economic & construction MARKET REVIEW

Barbour ABI | Building | bd

DECEMBER 2015

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www.barbour-abi.com

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

T: 0151 353 3500

E: info@barbour-abi.com

@BarbourABI

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.

To contact Michael either:

T: 020 7560 4141

E: michael.dall@ubm.com

@MichaelGDall

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Bespoke Research and Intelligence

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

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

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

T: 0151 353 3500

E: info@barbour-abi.com

W: www.barbour-abi.com

@BarbourABI

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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E: info@barbour-abi.com

@BarbourABI

ECONOMIC CONTEXT

AUTUMN STATEMENT SETS THE SCENE FOR THE PARLIAMENT

The Comprehensive Spending Review was delivered in the last month which set the course for government spending for the lifetime of the Parliament.

In what seemed have more political than economic importance, most of the headlines centred on what was not included, namely cuts to tax credits or the Police budget. However, for construction there were some potentially important announcements including a proposal to increase capital budgets up to 2020 and a promise to build 400,000 homes. Infrastructure also received guarantees over major projects including HS2 and transport in London.

Within the Autumn Statement, the Office for Budget Responsibility (OBR) updated its economic forecasts for the UK in the upcoming years with its estimate for growth this year at 2.4%, no change from the forecast in the Summer Budget in July. The forecast for 2016 was increased to 2.4% growth, but the economy is now forecast to grow by 2.5% in 2017, a slight increase from the 2.4% forecast in the Summer Budget. Growth is forecast to slow towards the end of the forecast period with 2.3% expected, compared to 2.4% in the summer (see Fig. 1.1).

GDP	2014	2015	2016	2017	2018	2019	2020
Autumn Statement	2.9	2.4	2.4	2.5	2.4	2.3	2.3
Summer Budget	3.0	2.4	2.3	2.4	2.4	2.4	2.4

Fig. 1.1 **GDP** Source: OBR/ONS

CPI (Inflation)	2014	2015	2016	2017	2018	2019	2020
Autumn Statement	1.5	0.1	1.0	1.8	1.9	2.0	2.0
Summer Budget	1.5	0.1	1.1	1.6	1.8	1.9	2.0

Fig. 1.2 **CPI (Inflation)** Source: OBR

Inflation forecasts also remained unchanged for 2015 at 0.1%, but it is predicted to increase more sharply in 2017 to 1.8%, compared to 1.6% in the last Budget (see Fig. 1.2). Given that the Bank of England target is 2% it shows how far the economy is from a desired inflation rate at present. The OBR's inflation target of 2.0% is predicted to be met in 2019 however, a year earlier than the Summer Budget predicted.

Average earnings growth was revised up within this Budget with the OBR now forecasting 2.6% wage growth this year, when it expected the figure to be 2.2% when the Summer Budget was announced. However, average earnings growth is not expected be as strong towards the end of the Parliament with 3.9% growth forecast in 2020, down from 4.4% in the Budget (see Fig. 1.3).

Average Earnings	2014	2015	2016	2017	2018	2019	2020
Autumn Statement	1.5	2.6	3.4	3.7	3.6	3.7	3.9
Summer Budget	2.6	2.2	3.6	3.9	3.9	4.1	4.4

Fig. 1.3 **Average Earnings** Source: OBR

Unemployment Rate	2014	2015	2016	2017	2018	2019	2020
Autumn Statement	6.2	5.5	5.2	5.2	5.3	5.4	5.4
Summer Budget	6.2	5.4	5.1	5.2	5.3	5.4	5.4

Fig. 1.4 **Unemployment Rate** Source: OBR

Unemployment forecasts remained broadly similar in the Autumn Statement, reflecting the rapid fall in unemployment levels in the last year with an estimate of 5.5% this year, compared to 5.4% in the Spring Budget. Unemployment is set to fall to 5.2% in 2016 and settle at the long-term rate of 5.4% in 2019 (see Fig. 1.4). These forecasts imply that inflation will be on target and unemployment will be at its "natural" rate in 2019, indicating a healthy economy.

The many policy measures announced in the statement included:

- **An extension of various measures including the Help to Buy Equity Loan scheme to 2021 and extension of it to develop the London Help to Buy scheme**
- **To aid the creation of more than 160,000 new homes the government will sell £4.5 billion worth of land and property assets**
- **Further reforms to the planning system were also proposed including establishing a new delivery test on local authorities, to ensure delivery against the number of homes set out in Local Plans**
- **An additional 3% of Stamp Duty Land Tax (SDLT) will be charged and on purchases of additional residential properties including Buy to Let homes**
- **To enhance the government's devolution aims, local government will retain 100% of business rate revenues to fund local services by 2020**
- **A package of measures to reduce the projected cost of green policies on the average annual household energy bill by £30 from 2017. The bulk of these savings will come from reforms to the current Energy Company Obligation (ECO) scheme.**

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

THE CONSTRUCTION SECTOR
BROAD GROWTH WITHIN CONSTRUCTION DURING NOVEMBER

The value of construction projects increased in November although overall contract numbers declined.

Construction Products Association (CPA) Forecasts

The Construction Products Association recently updated its forecasts for 2015 and beyond and the industry is now predicted to grow by 3.6% this year and 3.8% next year on the back of continuing strength in the new build private residential sector and increasing activity in infrastructure sector (see Fig. 2.1).

While this is welcome news for the industry it is important to note that it will be 2016 before the industry exceeds the levels of activity occurring in 2007 before the recession took hold.

	Output	Growth
2013	117,859	1.6%
2014	127,425	8.1%
2015 (e)	132,021	3.6%
2016 (f)	137,005	3.8%
2017 (f)	142,115	3.7%
2018 (p)	147,345	3.7%
2019 (p)	152,544	3.5%

Fig. 2.1 **Forecasts** Source: Construction Products Association

Construction Sector

According to Barbour ABI data on all contract activity, November witnessed an increase in construction activity levels with the value of new contracts awarded £7.9 billion, based on a three month rolling average (see Fig. 2.3). This is a 7.2% increase from October and a 37.6% increase on the value recorded in November 2014. The number of construction projects within the UK in November decreased by 27.9% on October, and were 6.1% lower than November 2014.

> “The industry is now predicted to grow by 3.6% this year and 3.8% next year

Projects by Region

The majority of the contracts awarded in November by value were in London, accounting for 44% of the UK total (see Fig. 2.2). In London, there were further contracts awarded as part of the Thames Tideway Tunnel with another set of main works valued at £800 million. The Tottenham Hotspur stadium development also reached contract award stage in November, with a projected value of £400 million, when it was announced that Mace would be the contractor. There were also two large commercial contracts awarded in London in November with the office led 40 Leadenhall Triangle awarded to Mace at a value of £390 million. Another major commercial contract was awarded at Canary Wharf, known as Ten Bank Street, which is valued at £325 million. This spread of contracts reinforces London as the main location of construction activity within the UK and with major infrastructure, commercial and residential projects in the pipeline this is likely to remain the case.

Types of Project

Residential had the highest proportion of contracts awarded by value in November, with 27% of the total value of projects awarded (see Fig. 2.4). As expected, the major schemes in London awarded this month included the Chelsea Waterfront project which aims to deliver an eight storey development incorporating 128 units. However, in a sign that major schemes are spreading out of London, the Lower Heathcote Farm project in the West Midlands was also a significant contributor to the residential sector this month. This scheme aims to build 435 homes and at a value of £43.5 million is the second biggest contract awarded in the sector in November.

The infrastructure sector was the next largest sector in November, accounting for 23% of the contract values. The commercial sector had the next highest share of contract value, accounting for 20% of all contracts awarded in November.

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

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Barbour ABI
www.barbour-abi.com
Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
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BROAD GROWTH WITHIN CONSTRUCTION DURING NOVEMBER

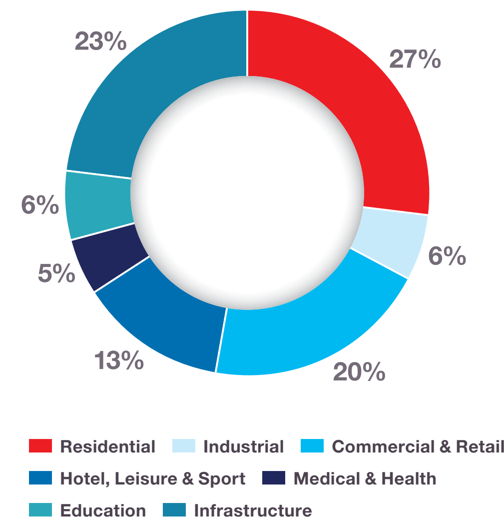

Fig. 2.4 **Type of Projects** Source: Barbour ABI

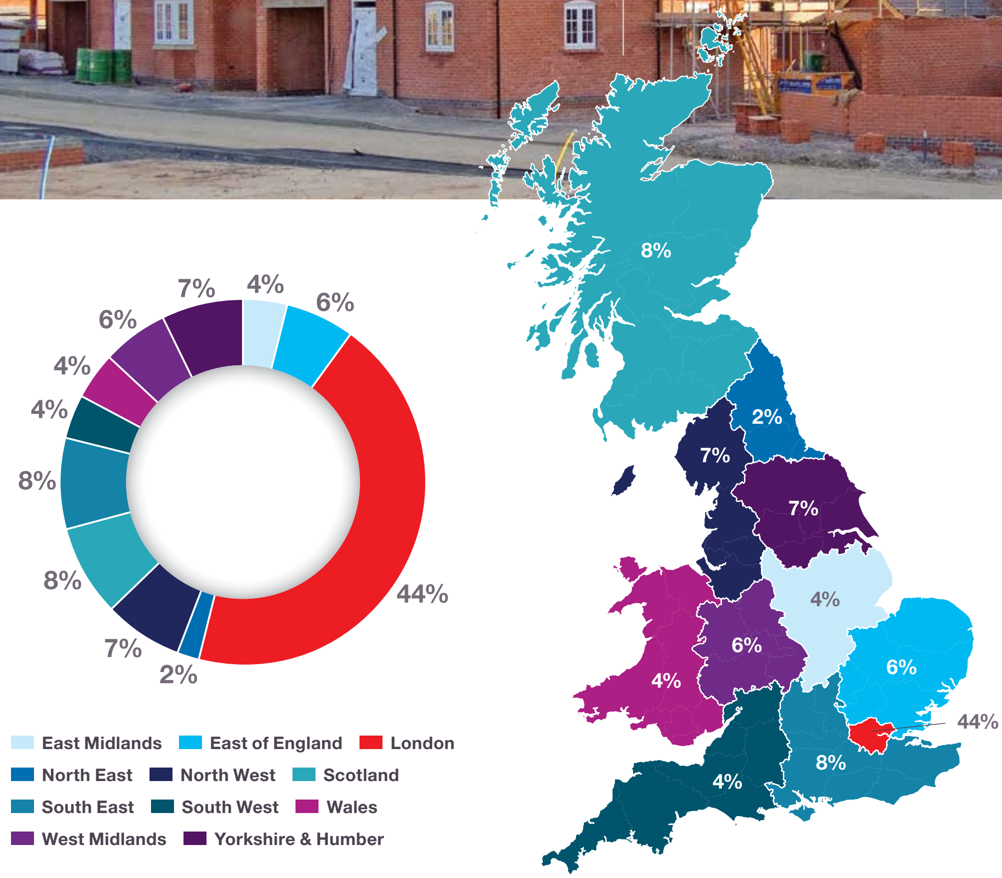

Fig. 2.2 **Locations of Contracts Awarded** Source: Barbour ABI

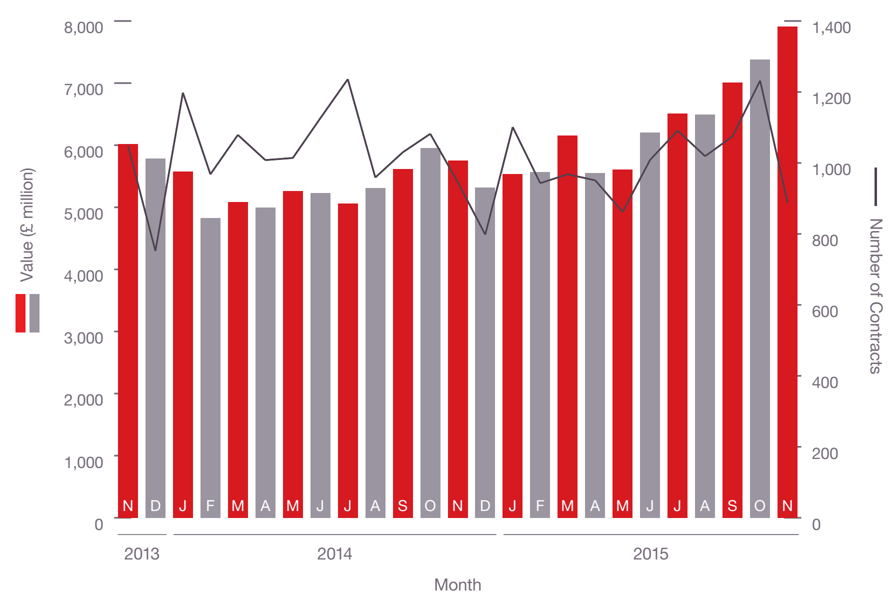

Fig. 2.3 **Construction Activity Trends** Source: Barbour ABI

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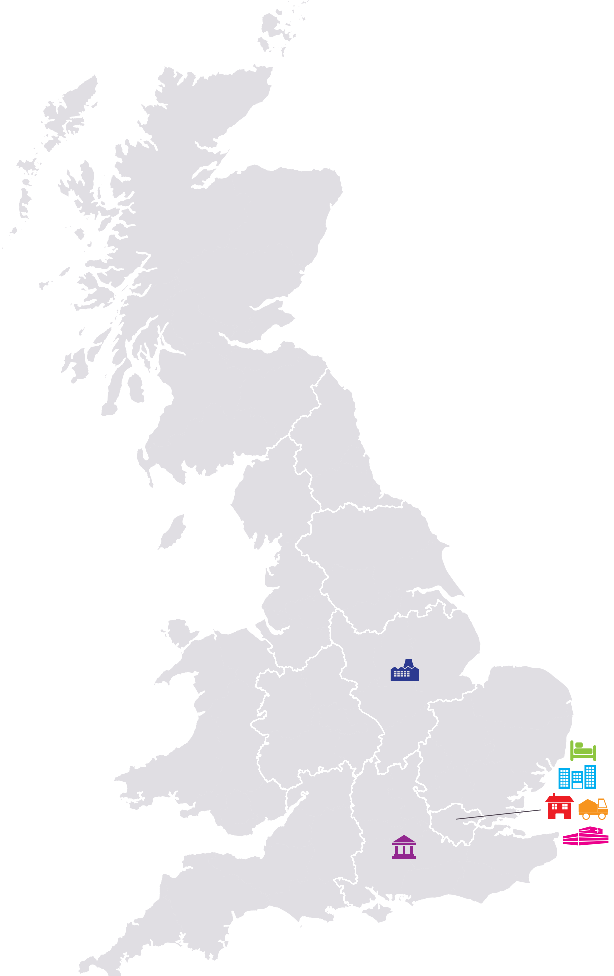
A snippet of this month's regional activity

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
Dundee Western Gateway – Dykes of Gray
£40,000,000

INFRASTRUCTURE
Energy Works (Hull) Project – 25 MW Waste to Energy Gasification Plant
£150,000,000

COMMERCIAL & RETAIL
40 Leadenhall Triangle
£391,000,000

HOTEL, LEISURE & SPORT
The Quadrant Q2 – Boston Football Club Stadium
£6,000,000

INDUSTRIAL
Dovenby Hall – M Sport Evaluation Centre
£15,000,000

MEDICAL & HEALTH
UCLH – Proton Beam Therapy Cancer Treatment Facility
£136,000,000

EDUCATION
School – Eastern High School
£25,000,000

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

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@BarbourABI

RESIDENTIAL

RESIDENTIAL UNITS RISE SLIGHTLY IN NOVEMBER

November heralded a slight increase in residential units awarded and the value of projects increased pointing to improving sentiment.

Activity in the residential sector increased in November with the total number of units awarded at 12,372, based on a three month rolling average. This is a 7% increase compared to October but is 7.3% lower than November 2014, indicating that new contract activity for units in the residential sector is lower than last year (see Fig. 3.1). However, the value of projects associated with residential contracts awarded increased by 3.2% between October and November based on a three month rolling average, and 39.8% higher than November 2014. Taken together these statistics are suggestive of an increase in the number of high value schemes rather than high density ones. It is a pattern which will be monitored to assess whether this is a sustained increase or simply pent-up demand after the post-election declines in activity. Given that the long term fundamentals that have been driving growth, in particular help for first time buyers, are set to continue Barbour ABI remains confident of the longer term growth prospects for the sector.

Sector Performance

The Autumn Statement provided a further boost to the residential sector within the UK with announcements of a variety of schemes to increase the rate of house building. The main measures were a doubling of the housing budget over the course of the Parliament with a commitment to deliver 400,000 affordable homes. Included in this figure are 200,000 starter homes, 135,000 Help to Buy Shared Ownership homes and 10,000 Rent to Buy homes. There was also a commitment to release enough public sector land for 160,000 homes, create a London specific Help to Buy scheme and confirmed funding for the Ebbsfleet Garden City. The outcome of these proposals had a positive impact on the share prices of the private house builders and these proposals from the Government should provide market stability in the forthcoming years.

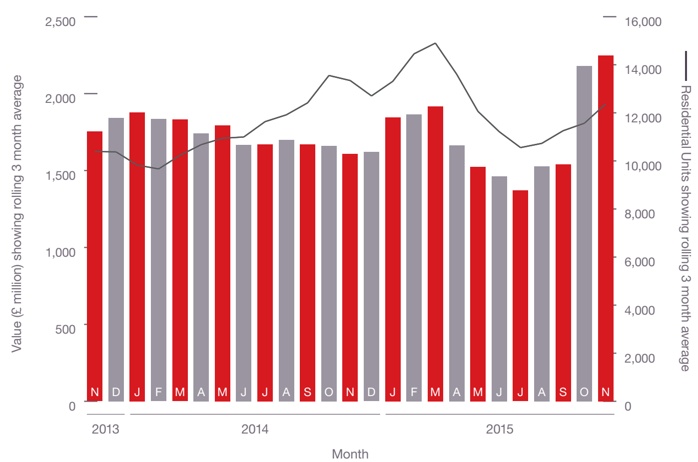

FIG. 3.1

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

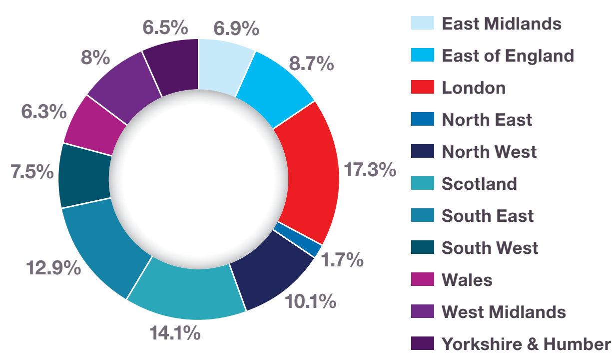

FIG. 3.2

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

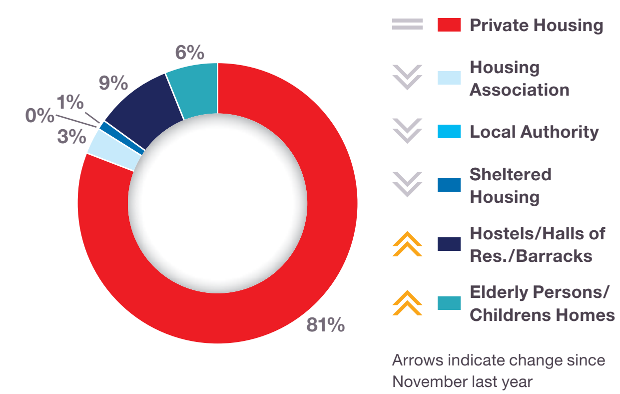

FIG. 3.3

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

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

+1.1%	East Midlands	+10.2%	Scotland *HOTTEST REGION*
-0.5%	East of England	-2.2%	South East
-9.1%	London	+1.9%	South West
-5.1%	North East	+5.0%	Wales
-3.8%	North West	+2.6%	West Midlands
		0.0%	Yorkshire & Humber

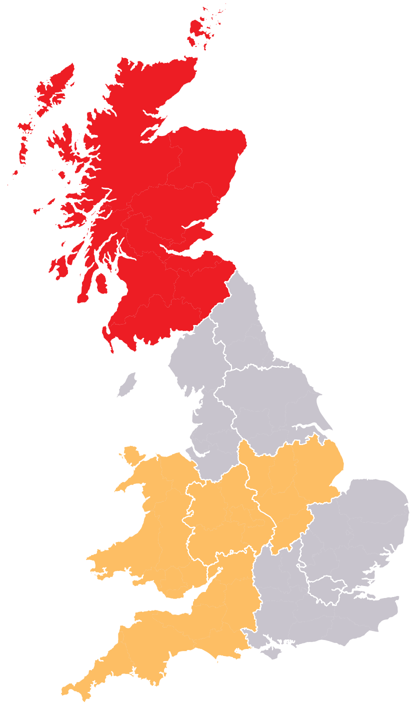

FIG. 3.4

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 17.3% of the value of contracts awarded, a decrease of 9.1% from the same month last year (see Fig. 3.2 & 3.4). Contracts such as the Chelsea Waterfront development and Brent Lock West valued at £60 million and £40 million respectively contribute to London's share this month. However, in a further sign that residential activity is increasing its geographical spread, Scotland accounted for 14.1% of contract value, a 10.2% increase from the same month in 2014. The Dykes of Gray project in Dundee which is set to deliver 365 units, with a value of £40 million was the largest project awarded in November within Scotland. This is indicative of a wider geographical spread of projects in the UK and signs of a lesser reliance on London to drive the industry.

Type of Projects

The type of projects awarded in this sector was dominated by private housing during November, which accounted for 81% of the value of contracts awarded. After private housing, the next largest project type were hostels/halls of residence projects which accounted 9% of the value awarded, an increase of 3% from the corresponding month last year (see Fig. 3.3).

PROJECT IN FOCUS

Dundee Western Gateway – Dykes of Gray £40,000,000

County	Tayside
Primary Category Sector	Residential
Government Region	Scotland
Start Date	September 2015
End Date	September 2025
Contract Award Date	November 2015
Funding	Private
Stage	Contract
Contractor	Springfield Properties

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RESIDENTIAL UNITS RISE SLIGHTLY IN NOVEMBER

TOP TEN Key Clients
Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	226	2,673
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	168	2,550
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	161	2,421
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	91	1,138
5	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	65	973
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	70	776
7	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	67	727
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	50	681
9	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	42	574
10	St Modwen Developments Plc	Park Point, 17 High Street, Longbridge, Birmingham, West Midlands, B31 2UQ	0121 222 9400	15	545

TOP TEN Key Architects
Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	109	1,200
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	22	816
3	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	33	550
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	45	528
5	Barton Willmore	The Blade, Abbey Square, Reading, Berkshire, RG1 3BE	0118 943 0000 (CTPS)	30	525
6	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	36	484
7	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GH	020 7880 6400	4	456
8	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555 (TPS)	6	425
9	Woods Hardwick Limited	17 Goldington Road, Bedford, Bedfordshire, MK40 3NH	01234 268862	32	414
10	Patel Taylor Architects	48 Rawstorne Street, City, London, EC1V 7ND	020 7278 2323	4	372

TOP TEN Key Contractors
Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	235	2,805
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	175	2,765
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	162	2,009
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	96	1,206
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	101	1,005
6	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	65	785
7	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	67	741
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	52	671
9	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	47	661
10	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	0161 876 6000	67	506

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.

Barbour ABI
www.barbour-abi.com

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

INFRASTRUCTURE
CONTRACTS INCREASE SLIGHTLY IN NOVEMBER

The award of further contracts for the Thames Tideway Tunnel boosted infrastructure in the past month.

The value of contracts awarded in the infrastructure sector increased in November with the total value awarded £2.8 billion based on a three month rolling average. This is a 7.2% increase from the previous month and is 115.3% higher than November 2014 (see Fig. 4.1). In the three months to November the total value of contract awards £8.2 billion based on a three month rolling average. This is 55% higher than the previous three months and 123.6% higher than the same period in 2014. This indicates a significant improvement on last year's performance and demonstrates the recovery within the sector in 2015.

Projects by region

London dominated infrastructure contracts in November, accounting for 53.2% of the value awarded, a 47.6% increase on November 2014 (see Fig. 4.2 & 4.4). The Thames Tideway Tunnel main works contract which has an £800 million value was awarded in November, hence the strong performance of London.

Type of Projects

Utilities accounted for 82% of the value of contracts awarded in November – an increase of 18% from November 2014 (see Fig. 4.3), mainly due to The Thames Tideway Tunnel. This is now the dominant sub-sector within infrastructure with both new orders and ONS output showing large increases in activity.

> "A significant improvement on last year's performance

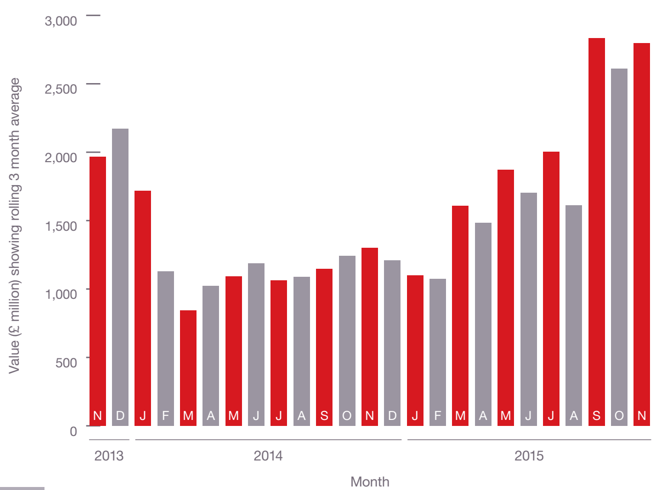

FIG. 4.1
Infrastructure: **Project Value showing 3 month moving average** Source: Barbour ABI

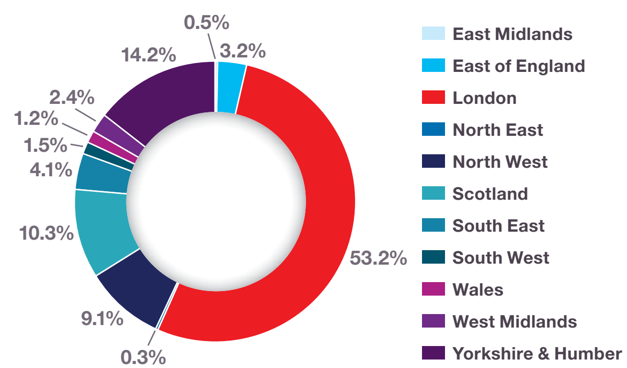

FIG. 4.2
Infrastructure: **Value of Contracts by Region** Source: Barbour ABI

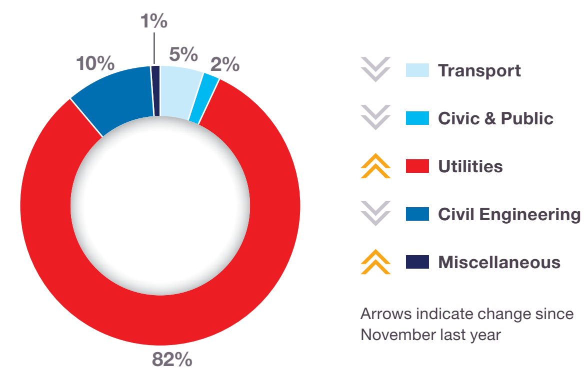

FIG. 4.3
Infrastructure: **Type of Projects Awarded** Source: Barbour ABI

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

		-21.4%	Scotland
-7.7%	East Midlands	-4.8%	South East
-4.9%	East of England	-3.8%	South West
+47.6%	London *HOTTEST REGION*	-2.9%	Wales
-1.3%	North East	-1.8%	West Midlands
-0.2%	North West	+1.3%	Yorkshire & Humber

FIG. 4.4

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

Outlook

The Autumn Statement was also potentially good news for the infrastructure sector. A series of funding initiatives were proposed for the Northern Powerhouse and it included an increase of over 50% of capital spending on transport over the next five years. This was met with large cuts to administrative budgets at the Department for Transport prompting scepticism as to how these projects would be delivered. Of particular note was £11 billion of funding for Transport for London to develop projects including Crossrail. There was also the announcement of a £300 million Transport Development Fund which will provide funding support for large schemes such as Crossrail 2 and High Speed 3 between Manchester and Leeds. However, the statement also cut funding to a number of renewable energy initiatives. Of particular relevance was the abolishment of subsidies for companies to develop carbon capture technologies which had been part of infrastructure construction in recent years.

> London dominated infrastructure contracts in November, accounting for 53.2% of the value awarded, a 47.6% increase on November 2014

PROJECT IN FOCUS

www.elevationdesign.org.uk

Energy Works (Hull) Project – 25 MW Waste to Energy Gasification Plant £150,000,000

County	Humberside
Primary Category Sector	Infrastructure
Government Region	Yorkshire and Humber
Start Date	April 2016
End Date	April 2019
Contract Award Date	November 2015
Funding	Private
Stage	Contract
Contractor	M & W UK

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TOP TEN Key Clients

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Thames Water Utilities Limited	Clearwater Court, Vastern Road, Reading, Berkshire, RG1 8DB	020 3577 8000	5	1,969
2	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	102	1,518
3	E.ON Limited	Newstead Court, Little Oak Drive, Annesley, Nottingham, Nottinghamshire, NG15 0DR	024 7618 1684	3	1,326
4	Welsh Assembly Government	Cathays Park, Cardiff, South Glamorgan, CF10 3NQ	0300 060 3300	4	820
5	Transport Scotland	Buchanan House, 58 Port Dundas Road, Glasgow, Strathclyde, G4 0HF	0141 272 7100	10	791
6	Dong Energy Power (UK) Limited	City Point 33rd Floor, 1 Ropemaker Street, City, London, EC2Y	020 7811 5200	3	616
7	Green Energy Parks Limited	Eco Innovation Centre, Peterscourt, Peterborough, Cambridgeshire, PE1 1SA	01733 348468	1	600
8	DONG Energy AVS	5 Howick Place, Westminster, London, SW1P 1WG	020 7811 5200	3	592
9	Aberdeen City Council	Town House, Broad Street, Aberdeen, Grampian, AB10 1AQ	01224 522000	6	558
10	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	88	415

TOP TEN Key Architects

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140 (TPS)	13	603
2	John Dickie Associates	Manor Barn, Wilsthorpe, Stamford, Lincolnshire, PE9 4PE	01778 560811	1	600
3	Garry Stewart Design Associates	Highland House, Office 101 165 The Broadway, Wimbledon, London, SW19 1NE	020 8544 8085	1	200
4	WA Fairhurst & Partners	225 Bath Street, Glasgow, Strathclyde, G2 4GZ	0141 204 8800	2	154
5	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	3	152
6	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	2	151
7	Elevation Projects Limited	1st Floor, 16 Wright Street, Hull, Humberside, HU2 8JU	01482 221155	1	150
8	Fletcher Rae Uk Limited	Hill Quays, 5 Jordan Street, Manchester, Greater Manchester, M15 4PY	0161 242 1140	1	100
9	Acanthus LW Architects	Voysey House, Barley Mow Passage, Chiswick, London, W4 4PN	020 8994 2288	1	71
10	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	0207 580 0400	3	68

TOP TEN Key Contractors

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	23	1,711
2	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	7	1,095
3	Costain Group Plc	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	10	887
4	Bachy Soletanche Limited	Henderson House, Langley Place, Higgins Lane, Burscough, Ormskirk, Lancashire, L40 8JS	01704 895686	1	800
5	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	51	792
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	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	22	665
8	Costain/Skanska JV	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444 / 01923 842444	2	600
9	KNM Group	15 Jalan Dagang SB4/1, Taman Sungai Besi Indah, 43300 Seri Kembangan, Malaysia	0060 389463000	1	600
10	Aberdeen Roads Limited	North Point, Exploration Drive, Bridge of Don, Aberdeen, Grampian, AB23 8GX	0800 058 8350	4	530

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

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

INCREASE IN CONTRACT VALUES IN NOVEMBER

Contract values in the commercial & retail sector were higher in November but still below the record month in August.

The value of contracts awarded in the commercial and retail sector was £1.1 billion in November based on a three month rolling average. This is an 18.6% increase from October and a 10.7% increase from the November 2014 figure (see Fig. 5.1). In the three months to November the value of contracts was 29.5% lower than the previous three months and 13.3% lower than the same period in 2014, indicating a slight decrease in activity over the longer term.

Projects by region

London was the main location for commercial construction activity in November 2015 accounting for 62.4% of contract value, a 30.5% increase from November 2014 (see Fig. 5.2 & 5.4). Two major office contracts awarded account for London's high share of total value. The 40 Leadenhall Triangle scheme in the City valued at £391 million and Ten Bank Street at Canary Wharf valued at £325 million are the two largest value projects awarded in the capital this month.

Type of Projects

These large value contracts also means that offices were the dominant type of project in the sector accounting for 86% of the value of contracts awarded this month, which is 39% higher than November 2014 (see Fig. 5.3).

> The value of contracts awarded was £1.1 billion in November based on a three month rolling average

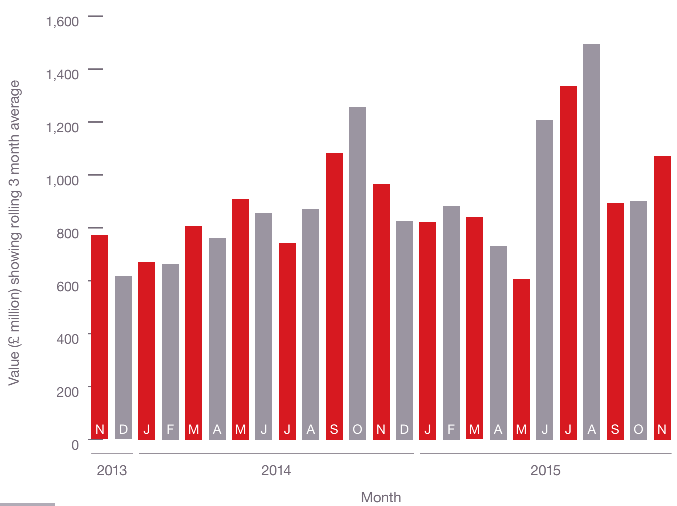

FIG. 5.1

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

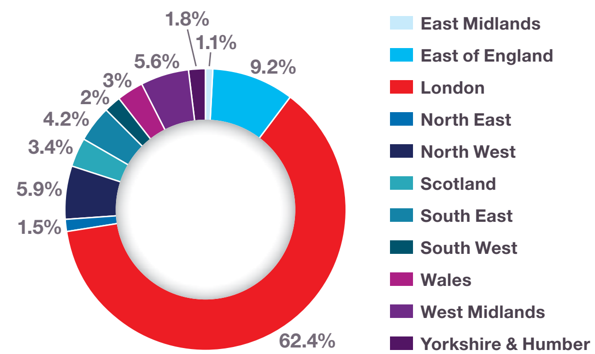

FIG. 5.2

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

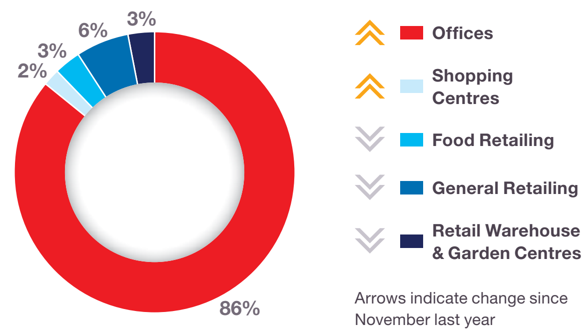

FIG. 5.3

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

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The map and figures show how the activity has changed since November 2014		-1.2%	Scotland
-18.7%	East Midlands	-5.4%	South East
+6.9%	East of England	+0.3%	South West
+30.5%	London *HOTTEST REGION*	+1.4%	Wales
+0.9%	North East	-2.2%	West Midlands
-5.2%	North West	-7.3%	Yorkshire & Humber

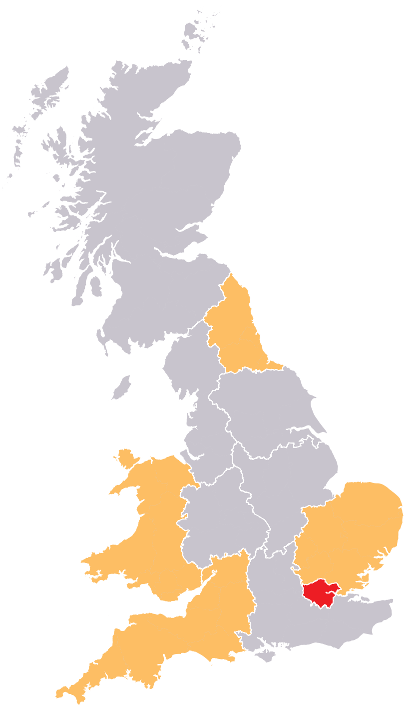

FIG. 5.4

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

PROJECT IN FOCUS

40 Leadenhall Triangle
£391,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	TBC
End Date	TBC
Contract Award Date	November 2015
Funding	Private
Stage	Tender
Contractor	Henderson Global Investor

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TOP TEN Key Clients

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	3	527
2	The Crown Estate	16 New Burlington Place, Westminster, London, W1S 2HX	020 7851 5000 (CTPS)	3	449
3	British Waterways	Brindley Suite, Willow Grange, Church Road, Watford, Hertfordshire, WD17 4QA	01923 226422	1	388
4	Goldman Sachs International Limited	Peterborough Court, 133 Fleet Street, City, London, EC4A 2BB	020 7774 1000	1	350
5	Britel Fund Trustees Limited And Clerical Medical	Lloyd Chambers, 1 Portsoken Street, Tower Hamlets, London, E1 8PP	020 7702 0888	1	250
6	Stanhope Plc	Norfolk House, 31 St James Square, Westminster, London, SW1Y 4JR	020 7170 1700	2	246
7	Land Securities Group	5 The Strand, Westminster, London, WC2N 5HR	020 7413 9000 (CTPS)	4	233
8	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	216
9	Saxon Land BV	117 Fenchurch Street, City, London, EC3M 5DY	020 7410 7300	1	150
10	Argent Group Plc	4 Stable Street, King's Cross, Camden, London, N1C 4AB	020 3664 0200 (TPS)	3	136

TOP TEN Key Architects

Dec 2014 – Nov 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)	4	729
2	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	9	724
3	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	3	676
4	Kohn Pederson Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	2	676
5	Dixon Jones Limited	2-3 Hanover Yard, Noel Yard, Islington, London, N1 8YA	020 7483 8888	2	509
6	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	1	440
7	Panter Hudspith Architects	11th Floor, Hannibal House, Elephant & Castle, Southwark, London, SE1 6TE	020 7701 0575	1	440
8	Pelli Clark Pelli Architects	1056 Chapel Street, New Haven, Connecticut, CT06510	00 1203 777 2515	1	388
9	Allford Hall Monaghan Morris	4 & 5th Floors, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	5	376
10	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	4	326

TOP TEN Key Contractors

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	3	913
2	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	18	640
3	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	543
4	Brookfield Multiplex Construction Europe Limited	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	6	529
5	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	34	324
6	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	12	306
7	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	38	269
8	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	6	263
9	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	16	236
10	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	12	224

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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www.barbour-abi.com

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

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

HOTEL, LEISURE & SPORT

INCREASE IN CONTRACT VALUE IN NOVEMBER

Two major stadia contract awards boost performance in this sector after subdued activity recently.

Contract award levels in the hotel, leisure & sport sector were £405 million in November, based on a three month rolling average. This was 107.4% higher than October but 29.5% lower than November 2014 (see Fig. 6.1). In the three months to November the value of contracts was £853 million, which was 3.1% lower than the previous three months. This was a decrease of 43.6% compared to the same period in 2014 indicating a longer term decline over the past year.

Projects by region

London had the highest share of the hotel, leisure & sport sector contracts accounting for 67.4% of the value awarded, a 27.4% increase from November 2014 (see Fig. 6.2 & 6.4). Two contracts in particular account for London's share in November. The new Tottenham Hotspur stadium valued at £400 million and the Number 1 Court redevelopment at Wimbledon valued at £150 million were both awarded in the month hence the high share in London.

Type of Projects

These two contracts also mean that arenas/stadia accounted for the highest proportion of the types of contract awarded in November with 63% of value, which was also a 63% increase from November 2014 (see Fig. 6.3).

“London had the highest share of the contracts accounting for 67.4% of the value awarded

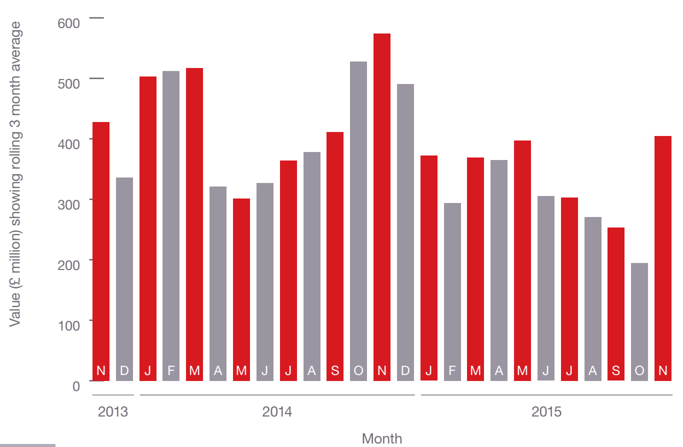

FIG. 6.1

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

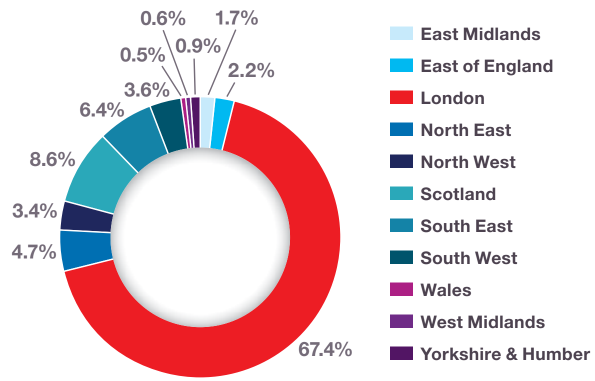

FIG. 6.2

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

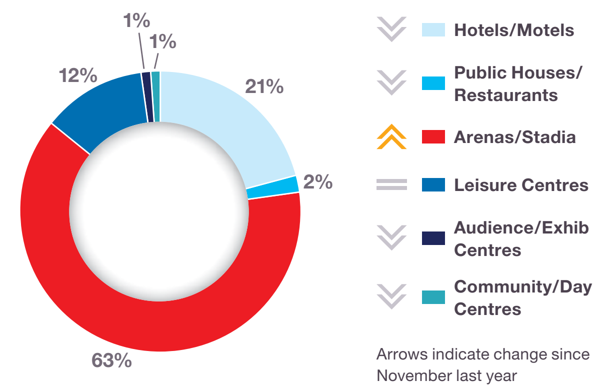

FIG. 6.3

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

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T: 0151 353 3500

E: info@barbour-abi.com

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INCREASE IN CONTRACT VALUE IN NOVEMBER

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

		+5.8%	Scotland
-3.9%	East Midlands	-0.6%	South East
-2.5%	East of England	-5.0%	South West
+27.4%	London *HOTTEST REGION*	+0.2%	Wales
+4.3%	North East	-15.7%	West Midlands
-8.3%	North West	-1.7%	Yorkshire & Humber

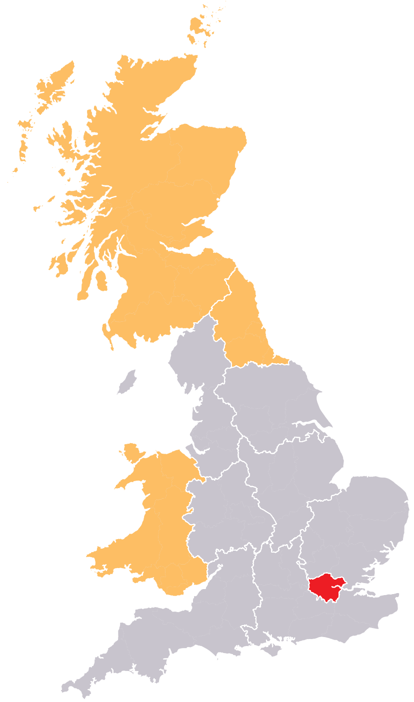

FIG. 6.4

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

> Arenas/stadia accounted for the highest proportion of the types of contract awarded

PROJECT IN FOCUS

The Quadrant Q2 – Boston Football Club Stadium £6,000,000

County	Lincolnshire
Primary Category Sector	Hotel, Leisure & Sport
Government Region	East Midlands
Start Date	April 2016
End Date	TBC
Contract Award Date	November 2015
Funding	Private
Stage	Contract
Contractor	Chestnut Homes Limited

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T: 0151 353 3500
E: info@barbour-abi.com
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INCREASE IN CONTRACT VALUE IN NOVEMBER

TOP TEN Key Clients

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Tottenham Hotspur Plc	White Hart Lane, 748 High Road, Tottenham, London, N17 0AP	020 8365 5055	1	400
2	Radisson Edwardian Hotels Limited	140 Bath Road, Hayes, Middlesex, UB3 5AW	020 8759 6311	2	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	48	124
5	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	1	100
6	The All England Lawn Tennis and Croquet Club	Church Road, Wimbledon, London, SW19 5AE	020 8944 1066	1	70
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	Stanley Dock Properties Limited	New Street Square, Westminster, London, EC4A 3LX	Not Listed	1	43
10	Premier Inn Limited	Whitbread Court, Houghton Business Park, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	0871 527 8000	22	39

TOP TEN Key Architects

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Populous	14 Blades Court, Deodar Road, Putney, London, SW15 2NU	020 8874 7666	1	400
2	Woods Bagot	46-48 Foley Street, Westminster, London, W1W 7TY	020 7637 6880 (CTPS)	1	150
3	Ian Simpson Architects	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000 (CTPS)	1	140
4	Urban Innovations	Wellington Buildings, 2 Wellington Street, Belfast, Northern Ireland, BT1 6HT	028 9043 5060	1	100
5	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269 (TPS)	30	99
6	Dexter Moren Associates	57d Jamestown Road, Camden Town, London, NW1 7DB	020 7267 4440	6	97
7	Leach Rhodes & Walker LLP	West Riverside, New Bailey Street, Manchester, Greater Manchester, M3 5AA	0161 833 0211	4	75
8	Nicholas Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	1	70
9	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	9	68
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

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	2	405
2	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	6	172
3	Brookfield Multiplex Construction Europe Limited	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	1	140
4	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	16	136
5	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	4	86
6	HOC UK Limited	Jubilee House, Townsend Lane, City, London, NW9 8TZ	020 8200 5873	3	74
7	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	7	72
8	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	8	59
9	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	9	57
10	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	7	57

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

INDUSTRIAL

ACTIVITY DECREASES IN THE SECTOR THIS MONTH

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

Activity in the industrial sector decreased in November with the value of contracts awarded £485 million, based on a three month rolling average. This equates to a 13.1% decrease on the value in October but is 40.9% above the figure recorded this time last year (see Fig. 7.1). In the three months to November the total value of contracts was £1.6 billion which was 28.5% lower than the previous three months and 62.4% higher than the same quarter last year. This indicates the comparatively strong performance the sector has been experiencing over the longer term.

Projects by region

The East Midlands is the region with the highest proportion of contracts, at 26.1% of the value of contracts awarded – a 13% increase on November 2014 (see Fig. 7.2 & 7.4). An expansion at the Warth Park Distribution Park near Raunds, which has an estimated value of £57.5 million was the largest project awarded in the region in November. The West Midlands had the next highest proportion of activity, accounting 17.6% of contract award value, an increase of 11.8% on the corresponding month last year. The award of the contract to construct more warehousing space at Rugby Gateway valued at £25.3 million was the major contributor to the contract value in the region in November.

Type of Projects

The types of project awarded in the sector were predominantly warehouses which accounted for 58% of contract values, an increase of 13% from November 2014. Heavy industrial projects had the second highest proportion of contracts by value in November accounting for 15% of contract value, a decrease of 20% from the same month in the previous year (see Fig. 7.3).

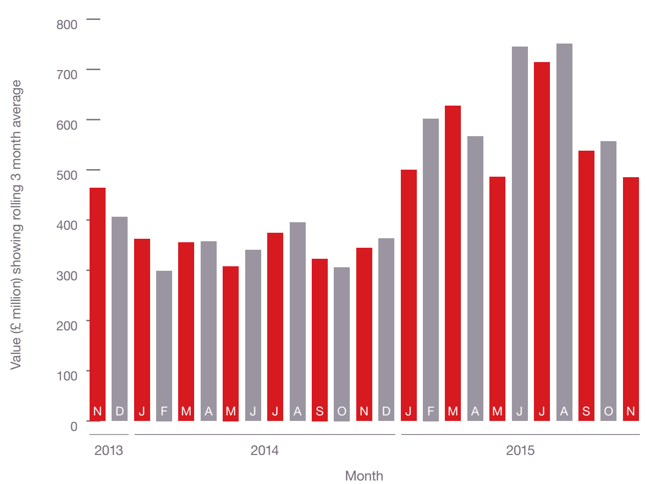

FIG. 7.1

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

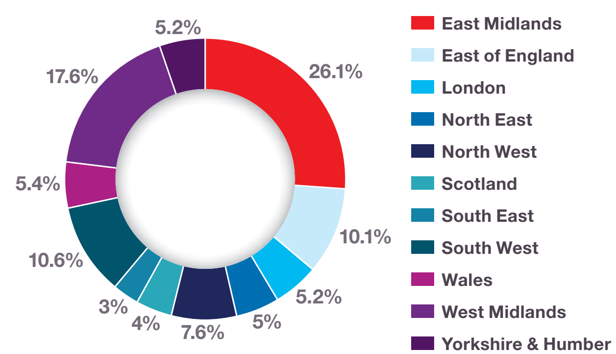

FIG. 7.2

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

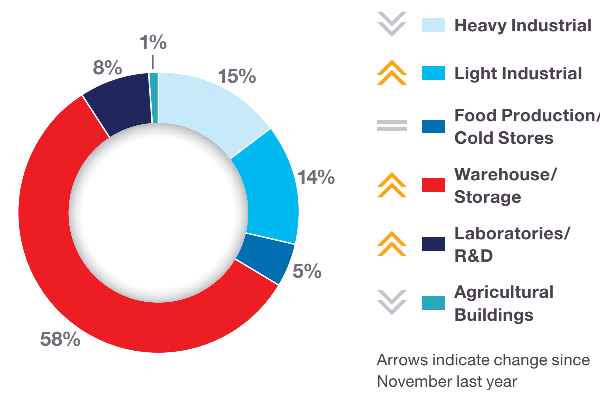

FIG. 7.3

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 November 2014

+13.0%	East Midlands *HOTTEST REGION*	+0.6%	Scotland
+5.9%	East of England	-7.7%	South East
+0.6%	London	+6.2%	South West
+3.7%	North East	+3.7%	Wales
-28.1%	North West	+11.8%	West Midlands
		-9.8%	Yorkshire & Humber

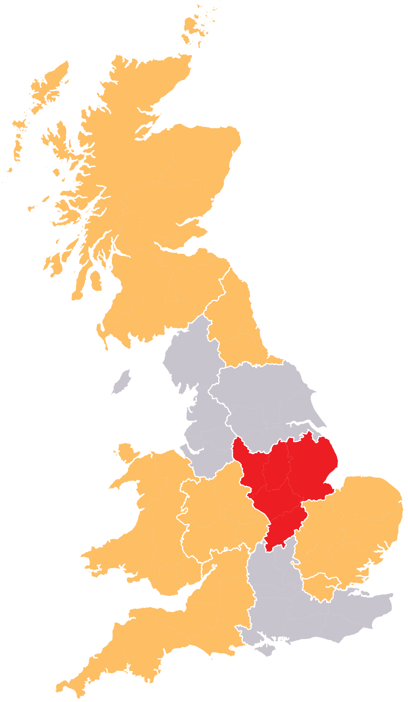

FIG. 7.4

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

PROJECT IN FOCUS

Dovenby Hall – M Sport Evaluation Centre £15,000,000

County	Cumbria
Primary Category Sector	Industrial
Government Region	North West
Start Date	October 2016
End Date	April 2018
Contract Award Date	November 2015
Funding	Private
Stage	Contract
Contractor	Northern Developments

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

TOP TEN
Key Clients
Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BP Exploration	Farburn Industrial Estate, Aberdeen, Grampian, AB21 7PB	01224 832000	1	500
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	BAE Systems Marine Limited	Bridge Road, Barrow in Furness, Cumbria, LA14 1AF	01229 823366	3	195
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	131
10	West Berkshire Council	Council Offices, Market Street, Newbury, Berkshire, RG14 5LD	01635 424000	1	125

TOP TEN
Key Architects
Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	14	320
2	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	1	300
3	Herzog & de Meuron UK Limited	65 Clerkenwell Road, City, London, EC1R 5BL	020 7025 2960	1	300
4	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	3	200
5	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	15	177
6	PHP Architects	The Old Rectory, 31 Rectory Lane, Milton Malsor, Northampton, Northamptonshire, NN7 3AQ	01604 858916	8	175
7	BHP Design LLP	Suite 2f, St Georges Court, 1 Albion Street, Birmingham, West Midlands, B1 3AH	0121 314 6618	1	150
8	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	13	147
9	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	14	142
10	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	8	129

TOP TEN
Key Contractors
Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	22	645
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	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	5	185
5	M & W UK	Unit A2, Metheun South, Bath Road, Chippenham, Wiltshire, SN14 0GT	01249 455150	2	176
6	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	10	173
7	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	2	150
8	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	6	149
9	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	9	128
10	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	9	128

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 NOVEMBER

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

Levels of activity in the medical & health sector were 41.1% in November 2015 compared to October, with the total value of contracts awarded £252 million based on a three month rolling average. This is 3.8% lower than the November 2014 figure (see Fig. 8.1). In the three months to November the values of contracts increased by 43.5% on the previous three months, but were 12.4% lower than the same period in 2014 indicating a longer term decrease in the value of contracts awarded in the sector.

Projects by region

London was the main location of development in the sector this month with 70.2% of the activity, an increase of 49.7% from November 2014 (see Fig. 8.2 & 8.4). The contract to develop a Proton Laser Beam cancer treatment facility at University College London Hospital valued at £136 million was awarded in November. In addition, a contract to develop new theatres at Whipps Cross Hospital in Leytonstone valued at £100 million was also awarded in November resulting in London's large share of contract value.

Type of Projects

These contracts also mean that public hospitals dominated the sector this month, accounting for 85% of overall contracts awarded, a 26% increase from November 2014 (see Fig. 8.3).

> “London was the main location of development this month

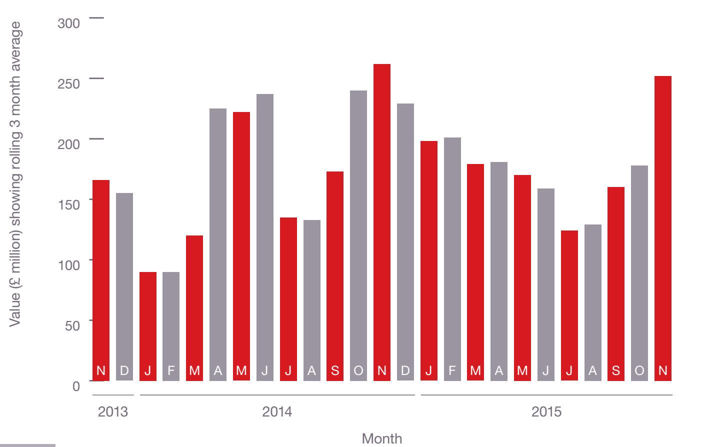

FIG. 8.1

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

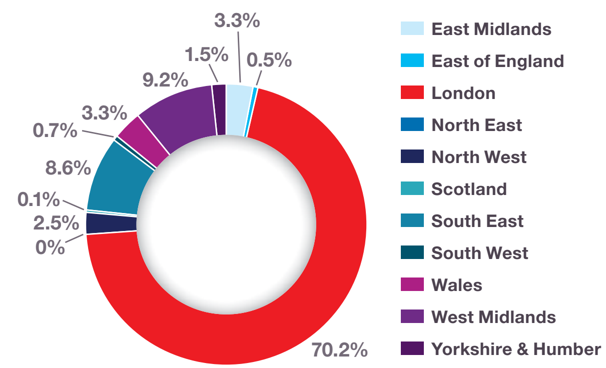

FIG. 8.2

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

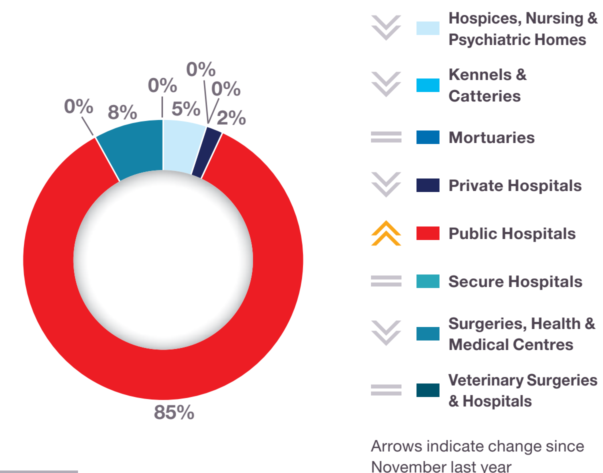

FIG. 8.3

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

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INCREASE IN VALUE OF CONTRACTS IN NOVEMBER

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

		-1.9%	Scotland
+0.5%	East Midlands	+0.7%	South East
-13.9%	East of England	-10.4%	South West
+49.7%	London *HOTTEST REGION*	+3.3%	Wales
0.0%	North East	+3.7%	West Midlands
-30.9%	North West	-0.8%	Yorkshire & Humber

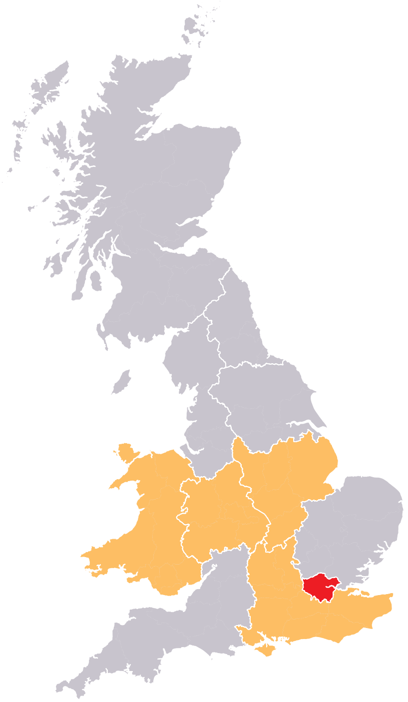

FIG. 8.4

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

> Levels of activity in the medical & health sector were 41.1% in November 2015 compared to October

PROJECT IN FOCUS

www.uclh.nhs.uk

UCLH – Proton Beam Therapy Cancer Treatment Facility
£136,000,000

County	London
Primary Category Sector	Medical & Health
Government Region	London
Start Date	November 2015
End Date	TBC
Contract Award Date	November 2015
Funding	Mixed
Stage	Contract
Contractor	Bouygues UK Limited

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TOP TEN Key Clients

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Royal Liverpool and Broadgreen Hospital NHS Trust	Prescot Street, Liverpool, Merseyside, L7 8XP	0151 706 2000	6	214
2	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	2	208
3	BS Stanford Limited	70 Grosvenor Street, Westminster, London, W1K 3JP	Not Listed	1	200
4	Aneurin Bevan Health Board	Mamhilad House, Block A, Mamhilad Park Estate, Pontypool, Gwent, NP4 0YP	01873 732732 (CTPS)	1	180
5	Royal Infirmary of Edinburgh NHS Trust	51 Little France Crescent, Old Dalkeith Road, Edinburgh, Lothian, EH16 4SA	0131 536 1000 (CTPS)	1	150
6	University College London Hospital NHS Foundation Trust	Trust Head Quarters, 2nd Floor, 250 Euston Road, City, London, NW1 2PG	020 3456 7890 (CTPS)	2	138
7	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)	3	104
8	Bartholomew & London Hospital (NHS) Trust	Capital & Facilities Directorate, 5th Floor, Queen Mary's Wing, West Smithfield, City, London, EC1A 7BE	020 7377 7000	1	100
9	Spire Healthcare Limited	PO Box 62647, 120 Holborn, City, London, EC1P 1JH	0800 169 1777	4	91
10	Birmingham Women's NHS Foundation Trust	Metchley Park Road, Edgbaston, Birmingham, West Midlands, B15 2TG	0121 472 1377	1	75

TOP TEN Key Architects

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	4	343
2	John Simpson & Partners	29 Great James Street, Holborn, Westminster, London, WC1N 3EY	020 7405 1285 (TPS)	1	200
3	Steffian Bradley Architects	45 Gee Street, Fifth Floor, City, London, EC1V 3RS	020 7549 4050	1	200
4	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	150
5	Scott Tallon Walker Architects	10 Cromwell Place, South Kensington, London, SW7 2JN	020 7589 4949 (TPS)	2	138
6	Ellis Williams Architects	151 Roseberry Avenue, 3-11 Pine Street, City, London, EC1R 0JH	020 7841 7200	1	136
7	IBI Group	Princes Manor Barn, Reading Road, Harwell, Oxford, Oxfordshire, OX11 0LU	01235 820222 (TPS)	10	121
8	Halliday Meecham Partnership	111 Piccadilly, Manchester, Greater Manchester, M1 2HY	0161 661 5566	2	81
9	Gilling Dod Architects	The Cruck Barn, Duxbury Park, Chorley, Lancashire, PR7 4AT	01257 260070	8	75
10	Murphy Philipps Architects Limited	140 Old Street, City, London, EC1V 9BJ	020 7490 8008	5	65

TOP TEN Key Contractors

Dec 2014 – Nov 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)	22	332
2	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	19	282
3	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	2	181
4	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	6	181
5	Brookfield Multiplex Construction Europe Limited	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	5	160
6	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	5	156
7	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	7	109
8	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	3	101
9	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	9	93
10	Redwall Developments Limited	Suite 2, 10 Redwall House, Waterside Business Park, Rotherham Road, Dinningham, Rotherham, South Yorkshire, S25 3QA	01909 517737	1	50

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

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EDUCATION

DECREASE IN THE VALUE OF CONTRACTS IN NOVEMBER

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

The value of contracts awarded in the education sector was £566 million in November based on a three month rolling average, a 15.5% decrease from October (see Fig. 9.1). This figure was 18.8% lower than November 2014 indicating a decrease in activity compared to the same time last year. The values of contract awards in the three months to November were 3.2% lower than the previous three months, but 13% below the figure in the corresponding period in 2014.

Projects by region

The South East accounted for the largest proportion of works awarded in November, with 23.5% of the overall total, a 14.2% increase from November 2014 (see Fig. 9.2 & 9.4). A contract to construct a new secondary school in Oxfordshire valued at £23 million was the highest value project in the South East in November.

Yorkshire and the Humber accounted for 21.6% of the contract value awarded in November, a 20% increase from November 2014. This was largely due to the contract to develop a new health campus at Hull University which has a value of £40 million.

> The values of contract awards in the three months to November were 3.2% lower than the previous three months

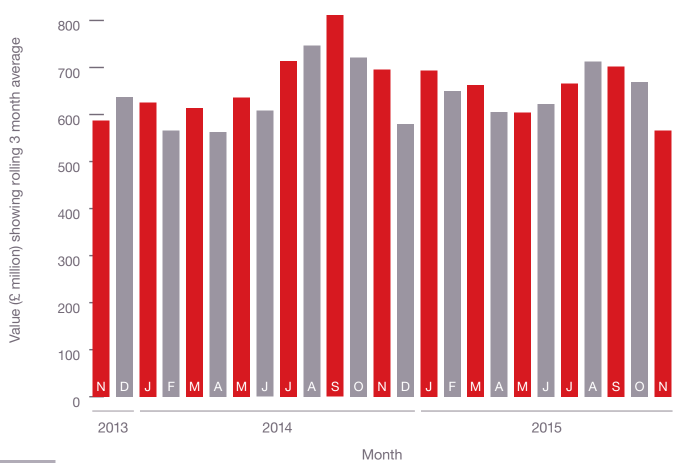

FIG. 9.1
Education: **Project Value showing 3 month moving average** Source: Barbour ABI

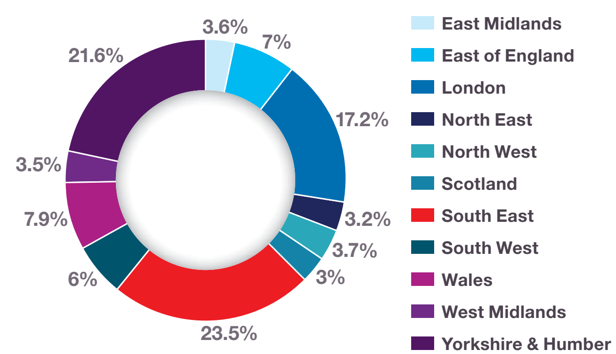

FIG. 9.2
Education: **Value of Contracts by Region** Source: Barbour ABI

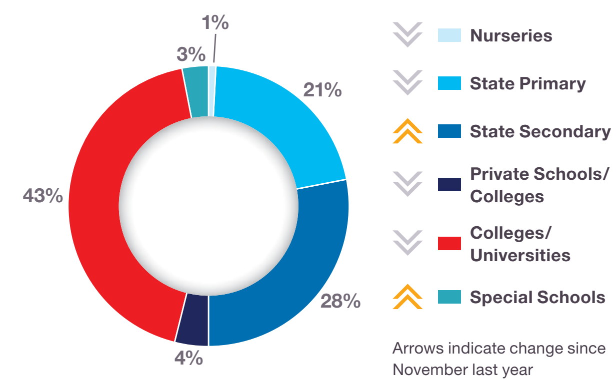

FIG. 9.3
Education: **Type of Projects Awarded** Source: Barbour ABI

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DECREASE IN THE VALUE OF CONTRACTS IN NOVEMBER

The map and figures show how the activity has changed since November 2014			
		-4.5%	Scotland
+2.7%	East Midlands	+14.2%	South East
+3.4%	East of England	+0.5%	South West
-31.0%	London	+0.5%	Wales
-2.7%	North East	+2.6%	West Midlands
-5.8%	North West	+20.0%	Yorkshire & Humber *HOTTEST REGION*

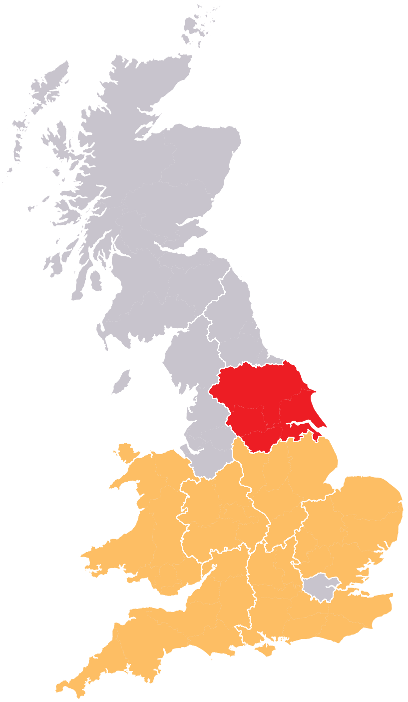

FIG. 9.4

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 November 2015 accounting for 43% of total value awarded. State secondary followed, contributing 28% of the overall value of contracts awarded (see Fig. 9.3).

> "The South East accounted for the largest proportion of works awarded in November, with 23.5% of the overall total

PROJECT IN FOCUS

School – Eastern High School
£25,000,000

County	South Glamorgan
Primary Category Sector	Education
Government Region	Wales
Start Date	April 2016
End Date	April 2017
Contract Award Date	November 2015
Funding	Public
Stage	Contract
Contractor	Willmott Dixon Construction Limited

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

T: 0151 353 3500
E: info@barbour-abi.com
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DECREASE IN THE VALUE OF CONTRACTS IN NOVEMBER

TOP TEN Key Clients

Dec 2014 – Nov 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	87	955
2	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	10	274
3	North Ayrshire Council	5th Floor, Cunninghame House, Irvine, Strathclyde, KA12 8EE	01294 310 000	3	137
4	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	8	129
5	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	11	100
6	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	7	100
7	Milton Keynes Council	Civic Offices, 1 Saxon Gate East, Milton Keynes, Buckinghamshire, MK9 3EJ	01908 691691	9	95
8	Dumfries & Galloway Council	Militia House, English Street, Dumfries, Dumfries and Galloway, DG1 2HR	0303 333 3000	7	86
9	University of Leeds	Woodhouse Lane, Leeds, West Yorkshire, LS2 9JT	0113 243 1751	13	83
10	University College London	Gower Street, Westminster, London, WC1E 6BT	020 7679 2000 (CTPS)	9	81

TOP TEN Key Architects

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140 (TPS)	30	308
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	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	16	210
5	The Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	28	195
6	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 652 1666	6	181
7	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	16	173
8	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	18	153
9	Hawkins Brown Architects	159 St John Street, City, London, EC1V 4QJ	020 7336 8030	16	150
10	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	38	144

TOP TEN Key Contractors

Dec 2014 – Nov 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	100	656
2	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	50	461
3	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	56	426
4	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	40	416
5	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	45	406
6	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	70	369
7	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	13	302
8	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	11	300
9	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	15	216
10	Carillion Plc	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	28	200

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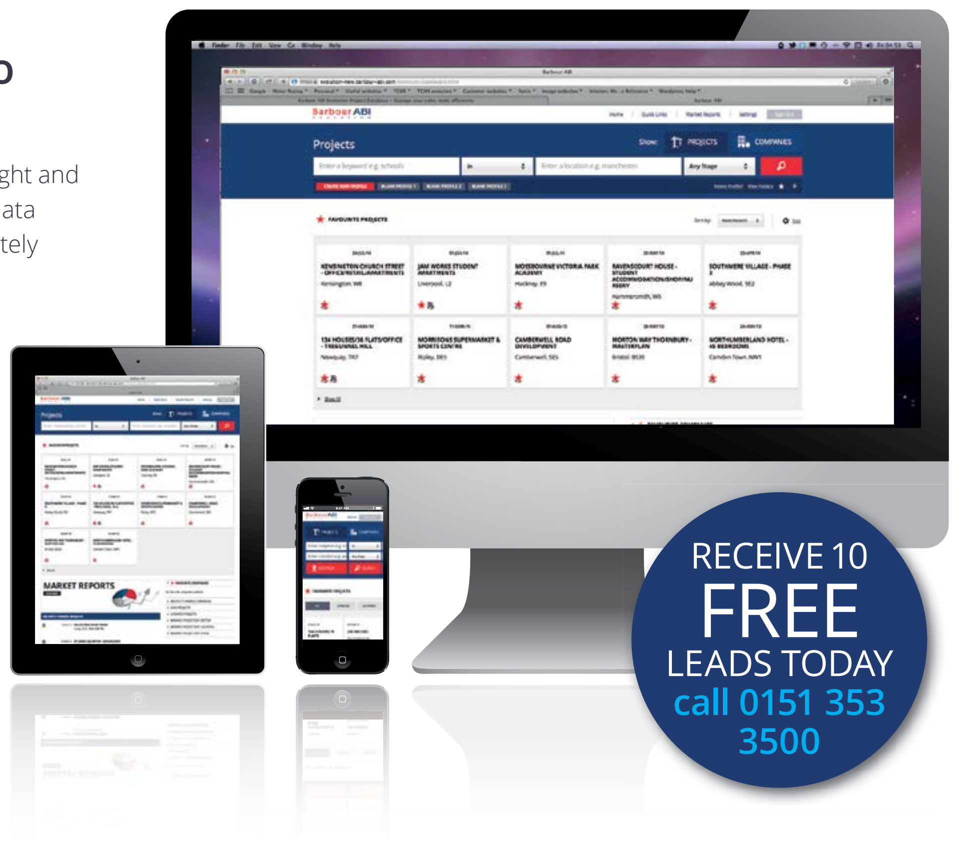
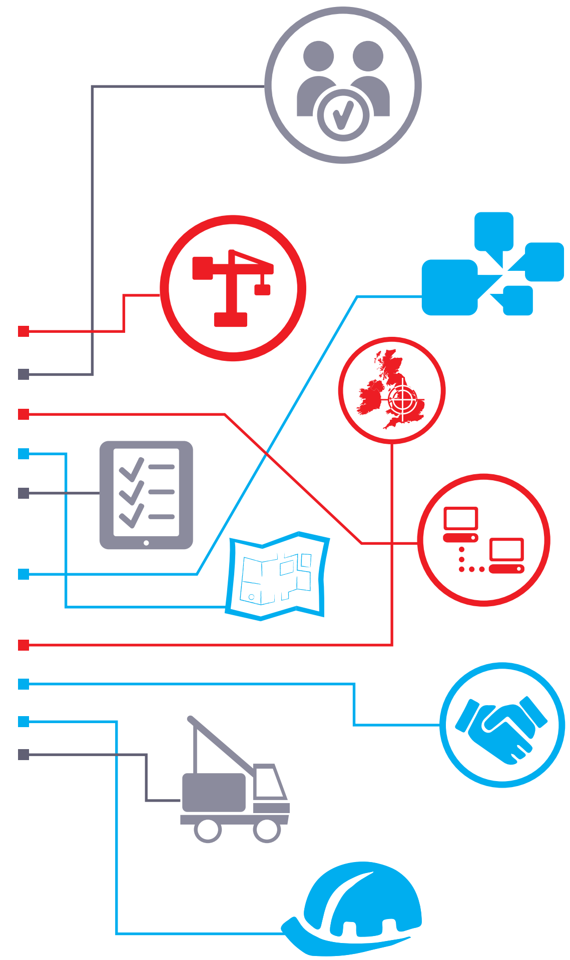
Our mobile apps are free to Barbour ABI Evolution users and are available from these stores.

Available on the App Store | Android app on Google play | Windows Store





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0151 353 3500 | info@barbour-abi.com | www.barbour-abi.com

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Barbour ABI
www.barbour-abi.com

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