economic & construction MARKET REVIEW

Barbour ABI | Building | bd

FEBRUARY 2016

FULL VERSION – AVAILABLE TO BARBOUR ABI CUSTOMERS, BUILDING & BD SUBSCRIBERS ONLY

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

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

DOWNLOAD METHODOLOGY CLICK HERE

Bespoke Research and Intelligence

Our Economist Michael Dall offers bespoke research and tailored analysis as well as providing consultations and speaking at industry events. Economist Michael Dall, works with customers to offer bespoke research and tailored analysis specific for your individual business. He currently provides consultations, detailed research as well as attend speaking events, speaking on topics related to your individual business needs.

Market Insight

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

To learn more about Market Insight and to download your copy, click on the button below. Additionally, to register your interest in our bespoke construction intelligence and tailored analysis please register your interest by selecting the tick box in the enquiry form.

DOWNLOAD MARKET INSIGHT CLICK HERE

Barbour ABI

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

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

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

T: 0151 353 3500

E: info@barbour-abi.com

W: www.barbour-abi.com

@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

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

ECONOMIC CONTEXT

YEARLY GDP GROWTH SLOWS IN 2015

There was continued growth in GDP in Q4 from Q3, but levels remained down on 2014 at 2.2%, compared to 2.9% last year.

The latest GDP figures for the UK economy were released in the last month and they showed that the UK economy had grown by 0.5% in the final quarter of 2015 (see Fig. 1.1). This was slightly higher than the 0.4% rate of growth experienced in the third quarter and meant that for the full year the economy grew by 2.2%, well below the 2.9% recorded in 2014.

While the total level of output is now comfortably above its pre-recession peak the pattern of growth within the economy is still very much focussed towards the dominant service sector. The latest figures show that the service sector is now 11.6% higher than its pre-recession peak while construction is currently 4.2% below its pre-recession peak and manufacturing is 6.4% below (see Fig. 1.2). This indicates the scale of the challenge of rebalancing the economy towards manufacturing and construction given the dominance of the service sector.

Putting the UK's economic recovery in the context of the other G7 economies suggests that since 2008 the UK has had a middling performance. While the USA and Canada have grown the most since the start of 2008, the UK had more subdued growth from 2010 to 2013 but one of the fastest growing since then (see Fig. 1.3).

Other news this month on the UK economy includes:

- **The IFS highlighted that slowing wage growth could endanger the Chancellor's target to eradicate the deficit by 2020**
- **The latest Inflation Report from the Bank of England forecast that the inflation level would remain below 1% for the whole of 2016**
- **The composite PMI index which measures activity across all sectors rose to a six month high of 56.0**

> Construction is currently 4.2% below its pre-recession peak

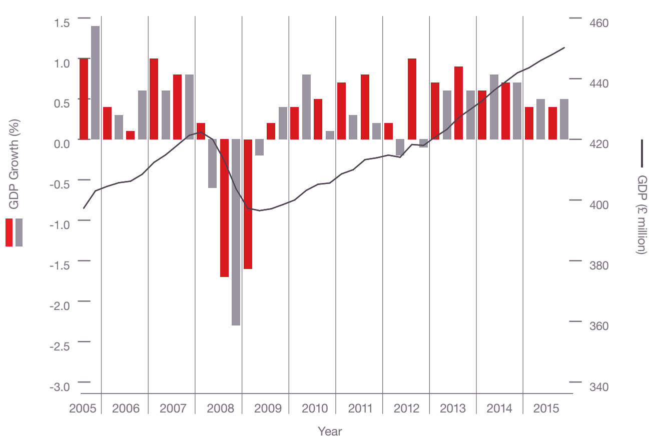


Fig. 1.1 **UK GDP** Source: ONS

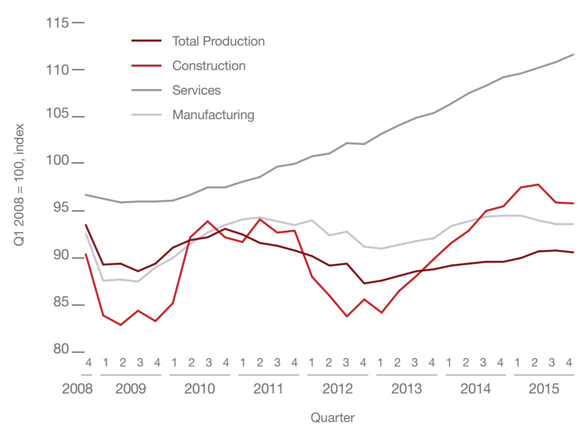


Fig. 1.2 **UK GDP** Source: ONS

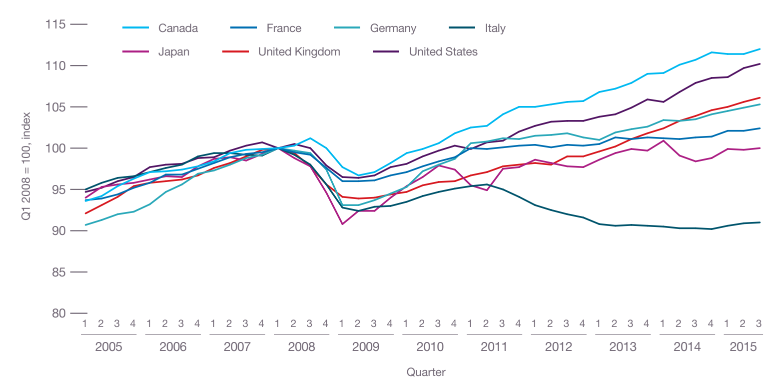


Fig. 1.3 **GDP Country Comparison** Source: OECD

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

SLOWER START TO THE YEAR FOR CONSTRUCTION CONTRACT VALUE

A further slow down in output levels in Q4, but growth on the same period last year. Private housing and infrastructure are the bright lights for 2016.

The latest figures from the ONS show that the construction sector decreased by 0.4% between September Q3 and Q4 2015. Comparing output levels with Q4 last year showed an increase of 0.4% (see Fig. 2.1).

Private Housing returned to quarter on quarter growth, with output levels up 4.5% on Q3 and also up 5.4% on the same quarter last year. Public Housing had quarter on quarter growth of 1.6% but more significantly was down a considerable 21.8% on Q4 2014.

	% change	
	Quarter 4 2014 – Quarter 4 2015	Quarter 3 2015 – Quarter 4 2015
Total All Work	**0.4**	**-0.4**
All New Work	**2.8**	**0.2**
Public Housing	-21.8	1.6
Private Housing	5.4	4.5
Infrastructure	20.7	-3.9
Public (ex Infrastructure)	-4.7	-1.1
Private Industrial	7.4	-6.2
Private Commercial	-2.1	0.5
Repair & Maintenance	**-3.7**	**-1.4**
Public Housing	-4.1	-4.3
Private Housing	0.3	-2.9
Non-Housing	-6.2	0.7

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

Infrastructure was down 3.9% on Q3 but remained up 20.7% up on the same quarter last year. With some large projects headed by HS2 and Thames Tideway Tunnel its hope that this sector will provide a boost to output levels over next couple of years.

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 128 for October. This is a continued decrease from the previous month. The readings for Private Housing remain high at 235, although down from level of 265 the previous two month. Commercial offices activity had a marked slowdown with a level of only 87. With plenty of promised work in the pipeline it is hope that the remainder of 2016 will see a pick up in activity.

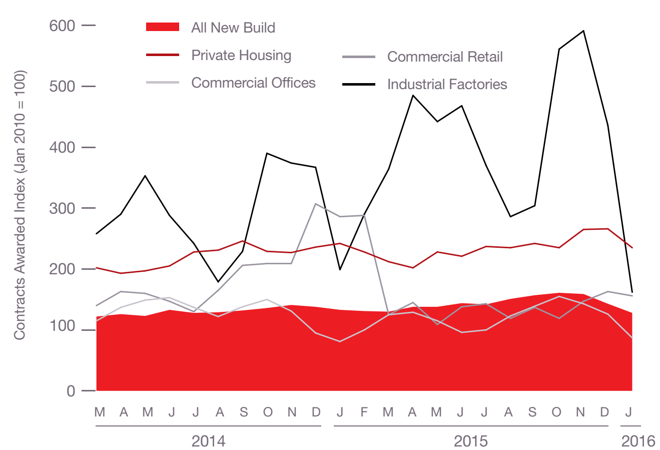


Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

CPA Forecasts

The Construction Products Association recently updated its forecasts for 2016 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 the infrastructure sector (see Fig. 2.3).

Construction Sector

According to Barbour ABI data on all contract activity, January witnessed a decrease in construction activity levels with the value of new contracts awarded at £5.3billion, based on a three month rolling average (see Fig. 2.5). This is an 8.6% decrease from December and a 3.7% decrease on the value recorded in January 2015. The number of construction projects within the UK in January increased by 26.1% on December, but were 18.3% lower than January 2015.

	Output	Growth
2013	117,859	1.6%
2014	126,685	7.5%
2015 (e)	131,609	3.9%
2016 (f)	136,357	3.6%
2017 (p)	142,013	4.1%
2018 (p)	147,950	4.2%
2019 (p)	153,937	4.0%

Fig. 2.3 **Growth Forecasts** Source: Construction Products Association

economic & construction MARKET REVIEW
FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Projects by Region

London received the highest proportion of construction contracts by region, accounting for 24% of the UK total (see Fig. 2.4). In London, the award of the 22 Bishopsgate contract to Brookfield Multiplex at a value of £500 million was the largest project in January by construction value.

The North West had the second highest portion of contract activity by value in January accounting for 13% of the value awarded. The contract to develop a new pharmaceutical HQ for GSK in Ulverston, Cumbria was the highest value contract in the region in January with an estimated construction cost of £350 million. Wales followed closely with the next highest proportion of contracts by value, also with 13% of contract value awarded in January. The largest project awarded was the Wylfa Nuclear Power Station in Anglesey which agreed contracts valued at £450 million for the construction element.

Types of Project

Both residential and infrastructure sectors received the highest proportion of contracts awarded by value in January with 23% of the total value of projects awarded (see Fig. 2.6). Residential projects such as the Streatham Hill development in South West London valued at £60 million and the Britannia music site in Ilford, valued at £50 million were the two largest projects awarded.

The Wylfa nuclear power station in Wales was the largest infrastructure project awarded as well as the Port Clarence biomass plant in Cleveland valued at £200 million. Commercial & retail accounted for 19% of contract values awarded with 22 Bishopsgate in the City of London the largest project in January.

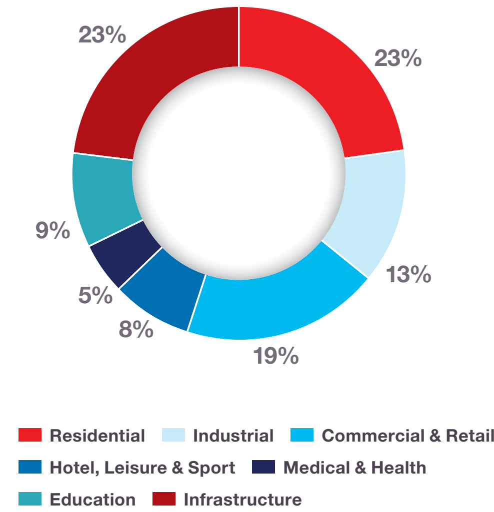
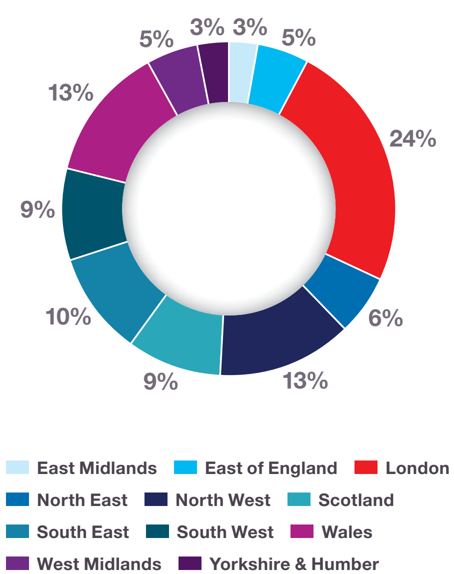


Fig. 2.6 **Type of Projects** Source: Barbour ABI



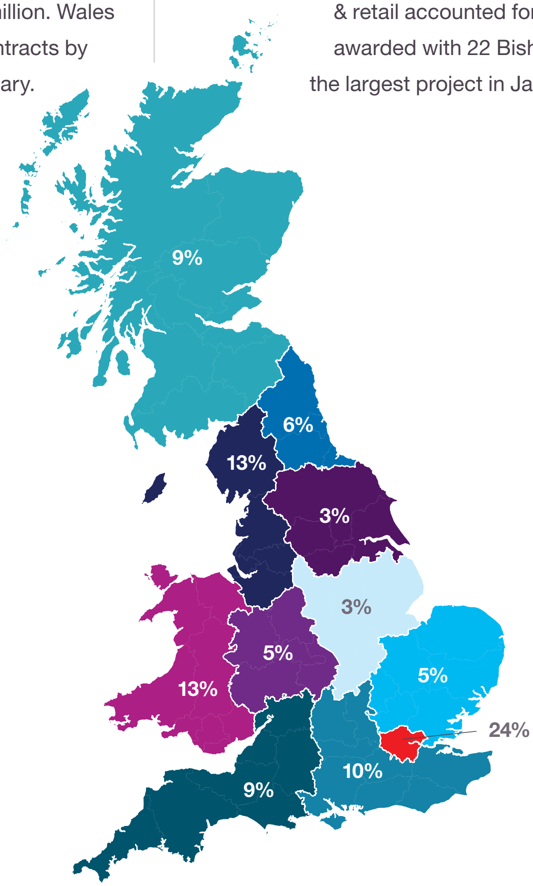


Fig. 2.4 **Locations of Contracts Awarded** Source: Barbour ABI

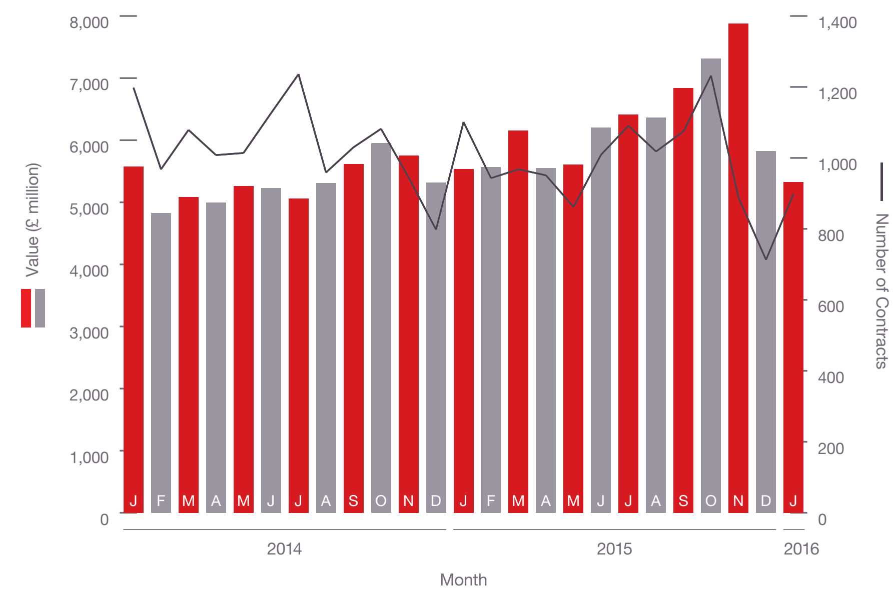


Fig. 2.5 **Construction Activity Trends** Source: Barbour ABI

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

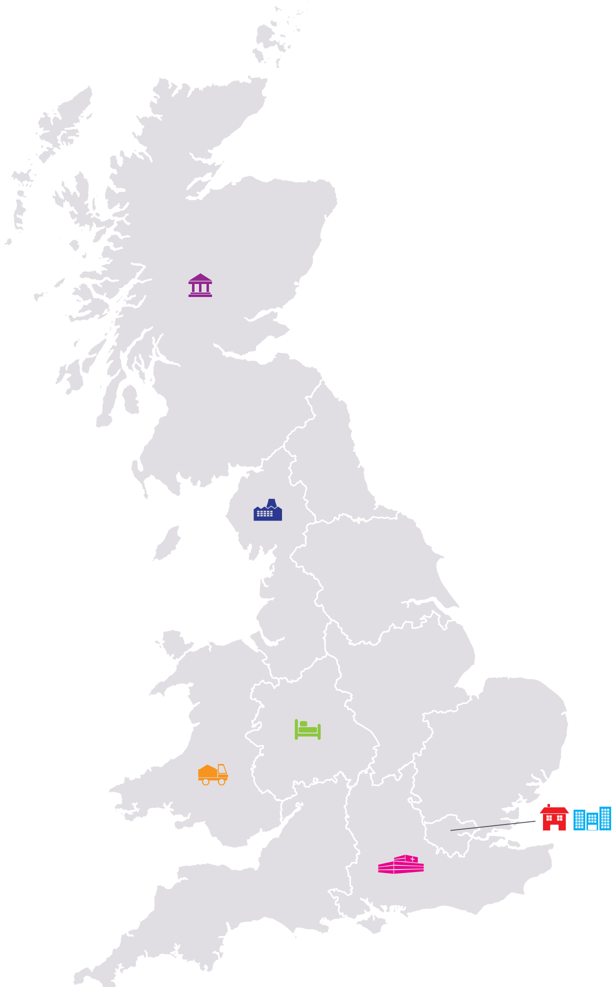
Barbour ABI
www.barbour-abi.com

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

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

A snippet of this month's regional activity

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



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

PROJECTS IN FOCUS THIS MONTH

Take a look at these construction projects in focus this month.
Click on one of the projects below to skip to that page.

RESIDENTIAL
Unite Student Accommodation – Edinburgh
£38,000,000

INFRASTRUCTURE
Twickenham Station Redevelopment
£38,000,000

COMMERCIAL & RETAIL
22-24 Bishopsgate – Office/Retail/Restaurant
£500,000,000

HOTEL, LEISURE & SPORT
Unite The Union – Hotel, Offices & Conference Centre
£35,000,000

INDUSTRIAL
Gsk Ulverston, North Lonsdale Road – Pharmaceutical Manufacturing Facility
£350,000,000

MEDICAL & HEALTH
Hampshire Hospitals – Critical Treatment Hospital
£150,000,000

EDUCATION
University Of Edinburgh – Data Technology Institute (DTI Building) Phase 3
£30,000,000

economic & construction
MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

RESIDENTIAL

RESIDENTIAL UNITS SLOW AT THE START OF THE YEAR

The month of January saw a slowing in the units and contract values in the residential sector following a strong finish to 2015.

Activity in the residential sector decreased in January 6.1% compared to December and is 14.6% lower than January 2015, indicating that new contract activity for units in the residential sector is lower than last year (see Fig. 3.1). The value of projects associated with residential contracts awarded decreased by 32.9% between December and January based on a three month rolling average, and by 21.4% on January 2015. Taken together these statistics are suggestive of a slower start for the residential sector at contract award stage. However, the numbers of housing completions are rising suggesting building activity in the sector remains strong. Given that the long term fundamentals that have been driving growth, in particular help for first time buyers, are set to continue Barbour ABI remain confident of the longer term growth prospects for the sector.

Sector Performance

The latest house price indices for January from Halifax showed that average house prices are increasing at 9.7% annually in the three months to January, an increase from 9.5% in December. This compares to a figure of 9.0% this time last year which shows the strengthening in house price growth over recent months. Nationwide reported annual house price rises of 4.4% slightly lower than the 4.5% recorded in December.

Projects by region

London was the main location of activity in the residential sector this month, accounting for 22.4% of the value of contracts awarded, a decrease of 15.7% from its share in the same month last year (see Fig. 3.2 & 3.4). Contracts such as the Streatham Hill development which proposes to build around 250 units in a mixed

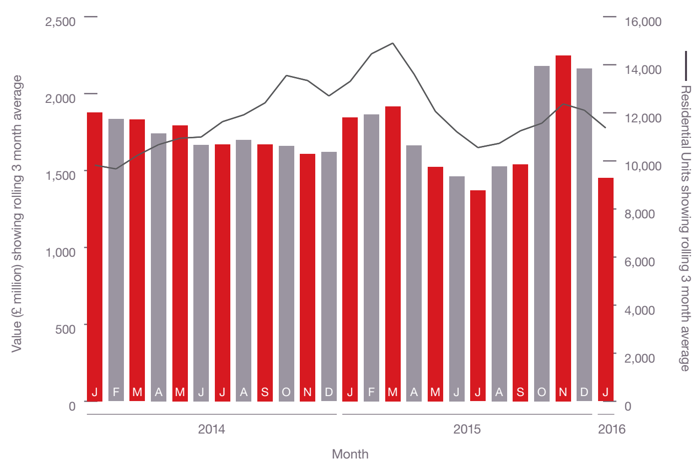


FIG. 3.1

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

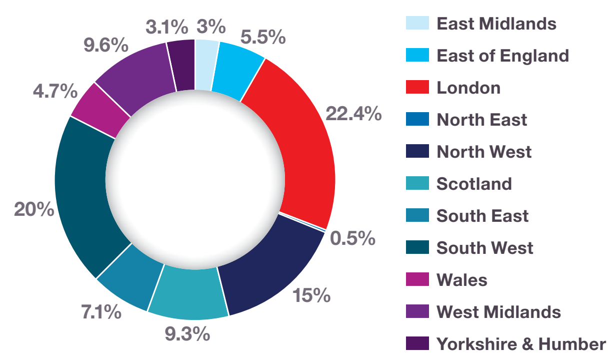


FIG. 3.2

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

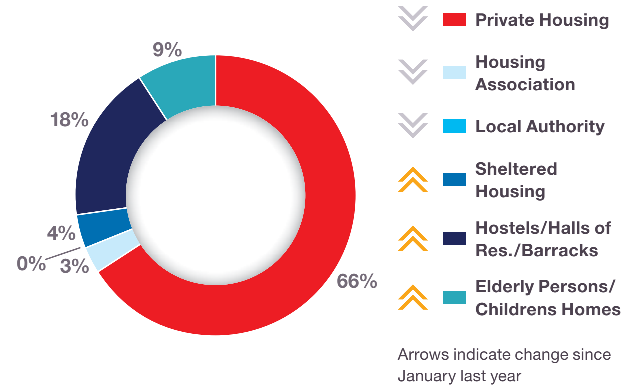


FIG. 3.3

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

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

RESIDENTIAL UNITS SLOW AT THE START OF THE YEAR

The map and figures show how the activity has changed since January 2015		+4.5%	Scotland
+0.2%	East Midlands	-2.0%	South East
-5.3%	East of England	+12.5%	South West *HOTTEST REGION*
-15.7%	London	+3.2%	Wales
-3.7%	North East	+4.4%	West Midlands
+3.9%	North West	-2.0%	Yorkshire & Humber

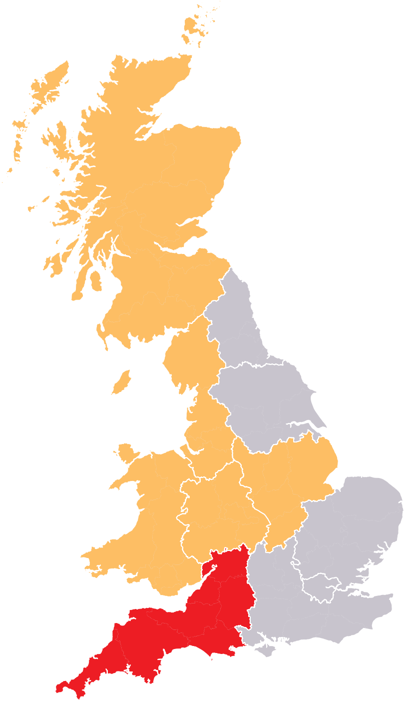


FIG. 3.4

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

use development near Brixton are examples of projects in the area in January. However, in a further sign that residential activity is increasing its geographical spread, the South West accounted for 20% of contract value. This was a 12.5% increase from the same month in 2015 and the accommodation for Hinkley Point workers valued at £60 million was the largest project in the region in January. The North West also had a high share of the project value in residential in January, accounting for 15% of the value awarded, a 3.9% increase on January 2014. The largest project in the region was the contract to convert Stanley Dock Tobacco Warehouse which is set to deliver 538 apartments at a total value of £60 million. 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 the residential sector was dominated by private housing in January. Private housing accounted for 66% of the value of contracts awarded this month, although this was a 12% decline on the corresponding month last year. After private housing, the next largest project type were hostels/halls of residence projects which 18% of the value awarded, an increase of 9% from the corresponding month last year (see Fig. 3.3).

> London was the main location of activity this month

PROJECT IN FOCUS

Unite Student Accommodation – Edinburgh £38,000,000

County	Lothian
Primary Category Sector	Residential
Government Region	Scotland
Start Date	April 2016
End Date	October 2017
Contract Award Date	January 2016
Funding	Private
Stage	Subcontract
Contractor	McAleer & Rushe Limited

economic & construction MARKET REVIEW

FEBRUARY 2016

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

RESIDENTIAL UNITS SLOW AT THE START OF THE YEAR

TOP TEN
Key Clients
Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	216	2,528
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	160	2,410
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	146	1,730
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	80	978
5	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	64	942
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	71	768
7	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	64	739
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	47	666
9	St Modwen Developments Plc	Park Point, 17 High Street, Longbridge, Birmingham, West Midlands, B31 2UQ	0121 222 9400	15	554
10	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	33	500

TOP TEN
Key Architects
Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	101	1,087
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	20	829
3	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	33	540
4	Barton Willmore	The Blade, Abbey Square, Reading, Berkshire, RG1 3BE	0118 943 0000 (CTPS)	28	529
5	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GH	020 7880 6400	4	515
6	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555 (TPS)	7	479
7	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	40	474
8	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	28	422
9	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	6	421
10	Tetlow King Planning	Unit 2 Eclipse Office Park, Staple Hill, Bristol, North Somerset, BS16 5EL	0117 9561916 (CTPS)	27	419

TOP TEN
Key Contractors
Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	223	2,606
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	165	2,455
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	144	1,723
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	88	1,045
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	101	1,012
6	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	64	754
7	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	0161 876 6000	68	753
8	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	63	725
9	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	49	656
10	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	37	548

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

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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 JANUARY

The award of the Wylfa Nuclear Power station contract boosted infrastructure in the past month.

The value of contracts awarded in the infrastructure sector increased in January with the total value awarded £1.1 billion based on a three month rolling average (see Fig. 4.1). This is a 12.6% increase from the previous month but is 2% lower than January 2015. In the three months to January the total value of contracts awarded was £4.8 billion based on a three month rolling average. This is 31.6% lower than the previous three months but 33.9% higher than the same period in 2015. This indicates the strong performance towards the end of last year when major schemes such as the Thames Tideway Tunnel reached contract award stage with activity moderating in recent months.

Projects by region

Wales dominated infrastructure contracts in January, accounting for 44.5% of the value awarded, a 27.8% increase on January 2015 (see Fig. 4.2 & 4.4). The agreement to appoint a main contractor on the Wylfa Power Station job in Anglesey is the major reason for Wales's high percentage share in January. A Hitachi led contractor group was established for the £450 million contract although the start date has still to be determined.

Type of Projects

The Wylfa Nuclear Power Station contract means that utilities attracted the highest proportion of contracts in January. Utilities accounted for 78% of the value of contracts awarded in January, an increase of 54% from January 2015 (see Fig. 4.3). This is now the dominant sub-sector within infrastructure with both new orders and ONS output showing large increases in activity.

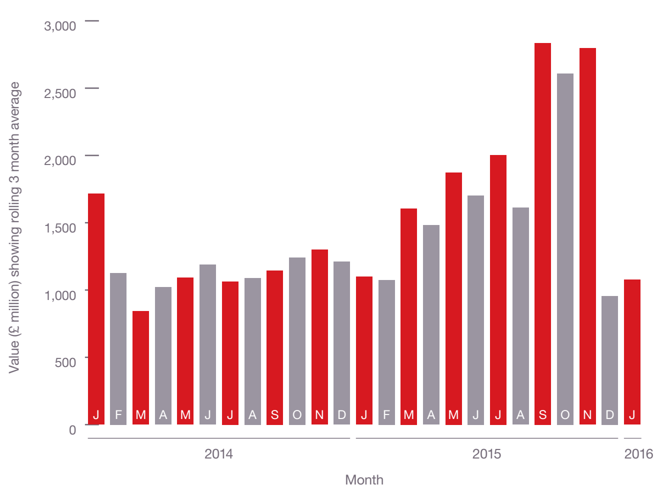


FIG. 4.1
Infrastructure: **Project Value showing 3 month moving average** Source: Barbour ABI

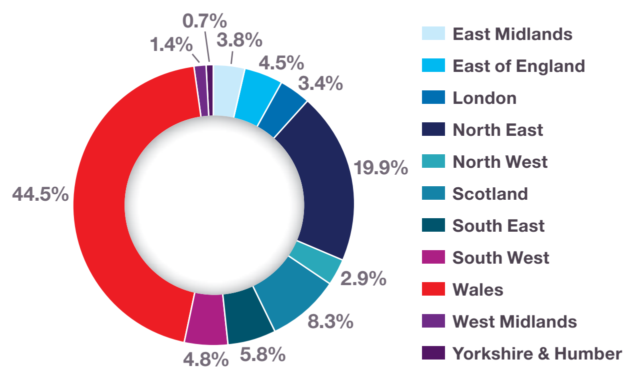


FIG. 4.2
Infrastructure: **Value of Contracts by Region** Source: Barbour ABI

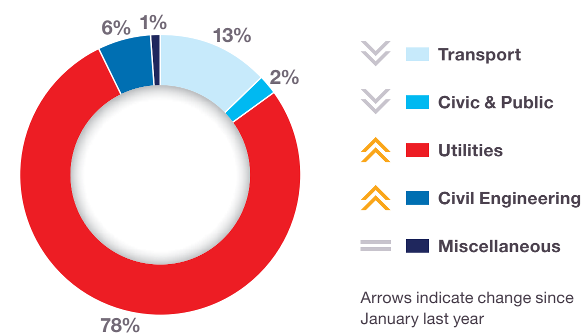


FIG. 4.3
Infrastructure: **Type of Projects Awarded** Source: Barbour ABI

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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 map and figures show how the activity has changed since January 2015

-1.0%	East Midlands	+1.8%	Scotland
-18.2%	East of England	+1.1%	South East
-6.5%	London	-11.7%	South West
+19.8%	North East	+27.8%	Wales *HOTTEST REGION*
-4.9%	North West	-0.1%	West Midlands
		-8.1%	Yorkshire & Humber

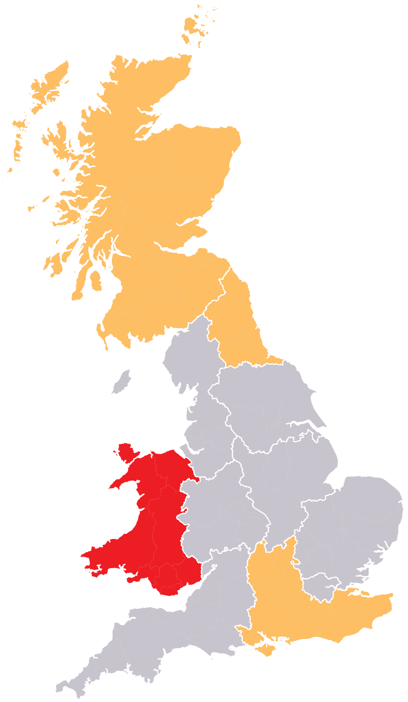


FIG. 4.4

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.

PROJECT IN FOCUS

Twickenham Station Redevelopment £38,000,000

County	Middlesex
Primary Category Sector	Infrastructure
Government Region	London
Start Date	May 2015
End Date	TBC
Contract Award Date	January 2016
Funding	Private
Stage	Contract
Contractor	Osborne

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

TOP TEN Key Clients
Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Thames Water Utilities Limited	Clearwater Court, Vastern Road, Reading, Berkshire, RG1 8DB	020 3577 8000	7	1,979
2	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	110	1,424
3	E.ON Limited	Newstead Court, Little Oak Drive, Annesley, Nottingham, Nottinghamshire, NG15 0DR	024 7618 1684	3	1,326
4	Transport Scotland	Buchanan House, 58 Port Dundas Road, Glasgow, Strathclyde, G4 0HF	0141 272 7100	12	801
5	Welsh Assembly Government	Cathays Park, Cardiff, South Glamorgan, CF10 3NQ	0300 060 3300	3	790
6	Dong Energy Power (UK) Limited	City Point 33rd Floor, 1 Ropemaker Street, City, London, EC2Y	020 7811 5200	4	641
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	526
10	Horizon Nuclear Power	5210 Valiant Court, Gloucester Business Park, Gloucester, Gloucestershire, GL3 4FE	0845 300 6816	1	450

TOP TEN Key Architects
Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	John Dickie Associates	Manor Barn, Wilsthorpe, Stamford, Lincolnshire, PE9 4PE	01778 560811	1	600
2	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	14	599
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)	13	102
9	Fletcher Rae UK Limited	Hill Quays, 5 Jordan Street, Manchester, Greater Manchester, M15 4PY	0161 242 1140	1	100
10	Foster & Partners	Riverside, 22 Hester Road, Battersea, London, SW11 4AN	020 7738 0455	1	100

TOP TEN Key Contractors
Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	27	1,721
2	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	8	1,096
3	Costain Group Plc	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	14	857
4	Bachy Soletanche Limited	Henderson House, Langley Place, Higgins Lane, Burscough, Ormskirk, Lancashire, L40 8JS	01704 895686 (CTPS)	1	800
5	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, London, E14 5HU	020 7216 6800	64	796
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.

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

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

COMMERCIAL & RETAIL

DECREASE IN CONTRACT VALUES IN JANUARY

Contract values in the commercial & retail sector were lower in January compared to December but well above the values in January 2015.

The value of contracts awarded in the commercial and retail sector was £980 million in January based on a three month rolling average (see Fig. 5.1). This is a 0.8% decrease from December but a 19.1% increase from the January 2015 figure. In the three months to January the value of contracts was 1.6% higher than the previous three months and 16.1% higher than the same period in 2015, indicating a slight decrease in activity over the longer term.

Projects by region

London was the main location for commercial construction activity in January 2016 accounting for 78.7% of contract value, a 60% increase from January 2015 (see Fig. 5.2 & 5.4). Two major office contracts awarded account for London's high share of total value. The 22 Bishopsgate scheme in the City valued at £500 million and the Marble Arch Tower redevelopment valued at £100 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 80% of the value of contracts awarded this month, which is 6% higher than January 2015 (see Fig. 5.3).

> In the three months to January the value of contracts was 1.6% higher than the previous three months

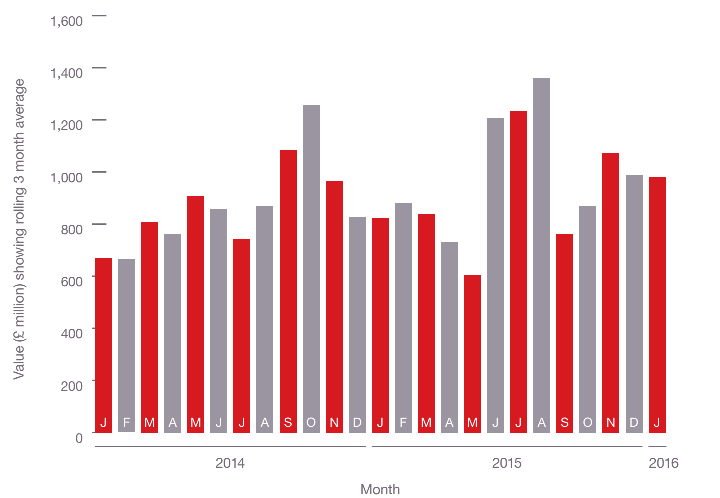


FIG. 5.1

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

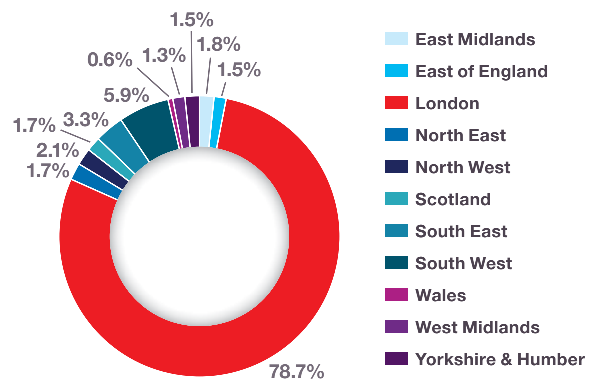


FIG. 5.2

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

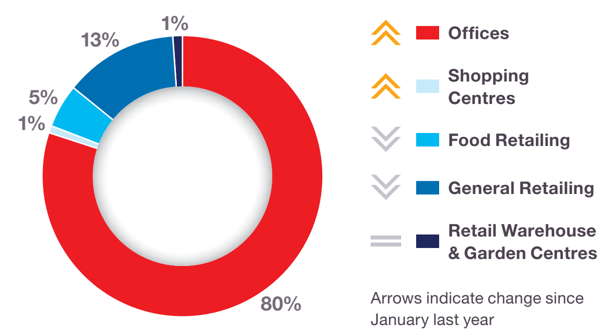


FIG. 5.3

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

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

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

DECREASE IN CONTRACT VALUES IN JANUARY

The map and figures show how the activity has changed since January 2015

-7.8%	East Midlands	-19.7%	Scotland
-5.4%	East of England	-22.8%	South East
+60.0%	London *HOTTEST REGION*	+2.9%	South West
+0.4%	North East	-0.8%	Wales
-0.5%	North West	-6.4%	West Midlands
		+0.1%	Yorkshire & Humber

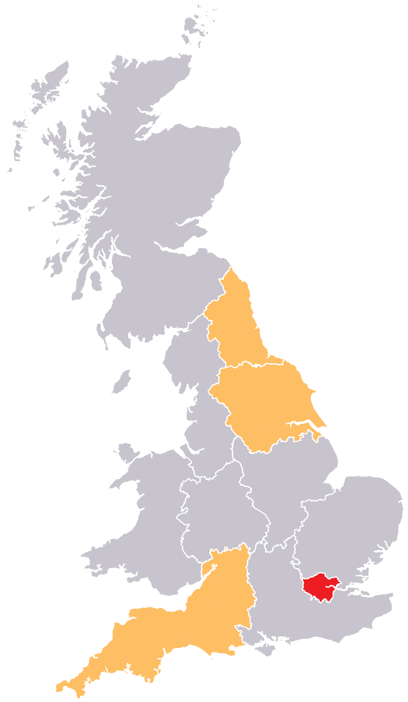


FIG. 5.4

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

PROJECT IN FOCUS

22-24 Bishopsgate – Office/Retail/ Restaurant £500,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	January 2016
End Date	January 2019
Contract Award Date	January 2016
Funding	Staff
Stage	Subcontract
Contractor	Brookfield Multiplex Construction Europe Limited

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

TOP TEN Key Clients

Feb 2015 – Jan 2016

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	Lipton Rogers Developments Llp	33 Cavendish Square, City, London, W1G 0PW	0207 3757 0575	1	500
3	The Crown Estate	16 New Burlington Place, Westminster, London, W1S 2HX	020 7851 5000 (CTPS)	3	449
4	British Waterways	Brindley Suite, Willow Grange, Church Road, Watford, Hertfordshire, WD17 4QA	01923 226422	1	388
5	Goldman Sachs International Limited	Peterborough Court, 133 Fleet Street, City, London, EC4A 2BB	020 7774 1000	1	350
6	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	216
7	West London & Suburban Property Investments Limited	25 Savile Row, City, London, W1S 2ER	Not Listed	1	125
8	Chelsfield Partners LLP	67 Brook Street, Westminster, London, W1K 4NJ	020 7290 2388 (CTPS)	1	115
9	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	2	107
10	Performance Retail Limited Partnership	One Coleman Street, City, London, EC2R 5AA	Not Listed	3	105

TOP TEN Key Architects

Feb 2015 – Jan 2016

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	10	549
4	PLP Architecture	Ibex House, 42-47 Minories, City, London, EC3N 1DY	020 3006 3900	3	513
5	Dixon Jones Limited	2-3 Hanover Yard, Noel Yard, Islington, London, N1 8YA	020 7483 8888	2	509
6	Glenn Howells Architects	321 Bradford Street, Digbeth, Birmingham, West Midlands, B5 6ET	0121 666 7640 (CTPS)	3	484
7	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	1	440
8	Panter Hudspith Architects	11th Floor, Hannibal House, Elephant & Castle, Southwark, London, SE1 6TE	020 7701 0575	1	440
9	Pelli Clark Pelli Architects	1056 Chapel Street, New Haven, Connecticut, CT06510	00 1203 777 2515	1	388
10	TP Bennett LLP	One America Street, Southwark, London, SE1 0NE	020 7208 2000	13	259

TOP TEN Key Contractors

Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Brookfield Multiplex Construction Europe Limited	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	8	1,129
2	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	3	913
3	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	3	540
4	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	18	314
5	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	27	283
6	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	37	276
7	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	13	238
8	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	216
9	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	8	211
10	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	13	185

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

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

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

HOTEL, LEISURE & SPORT

INCREASE IN CONTRACT VALUES IN JANUARY

Hotel contracts awarded in January contributed to continued improvement in the sectors performance.

Contract award levels in the hotel, leisure & sport sector were £518 million in January, based on a three month rolling average (see Fig. 6.1). This was 18.7% higher than December and 39.3% higher than January 2015. In the three months to January the value of contracts was £1.4 billion, which was 89% higher than the previous three months. This was a decrease of 5.4% compared to the same period in 2015 however indicating longer term decline over the past year.

Projects by region

The West Midlands had the highest share of the hotel, leisure & sport sector contracts accounting for 19.1% of value awarded, a 10.7% increase from January 2015 (see Fig. 6.2 & 6.4). The contract to develop the Unite the Union hotel and conference centre in Birmingham valued at £35 million is the largest contract let in the region accounting for its strong performance in January. Another contract to redevelop Bell Court in Stratford upon Avon with a variety of leisure uses valued at £30 million also contributes to the West Midlands percentage share in January.

> Hotels/motels accounted for 43% of the value awarded

Type of Projects

The hotels/motels category had the highest proportion of project type by value in January accounting for 43% of the value awarded, although this was a 5% decline from the corresponding month in January 2015 (see Fig. 6.3).

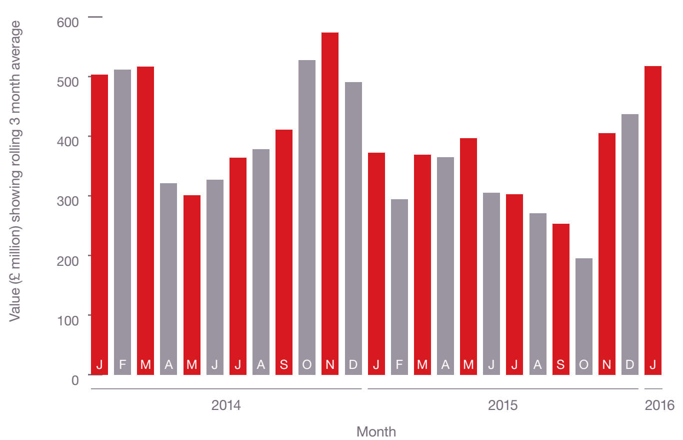


FIG. 6.1

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

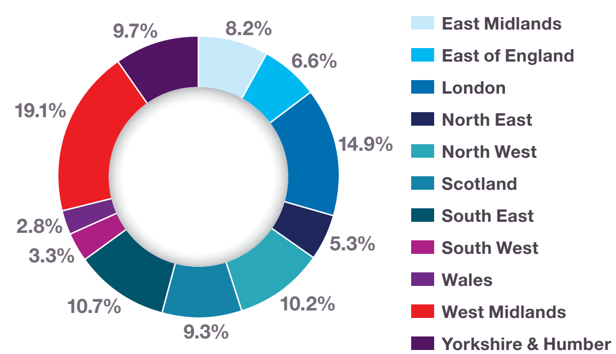


FIG. 6.2

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

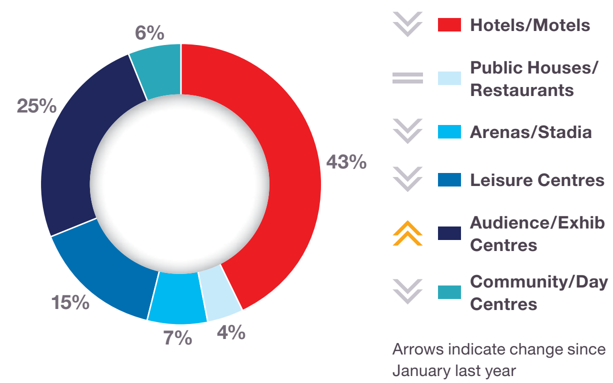


FIG. 6.3

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

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

INCREASE IN CONTRACT VALUES IN JANUARY

The map and figures show how the activity has changed since January 2015

Down	-3.3%	Scotland	Up	+4.6%	East Midlands
Up	+6.9%	South East	Down	-1.6%	East of England
Up	+0.3%	South West	Down	-15.8%	London
Up	+1.3%	Wales	Up	+5.2%	North East
Up	+10.7%	West Midlands *HOTTEST REGION*	Down	-1.6%	North West
Down	-6.8%	Yorkshire & Humber			

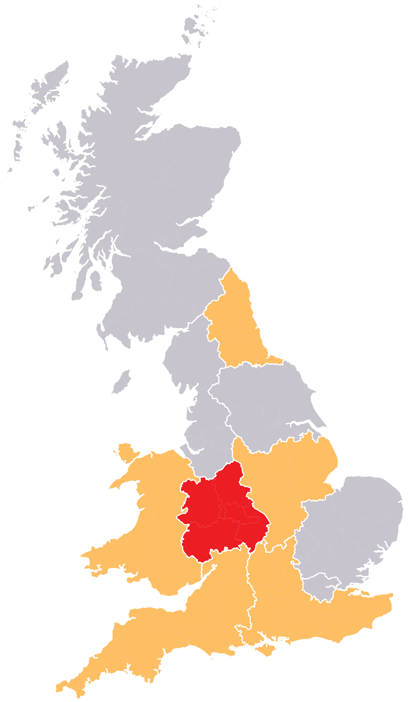


FIG. 6.4

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

> The West Midlands had the highest share of the hotel, leisure & sport sector contracts

PROJECT IN FOCUS

Unite The Union – Hotel, Offices & Conference Centre
£35,000,000

County	Birmingham
Primary Category Sector	Hotel, Leisure & Sport
Government Region	West Midlands
Start Date	January 2016
End Date	July 2017
Contract Award Date	January 2016
Funding	Private
Stage	Contract
Contractor	Flanagans Group

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

INCREASE IN CONTRACT VALUES IN JANUARY

TOP TEN Key Clients

Feb 2015 – Jan 2016

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	47	128
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	24	41

TOP TEN Key Architects

Feb 2015 – Jan 2016

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	Dexter Moren Associates	57d Jamestown Road, Camden Town, London, NW1 7DB	020 7267 4440	4	111
5	Urban Innovations	Wellington Buildings, 2 Wellington Street, Belfast, Northern Ireland, BT1 6HT	028 9043 5060	1	100
6	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269 (TPS)	29	100
7	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	10	92
8	Nicholas Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	1	70
9	Allford Hall Monaghan Morris	4 & 5th Floors, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	3	56
10	Skidmore Owings & Merrill	The Broadgate Tower, 20 Primrose Street, City, London, EC2A 2EW	020 7798 1000 (TPS)	1	50

TOP TEN Key Contractors

Feb 2015 – Jan 2016

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)	4	151
3	Brookfield Multiplex Construction Europe Limited	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	1	140
4	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	5	87
5	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	7	77
6	HOC UK Limited	Jubilee House, Townsend Lane, City, London, NW9 8TZ	020 8200 5873	3	74
7	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	8	68
8	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	9	67
9	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	10	65
10	RG Carter Limited	9-11 Drayton High Road, Drayton, Norwich, Norfolk, NR8 6AH	01603 867355	12	55

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

INDUSTRIAL

ACTIVITY INCREASES IN THE SECTOR THIS MONTH

The industrial sector experienced an increase in contract value awarded in January and the value of work is still higher than the same time in 2015.

Activity in the industrial sector increased in January with the value of contracts awarded £535 million, based on a three month rolling average (see Fig. 7.1). This equates to a 10.8% increase on the value in December and is 7% above the figure recorded this time last year. In the three months to January the total value of contracts was £1.5 billion which 18.6% lower than the previous three months but 24.5% 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 North West is the region with the highest proportion of contracts with 59.5% of the value of contracts awarded, which was a 15.1% increase on January 2015 (see Fig. 7.2 & 7.4). The development of a pharmaceutical campus for GSK in Ulverston in Cumbria which is valued at £350 million is the major project awarded in January for the industrial sector. Projects of this scale are rare in this sector but demonstrates the potential within pharmaceuticals that exist in the UK.

Type of Projects

The types of project awarded in the sector were predominantly laboratories due which was largely down to the GSK project in Cumbria. This type of project accounted for 56% of contract values, an increase of 40% from January 2015. Light industrial projects had the second highest proportion of contracts by value in January accounting for 19% of contract value, an increase of 10% from the same month in the previous year (see Fig. 7.3).

> “The North West is the region with the highest proportion of contracts

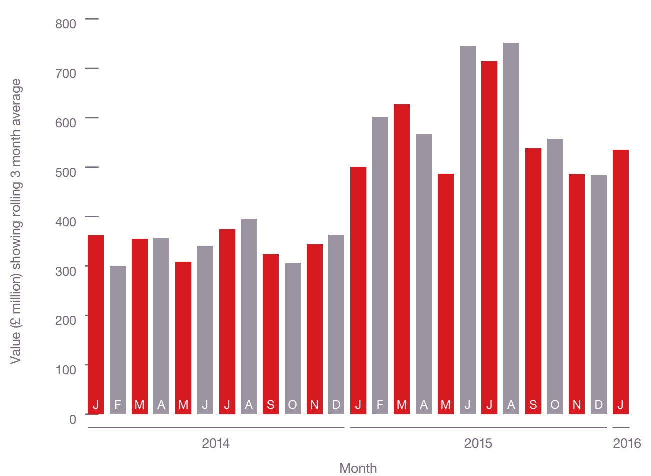


FIG. 7.1

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

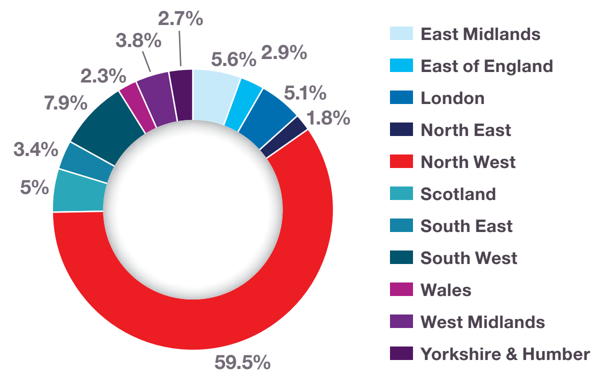


FIG. 7.2

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

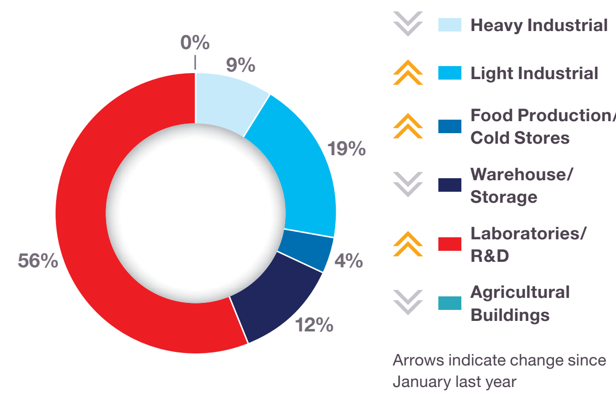


FIG. 7.3

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

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

ACTIVITY INCREASES IN THE SECTOR THIS MONTH

The map and figures show how the activity has changed since January 2015			+3.8%	Scotland	
-0.3%	East Midlands		-8.4%	South East	
-14.6%	East of England		+4.9%	South West	
+3.2%	London		+1.0%	Wales	
-4.5%	North East		+1.4%	West Midlands	
+15.1%	North West *HOTTEST REGION*		-1.7%	Yorkshire & Humber	

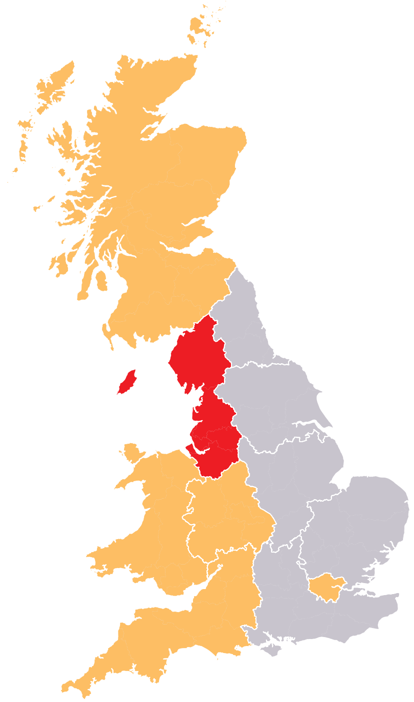


FIG. 7.4
Industrial: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

PROJECT IN FOCUS

Gsk Ulverston, North Lonsdale Road – Pharmaceutical Manufacturing Facility £350,000,000

County	Cumbria
Primary Category Sector	Industrial
Government Region	North West
Start Date	January 2016
End Date	TBC
Contract Award Date	January 2016
Funding	Private
Stage	Contract
Contractor	Esh Border Construction Group

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

ACTIVITY INCREASES IN THE SECTOR THIS MONTH

TOP TEN Key Clients
Feb 2015 – Jan 2016

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	The London Taxi Company	Holyhead Road, Coventry, West Midlands, CV5 8JJ	024 7657 2000	1	150
7	Goodman International	Nelson House, Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG	0121 506 8100	5	145
8	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	5	131
9	West Berkshire Council	Council Offices, Market Street, Newbury, Berkshire, RG14 5LD	01635 424000	1	125
10	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	6	124

TOP TEN Key Architects
Feb 2015 – Jan 2016

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	24	405
2	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	11	304
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	Faulks Perry Culley & Rech	Lockington Hall, Lockington, Derby, Derbyshire, DE74 2RH	01509 672772	1	120
9	Fairhursts Design Group	55 King Street, Manchester, Greater Manchester, M2 4LQ	0161 831 7300 (CTPS)	6	113
10	AMEC Group PLC	76-78 Old Street, City, London, EC1V 9AZ	020 3215 1700	1	100

TOP TEN Key Contractors
Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	24	768
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	7	204
5	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	2	150
6	VolkerWessels UK Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	5	129
7	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	8	128
8	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	7	116
9	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	8	105
10	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	2	95

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

MEDICAL & HEALTH
INCREASE IN VALUE OF CONTRACTS IN JANUARY

The monthly and yearly growth in the value of medical & health contracts continued in January.

Levels of activity in the medical & health sector increased by 12.8% in January 2016 compared to December, with the total value of contracts awarded £319 million based on a three month rolling average (see Fig. 8.1). This is 60.9% higher than the January 2015 figure. In the three months to January the values of contracts increased by 82.5% on the previous three months, and were 23.9% higher than the same period in 2015 indicating a longer term increase in the value of contracts awarded in the sector.

Projects by region

The South East was the main location of development in the sector this month with 61.2% of activity, an increase of 57.3% from January 2015 (see Fig. 8.2 & 8.4). The contract to develop a Critical Treatment Hospital in Basingstoke, Hampshire is the largest single project awarded in the region in January. At a value of £150 million it is the largest healthcare project by some distance awarded in the month.

Type of Projects

This contract also means that public hospitals dominated the sector this month, accounting for 88% of overall contracts awarded, a 27% increase from January 2015 (see Fig. 8.3).

> “In the three months to January the values of contracts increased by 82.5% on the previous three months

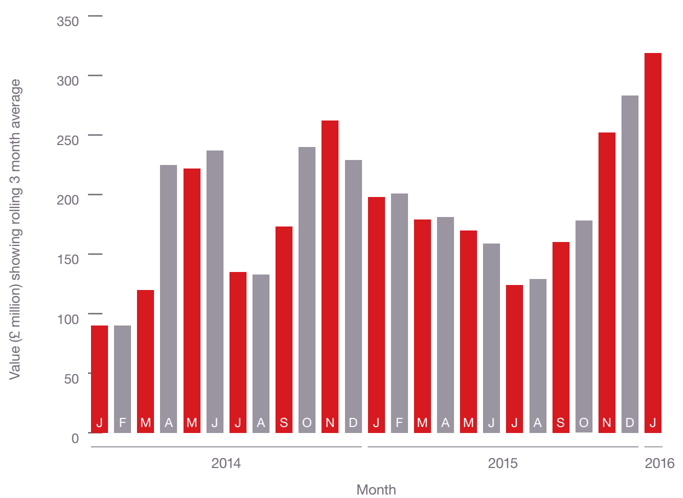


FIG. 8.1

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

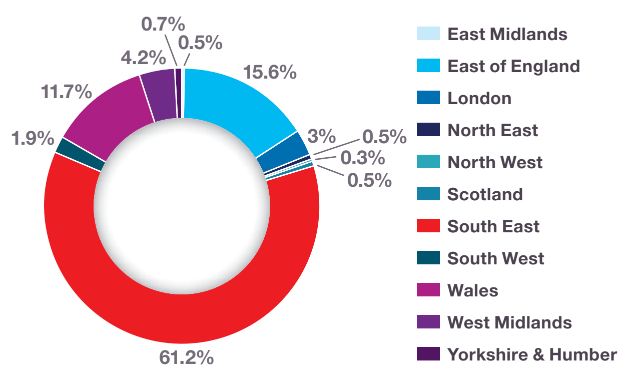
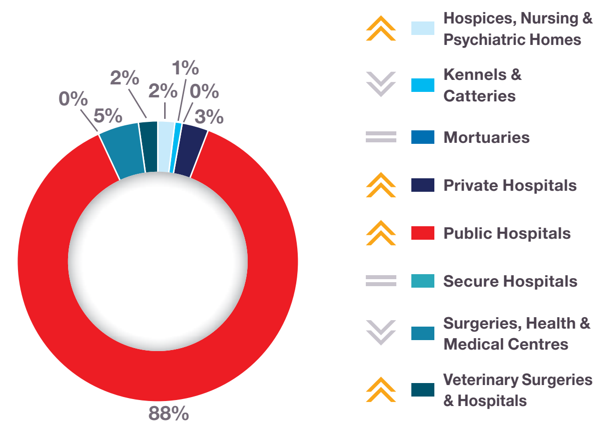


FIG. 8.2

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



Arrows indicate change since January last year

FIG. 8.3

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

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

INCREASE IN VALUE OF CONTRACTS IN JANUARY

The map and figures show how the activity has changed since January 2015			-16.1%	Scotland
-8.8%	East Midlands		+3.6%	South East *HOTTEST REGION*
+7.9%	East of England		+0.2%	South West
-8.8%	London		+0.4%	Wales
-2.9%	North East		-14.5%	West Midlands
-6.1%	North West		-1.1%	Yorkshire & Humber

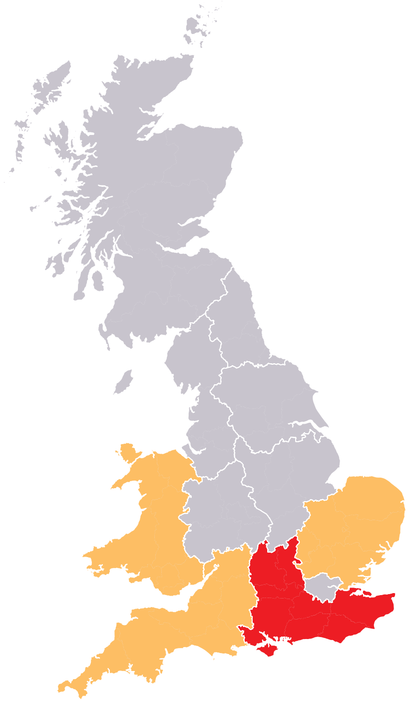


FIG. 8.4

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

Source: Barbour ABI

> Public hospitals dominated the sector this month, accounting for 88% of overall contracts awarded

PROJECT IN FOCUS

Hampshire Hospitals – Critical Treatment Hospital £150,000,000

County	Hampshire
Primary Category Sector	Medical & Health
Government Region	South East
Start Date	July 2016
End Date	July 2018
Contract Award Date	January 2016
Funding	Mainly Private
Stage	Contract
Contractor	Kier Building Services Engineers Limited

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

INCREASE IN VALUE OF CONTRACTS IN JANUARY

TOP TEN Key Clients
Feb 2015 – Jan 2016

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	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	Hampshire Hospitals NHS Foundation Trust	Aldermaston Road, Basingstoke, Hampshire, RG24 9NA	01256 473202	2	151
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	The Trustees of the London Clinic	20 Devonshire Place, Westminster, London, W1G 6BW	020 7935 4444	1	55

TOP TEN Key Architects
Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Billfinger GVA	65 Gresham Street, Westminster, London, EC2V 7NQ	020 7491 2188 (TPS)	2	283
2	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	5	223
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	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	4	159
6	Hassell	James William House, 9 Museum Place, Cardiff, South Glamorgan, CF10 3BD	029 2072 9071	2	151
7	Scott Tallon Walker Architects	10 Cromwell Place, South Kensington, London, SW7 2JN	020 7589 4949 (TPS)	2	138
8	Ellis Williams Architects	151 Roseberry Avenue, 3-11 Pine Street, City, London, EC1R 0JH	020 7841 7200	1	136
9	Murphy Philipps Architects Limited	140 Old Street, City, London, EC1V 9BJ	020 7490 8008	6	98
10	Halliday Meecham Partnership	111 Piccadilly, Manchester, Greater Manchester, M1 2HY	0161 661 5566	2	81

TOP TEN Key Contractors
Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	16	309
2	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	18	298
3	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	2	290
4	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	5	176
5	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	1	136
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	8	110
7	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	9	92
8	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	3	53
9	Redwall Developments Limited	Suite 2, 10 Redwall House, Waterside Business Park, Rotherham Road, Dinningham, Rotherham, South Yorkshire, S25 3QA	01909 517737	1	50
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	4	38

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

economic & construction MARKET REVIEW
FEBRUARY 2016

EDUCATION

DECREASE IN THE VALUE OF CONTRACTS IN JANUARY

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

The value of contracts awarded in the education sector was £446 million in January based on a three month rolling average, a 13.9% decrease from December (see Fig. 9.1). This figure is 35.8% lower than January 2015 indicating a decrease in activity compared to the same time last year. The values of contract awards in the three months to January were 26.6% lower than the previous three months, 22.4% below the figure in the corresponding period in 2015.

Projects by region

Scotland accounted for the largest proportion of works awarded in January, with 32.4% of the overall total, a 21.8% increase from January 2015 (see Fig. 9.2 & 9.4). A contract to construct the Largs Education Campus valued at £52 million was the largest awarded in January. The development is set to contain a nursery, primary and secondary school and was awarded to Morrison construction.

Another major contract awarded in Scotland was the University of Edinburgh Data Technology Institute Building valued at £30 million awarded to McLaughlin & Harvey.

Type of Projects

Colleges/universities were the sub sector with the largest proportion of contracts in January 2016 accounting for 41% of total value awarded. State secondary followed, contributing 33% of the overall value of contracts awarded (see Fig. 9.3).

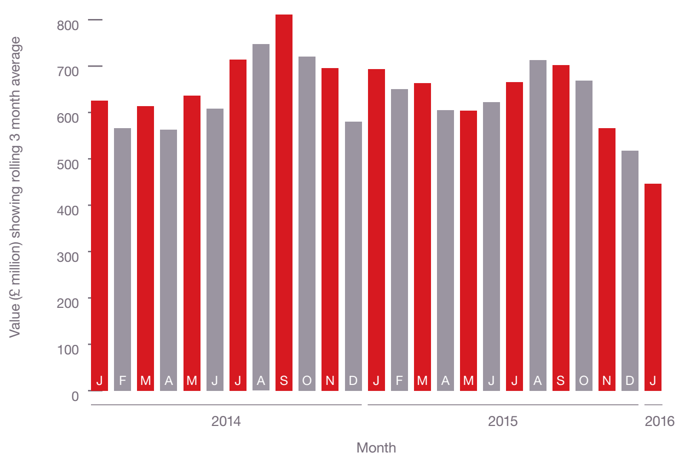


FIG. 9.1

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

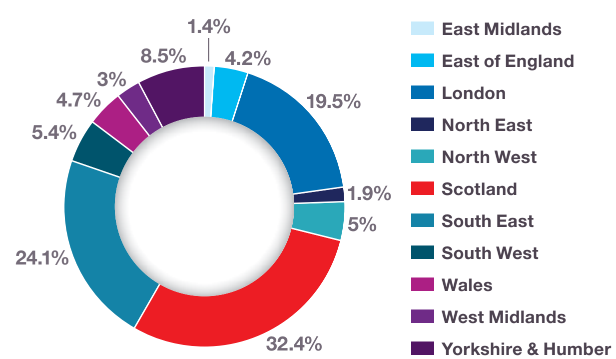


FIG. 9.2

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

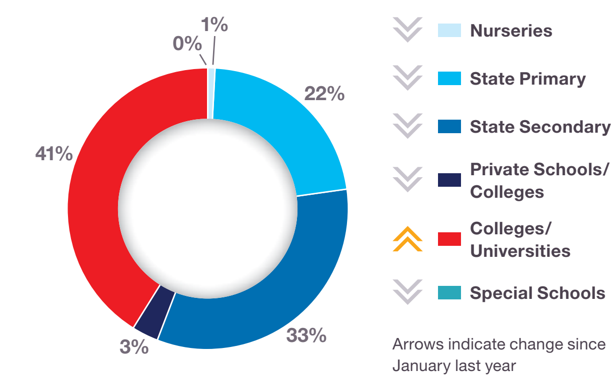


FIG. 9.3

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

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

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

DECREASE IN THE VALUE OF CONTRACTS IN JANUARY

The map and figures show how the activity has changed since January 2015				
			+21.8%	Scotland *HOTTEST REGION*
-4.8%	East Midlands		+18.2%	South East
-3.5%	East of England		-0.9%	South West
-9.5%	London		-2.1%	Wales
-0.4%	North East		-18.6%	West Midlands
-2.1%	North West		+1.9%	Yorkshire & Humber

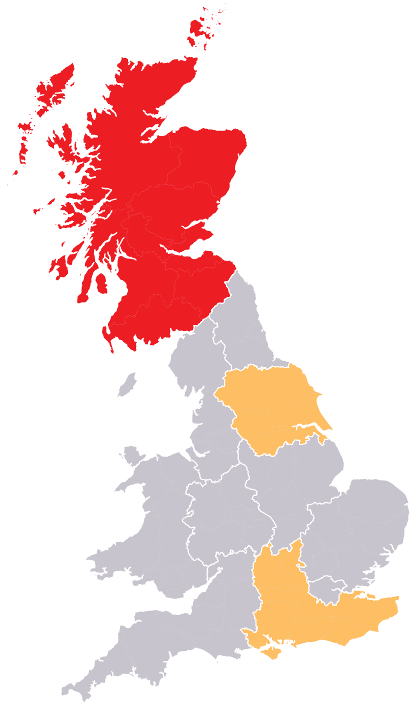


FIG. 9.4

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

Source: Barbour ABI

> The values of contract awards in the three months to January were 26.6% lower than the previous three months

PROJECT IN FOCUS

University Of Edinburgh – Data Technology Institute (DTI Building) Phase 3 £30,000,000

County	Lothian
Primary Category Sector	Education
Government Region	Scotland
Start Date	February 2016
End Date	February 2018
Contract Award Date	January 2016
Funding	External
Stage	Contract
Contractor	McLaughlin & Harvey

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

DECREASE IN THE VALUE OF CONTRACTS IN JANUARY

TOP TEN Key Clients

Feb 2015 – Jan 2016

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	91	967
2	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	9	274
3	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	12	142
4	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	6	128
5	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	7	100
6	North Ayrshire Council	5th Floor, Cunninghame House, Irvine, Strathclyde, KA12 8EE	01294 310 000	2	88
7	Dumfries & Galloway Council	Militia House, English Street, Dumfries, Dumfries and Galloway, DG1 2HR	0303 333 3000	7	86
8	University of Leeds	Woodhouse Lane, Leeds, West Yorkshire, LS2 9JT	0113 243 1751	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

Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	28	292
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	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	16	186
5	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	28	180
6	The Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	28	171
7	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	18	166
8	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	14	160
9	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 652 1666	6	141
10	Pick Everard (Leicester)	Halford House, Charles Street, Leicester, Leicestershire, LE1 1HA	0116 223 4400 (TPS)	20	132

TOP TEN Key Contractors

Feb 2015 – Jan 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	90	637
2	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	48	415
3	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	43	404
4	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	37	375
5	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	53	350
6	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	65	323
7	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, London, E14 5HU	020 7216 6800	10	290
8	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	8	268
9	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	14	203
10	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	26	196

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

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

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

CRASH CHARITY

Creating Places that Care for People

Can you help us to build on the great success we've achieved together?

As the construction industry's charity, our focus is on helping homeless and hospice charities with their buildings. We do this by channelling the professional expertise, building materials and financial donations from the industry to help vulnerable men, women and children who are homeless or have life limiting illnesses.

However, we can only continue with this work with the support of companies and individuals within the construction industry.

If you would like to get involved, please contact us today.

Call Francesca Roberts CRASH Chief Executive on 0208 742 0717

www.crash.org.uk

20 YEARS OF CRASH 1996 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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

Barbour ABI

CONNECTING YOU…

to the right companies, people & projects

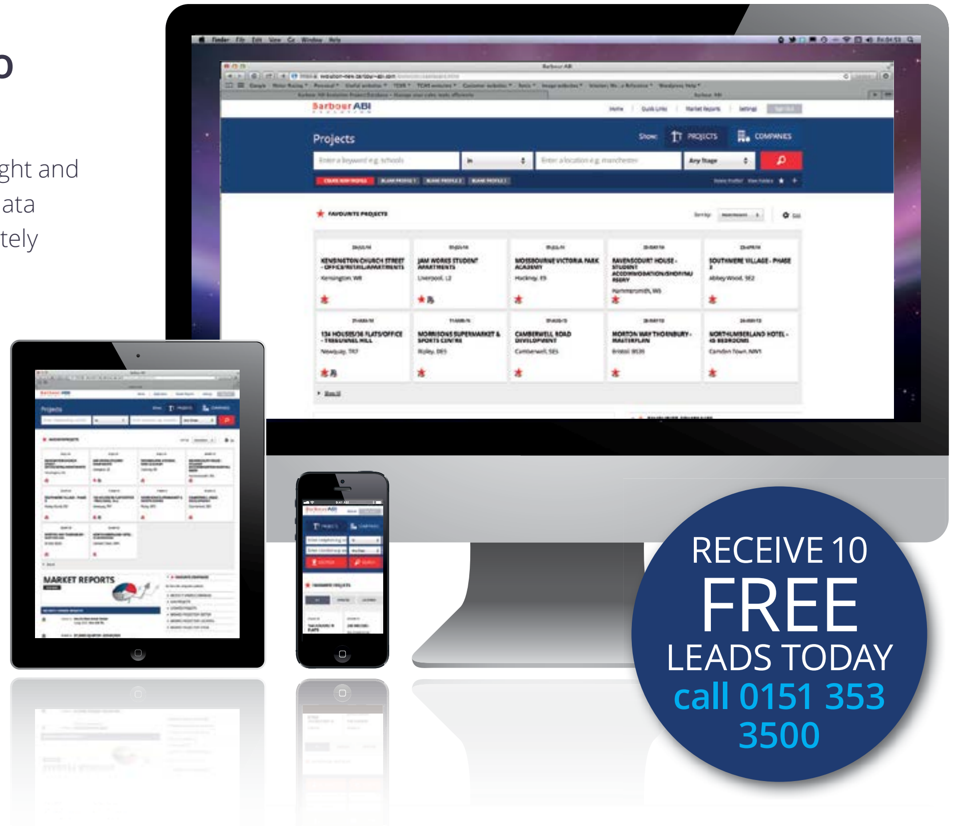
See how our construction intelligence can help you to grow your business

Barbour ABI is a leading provider of market insight and construction intelligence – our clients use our data to build new business opportunities and ultimately maximise profits.

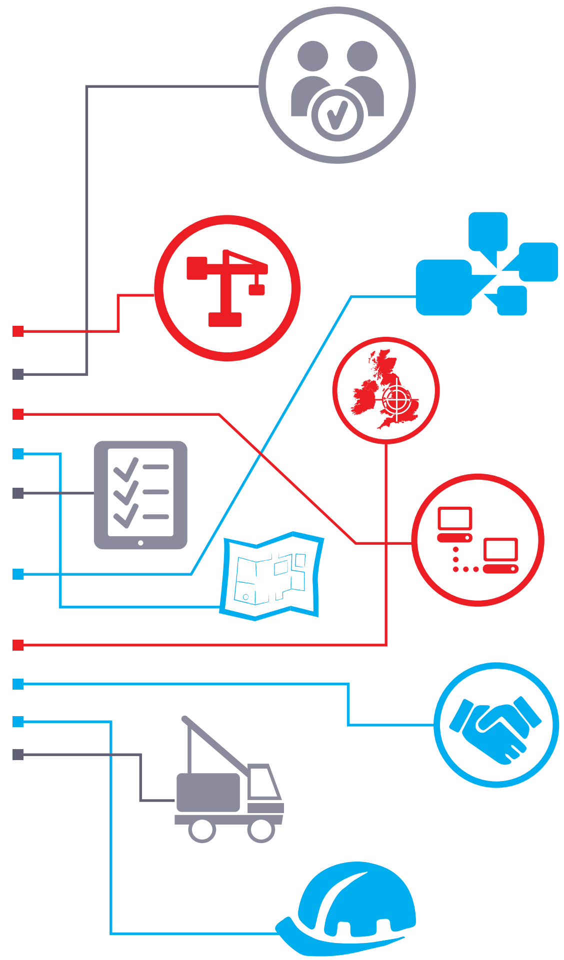
Our extensive database can be tailored according to your individual business requirements. Our newly improved intuitive online system Evolution not only delivers your sales leads and contact data, but also allows CRM interaction and analysis of industry activity.

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



RECEIVE 10 FREE LEADS TODAY call 0151 353 3500



Barbour ABI
EVOLUTION

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

UBM

economic & construction MARKET REVIEW

FEBRUARY 2016

To navigate just click on the tabs, buttons or page numbers and they will take you directly to your chosen section.

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