economic & construction MARKET REVIEW

Barbour ABI | Building | bd

JANUARY 2016

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

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The Construction Sector
The main economic headlines in the construction industry this month.

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

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ABOUT US

SPECIALIST PROVIDER OF CONSTRUCTION INTELLIGENCE

Michael Dall

Michael is Barbour ABI's Lead Economist specialising in construction and the built environment. He leads on Barbour ABI's research and outputs on the construction sector assessing the trends and developments which impact upon it. Michael is also a regular contributor to Building magazine, sits on the current CPA Forecasting Panel as well as being frequently noted in construction trade and the national press.

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

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Provider of the Government's Construction and Infrastructure Pipeline

HM Government

Chosen provider of Construction New Orders estimates to the ONS and communal dwellings data

Office for National Statistics

construction products association

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The Construction Sector
Residential
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ECONOMIC CONTEXT

UK ECONOMIC GROWTH CONTINUES BUT SIGNS OF SOFTENING

The UK economy looks set to grow by 2.4% in 2015 which, while welcome, indicates a slowing rate of growth compared to 2014.

UK GDP growth in Q3 2015 was revised downwards to 0.4%, from its initial estimate of 0.5% with the economy now expected to grow by around 2.4% compared to 2.9% in 2014 (see Fig. 1.1). Various sentiment surveys have pointed to slower growth in the final quarter of 2015 meaning that while the economy is still growing, it is at a slower pace than last 2014.

The labour market continues to be the star performer in the UK economy with the unemployment rate in the three months to October 5.2%, down from a recent high of 8.4% in November 2011 (see Fig. 1.2).

Inflation also remains low with the latest figures showing the CPI rate in the UK is now 0.2% in December after dipping into negative territory at various points throughout the year (see Fig. 1.3). This is largely attributable to the falling oil price which has transferred through to drops in petrol station prices.

Over the course of the year the UK economy has performed well although headline growth has eased to an average of 0.5% per quarter compared to 0.7% in 2014. The labour market remains strong, however, and the low level of inflation is generally seen as boosting demand in the economy as wages rise higher than the general price level. However, a number of risks remain to UK economic growth in 2015. There are various political uncertainties which could impact on growth, not least the potential of Britain leaving the EU with a referendum expected sometime this year. Productivity has begun to improve but the path of productivity growth still remains below pre-recession rates. It is also important to note that while growth has been led by the service sector, both manufacturing and construction are still below the levels of activity in 2007. This highlights the imbalance in the UK economy which magnifies the impact of any business cycle downturns. General concerns about subdued global growth are also likely to weigh on the downside for the UK in 2016 with slowing growth in China a particular concern for the trading environment.

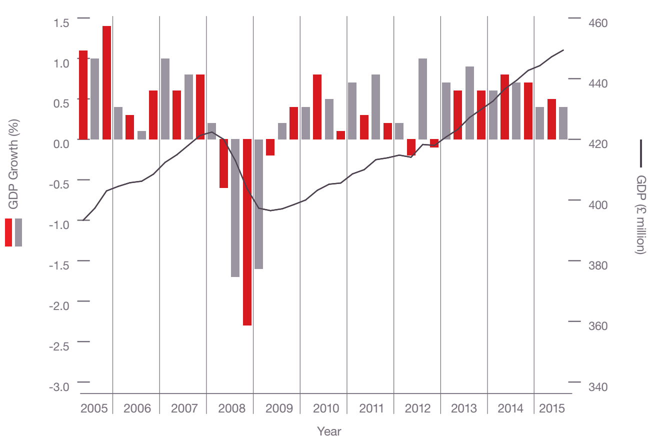

Fig. 1.1 **UK GDP** Source: ONS

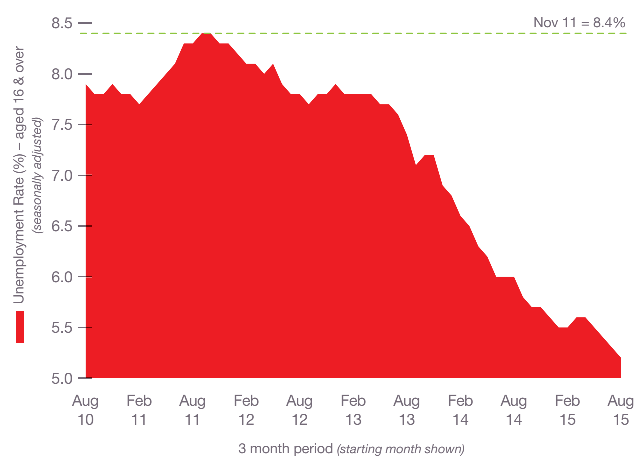

Fig. 1.2 **Unemployment Rate** Source: ONS

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

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THE CONSTRUCTION SECTOR

2015 A STRONG YEAR FOR CONSTRUCTION CONTRACT VALUES

While output slowed, the value of construction projects awarded increased in 2015, which may be indicative of increased business confidence in the industry as this year progresses.

The latest figures from the ONS show that the construction sector in the UK shrank by 0.5% between October and November 2015. Comparing output levels with November 2014 showed a decrease of 1.1% (see Fig. 2.1). This provides further evidence that the industry had a subdued second half of the year.

It is clear that the housing sector remains the main component of growth within the industry over the longer term. In particular Private Housing output increased by 3.1% in November from the corresponding month in 2014. Output in the Private Commercial sector fell slightly by 0.7% year-on-year however activity in the industrial sector was 18.5% higher. Infrastructure also increased significantly over the year with activity 11.7% higher in November 2015 compared to 2014, which indicates a broader pattern of growth over the past year.

	% change	
	November 2014 – November 2015	**October 2015 – November 2015**
Total All Work	**-1.1**	**-0.5**
All New Work	**1.3**	**-0.7**
Public Housing	-21.6	0.8
Private Housing	3.1	0.9
Infrastructure	11.7	-4.3
Public (ex Infrastructure)	-7.0	2.3
Private Industrial	18.5	1.7
Private Commercial	-0.7	-1.5
Repair & Maintenance	**-5.1**	**-0.2**
Public Housing	-6.9	-0.7
Private Housing	1.3	-1.3
Non-Housing	-8.9	0.8

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

> "The value of all construction contracts awarded in the UK was £74.3 billion in 2015

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 143 for December. This is a slight decrease from November but continues to support the view that overall activity in the industry remains strong. The readings for Private Housing, and Commercial Retail increased this month but Commercial Offices fell to 126 (see Fig. 2.2).

Construction Sector

According to Barbour ABI data on all contract activity, the value of all construction contracts awarded in the UK was £74.3 billion in 2015, an increase of 15.7% compared to 2014 (see Fig. 2.4). This is reflective of the year overall which saw growth in contract value continue with a shift to higher value projects. It is in marked contrast to last year where growth in the value of projects was lower at 2.8%.

To illustrate the increase the number of high value projects in 2015, the actual number of construction contracts awarded in Britain last year 11,857 a decrease of 4.7% from 2014. This is lower than growth in 2014 (10.4%) and 2013 (21%) but with higher value of contracts shows the general pattern of increasing activity in the industry over the year.

Projects by Region

The largest share of the contracts awarded in 2015 by value were in London, accounting for 26% of the UK total (see Fig. 2.3).

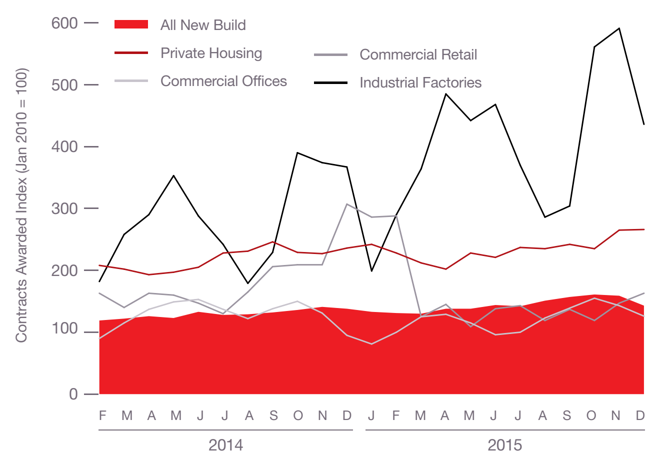

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

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Major projects including the Thames Tideway Tunnel works with a total value in excess of £1 billion and a major new Energy from waste facility in Beddington valued at £200 million contributed to London's prominence this year. The South East was the region with the second highest proportion of construction contracts by value this year with 11% of the total value of contracts awarded. Major contracts awarded in the South East this year include the £1.3 billion Rampion Offshore wind farm in Mid Sussex. The North West also featured prominently in 2015 accounting for 11% of the value of contracts awarded over the year. The largest single project awarded by value in the North West was the Walney Extension Offshore wind farm valued at £330 million. Another offshore wind farm, the Burbo Bank extension was the second highest value project with an estimated cost of £250 million. An offshore wind project was also the largest construction project in the East Midlands with the Race Bank offshore wind farm valued at £300 million the largest by value in 2015. Finally, Scotland also had a large offshore wind farm project which contributed to its 10% of project value in 2015. The Kilgallioch Forest project in Dumfries and Galloway was awarded at a value of £300 million.

Types of Project

Residential had the highest proportion of contracts awarded by value in 2015 with 29% of the total (see Fig. 2.5). There is also increasing evidence that the location of contracts awarded in 2015 widened from London, which was the case in recent years. Infrastructure also had a strong year, accounting for 25% of the total value awarded. Clearly, the number of large value offshore wind farm projects has been one of the major reasons for the infrastructure performing so well in 2015. It is indicative of the changing nature of the construction industry in the past year.

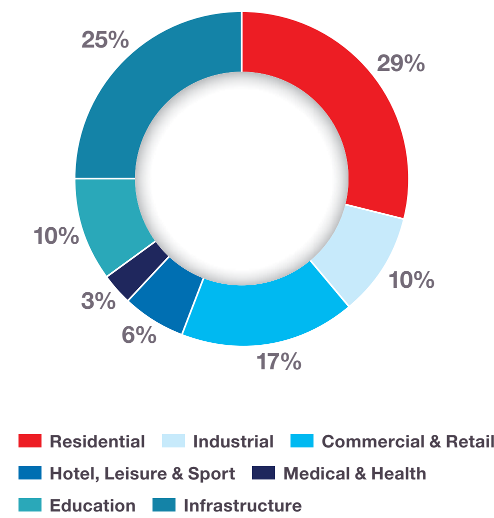

Fig. 2.5 **Type of Projects** Source: Barbour ABI

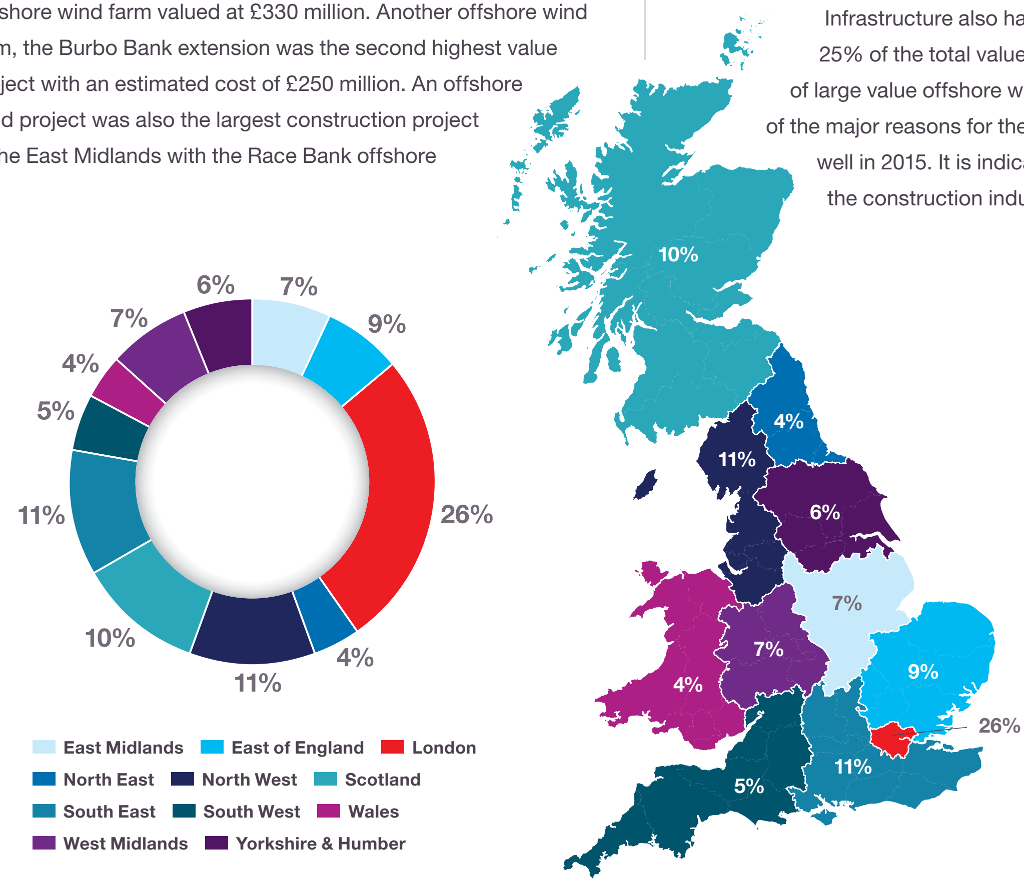

Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

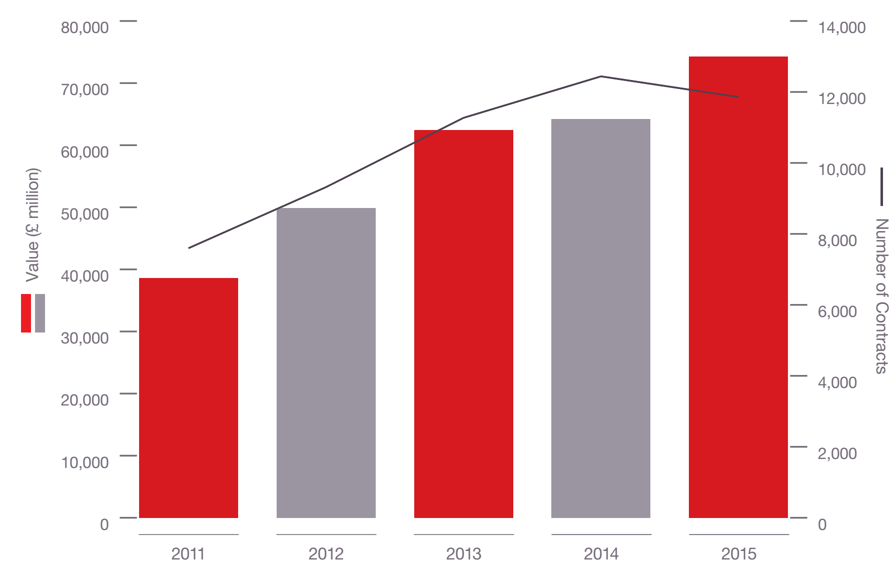

Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

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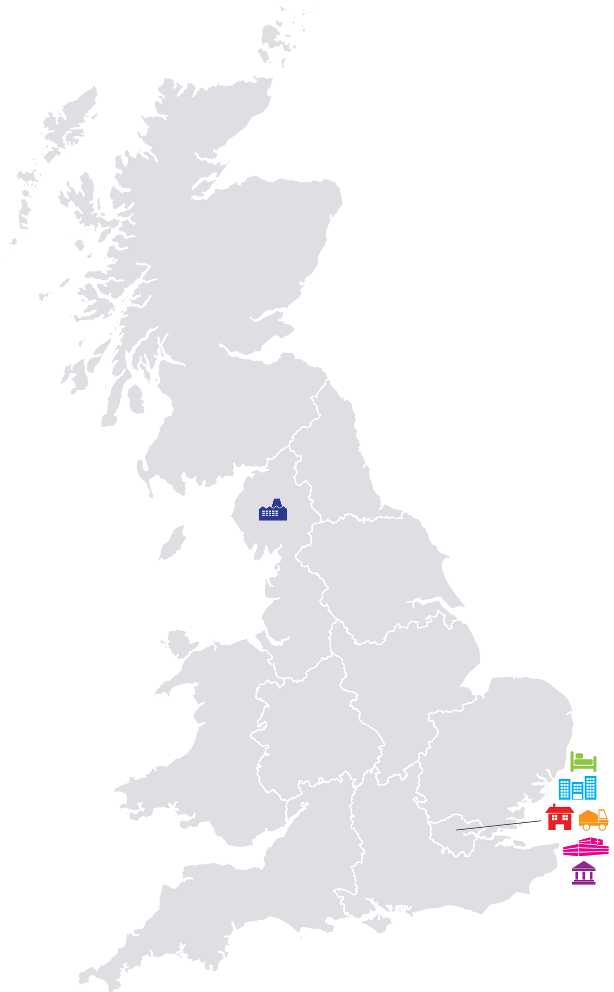
A snippet of this month's regional activity

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
Islington Square
£100,000,000

INFRASTRUCTURE
M4 Corridor Around Newport
£750,000,000

COMMERCIAL & RETAIL
Saatchi Block – Offices & Flats
£125,000,000

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

INDUSTRIAL
London Taxi Corporation Manufacturing Facility – Ansty Park
£150,000,000

MEDICAL & HEALTH
Midland Metropolitan Hospital Project
£280,000,000

EDUCATION
Manchester Business School Redevelopment – Phase 2
£40,000,000

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RESIDENTIAL

RESIDENTIAL VALUES INCREASED IN 2015

The residential sector performed well in 2015 by contract award values increasing 3%.

Activity in the residential sector was higher in 2015 with the total value of contracts reaching £21.2 billion, an increase of 3% on the value recorded for 2014. The scale of the upturn in the residential is demonstrated by analysing the value of new contracts recorded in 2011 which was £1.5 billion. After recovering from this severe trough contract values increased significantly in 2013, increasing by 62.9% and although growth continued in 2014 and 2015, it was at a lower rate (see Fig. 3.1).

Sector Performance

As 2015 drew to a close, annual house price increases remained lower than the 2014, with the second half of the year in particular experiencing lower growth. This has been attributed in part to less activity at the top end of the market, particularly in London, with changes to Stamp Duty and other property related tax rules slowing the rate of transactions. The latest house price indices for December from Nationwide showed that average house prices are rising at 4.5% annually, down from a high of 6.4% in January. The Halifax reported annual house price rises of 9.5% in December, however the survey recorded a pick up in price increases in the last three months of the year. The Bank of England confirmed that mortgage lending increased by 2.5% in November 2015 compared to November 2014 and Taylor Wimpey achieved a record profit margin of over 20% in the year, suggesting favourable conditions remain in the housing market for the major house builders.

> “Contracts worth a total of £4.5 billion were awarded in London in 2015

Projects by region

London was the major location of residential contracts in 2015, which is unsurprising given the nature of the UK housing market.

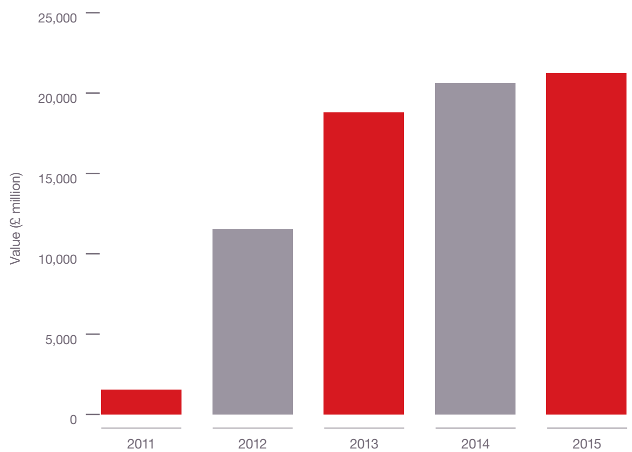

FIG. 3.1

Residential: **Project Value by Year** Source: Barbour ABI

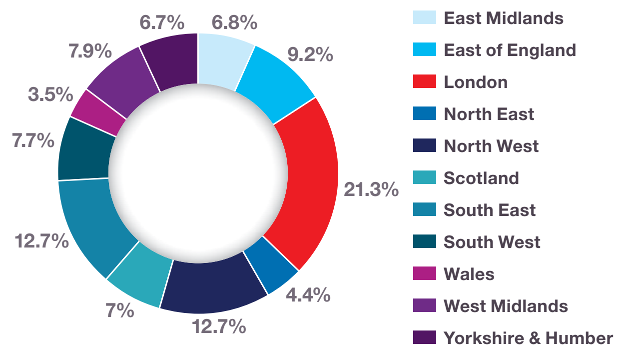

FIG. 3.2

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

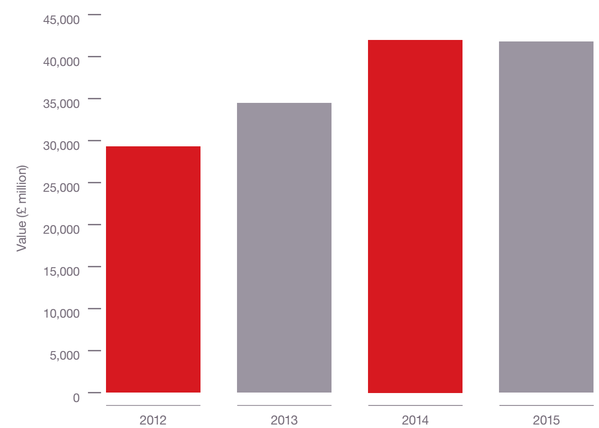

FIG. 3.3

Residential: **Contracts at Advanced Planning** Source: Barbour ABI

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The map and figures show how the activity has changed since 2014		+0.6%	Scotland
+1.6%	East Midlands	-1.0%	South East
+1.6%	East of England	-1.2%	South West
-4.2%	London	+0.3%	Wales
+0.1%	North East	+1.0%	West Midlands
+1.8%	North West *HOTTEST REGION*	-0.5%	Yorkshire & Humber

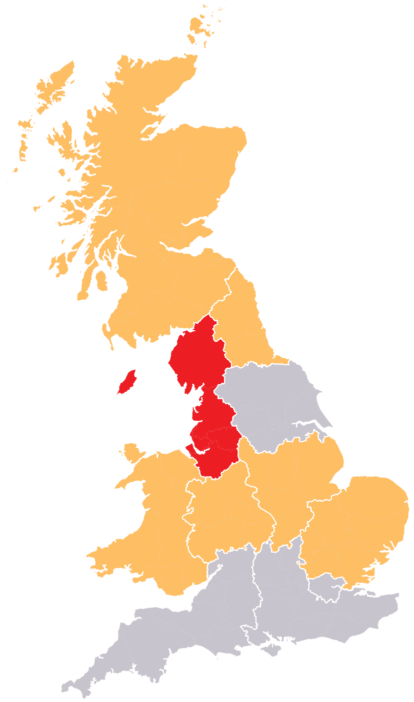

FIG. 3.4

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

Residential contracts worth a total of £4.5 billion were awarded in London in 2015. This accounted for 21.3% of the total value awarded in Britain over the year. The other major location of residential contracts in 2015 was the North West which accounted for 12.7% of value, recording contract values of £2.7 billion in total. The South East also witnessed a high proportion of activity with £2.7 billion worth of contracts awarded, which also accounted for 12.7% of the total in Britain (see Fig. 3.2 & 3.4). Major residential contracts by value in 2015 included the Media City development in Manchester to provide circa 1000 apartments, a scheme valued at £200 million. The Eileen House development, part of the regeneration of Elephant & Castle was also awarded this year which includes proposals to develop 329 flats with an estimated value of £150 million.

Planning Activity

Planning activity in the residential sector was slightly down in 2015 with the total value of projects reaching an advanced planning stage of £41.8 billion. This is a decrease of 0.5% from the value in 2014 but indicates that the sector is likely to continue to grow in 2016, as the values of projects are still high (see Fig. 3.3). Clearly not all of these projects will reach contract award stage but the increase in schemes at advanced planning indicates that investment sentiment remain high within the UK residential sector.

> Planning activity in the residential sector was slightly down in 2015

PROJECT IN FOCUS

Islington Square
£100,000,000

County	London
Primary Category Sector	Residential
Government Region	London
Start Date	December 2015
End Date	December 2018
Contract Award Date	December 2015
Funding	Private
Stage	Detail Approval/Contract
Contractor	Galliard Construction Limited

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TOP TEN Key Clients
Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	220	2,537
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	162	2,445
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	157	2,340
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	92	1,120
5	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	68	1,024
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	74	809
7	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	66	742
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	51	688
9	St Modwen Developments Plc	Park Point, 17 High Street, Longbridge, Birmingham, West Midlands, B31 2UQ	0121 222 9400	15	564
10	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	35	505

TOP TEN Key Architects
Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	105	1,129
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	19	792
3	Barton Willmore	The Blade, Abbey Square, Reading, Berkshire, RG1 3BE	0118 943 0000 (CTPS)	30	535
4	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GH	020 7880 6400	5	516
5	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	32	515
6	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	42	501
7	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	34	473
8	Tetlow King Planning	Unit 2 Eclipse Office Park, Staple Hill, Bristol, North Somerset, BS16 5EL	0117 9561916 (CTPS)	27	425
9	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555 (TPS)	6	425
10	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	6	421

TOP TEN Key Contractors
Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	226	2,607
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	165	2,479
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	156	1,888
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	97	1,188
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	106	1,096
6	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	68	836
7	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	67	770
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	53	678
9	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	39	572
10	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	0161 876 6000	66	500

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

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INFRASTRUCTURE ACTIVITY STRONG IN 2015

The value of infrastructure contracts increased in 2015 with a number of major projects announced.

The infrastructure sector experienced lower levels of activity in 2015 with the total value of contracts awarded at £18.9 billion, a 47% increase from the value awarded in 2014 (see Fig. 4.1). This was a much needed improvement in a sector which had a low level of contracts awarded in the previous year and should provide a boost to output figures in subsequent years.

Projects by region

London was the main location for infrastructure projects in 2015 accounting for 21.1% of the total value of contracts awarded, a 6.7% increase from its share in 2014 (see Fig. 4.2 & 4.4). The award of the Thames Tideway Tunnel main works contracts contributes a significant proportion of London's contract value with a combined total value in excess of £2 billion. There were also a series of capital projects awarded by TFL for the modernisation of several London Underground lines and stations at a combined value of circa £750 million. Scotland was the next most prominent location for infrastructure contracts in 2015 accounting for 13.3% of contract value, although was decrease of 7.2% from last year. The largest infrastructure project awarded in Scotland in 2015 was the Kilgallioch Forest wind farm which began construction in June and has a total value of £300 million.

> Schemes reaching detail planning increased by 21.8% to a total of £16.2 billion

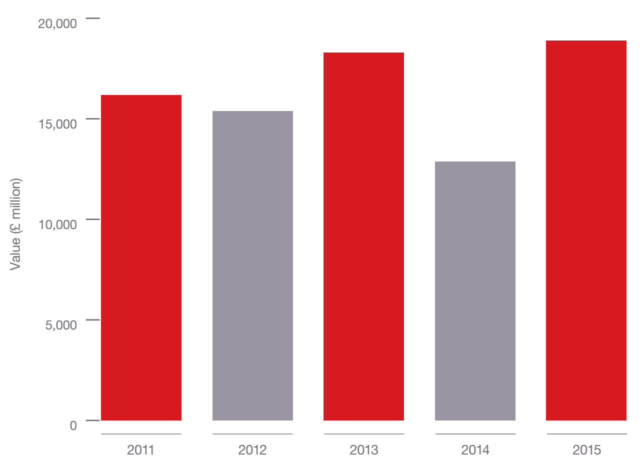

FIG. 4.1

Infrastructure: **Project Value by Year** Source: Barbour ABI

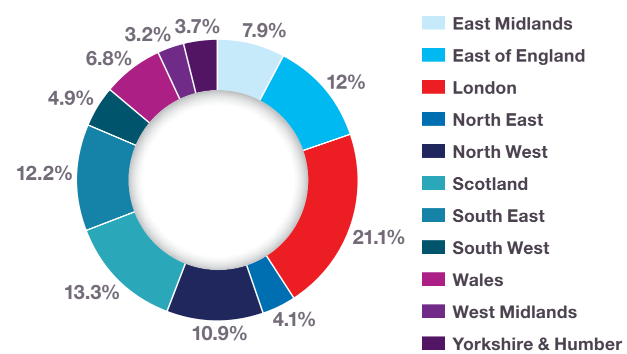

FIG. 4.2

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

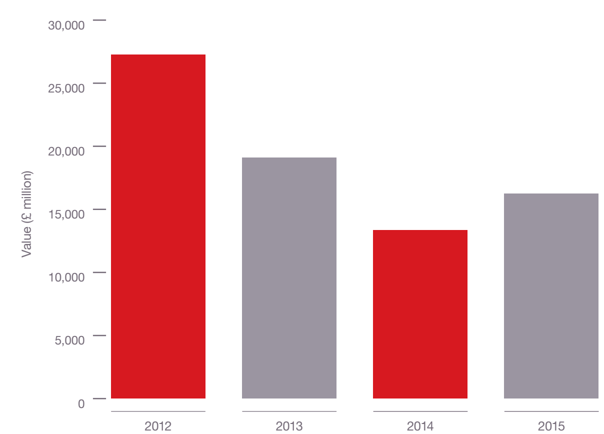

FIG. 4.3

Infrastructure: **Contracts at Advanced Planning** Source: Barbour ABI

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

		-7.2%	Scotland
+2.2%	East Midlands	+2.6%	South East
+0.7%	East of England	-1.6%	South West
+6.7%	London *HOTTEST REGION*	+1.6%	Wales
-0.9%	North East	-1.7%	West Midlands
+1.7%	North West	-4.2%	Yorkshire & Humber

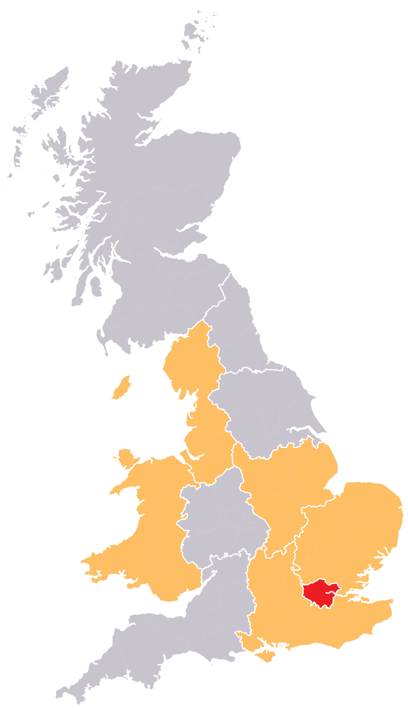

FIG. 4.4

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

Planning Activity

Reflecting the increase in the value of contracts awarded in 2015, schemes reaching detail planning increased by 21.8% to a total of £16.2 billion (see Fig. 4.3). Considering the growth in contract awards in 2015 this suggests the potential for a stronger year in 2016 for the infrastructure sector which will be a boost to the industry overall.

> London was the main location for infrastructure projects in 2015 accounting for 21.1% of the total value of contracts awarded

PROJECT IN FOCUS

M4 Corridor Around Newport
£750,000,000

County	Gwent
Primary Category Sector	Infrastructure
Government Region	Wales
Start Date	April 2018
End Date	April 2022
Contract Award Date	December 2015
Funding	Public
Stage	Contract
Contractor	Vinci Construction Grand Projects

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TOP TEN Key Clients

Jan 2015 – Dec 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	6	1,974
2	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	108	1,413
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	12	801
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	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	105	509
10	Aberdeen City Council	Town House, Broad Street, Aberdeen, Grampian, AB10 1AQ	01224 522000	5	426

TOP TEN Key Architects

Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	15	604
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, East Riding of Yorkshire, HU2 8JU	01482 221155	1	150
8	Pascall & Watson Architects	5 Carlson Court, 116 Putney Bridge Road, Putney, London, SW15 2NQ	020 8874 1311 (TPS)	15	113
9	Fletcher Rae UK Limited	Hill Quays, 5 Jordan Street, Manchester, Greater Manchester, M15 4PY	0161 242 1140	1	100
10	Acanthus LW Architects	Voysey House, Barley Mow Passage, Chiswick, London, W4 4PN	020 8994 2288	1	71

TOP TEN Key Contractors

Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	27	1,724
2	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	8	1,096
3	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	61	887
4	Costain Group Plc	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	15	887
5	Bachy Soletanche Limited	Henderson House, Langley Place, Higgins Lane, Burscough, Ormskirk, Lancashire, L40 8JS	01704 895686 (CTPS)	1	800
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	23	641
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	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	9	459

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

STRONG YEAR FOR THE COMMERCIAL & RETAIL SECTOR

Contract values in the commercial & retail sector increased in 2015 indicating good prospects for this important sector.

The commercial & retail sector had a much stronger year overall in 2015 with contracts awarded valued at £13.2 billion, an increase of 23.3% from 2014 (see Fig. 5.1). While 2012 and 2013 were broadly similar for contract awarded values, the significant increase in 2014 and 2015 suggests that construction's traditionally largest sector is set to grow again in 2016 as investment confidence improves further.

Projects by region

London dominated the commercial contracts market in 2015, accounting for 55.4% of the value of contracts awarded, an increase of 14% from last year (see Fig. 5.2 & 5.4). Major contracts in 2015 included the Wood Wharf commercial development which comprises 155,000 sq m of office floorspace, and has a total project value of circa £2 billion. In addition, 40 Leadenhall Triangle in the City of London was another major development awarded at a value of £391 million and is set to provide over 80,000 sq m of office floorspace.

Planning Activity

The value of schemes reaching Detail Planning stage also increased in 2015 to a total of £11.5 billion. This is a 6.9% increase from the value recorded in 2014 and is still significantly higher than the values recorded in 2012 (see Fig. 5.3). This is consistent with the likelihood of continued growth in the sector in 2015.

> The significant increase in 2014 and 2015 suggests the sector is set to grow again in 2016

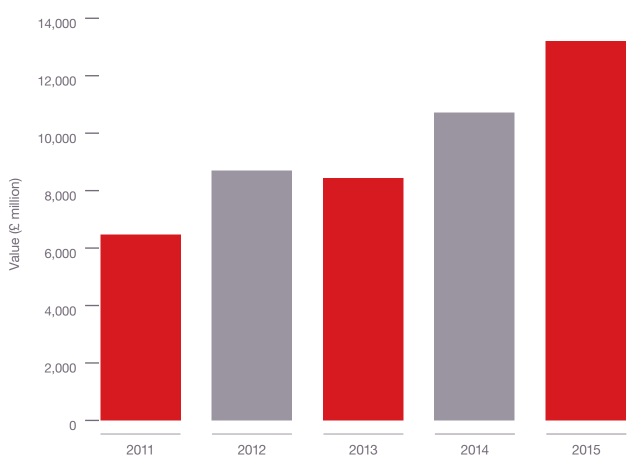

FIG. 5.1

Commercial & Retail: **Project Value by Year** Source: Barbour ABI

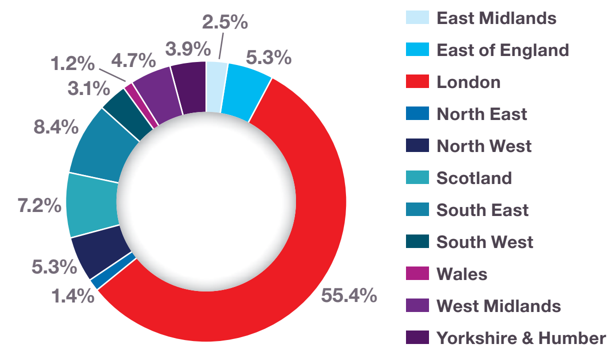

FIG. 5.2

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

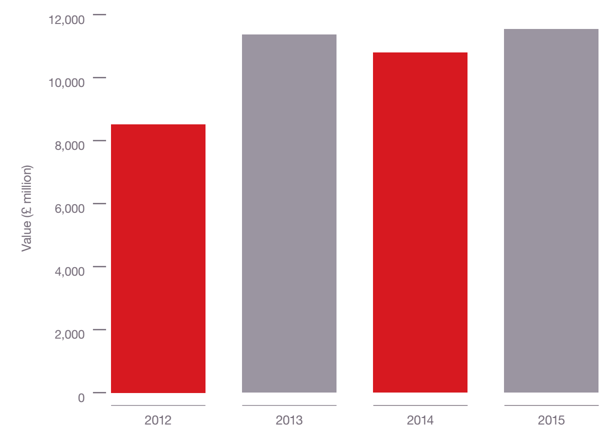

FIG. 5.3

Commercial & Retail: **Contracts at Advanced Planning** Source: Barbour ABI

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STRONG YEAR FOR THE COMMERCIAL & RETAIL SECTOR

The map and figures show how the activity has changed since 2014			-0.7%	Scotland	
-4.7%	East Midlands		-1.3%	South East	
+0.4%	East of England		-1.2%	South West	
+14.0%	London *HOTTEST REGION*		-0.4%	Wales	
-0.6%	North East		-2.8%	West Midlands	
0.0%	North West		-4.4%	Yorkshire & Humber	

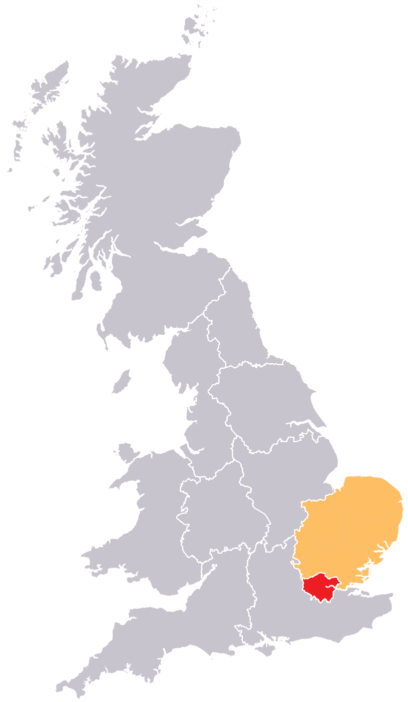

FIG. 5.4

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

PROJECT IN FOCUS

Saatchi Block – Offices & Flats
£125,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	June 2016
End Date	July 2018
Contract Award Date	December 2015
Funding	Private
Stage	Detail Approval/Subcontract
Contractor	Brookfield Multiplex

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STRONG YEAR FOR THE COMMERCIAL & RETAIL SECTOR

TOP TEN
Key Clients
Jan 2015 – Dec 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	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	216
6	Saxon Land BV	117 Fenchurch Street, City, London, EC3M 5DY	020 7410 7300	1	150
7	Argent Group Plc	4 Stable Street, King's Cross, Camden, London, N1C 4AB	020 3664 0200 (TPS)	3	136
8	West London & Suburban Property Investments Limited	25 Savile Row, City, London, W1S 2ER	Not Listed	1	125
9	Chelsfield Partners LLP	67 Brook Street, Westminster, London, W1K 4NJ	020 7290 2388 (CTPS)	1	115
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	1	107

TOP TEN
Key Architects
Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	3	676
2	Kohn Pederson Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	2	676
3	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	8	535
4	Dixon Jones Limited	2-3 Hanover Yard, Noel Yard, Islington, London, N1 8YA	020 7483 8888	2	509
5	Glenn Howells Architects	321 Bradford Street, Digbeth, Birmingham, West Midlands, B5 6ET	0121 666 7640 (CTPS)	3	479
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	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	4	326
10	TP Bennett LLP	One America Street, Southwark, London, SE1 0NE	020 7208 2000	17	289

TOP TEN
Key Contractors
Jan 2015 – Dec 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	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	3	540
3	Brookfield Multiplex Construction Europe Limited	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	6	529
4	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	17	397
5	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	13	357
6	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	8	351
7	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	32	312
8	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	14	301
9	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	38	267
10	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	216

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

DECLINES IN THE HOTEL, LEISURE & SPORT MARKET

The hotel, leisure & sport had a comparatively slow year in 2015 with contract value declines of 21.4%.

Contract award values in the hotel, leisure & sport sector in 2015 were £4.1 billion, a decrease of 21.4% from 2014 (see Fig. 6.1). This indicates a more subdued picture in the sector in 2015 with the value of contracts below even the levels of 2011.

Projects by region

London dominated this sector in 2015 accounting for 35.6% of contract values, an increase of 2% from last year (see Fig. 6.2 & 6.4). Projects such as the Tottenham Hotspur Stadium valued at £400 million and the hotel and leisure development in Leicester Square valued at £150 million contribute to London's strong performance over the course of the year.

Planning Activity

The value of projects in the sector reaching advanced planning in 2015 was £8 billion, an increase of 59.9% from the figure recorded in 2014 (see Fig. 6.3). This indicates that the existing plans for the Tottenham Hotspur stadium and the proposals for the Chelsea Football Club stadium could have a significant impact on this sector in future years.

> “London dominated this sector in 2015 accounting for 35.6% of contract values, an increase of 2% from last year

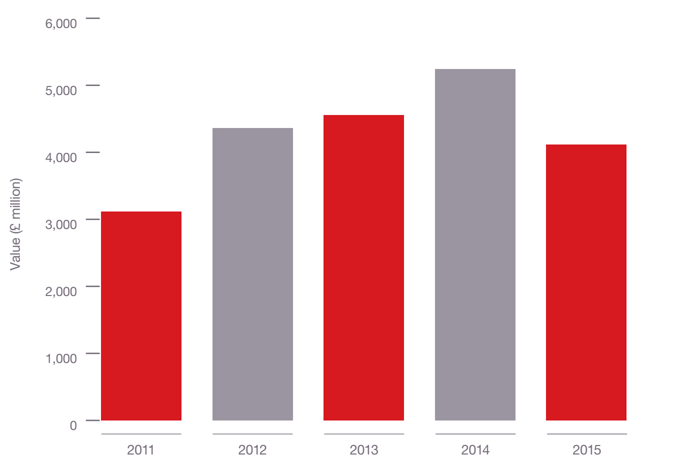

FIG. 6.1

Hotel, Leisure & Sport: **Project Value by Year** Source: Barbour ABI

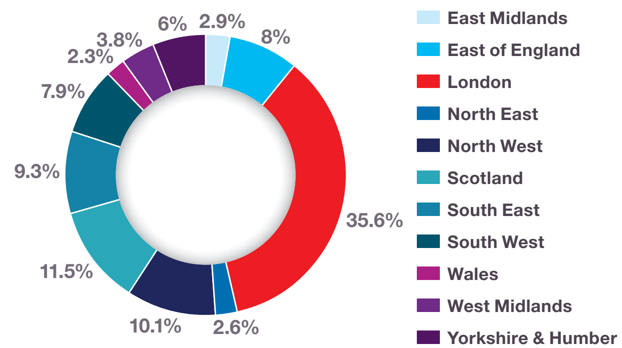

FIG. 6.2

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

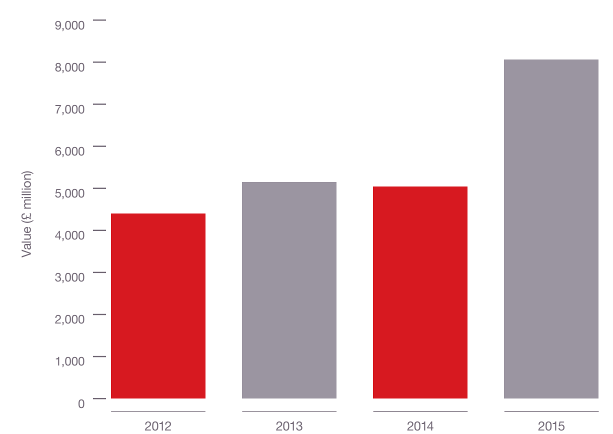

FIG. 6.3

Hotel, Leisure & Sport: **Contracts at Advanced Planning** Source: Barbour ABI

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The map and figures show how the activity has changed since 2014		+3.8%	Scotland *HOTTEST REGION*
-1.2%	East Midlands	+2.7%	South East
+3.0%	East of England	+1.5%	South West
+2.0%	London	-6.8%	Wales
-1.7%	North East	-2.8%	West Midlands
-1.5%	North West	+1.0%	Yorkshire & Humber

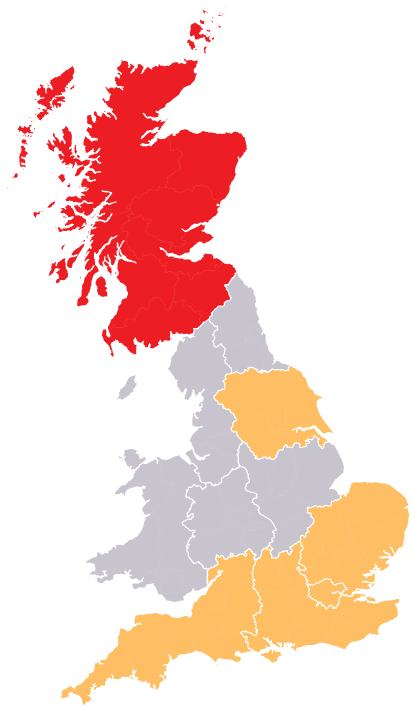
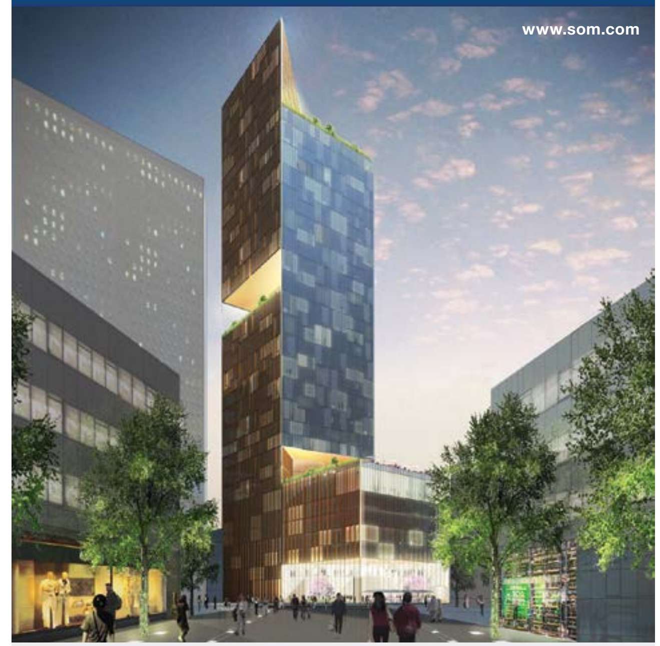


FIG. 6.4

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

"The value of projects in the sector reaching advanced planning in 2015 was £8 billion

PROJECT IN FOCUS



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

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

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TOP TEN Key Clients

Jan 2015 – Dec 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	2	404
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	46	123
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	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

Jan 2015 – Dec 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)	28	96
6	Dexter Moren Associates	57d Jamestown Road, Camden Town, London, NW1 7DB	020 7267 4440	5	91
7	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	9	80
8	Leach Rhodes & Walker LLP	West Riverside, New Bailey Street, Manchester, Greater Manchester, M3 5AA	0161 833 0211	4	75
9	Nicholas Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	1	70
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

Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	3	406
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	13	124
5	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	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)	9	71
9	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	9	67
10	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	7	57

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INDUSTRIAL

ACTIVITY INCREASES IN THE INDUSTRIAL SECTOR IN 2015

The industrial sector performed well in 2015 with contract award values increasing by 42.3% in the year.

Activity in the industrial sector increased in 2015 with contract award values of £7.2 billion in the year. This was an increase of 42.3% on the value awarded in 2014 and followed on from a 14.1% increase in contract values between 2013 and 2014 (see Fig. 7.1). This indicates that after lower levels of activity in 2011 and 2012 the industrial sector continued to grow substantially in 2015 and the general upturn in economic activity and shifting consumer patterns towards more online shopping is part of the reason for this. There has also been a return of more specialist chemical type projects which have boosted the figures over the year.

Projects by region

Activity in the sector was fairly evenly spread in the year with the North West attracting 15.8% of the value of contracts awarded, an increase of 3.9% from 2014. This was followed by the East of England which accounted for 14.6% of contract value, an increase of 3.8% from 2014. The East Midlands also had a noteworthy share of contracts in 2015; accounting for 12.4% of contract values awarded which was an increase of 3.3% from 2014 (see Fig. 7.2 & 7.4). The major project this year is an oil industry chemical plant in Shetland worth £500 million, which is proceeding despite the precipitous decline in oil prices. In addition, the relocation of the Astra Zeneca headquarters to Cambridge was awarded this year at a value of £330 million.

> “After lower levels of activity in 2011 and 2012 the industrial sector continued to grow substantially in 2015

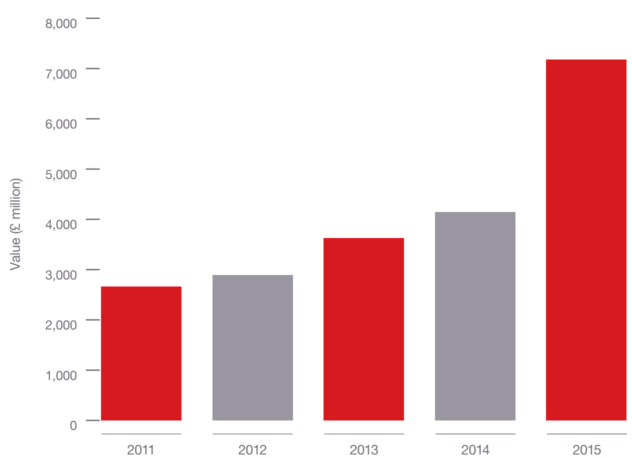

FIG. 7.1

Industrial: **Project Value by Year** Source: Barbour ABI

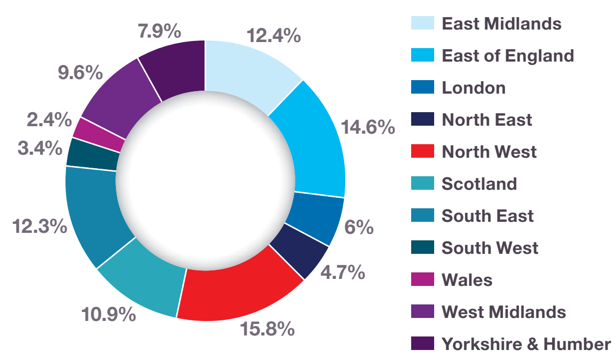

FIG. 7.2

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

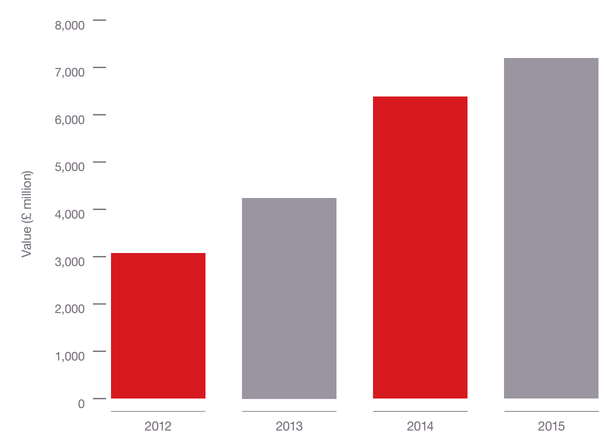

FIG. 7.3

Industrial: **Contracts at Advanced Planning** Source: Barbour ABI

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

		+0.6%	Scotland
+3.3%	East Midlands	-2.6%	South East
+3.8%	East of England	-2.9%	South West
+0.4%	London	-0.8%	Wales
-2.4%	North East	-1.6%	West Midlands
+3.9%	North West *HOTTEST REGION*	-1.7%	Yorkshire & Humber

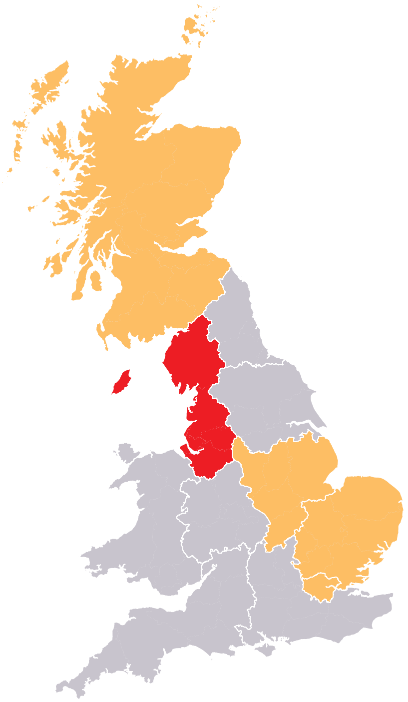

FIG. 7.4

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

Source: Barbour ABI

Planning Activity

Detail planning activity increased in 2015 in the industrial sector suggesting that the sector is likely to expand in 2016. The total value of projects reaching advanced planning stage was £7.2 billion, an increase of 12.8% (see Fig. 7.3). This followed a 50.5% increase in 2014 and indicates the brighter prospects in the sector as a number of larger warehousing projects are proposed, perhaps reflective of the changing nature of the consumer tastes of the British public.

> "The major project this year is an oil industry chemical plant in Shetland worth £500 million

PROJECT IN FOCUS

London Taxi Corporation Manufacturing Facility – Ansty Park £150,000,000

County	West Midlands
Primary Category Sector	Industrial
Government Region	West Midlands
Start Date	June 2015
End Date	June 2017
Contract Award Date	December 2015
Funding	Private
Stage	Detail Approval/Subcontract
Contractor	Winvic Construction

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TOP TEN Key Clients
Jan 2015 – Dec 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	The Peel Group	Peel Management, Peel Dome, The Trafford Centre, Manchester, Greater Manchester, M17 8PL	0161 629 8200	5	163
6	Goodman International	Nelson House, Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG	0121 506 8100	7	156
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
Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	17	322
2	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	12	308
3	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	1	300
4	Herzog & de Meuron UK Limited	65 Clerkenwell Road, City, London, EC1R 5BL	020 7025 2960	1	300
5	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	3	200
6	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	13	176
7	BHP Design LLP	Suite 2f, St Georges Court, 1 Albion Street, Birmingham, West Midlands, B1 3AH	0121 314 6618	1	150
8	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	13	130
9	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	7	121
10	Faulks Perry Culley & Rech	Lockington Hall, Lockington, Derby, Derbyshire, DE74 2RH	01509 672772	1	120

TOP TEN Key Contractors
Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	24	784
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	3	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	9	169
7	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	2	150
8	VolkerWessels UK Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	6	130
9	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	8	121
10	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	9	106

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

MODEST INCREASE IN CONTRACT AWARDS IN 2015

Contract award values for medical & healthcare contracts increased by 2.8% in 2015, an improvement on the previous year.

The relatively small medical & healthcare sector recorded modest growth in contract award values in 2015. A total of £2.3 billion of contracts were awarded, an increase of 2.8% from 2014 (see Fig. 8.1). After falling levels of contract award values in 2012 and 2013 this was a welcome continuation of growth for the sector.

Projects by region

London had the highest proportion of contracts by value in 2015, with 22% of the total. This was an increase of 8.8% from 2014 (see Fig. 8.2 & 8.4) with two contracts in particular – a research facility at Great Ormond Street Hospital valued at £45 million and another at the Royal Free Hospital worth £42 million contributing to the total. The West Midlands also witnessed a significant level of activity accounting for 20.5% of the total value of contracts awarded. This was largely due to the award of the £75 million construct an extension to the maternity ward at Birmingham Women's Hospital.

Planning Activity

The value of schemes at detail planning stage was £2 billion in 2015, a decrease of 12.6% on the figure recorded in 2014 (see Fig. 8.3). While this is a decrease the value of schemes is significantly higher than 2012/13 indicating that current levels of activity will be maintained.

> "The sector recorded modest growth in contract award values in 2015"

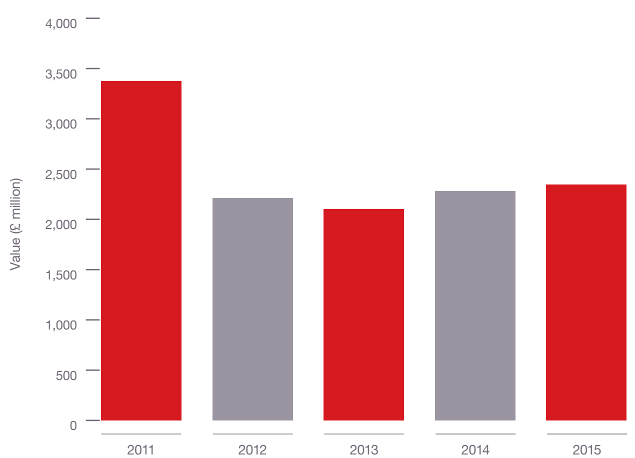

FIG. 8.1

Medical & Health: **Project Value by Year** Source: Barbour ABI

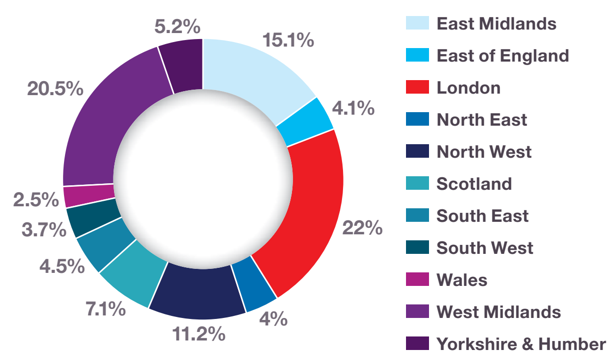

FIG. 8.2

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

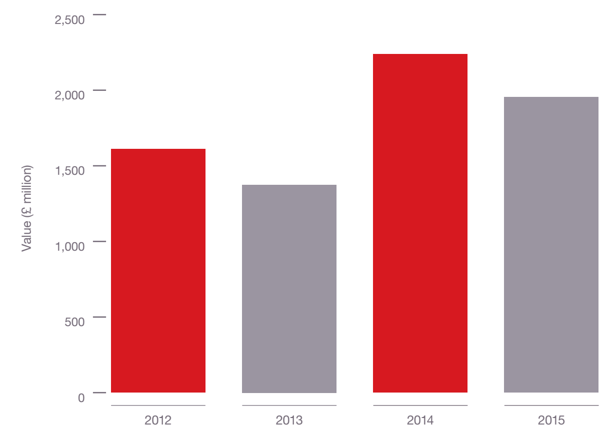

FIG. 8.3

Medical & Health: **Contracts at Advanced Planning** Source: Barbour ABI

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MODEST INCREASE IN CONTRACT AWARDS IN 2015

The map and figures show how the activity has changed since 2014				
+8.8%	East Midlands		-3.6%	South East
-7.9%	East of England		+0.2%	South West
+8.8%	London		-0.4%	Wales
+2.9%	North East		+14.5%	West Midlands *HOTTEST REGION*
-6.1%	North West		-1.1%	Yorkshire & Humber
			-16.1%	Scotland

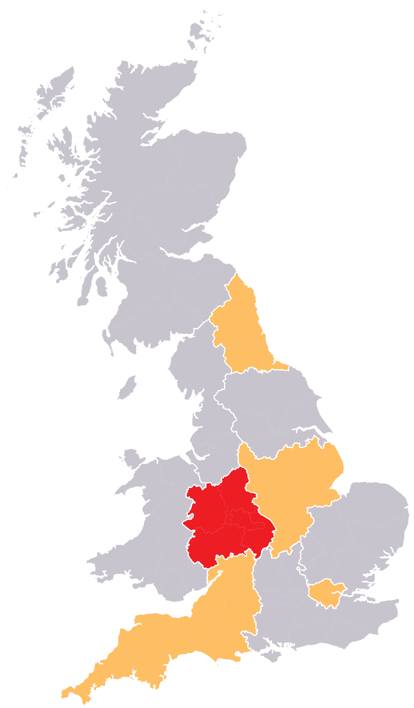

FIG. 8.4

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

Outlook

The National Infrastructure Plan 2012 commits £4.6 billion in health and social care capital in 2014-2015 and £4.7 billion in 2015-2016 including investment of £1.4 billion in hospital upgrades and redevelopments, which suggests that this sector will improve in the medium term. The commitment to continue to protect health budgets was included in the Budget in March indicating this spending will occur.

> London had the highest proportion of contracts by value in 2015, with 22% of the total

PROJECT IN FOCUS

Midland Metropolitan Hospital Project £280,000,000

County	West Midlands
Primary Category Sector	Medical & Health
Government Region	West Midlands
Start Date	November 2015
End Date	October 2018
Contract Award Date	December 2015
Funding	Private
Stage	Detail Approval/Subcontract
Contractor	Carillion

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TOP TEN Key Clients

Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Sandwell and West Birmingham Hospital NHS Trust	City Hospital, Dudley Road, Birmingham, West Midlands, B18 7QH	0121 554 3801	1	280
2	Royal Liverpool and Broadgreen Hospital NHS Trust	Prescot Street, Liverpool, Merseyside, L7 8XP	0151 706 2000	5	208
3	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	2	208
4	BS Stanford Limited	70 Grosvenor Street, Westminster, London, W1K 3JP	Not Listed	1	200
5	Aneurin Bevan Health Board	Mamhilad House, Block A, Mamhilad Park Estate, Pontypool, Gwent, NP4 0YP	01873 732732 (CTPS)	1	180
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 Children's Hospital NHS Trust	Diana Princess of Wales Hospital, Steel House Lane, Birmingham, West Midlands, B4 6NH	0121 333 9999	3	65

TOP TEN Key Architects

Jan 2015 – Dec 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	Billfinger GVA	65 Gresham Street, Westminster, London, EC2V 7NQ	020 7491 2188 (TPS)	3	285
3	John Simpson & Partners	29 Great James Street, Holborn, Westminster, London, WC1N 3EY	020 7405 1285 (TPS)	1	200
4	Steffian Bradley Architects	45 Gee Street, Fifth Floor, City, London, EC1V 3RS	020 7549 4050	1	200
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	Halliday Meecham Partnership	111 Piccadilly, Manchester, Greater Manchester, M1 2HY	0161 661 5566	2	81
8	Gilling Dod Architects	The Cruck Barn, Duxbury Park, Chorley, Lancashire, PR7 4AT	01257 260070	8	75
9	Murphy Philipps Architects Limited	140 Old Street, City, London, EC1V 9BJ	020 7490 8008	5	65
10	Boswell Mitchell & Johnston	The Hub, 70 Pacific Quay, Glasgow, Strathclyde, G51 1DZ	0141 271 3200	1	64

TOP TEN Key Contractors

Jan 2015 – Dec 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)	23	333
2	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	2	290
3	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	17	201
4	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	2	181
5	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	5	176
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)	10	95
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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EDUCATION SECTOR FALLS SLIGHTLY

The education sector had a solid year in 2015 with contract award values 4.2% lower than the previous year.

Contracts awarded in the education sector totalled £7.5 billion in 2015, a 4.2% decrease from the value recorded in 2014 (see Fig. 9.1). While this year's value fell it should be noted that the value of projects in the sector are now significantly above the values recorded around 2012.

Projects by region

London had the highest share of contracts awarded by value in 2015, accounting for 19.6% of the total value of contracts awarded, the same proportion as 2014. The South East also had strong performance in 2015, accounting for 12.8% of contract award value although this was a decrease of 3.3% from 2014 (see Fig. 9.2 & 9.4). Examples of larger projects awarded in 2015 include a new campus for the University of Northampton worth £90 million and a new school in Largs, Scotland worth £52 million.

Planning Activity

Planning activity decreased in 2015, with the total value of schemes reaching an advanced planning stage of £6.4 billion in the year. This is a decrease of 10.1% and but is still a relatively healthy pipeline of education projects for 2016 (see Fig. 9.3).

> London had the highest share of contracts awarded by value in 2015

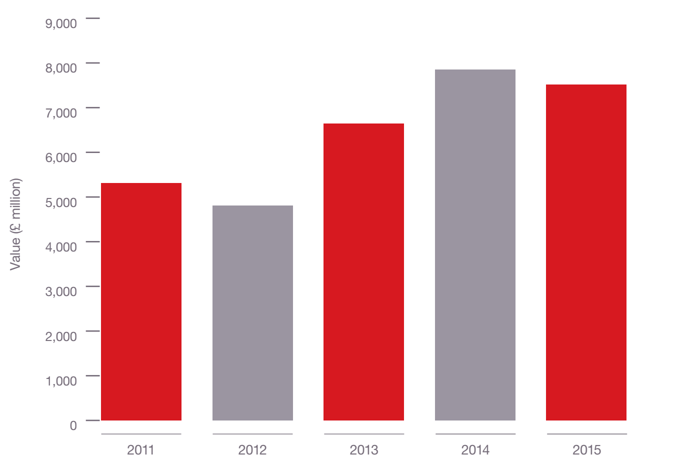

FIG. 9.1
Education: **Project Value by Year** Source: Barbour ABI

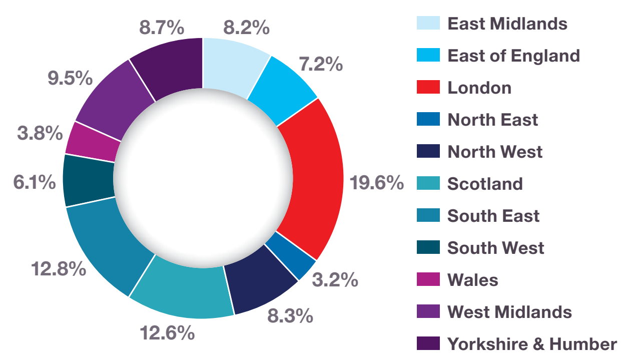

FIG. 9.2
Education: **Value of Contracts by Region** Source: Barbour ABI

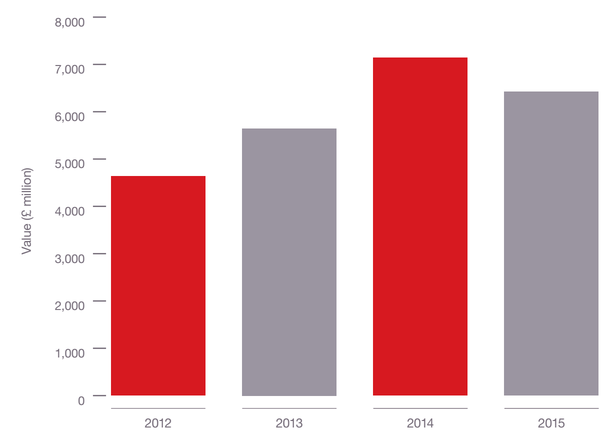

FIG. 9.3
Education: **Contracts at Advanced Planning** Source: Barbour ABI

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EDUCATION SECTOR FALLS SLIGHTLY

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

		+0.4%	Scotland
+3.9%	East Midlands *HOTTEST REGION*	-3.3%	South East
-1.9%	East of England	-0.9%	South West
0.0%	London	-0.7%	Wales
-1.5%	North East	+2.4%	West Midlands
-1.9%	North West	+3.5%	Yorkshire & Humber

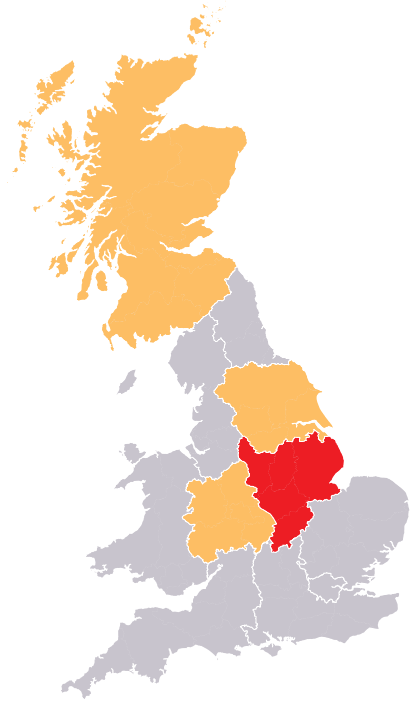

FIG. 9.4

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

> The value of projects in the sector are now significantly above the values recorded around 2012

PROJECT IN FOCUS

www.bruntwood.co.uk

Manchester Business School Redevelopment – Phase 2
£40,000,000

County	Greater Manchester
Primary Category Sector	Education
Government Region	North West
Start Date	January 2016
End Date	January 2019
Contract Award Date	December 2015
Funding	Private
Stage	Detail Approval/Contract
Contractor	Mace

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EDUCATION SECTOR FALLS SLIGHTLY

TOP TEN

Key Clients

Jan 2015 – Dec 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	89	953
2	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	10	274
3	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	8	129
4	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	12	111
5	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	7	100
6	Dumfries & Galloway Council	Militia House, English Street, Dumfries, Dumfries and Galloway, DG1 2HR	0303 333 3000	7	86
7	North Ayrshire Council	5th Floor, Cunninghame House, Irvine, Strathclyde, KA12 8EE	01294 310 000	2	85
8	University of Leeds	Woodhouse Lane, Leeds, West Yorkshire, LS2 9JT	0113 243 1751	13	83
9	University of the West of England	Frenchay Campus, Coldharbour Lane, Bristol, Avon, BS16 1QY	0117 965 6261	6	78
10	Milton Keynes Council	Civic Offices, 1 Saxon Gate East, Milton Keynes, Buckinghamshire, MK9 3EJ	01908 691691	6	74

TOP TEN

Key Architects

Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	29	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	The Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	27	177
5	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	16	173
6	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	19	162
7	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	14	161
8	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	26	151
9	Pick Everard (Leicester)	Halford House, Charles Street, Leicester, Leicestershire, LE1 1HA	0116 223 4400 (TPS)	20	139
10	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 652 1666	6	138

TOP TEN

Key Contractors

Jan 2015 – Dec 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	101	662
2	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	39	434
3	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	43	392
4	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	48	385
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	54	372
6	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	69	349
7	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	10	297
8	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	11	290
9	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	27	197
10	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	13	197

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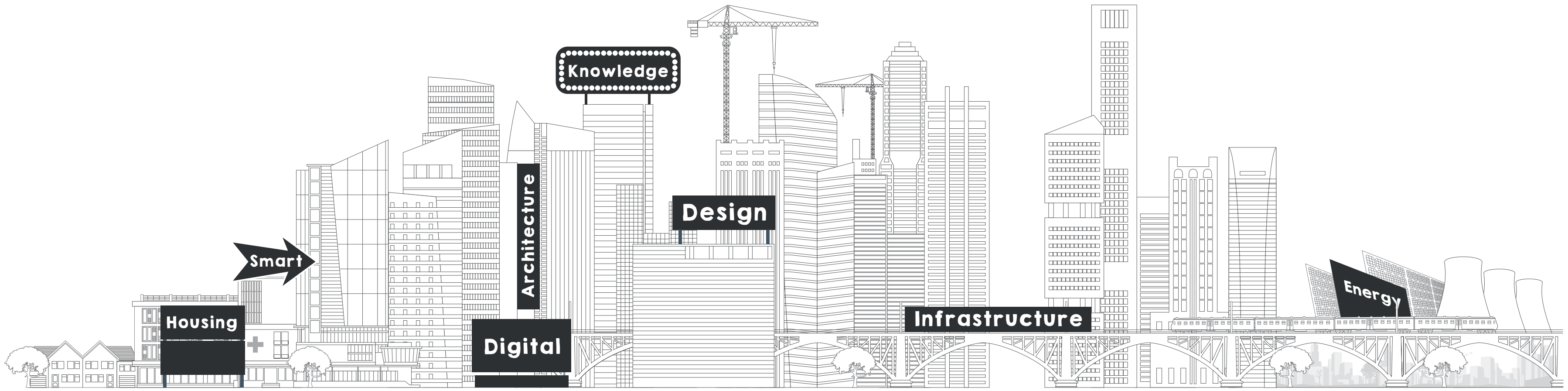

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