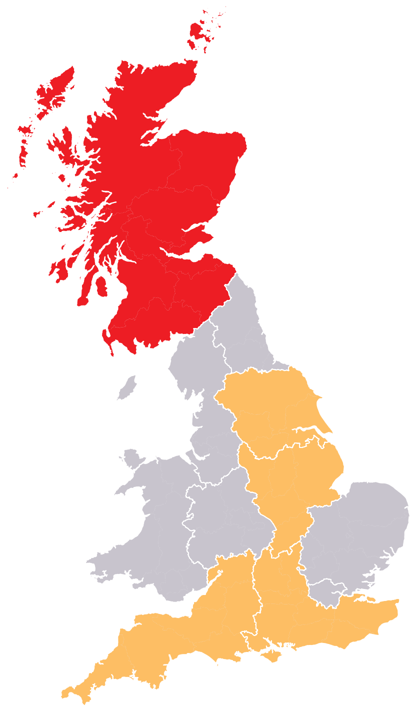
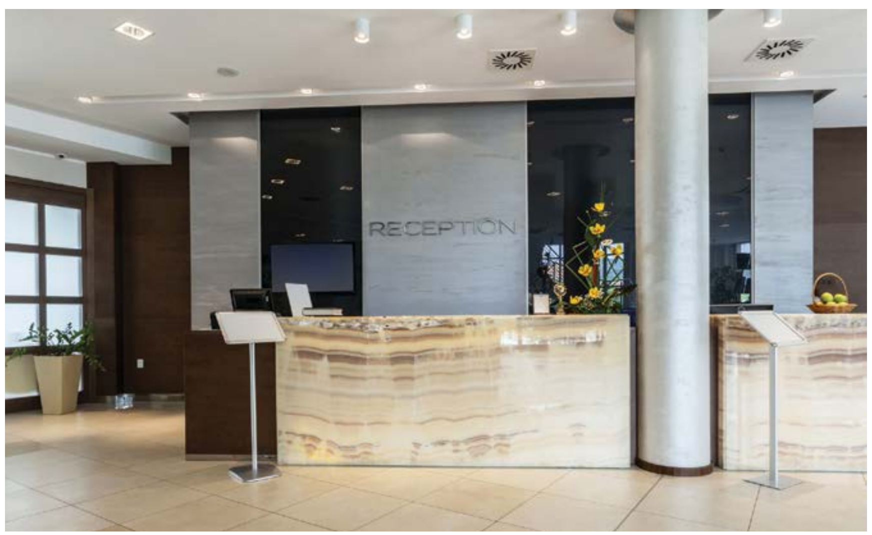


FIG. 6.4

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



> Scotland dominated the sector accounting for 26.6% of total levels of contracts awarded

PROJECT IN FOCUS

Motel One Hotel – Glasgow

£18,000,000

County	Strathclyde
Primary Category Sector	Hotel, Leisure & Sport
Government Region	Scotland
Start Date	November 2015
End Date	May 2017
Contract Award Date	September 2015
Funding	Private
Stage	Contract
Contractor	Ogilvie Construction

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TOP TEN Key Clients

Oct 2014 – Sep 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	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499	42	114
5	Galliard Construction Limited	Sterling House, Langston Road, Loughton, Essex, IG10 3TS	020 8418 1000	2	104
6	The Casey Group Limited	Rydings Road, Wardle, Rochdale, Lancashire, OL12 9PS	01706 341121	1	100
7	4C Hotels	13 Wadham Gardens, City, London, NW3 3DN	020 7419 1839	1	60
8	Manhattan Loft Corporation Limited	223 - 231 Old Marylebone Road, Edison House, City, London, NW1 5QT	020 7535 2222	1	50
9	Timec 1209 Llp	Time Central, Gallowgate, Newcastle Upon Tyne, Tyne And Wear, NE1 4BF	Not Listed	1	45
10	Art'otel	c/o Park Plaza, Germany Holdings GmbH, Markisches Ufer 12, D-10179, Berlin, Germany	+49 (0) 30 400 557 0	1	40

TOP TEN Key Architects

Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Woods Bagot	46-48 Foley Street, Westminster, London, W1W 7TY	020 7637 6880 (CTPS)	2	170
2	Nicholas Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	2	151
3	Ian Simpson Architects	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000 (CTPS)	1	140
4	EPR Architects	21 Douglas Street, Barnet, London, SW1P4PE	020 7834 4411	3	131
5	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269 (TPS)	33	107
6	Dexter Moren Associates	57d Jamestown Road, Camden Town, London, NW1 7DB	020 7267 4440	6	97
7	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	11	77
8	Leach Rhodes & Walker LLP	West Riverside, New Bailey Street, Manchester, Greater Manchester, M3 5AA	0161 833 0211	4	75
9	Holmes Miller	89 Minerva Street, Glasgow, Strathclyde, G3 8LE	0141 204 2080	3	59
10	Donald Insall & Associates Limited	19 West Eaton Place, Eaton Square, Westminster, London, SW1X 8LT	020 7245 9888 (TPS)	2	54

TOP TEN Key Contractors

Oct 2014 – Sep 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	16	136
3	Bay Construct Limited	64 Clerkenwell Road, Islington, London, EC1M 5PX	0203 714 7390	3	108
4	The 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	91
6	HOC UK Limited	Jubilee House, Townsend Lane, City, London, NW9 8TZ	020 8200 5873	3	74
7	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	5	72
8	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	3	65
9	RG Carter Limited	9-11 Drayton High Road, Drayton, Norwich, Norfolk, NR8 6AH	01603 867355	11	59
10	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	6	55

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INDUSTRIAL

ACTIVITY DECREASES IN THE SECTOR THIS MONTH

The industrial sector experienced a decrease in contract values awarded in September but the value of work is still significantly higher than the same time in 2014.

Activity in the industrial sector decreased in September with the value of contracts awarded standing at £538 million, based on a three month rolling average (see Fig. 7.1). This equates to a decrease of 28.4% on the value in August but is 65.5% above the figure recorded this time last year. In the three months to September the total value of contracts was £2 billion which was 11.4% higher the previous three months and 83.5% higher than the same quarter last year. This indicates the comparatively strong performance the sector has been experiencing over the longer term despite this month's drop.

Projects by region

The South East is the region with the highest proportion of contracts recording 25.3% of the value of contracts awarded, which was a 3.7% decrease from September 2014 (see Fig. 7.2 & 7.4). Phase 2 of the defence project at Wellesley in Worthy Down, valued at £100 million, in Hampshire is a major reason for the strong performance of the region. Yorkshire & the Humber had the next highest proportion of activity, accounting for 19.6% of contract award values, an increase of 8% on the corresponding month last year. The award of the contract to construct a distribution warehouse with offices in Knottingley, valued at £36 million was the major contributor to the contract value in the region in September.

> In the three months to September the total value of contracts was £2 billion

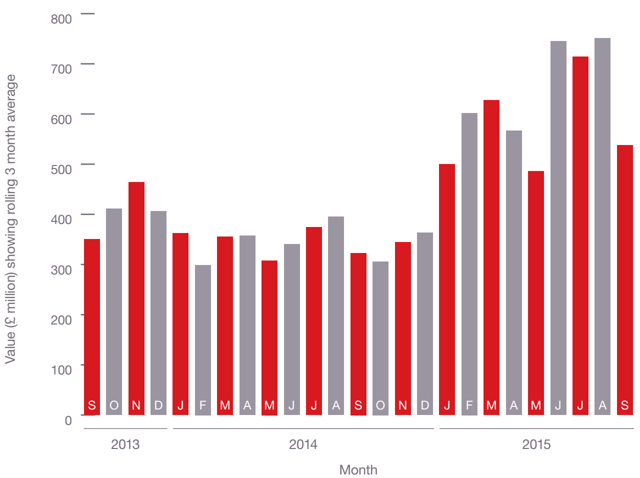

FIG. 7.1
Industrial: **Project Value showing 3 month moving average** Source: Barbour ABI

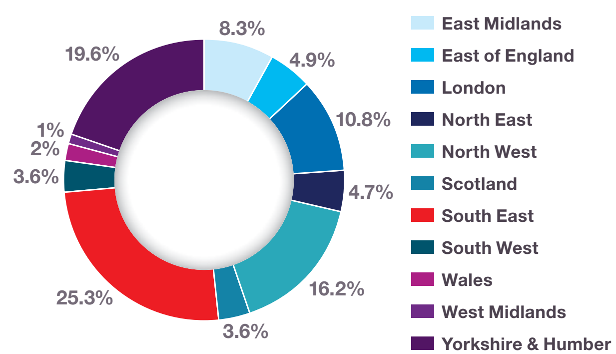

FIG. 7.2
Industrial: **Value of Contracts by Region** Source: Barbour ABI

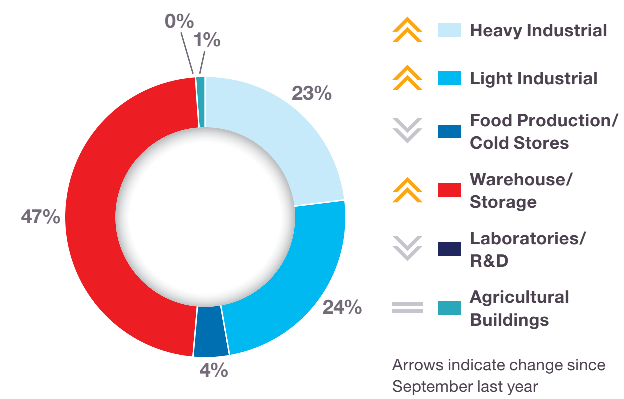

FIG. 7.3
Industrial: **Type of Projects Awarded** Source: Barbour ABI

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

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

		-13.4%	Scotland
+5.4%	East Midlands	-3.7%	South East
-3.6%	East of England	-1.7%	South West
+7.4%	London	-2.3%	Wales
+4.0%	North East	-7.7%	West Midlands
+7.6%	North West	+8.0%	Yorkshire & Humber *HOTTEST REGION*

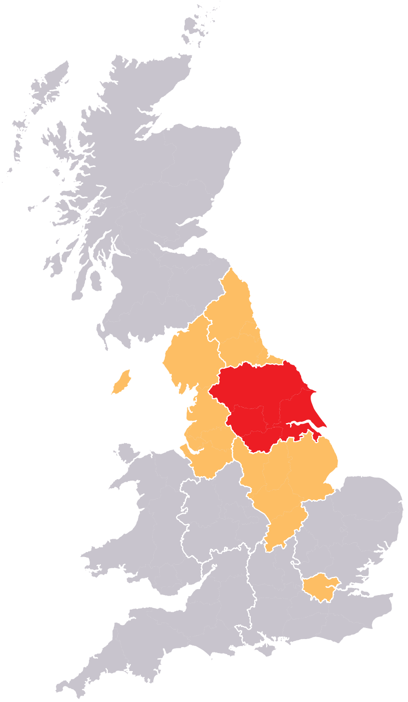


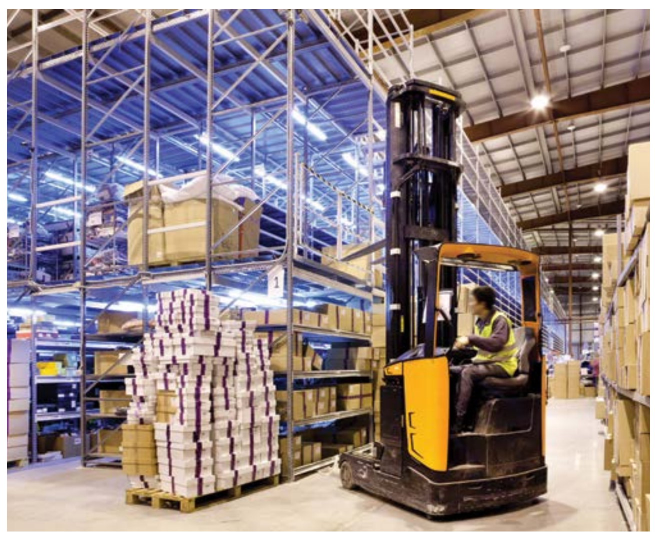
FIG. 7.4

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

Type of Projects

The types of project awarded in the sector were predominantly warehouses/storage which accounted for 47% of contract values, an increase of 11% from September 2014. Light industrial projects had the second highest proportion of contracts by value in September accounting for 24% of contract value, an increase of 8% from the same month in the previous year (see Fig. 7.3).

> Warehouses/storage accounted for 47% of contract values, an increase of 11% from last year



PROJECT IN FOCUS

Green Port Alexandra Dock – Turbine Maintenance Buildings £15,000,000

County	Humberside
Primary Category Sector	Industrial
Government Region	Yorkshire & Humber
Start Date	August 2015
End Date	January 2017
Contract Award Date	September 2015
Funding	Private
Stage	Contract
Contractor	VolkerWessels UK Limited

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

TOP TEN Key Clients

Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BP Exploration	Farburn Industrial Estate, Aberdeen, Grampian, AB21 7PB	01224 832000	1	500
2	BAE Systems Marine Limited	Bridge Road, Barrow in Furness, Cumbria, LA14 1AF	01229 823366	3	365
3	AstraZeneca	2 Kingdom Street, City, London, W2 6BD	020 7604 8000	1	300
4	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	3	200
5	Goodman International	Nelson House, Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG	0121 506 8100	9	193
6	The Peel Group	Peel Management, Peel Dome, The Trafford Centre, Manchester, Greater Manchester, M17 8PL	0161 629 8200	4	155
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	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	5	125
10	West Berkshire Council	Council Offices, Market Street, Newbury, Berkshire, RG14 5LD	01635 424000	1	125

TOP TEN Key Architects

Oct 2014 – Sep 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	10	231
5	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	3	200
6	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	14	194
7	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	14	164
8	BHP Design LLP	Suite 2f, St Georges Court, 1 Albion Street, Birmingham, West Midlands, B1 3AH	0121 314 6618	1	150
9	Kilmartin Plowman & Partners	Lodge House, 12 Town Street, Horsforth, Leeds, West Yorkshire, LS18 4RJ	0113 239 0460	9	146
10	PHP Architects	The Old Rectory, 31 Rectory Lane, Milton Malsor, Northampton, Northamptonshire, NN7 3AQ	01604 858916	6	140

TOP TEN Key Contractors

Oct 2014 – Sep 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	560
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	2	400
4	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	11	257
5	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	12	201
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	6	195
7	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	2	150
8	M & W UK	Unit A2, Metheun South, Bath Road, Chippenham, Wiltshire, SN14 0GT	01249 455150	1	150
9	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	5	143
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

INCREASE IN VALUE OF CONTRACTS IN SEPTEMBER

The monthly value of medical & health contracts increased in September but were below the values for September 2014.

Levels of activity in the medical & health sector increased 24.6% in September 2015 compared to August, with the total value of contracts awarded being £160 million, based on a three month rolling average (see Fig. 8.1). This is 7.4% lower than the values in September 2014. In the three months to September the value of contracts decreased by 18.9% on the previous three months, and was 6.2% lower than the same period in 2014 indicating a longer term decrease in the value of contracts awarded in the sector.

Projects by region

East Midlands was the main location of development in the sector this month capturing 85.5% of activity, an increase of 71.6% from September 2014 (see Fig. 8.2 & 8.4). One project in particular contributes to the East Midlands strong share of contracts in September – a contract to construct the Defence Rehabilitation Centre in Leicestershire which will cost £200 million.

Type of Projects

Hospices and nursing homes dominated the sector this month, accounting for a large 84% of overall contracts awarded (see Fig. 8.3). The above mentioned scheme for the MOD at a cost of £200 million dominated levels this month.

> East Midlands was the main location of development in the sector this month

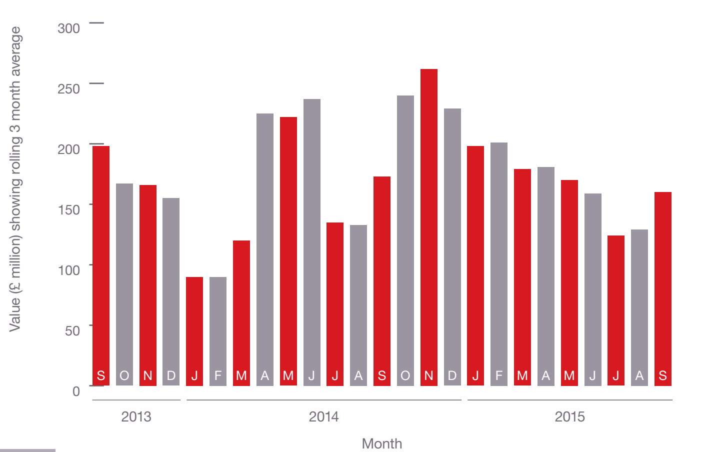

FIG. 8.1
Medical & Health: **Project Value showing 3 month moving average** Source: Barbour ABI

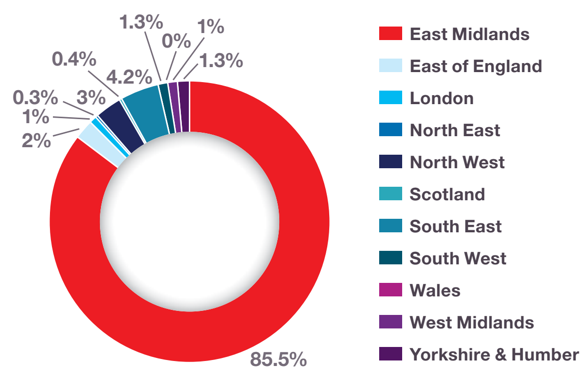

FIG. 8.2
Medical & Health: **Value of Contracts by Region** Source: Barbour ABI

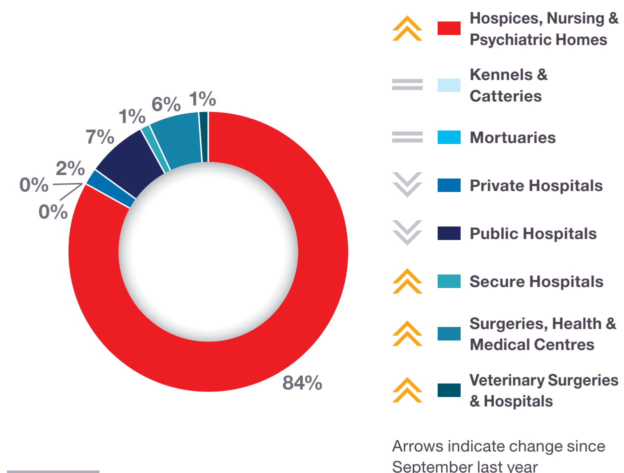

FIG. 8.3
Medical & Health: **Type of Projects Awarded** Source: Barbour ABI

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INCREASE IN VALUE OF CONTRACTS IN SEPTEMBER

The map and figures show how the activity has changed since September 2014		-58.6%	Scotland
+71.6%	East Midlands *HOTTEST REGION*	+1.4%	South East
-1.5%	East of England	-0.5%	South West
-5.7%	London	-1.5%	Wales
-1.6%	North East	-4.2%	West Midlands
+0.4%	North West	+0.2%	Yorkshire & Humber

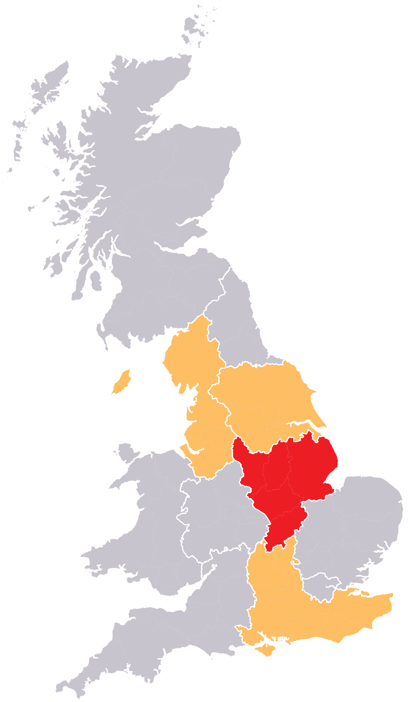

FIG. 8.4

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

PROJECT IN FOCUS

Defence & National Rehabilitation Centre – Defence Rehabilitation Establishment £200,000,000

County	Leicestershire
Primary Category Sector	Medical & Health
Government Region	East Midlands
Start Date	August 2015
End Date	August 2018
Contract Award Date	September 2015
Funding	Public
Stage	Subcontract
Contractor	Interserve Construction Limited

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INCREASE IN VALUE OF CONTRACTS IN SEPTEMBER

TOP TEN Key Clients
Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	2	208
2	BS Stanford Limited	70 Grosvenor Street, Westminster, London, W1K 3JP	Not Listed	1	200
3	Aneurin Bevan Health Board	Mamhilad House, Block A, Mamhilad Park Estate, Pontypool, Gwent, NP4 0YP	01873 732732 (CTPS)	1	180
4	Royal Infirmary of Edinburgh NHS Trust	51 Little France Crescent, Old Dalkeith Road, Edinburgh, Lothian, EH16 4SA	0131 536 1000 (CTPS)	1	150
5	Papworth Hospital NHS Trust	Papworth Hospital, Papworth Everard, Cambridge, Cambridgeshire, CB23 3RE	01480 830541	1	140
6	Royal Liverpool and Broadgreen Hospital NHS Trust	Prescot Street, Liverpool, Merseyside, L7 8XP	0151 706 2000	6	117
7	Spire Healthcare Limited	PO Box 62647, 120 Holborn, City, London, EC1P 1JH	0800 169 1777	3	88
8	University of Glasgow	Gilbert Scott Building, University Avenue, Glasgow, Strathclyde, G12 8QQ	0141 330 2000 (TPS)	2	76
9	Birmingham Women's NHS Foundation Trust	Metchley Park Road, Edgbaston, Birmingham, West Midlands, B15 2TG	0121 472 1377	1	75
10	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)	2	72

TOP TEN Key Architects
Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	John Simpson & Partners	29 Great James Street, Holborn, Westminster, London, WC1N 3EY	020 7405 1285 (TPS)	1	200
2	Steffian Bradley Architects	45 Gee Street, Fifth Floor, City, London, EC1V 3RS	020 7549 4050	1	200
3	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	2	184
4	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	6	180
5	IBI Group	Princes Manor Barn, Reading Road, Harwell, Oxford, Oxfordshire, OX11 0LU	01235 820222 (TPS)	11	159
6	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	150
7	HOK International Limited	Qube, 90 Whitfield Street, Westminster, London, W1T 4EZ	020 7636 2006	1	140
8	Gilling Dod Architects	The Cruck Barn, Duxbury Park, Chorley, Lancashire, PR7 4AT	01257 260070	9	82
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
Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	20	302
2	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	7	272
3	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	24	272
4	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	7	167
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)	11	127
7	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	5	115
8	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	6	104
9	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	4	75
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 DECREASE IN THE VALUE OF CONTRACTS

Contract values in the education sector decreased in September and activity is lower than this time last year indicating a decline in the longer term performance in this sector.

The value of contracts awarded in the education sector was £702 million in September based on a three month rolling average, a 1.5% decrease from August (see Fig. 9.1). This figure was 13.4% lower than September 2014 indicating a slight decrease in activity compared to the same time last year. The values of contract awards in the three months to September were 13.6% higher than the previous three months, but 8.4% below the figure in the corresponding period in 2014.

Projects by region

Scotland accounted for the largest proportion of works awarded in September, with 21.1% of the overall total (see Fig. 9.2 & 9.4). The Ayr Academy and Marr College, part of the Scotland's Schools for the Future scheme, accounted for £45 million between them. London accounted for the next largest proportion of contracts awarded in September, with 20% of the value awarded. This was a 3.9% increase on the equivalent month in 2014. A £19 million development of the Kingston Academy in Kingston upon Thames was the major project awarded this month.

> "The values of contract awards in the three months to September were 13.6% higher than the previous three months

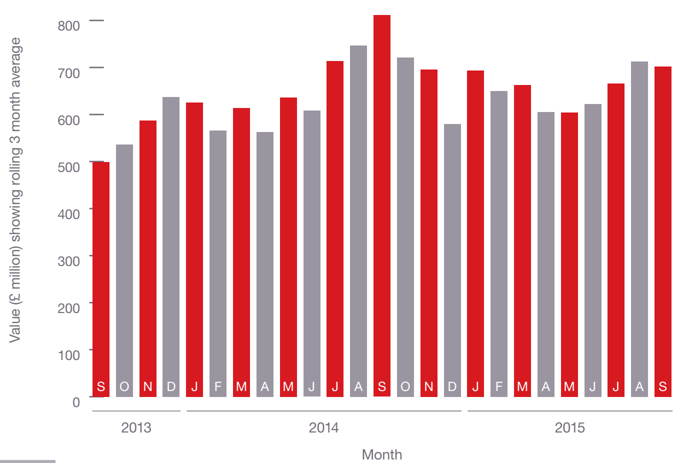

FIG. 9.1

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

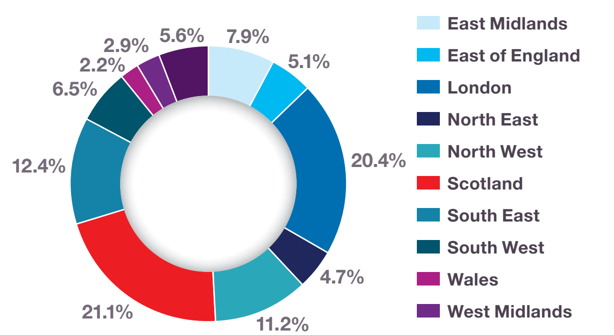

FIG. 9.2

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

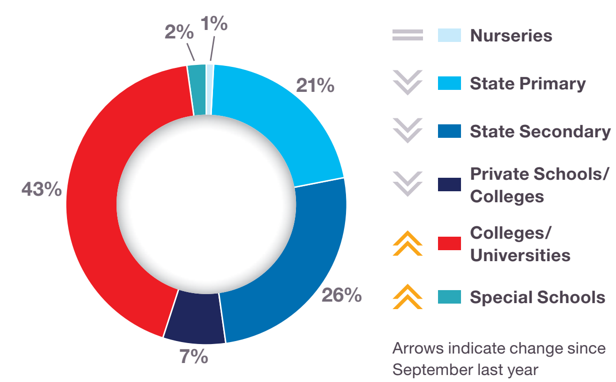

FIG. 9.3

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

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The map and figures show how the activity has changed since September 2014			+7.9%	Scotland *HOTTEST REGION*
+6.8%	East Midlands		-0.2%	South East
+0.2%	East of England		-6.2%	South West
+3.9%	London		-3.4%	Wales
+2.9%	North East		-1.2%	West Midlands
-10.8%	North West		+0.1%	Yorkshire & Humber

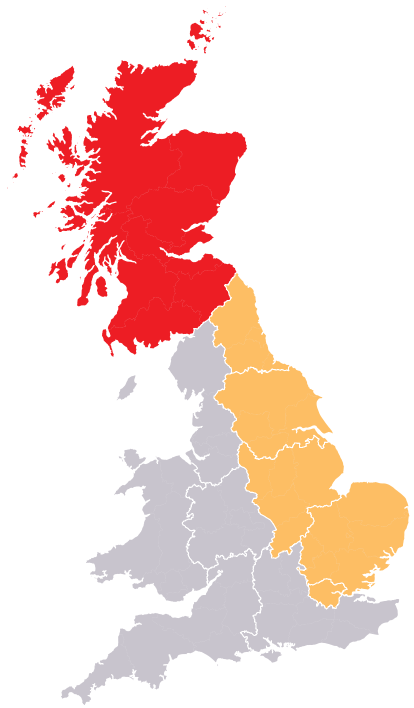

FIG. 9.4

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

Type of Projects

Colleges/universities were the sub sector with the largest proportion of contracts in September 2015 accounting for 43% of total value awarded. State secondary followed, contributing 26% of the overall value of contracts awarded (see Fig. 9.3).

> The Ayr Academy and Marr College, part of the Scotland's Schools for the Future scheme, accounted for £45 million between them

PROJECT IN FOCUS

Gowanbank Campus
£21,000,000

County	Strathclyde
Primary Category Sector	Education
Government Region	Scotland
Start Date	November 2015
End Date	May 2017
Contract Award Date	September 2015
Funding	Public
Stage	Contract
Contractor	City Building (Glasgow) LLP

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SLIGHT DECREASE IN THE VALUE OF CONTRACTS

TOP TEN Key Clients Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	The Department For Education	Castle View House, East Lane, Runcorn, Cheshire, WA7 2AA	0370 000 2288	83	860
2	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	15	299
3	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2DB	020 7589 5111 (CTPS)	2	151
4	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	11	132
5	University of Cambridge	74 Trumpington Street, Cambridge, Cambridgeshire, CB2 1RW	01223 337770 (CTPS)	13	106
6	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	8	106
7	Dumfries & Galloway Council	Militia House, English Street, Dumfries, Dumfries and Galloway, DG1 2HR	0303 333 3000	7	86
8	University of Leeds	Woodhouse Lane, Leeds, West Yorkshire, LS2 9JT	0113 243 1751	11	80
9	Kent County Council	County Hall, County Road, Maidstone, Kent, ME14 1XQ	03000 414141	24	80
10	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	9	76

TOP TEN Key Architects Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140 (TPS)	31	294
2	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	2	232
3	Mecanoo Architecten	Oude Delft 203, 2611 HD Delft, Holland	+31 15 2798100	1	225
4	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	21	186
5	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	12	164
6	The Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	28	163
7	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	14	152
8	PLP Architecture	2 Seething Lane, City, London, EC3N 4AT	020 3006 3900	1	150
9	Aukett Swanke	25 Christopher Street, City, London, EC2A 2BS	020 7454 8200	1	150
10	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	38	134

TOP TEN Key Contractors Oct 2014 – Sep 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	86	520
2	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	68	465
3	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	76	395
4	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	54	385
5	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	31	382
6	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	45	376
7	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	15	367
8	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	10	242
9	Carillion Plc	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	28	186
10	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	11	139

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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