economic & construction MARKET REVIEW

Barbour ABI | Building | bd

SEPTEMBER 2016

Economic Context

Major announcements and developments in the UK economy this month.

SKIP TO THIS SECTION

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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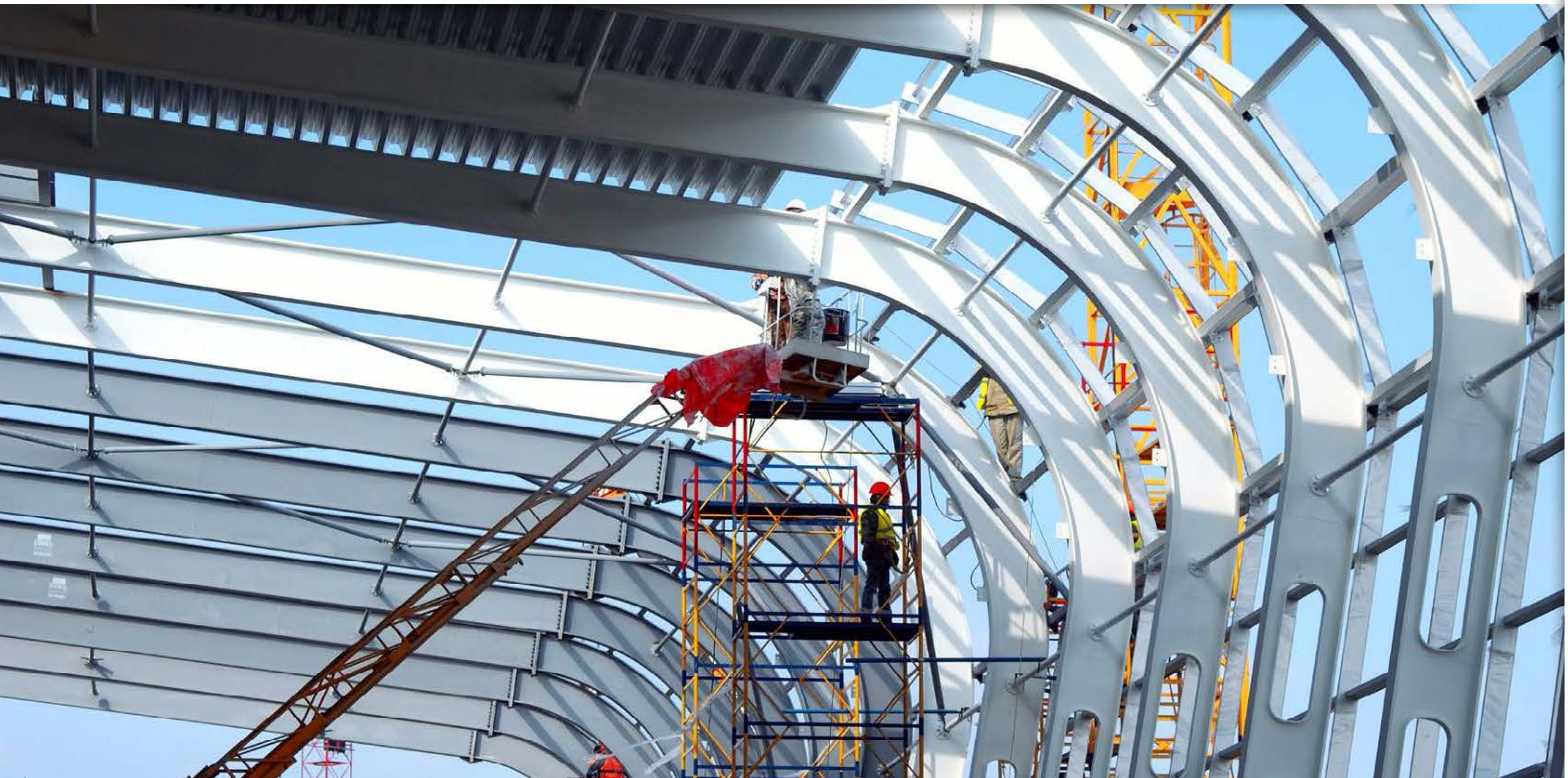

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ABOUT US
SPECIALIST PROVIDER OF CONSTRUCTION INTELLIGENCE

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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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.

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

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Barbour ABI is 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.

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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

cpa construction products association

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ECONOMIC CONTEXT

ECONOMY BOUNCES BACK IN AUGUST AFTER JULY SLUMP

The fallout from the Brexit vote continued with the latest all sector Purchasing Managers Index from Markit increasing to 53.2 in August, up from 47.4 in July.

This was the largest ever monthly increase in the measure and followed the largest ever fall in July immediately after the Brexit vote (see Fig. 1.1). It adds to the impression that after an initial Brexit "shock" the UK economy in July, the economy recovered in August. It is still too early to draw any firm conclusions from the available data but the ultimate impact of the vote is likely to be evident in the longer term.

The labour market is still proving to be particularly robust with the level of unemployment remaining at 4.9% in the three months to August (see Fig. 1.2). This is the third month in a row that this has been the rate demonstrating that the job market has been the key success of the economy in recent times.

The fall in the value of the pound was also expected to herald in a period of higher inflation but that appears as yet unsupported by official statistics. The latest inflation figures shows that the Consumer Price Index remained at 0.6% in August, no change from the previous month (see Fig. 1.3). The fall in prices for hotel accommodation as well as smaller rises in alcohol and clothing prices compared to a year ago.

> "The job market has been the key success of the economy in recent times

Other news this month on the UK economy includes:

- **A survey by the Association of Graduate Recruiters showed that the number of graduate vacancies offered by top companies fell by 8% compared to 2015**
- **The Bank of England governor Mark Carney refused to rule out the possibility of further cuts to the base rate of interest**
- **According to a survey by Auto Trader one in ten consumers plan to delay or downgrade a car purchase in the wake of the Brexit vote.**

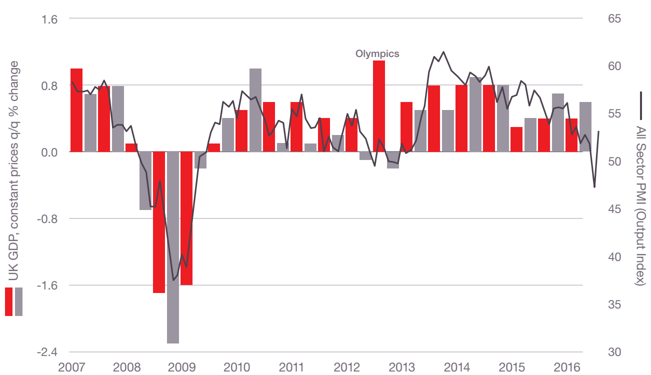

Fig. 1.1 **UK GDP & PMI** Source: IHS/ONS/Markit/CIPS

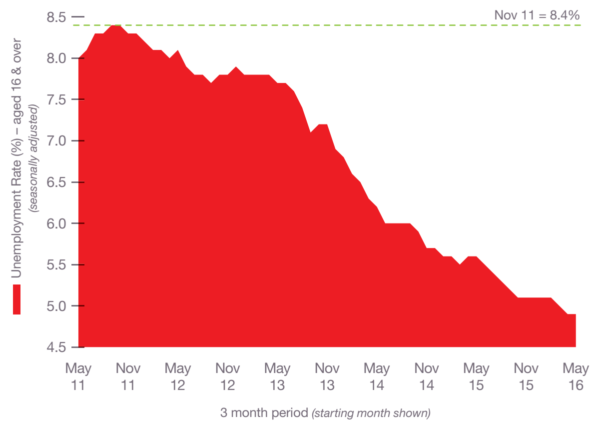

Fig. 1.2 **Unemployment Rate** Source: ONS

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

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CONSTRUCTION CONTRACT ACTIVITY FALLS IN AUGUST

The latest figures from the ONS indicate the construction sector in the UK showed no change between June and July 2016.

Comparing July output levels with the same period in 2015 showed a decrease of 1.5%.

There were monthly increases in infrastructure output but this was offset by declines in private housing and private commercial. Infrastructure output increased by 3.9% on June 2016 but private housing declined 0.6% and private commercial by 1.4%. Comparing the figures to the corresponding month last year showed that private housing output was 8.3% higher but infrastructure was 9.6% lower than July 2015 (see Fig. 2.1).

	% change	
	July 2015 – July 2016	June 2016 – July 2016
Total All Work	**-1.5**	**0.0**
All New Work	**-0.6**	**0.5**
Public Housing	-8.6	-1.6
Private Housing	8.3	-0.6
Infrastructure	-9.6	3.9
Public (ex Infrastructure)	2.4	3.9
Private Industrial	-16.9	-0.6
Private Commercial	1.8	-1.4
Repair & Maintenance	**-3.2**	**-1.1**
Public Housing	-9.6	-2.4
Private Housing	-0.9	-0.4
Non-Housing	-2.9	-1.2

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

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 139 for August (see Fig. 2.2). This is no change from the previous month and suggests that activity in the industry is flat. The readings for Private Housing improved slightly to a reading of 227, up from 226 the previous month. Commercial retail fell sharply from 189 to 115 but industrial factories jumped from 458 to 466 presenting a mixed picture at a sector level.

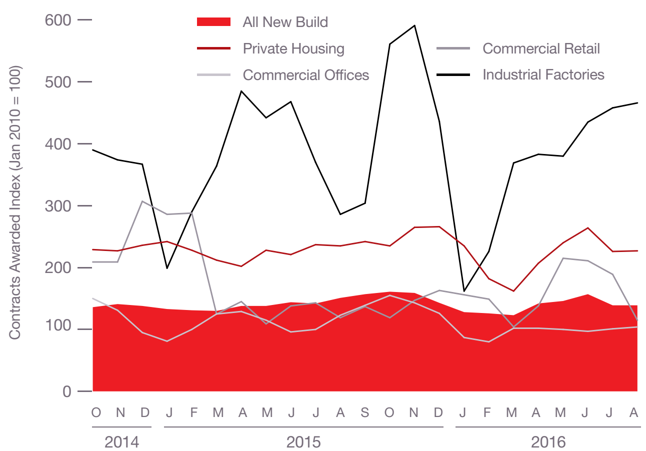

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

Construction Sector

According to Barbour ABI data on all contract activity, August witnessed a drop in construction levels with the value of new contracts awarded £5.5 billion, based on a three month rolling average (see Fig. 2.4). This is a 5.1% decrease from July and is 13.4% lower than the value recorded in August 2015. The number of construction projects within the UK in August decreased by 5.2% on July, and were 5.4% lower than August 2015.

Projects by Region

The majority of the contracts awarded in August by value were in the East of England, accounting for 19% of the UK total. This is followed by the North West and London with 17% and 16% of contract award value respectively (see Fig. 2.3). The main reason for the East of England's figures this month was the award to construct the Galloper offshore wind farm in Suffolk which has a £750 million construction value. The largest contract by value in the North West was the expansion of terminal 2 at Manchester Airport which is worth £450 million and was awarded to Laing O'Rourke. In London, a major residential project was awarded in August which accounts for the largest proportion of contract value in the month.

> "Terminal 2 at Manchester Airport which is worth £450 million and was awarded to Laing O'Rourke"

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The development at Greenwich Peninsula is set to deliver 464 apartments at a value of £150 million and was awarded to Mace.

Types of Project

Infrastructure had the highest proportion of contracts awarded by value in August with 33% of the total (see Fig. 2.5). The two aforementioned infrastructure contracts, the Galloper offshore wind farm and the expansion of terminal 2 at Manchester Airport are the main reasons for the strong showing for infrastructure in August.

> The Galloper offshore wind farm has a £750 million construction value

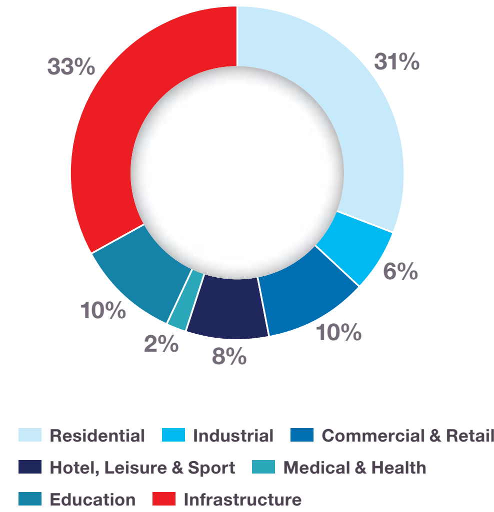

Fig. 2.5 **Type of Projects** Source: Barbour ABI

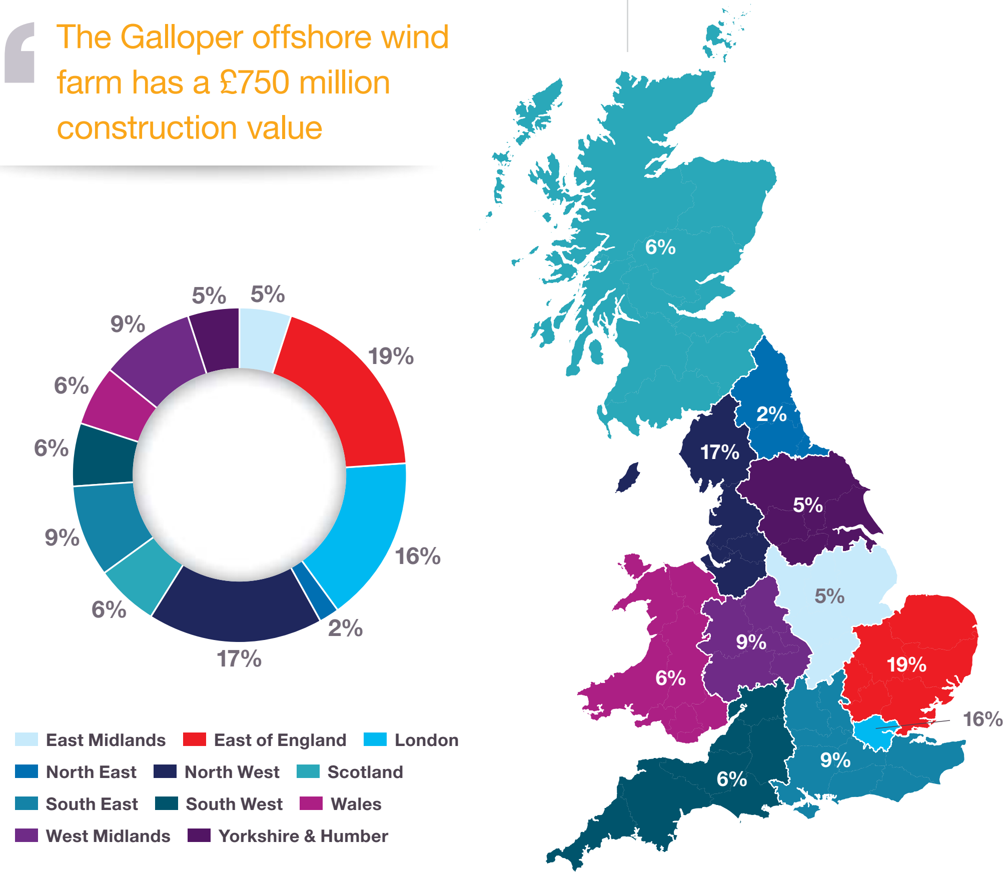

Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

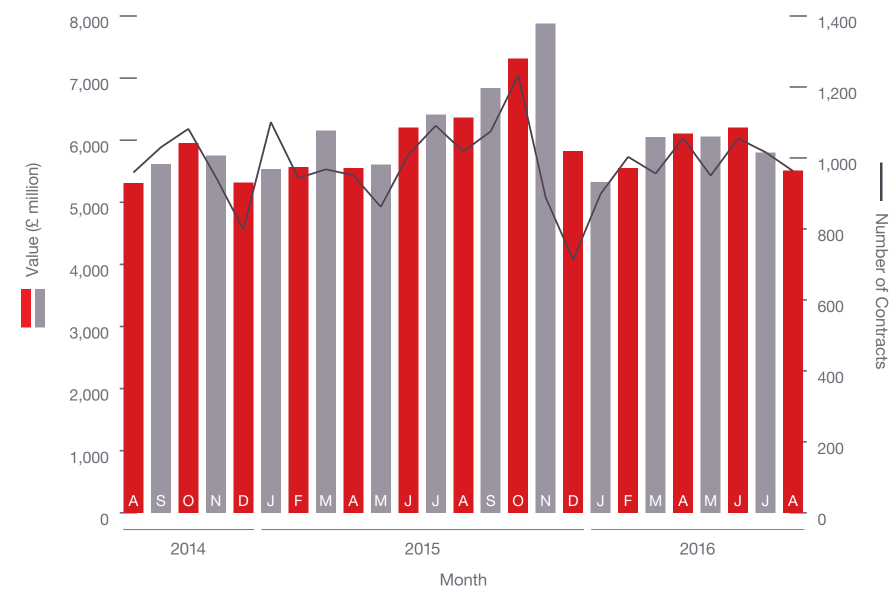

Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

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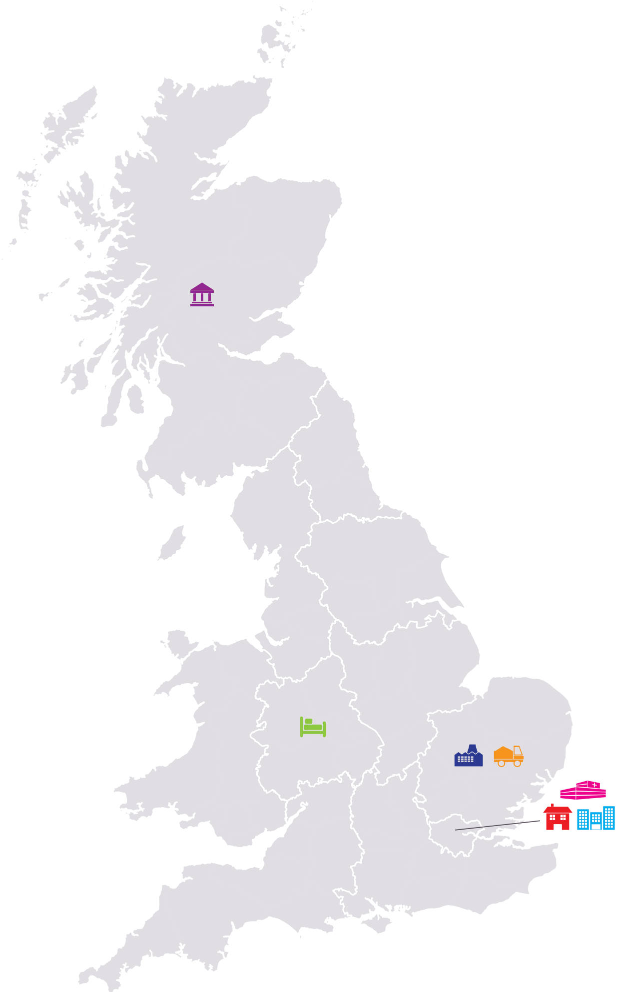
A snippet of this month's regional activity

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
The Greengate Embankment West – 2 Residential Blocks
£100,000,000

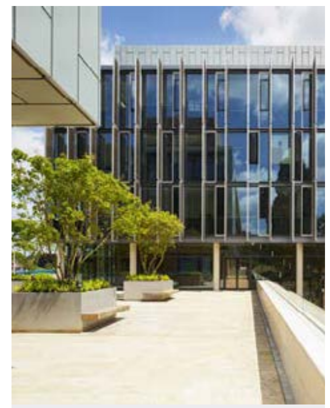
INFRASTRUCTURE
Galloper Offshore 336 MW Wind Farm
£750,000,000

COMMERCIAL & RETAIL
Former Beagle House – Commercial Development
£100,000,000

HOTEL, LEISURE & SPORT
Regal Tower – Broad Street
£125,000,000

INDUSTRIAL
Cambridge Biomedical Campus – The Abcam Building
£40,000,000

MEDICAL & HEALTH
Royal National Orthopaedic Hospital NHS Trust – Phase 2a
£30,000,000



EDUCATION
University of Southampton – Boldrewood Campus Blocks D&G
£20,000,000

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RESIDENTIAL
SLIGHT INCREASE IN RESIDENTIAL CONTRACT VALUE

The value of residential contracts awarded increased month-on-month compared to August 2015.

The performance of the residential sector was mixed in August with the total value of projects awarded valued at £1.7 billion based on a three month rolling average (see Fig. 3.1). This is a 3.9% increase compared to July and is 12.9% higher than August 2015. However, the number of units associated with residential contracts awarded decreased by 3.8% between July and August based on a three month rolling average, but are 7.4% higher than August 2015. The monthly increases in residential values suggest a recovery in the housing market after a subdued performance in July. However, subsequent month's data will be more revealing as to the extent of the Brexit effect.

Sector Performance

The latest house price indices for August from Nationwide showed that average house prices are rising at 5.6% annually, an increase from 5.2% in July. This is little change and it is expected that the relative strength of the labour market should continue to underpin these levels of increases. The Halifax reported annual house price rises at 6.9% in August, down from 8.4% in July. In signs that the residential market remains robust, Barratt Developments reported that reservations for new homes is up by 6% from last year.

Projects by region

London is the main location of activity in the residential sector this month, accounting for 31.3% of the value of contracts awarded, an increase of 20.2% from the same month last year. The West Midlands had the next highest proportion of contract award value in August with 19.3% of total value awarded, an increase of 12.2% from August 2015 (see Fig. 3.2 & 3.4). The Greenwich Peninsula development was the largest contract awarded in London during

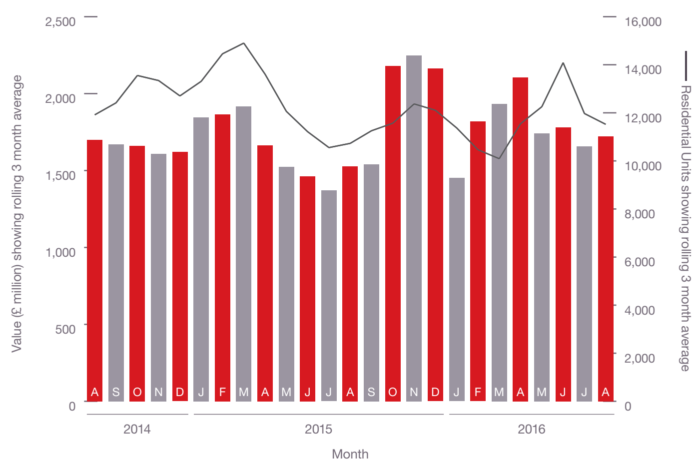

FIG. 3.1

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

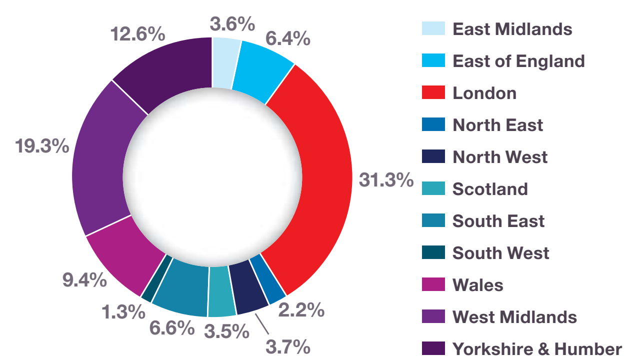

FIG. 3.2

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

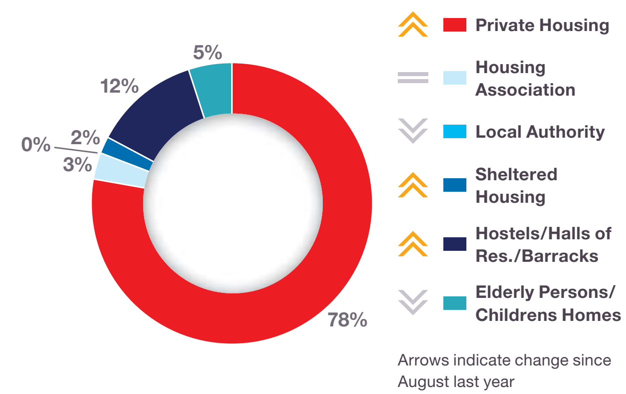

FIG. 3.3

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

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SHARP FALL IN RESIDENTIAL CONTRACT VALUE

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

		-2.0%	Scotland
-5.7%	East Midlands	-14.0%	South East
-8.2%	East of England	-7.7%	South West
+20.2%	London *HOTTEST REGION*	+8.6%	Wales
0.0%	North East	+12.2%	West Midlands
-9.5%	North West	+6.1%	Yorkshire & Humber

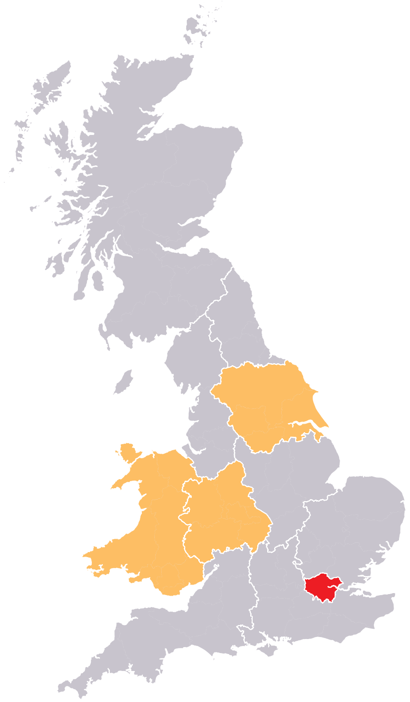

FIG. 3.4

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

August, with a value of £150 million. Other residential contracts awarded in London this month include the £65 million Theatre Square development in Hampstead and the Atlas student accommodation project in South Lambeth valued at circa £45 million.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing this month. Private housing accounted for 78% of the value of contracts awarded this month, a 2% increase from the corresponding month last year. After private housing, the next largest project type were hostels which accounted for 12% of the value awarded, a 2% increase from the corresponding month last year (see Fig. 3.3).

PROJECT IN FOCUS

The Greengate Embankment West – 2 Residential Blocks £100,000,000

County	Greater Manchester
Primary Category Sector	Residential
Government Region	North West
Start Date	July 2016
End Date	December 2019
Contract Award Date	August 2016
Funding	Private
Stage	Contract
Contractor	Carillion Plc

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SHARP FALL IN RESIDENTIAL CONTRACT VALUE

TOP TEN
Key Clients
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	164	2,081
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	146	1,822
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	120	1,397
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	110	1,349
5	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 876200 (CTPS)	55	708
6	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	56	579
7	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	41	512
8	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	29	484
9	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	51	469
10	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	26	333

TOP TEN
Key Architects
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	86	886
2	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555	5	477
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	35	452
4	Grid Architects Limited	128 Southwark Street, Westminster, London, SE1 0SW	020 7593 3260	4	425
5	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GJ	020 7880 6400	2	360
6	Simon Cooper Associates Limited	Connaught House, 22/24 Guildford Road, Bagshot, Surrey, GU19 5JN	01276 450866	25	332
7	Patel Taylor Architects	48 Rawstorne Street, City, London, EC1V 7ND	020 7278 2323	2	328
8	Woods Hardwick Limited	17 Goldington Road, Bedford, Bedfordshire, MK40 3NH	01234 268862	24	324
9	Rolfe Judd Group Practice	Old Church Court, Claylands Road, The Oval, South Lambeth, London, SW8 1NZ	020 7556 1500	6	321
10	Tetlow King Planning	Unit 2 Eclipse Office Park, Staple Hill, Bristol, North Somerset, BS16 5EL	0117 9561916 (CTPS)	23	310

TOP TEN
Key Contractors
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	168	2,123
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	151	1,909
3	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	120	1,481
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	122	1,386
5	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	69	824
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	73	786
7	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 876200 (CTPS)	56	718
8	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	56	608
9	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	33	583
10	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	42	517

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

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INFRASTRUCTURE
CONTRACT VALUES DECREASE IN AUGUST

Infrastructure contract values were down month-on-month and lower than the same month in 2015.

The value of contracts awarded in the infrastructure sector in August totalled £1.3 billion based on a three month rolling average (see Fig. 4.1). This is 16.1% lower than the previous month and 19.7% lower than August 2015. In the three months to August the total value of contract awards was £4.8 billion based on a three month rolling average. This is 19.3% lower than the previous three months and 10.2% lower than the same period in 2015.

Projects by region

The main location of infrastructure projects this month was the East of England with 18.5% of the value, and this was 12.8% higher than August 2015 (see Fig. 4.2 & 4.4). The main project awarded in the region was the Galloper offshore wind farm in Suffolk valued at £750 million. The North West was the next most active location accounting for 17.3% of contract value, an 11.7% increase since August 2015. The award of the Manchester Airport terminal upgrade works was the highest value contract awarded at £450 million.

Type of Projects

Utilities was the dominant sector within infrastructure, accounting for 52% of the contract value awarded. Transport was the second major sector accounting for 32% of the value of contracts (see Fig. 4.3).

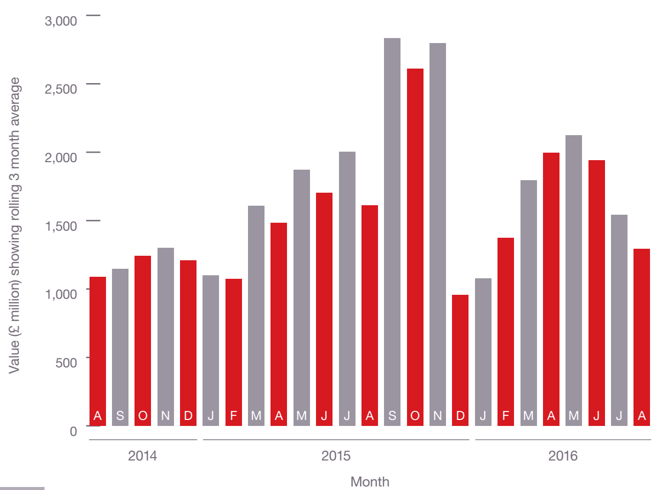

FIG. 4.1

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

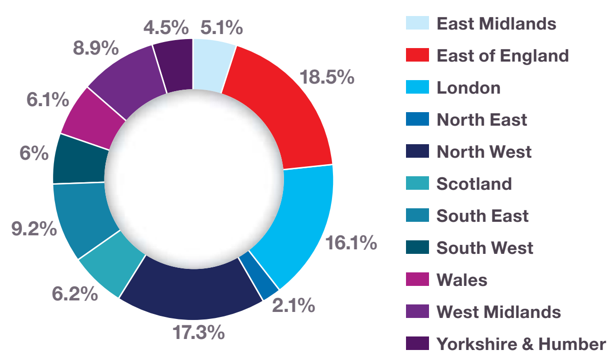

FIG. 4.2

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

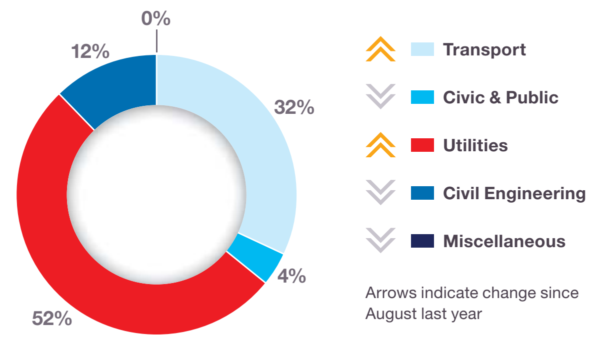

FIG. 4.3

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

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

-1.6%	East Midlands	-2.9%	Scotland
+12.8%	East of England *HOTTEST REGION*	+3.7%	South East
-33.7%	London	-2.7%	South West
+0.6%	North East	+4.4%	Wales
+11.7%	North West	+5.1%	West Midlands
		+2.5%	Yorkshire & Humber

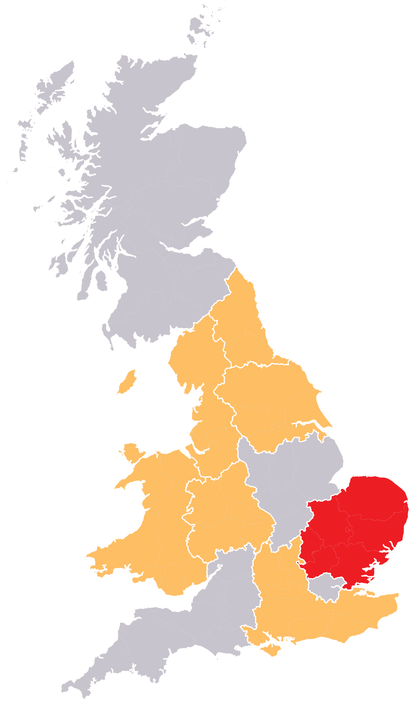

FIG. 4.4

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

> In the three months to August the total value of contract awards was £6.2 billion based on a three month rolling average

PROJECT IN FOCUS

Galloper Offshore 336 MW Wind Farm £750,000,000

County	Suffolk
Primary Category Sector	Infrastructure
Government Region	East England
Start Date	November 2016
End Date	March 2018
Contract Award Date	August 2016
Funding	Private
Stage	Contract
Contractor	Siemens AG

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TOP TEN Key Clients
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Thames Water Utilities Limited	Clearwater Court, Vastern Road, Reading, Berkshire, RG1 8DB	0800 316 9800	5	1,562
2	SSE Limited	55 Vastern Road, Reading, Berkshire, RG1 8BU	0118 953 4695	4	1,436
3	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	170	1,255
4	Repsol Nuevas Energias UK	40 Level 5 Princes Street, Edinburgh, Lothian, EH2 2BY	0131 557 7101	1	1,000
5	Talisman Energy UK Limited	Talisman House, 163 Holburn Street, Aberdeen, Aberdeenshire, AB10 6BZ	01224 352500 (CTPS)	1	1,000
6	RWE NPower Plc	Windmill Hill Business Park, Whitehill Way, Swindon, Wiltshire, SN5 6PB	01793 877777	5	952
7	Transport for London	55 Broadway, Westminster, London, SW1 0BD	03432 220000	14	823
8	Scottish Power	Cathcart Business Park, Spean Street, Glasgow, Strathclyde, G44 4GP	0141 568 2000	5	769
9	Dong Energy Power (UK) Limited	5 Howick Palce, Westminster, London, SW1P 1WG	020 7811 5200	4	641
10	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	58	633

TOP TEN Key Architects
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	3	216
2	WA Fairhurst & Partners	225 Bath Street, Glasgow, Strathclyde, G2 4GZ	0141 204 8800	2	154
3	Elevation Projects Limited	1st Floor, 16 Wright Street, Hull, East Riding of Yorkshire, HU2 8JU	01482 221155	1	150
4	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	150
5	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	2	140
6	Fletcher Rae UK Limited	Hill Quays, 5 Jordan Street, Manchester, Greater Manchester, M15 4PY	0161 242 1140	2	130
7	WSP Parsons Brinckerhoff	WSP House, 70 Chancery Lane, Westminster, London, WC2A 1AF	020 7314 5000	1	97
8	Sergison Bates Architects	44 Newman Street, Westminster, London, W1T 1QD	020 7255 1564 (TPS)	1	70
9	CPMG Architects	23 Warser Gate, Nottingham, Nottinghamshire, NG1 1NU	0115 958 9500	1	70
10	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	1	50

TOP TEN Key Contractors
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Costain Group Plc	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	18	1,029
2	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	8	854
3	Bachy Soletanche Limited	Henderson House, Langley Place, Higgins Lane, Burscough, Ormskirk, Lancashire, L40 8JS	01704 895686 (CTPS)	1	800
4	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	5	794
5	Thales Transportation	The Quadrant, 4 Thomas More Square, Thomas More Street, City, London, E1W 1YW	020 3300 6000	4	760
6	Ferrovial Agroman, S. A.	Calle Ribera del Loira 42 Campo de las Naciones, Madrid, Spain, 28042	0034 91 300 85 43	1	746
7	Decommissioning Alliance	Lakes Road, Workington, Cumbria, CA14 3YP	01900 870780	1	500
8	CH2M Hill	Elm House, 43 Brook Green, Hammersmith, London, W6 7EF	020 3479 8000	1	350
9	Waystone Limited	8 Swannick Court, Swannick, Alfreton, Derbyshire, DE55 7AS	01773 524500	1	300
10	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	15	278

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

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COMMERCIAL & RETAIL
DECREASE IN CONTRACT VALUES IN AUGUST

Contract values in the commercial & retail sector were lower in August and are below the levels witnessed in the corresponding month last year.

The value of contracts awarded in the commercial and retail sector were £775 million in August based on a three month rolling average (see Fig. 5.1). This is a 15.6% decrease from July and a 43.1% decrease from the August 2015 figure. In the three months to July the value of contracts were 1% above the previous three months and 33.9% lower than the same period in 2015, indicating poorer performance in the sector over the longer term.

Projects by region

London was the main region of activity in the sector this month accounting for 31.3% of the value of all contracts awarded, which was 24.2% lower than August 2015 (see Fig. 5.2 & 5.4). The largest contract awarded in London in July was the Beagle House development in Tower Hamlets, a 20 storey office block valued at an estimated £100 million. The West Midlands received the second highest share of contracts awarded in July with 19.3% of the value, which was 14.2% above the share in August 2015. The largest office contract awarded in the region was the redevelopment by Jaguar Land Rover of its Gaydon site in Warwickshire which has a construction value of £100 million.

Type of Projects

Offices were the dominant type of project in the sector accounting for 62% of the value of contracts awarded this month, although 22% lower than August 2015. General retailing is the next largest sector with 16% of contract award value, which is a 6% increase from August 2015 figure (see Fig. 5.3).

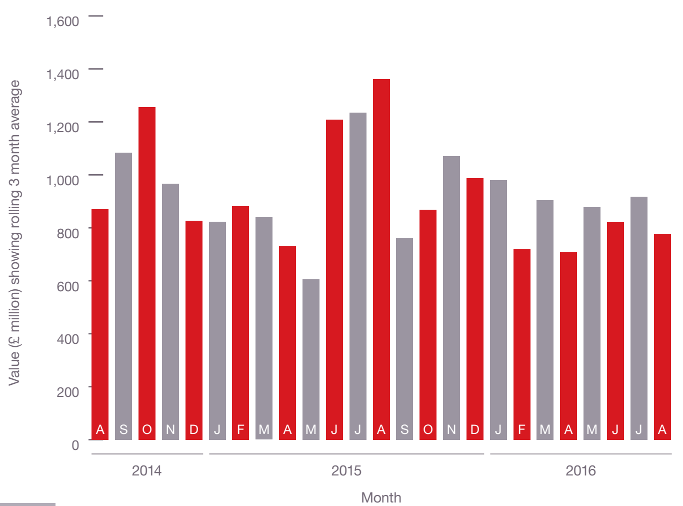

FIG. 5.1

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

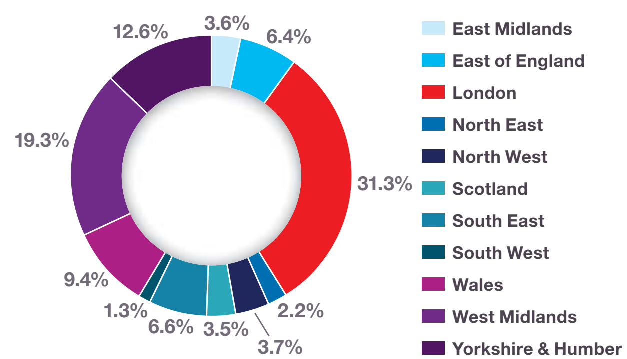

FIG. 5.2

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

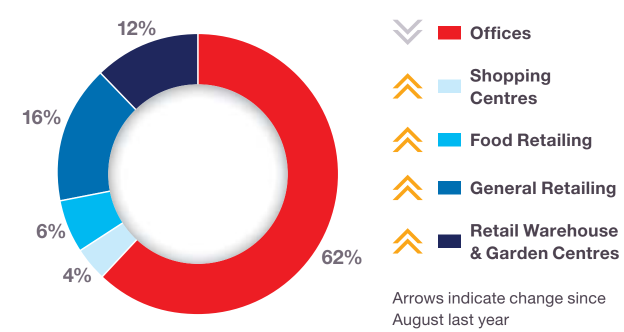

FIG. 5.3

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

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DECREASE IN CONTRACT VALUES IN AUGUST

The map and figures show how the activity has changed since August 2015		+0.1%	Scotland
+1.3%	East Midlands	-3.9%	South East
+4.5%	East of England	+1.2%	South West
-24.2%	London	+8.8%	Wales
-5.1%	North East	+14.2%	West Midlands *HOTTEST REGION*
-3.8%	North West	+7.0%	Yorkshire & Humber

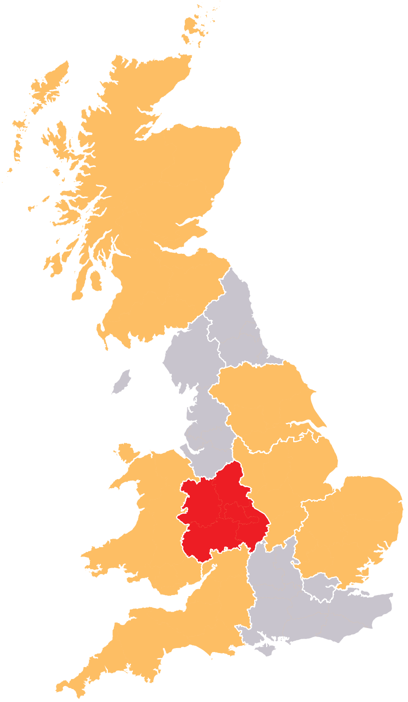
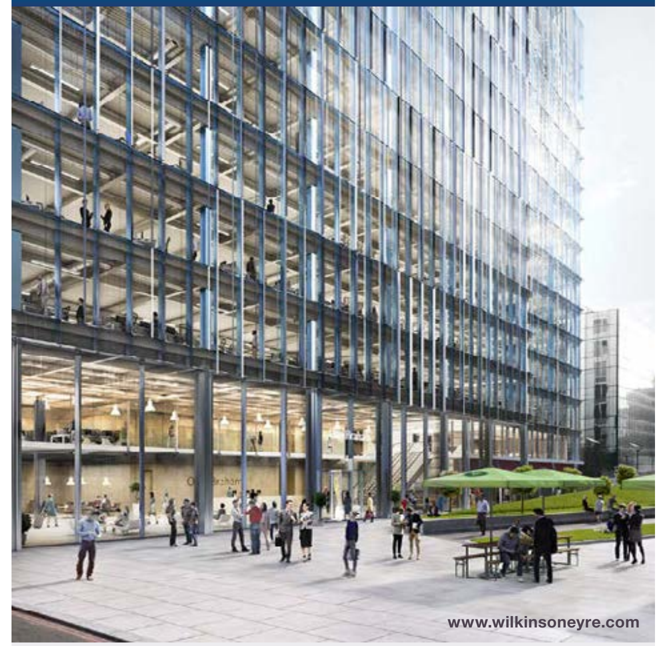


FIG. 5.4

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

PROJECT IN FOCUS



Former Beagle House – Commercial Development £100,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	July 2016
End Date	July 2019
Contract Award Date	August 2016
Funding	Private
Stage	Contract
Contractor	Multiplex Head Office

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DECREASE IN CONTRACT VALUES IN AUGUST

TOP TEN
Key Clients
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Lipton Rogers Developments Llp	33 Cavendish Square, City, London, W1G 0PW	0207 3757 0575	1	550
2	Goldman Sachs International Limited	Peterborough Court, 133 Fleet Street, City, London, EC4A 2BB	020 7774 1000	1	350
3	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	1	326
4	Google UK Limited	Belgrave House, 76 Buckingham Palace Road, Westminster, London, SW1W 9TQ	020 7031 3000 (TPS)	1	300
5	Legal and General Assurance Society Limited	City Park, The Droveway, Hove, East Sussex, BN3 7PY	0345 274 5007	1	275
6	Argent Estates Limited	11 Brindley Place, 2 Brunswick Square, Birmingham, West Midlands, B1 2LP	0121 643 7799	1	250
7	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	2	210
8	Intu Group	40 Broadway, Westminster, London, SW1H 0BU	020 7887 4220	2	202
9	Lidl UK GMBH	19 Worple Road, Wimbledon, London, SW19 4JS	0800 977 7766	69	165
10	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	58	138

TOP TEN
Key Architects
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kohn Pedersen Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	4	691
2	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	2	676
3	PLP Architecture	Ibex House, 42-47 Minories, City, London, EC3N 1DY	020 3006 3900	5	618
4	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	3	366
5	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	7	336
6	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	2	306
7	Bennetts Associates Architects	1 Rawstorne Place, City, London, EC1V 7NL	020 7520 3300 (CTPS)	4	256
8	Leslie Jones Architects	121 Great Portland Street, Westminster, London, W1W 6QL	020 7255 1150	6	229
9	Chapman Taylor & Partners	10 Eastbourne Terrace, Paddington, London, W2 6LG	020 7371 3000	3	218
10	Rogers Stirk Harbour and Partners	The Leadenhall Building, 122 Leadenhall Street, City, London, EC3V 4AB	020 7385 1235	3	212

TOP TEN
Key Contractors
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Multiplex	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	7	1,221
2	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	4	650
3	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	32	413
4	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	378
5	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	1	326
6	Lendlease Construction (EMEA) Limited	EMEA Head Office, 20 Triton Street, Regents Place, London, NW1 3BF	0203 430 9000	4	315
7	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	21	314
8	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	8	301
9	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	2	210
10	Sir Robert McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	9	188

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

INCREASE IN CONTRACT VALUE IN AUGUST

The hotel, leisure & sport sector showed a large increase in contract value both on last month and August 2015.

Contract award levels in the hotel, leisure & sport sector were £406 million in August, based on a three month rolling average (see Fig. 6.1). This was 15.9% higher than July and 49.7% higher than August 2015. In the three months to August the value of contracts was £1.1 billion, which was 2% higher than the previous three months. This was an increase of 26.2% compared to the same period in 2015 indicating an increase in the industry over the past year.

Projects by region

The West Midlands was the main location for hotel, leisure & sport contracts this month accounting for 26.6% of the value awarded, 24.2% higher than July 2015 (see Fig. 6.2 & 6.4). The largest individual contract was the Regal Tower hotel project on Broad Street in Birmingham valued at £125 million. The North West was the region with the next highest share of contract value with 19.4% of contract value, an increase of 13.4% from the previous year.

The largest contract awarded in the region during August was the Hampton by Hilton hotel in Angel Square in Manchester awarded to Create Construction with a value of £30 million.

Type of Projects

As is often the case the hotels/motels category saw the highest proportion of activity accounting for 62% of contract value awarded in August. This was a decrease of 7% from the share in the corresponding month in 2015 but still shows signs of a strong hotel market in the UK. Leisure Centres accounted for 21% of the value awarded in August, which is a 6% increase from August 2015 (see Fig. 6.3).

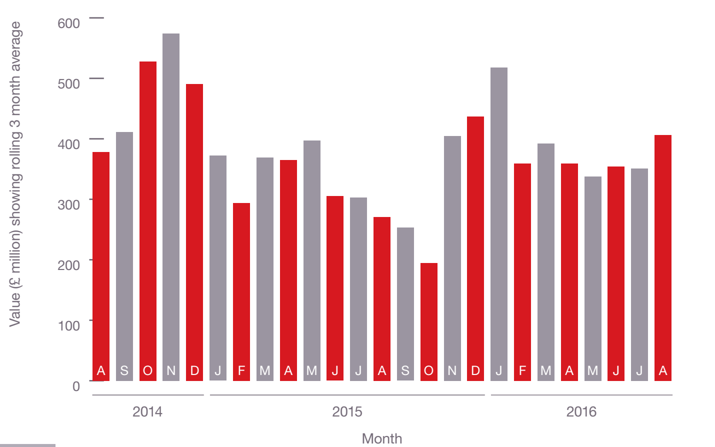

FIG. 6.1

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

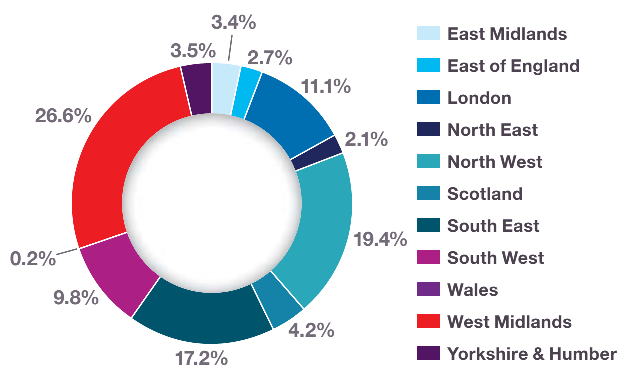

FIG. 6.2

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

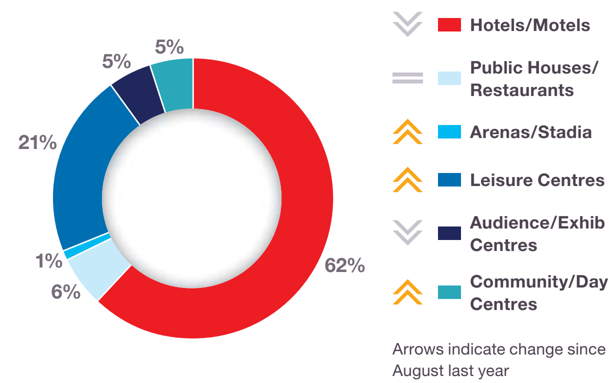

FIG. 6.3

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

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INCREASE IN CONTRACT VALUE IN AUGUST

The map and figures show how the activity has changed since August 2015					
				-2.7%	Scotland
	+2.1%	East Midlands		+5.4%	South East
	-1.2%	East of England		-0.8%	South West
	-34.5%	London		-5.9%	Wales
	+0.4%	North East		+24.2%	West Midlands *HOTTEST REGION*
	+13.4%	North West		-0.5%	Yorkshire & Humber

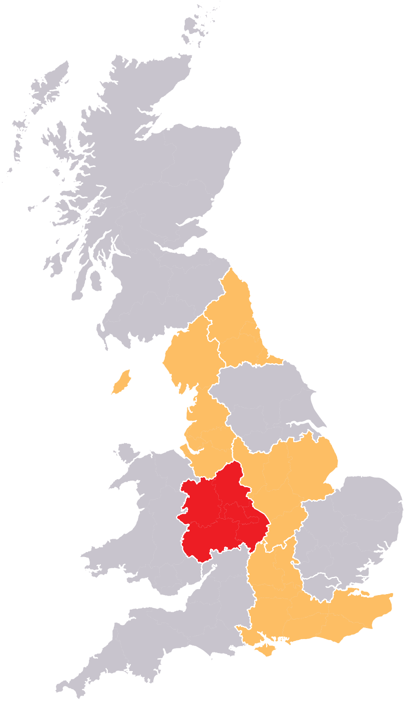

FIG. 6.4

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

"The West Midlands was the main location for contracts this month accounting for 26.6% of the value awarded

PROJECT IN FOCUS

Regal Tower – Broad Street £125,000,000

County	West Midlands
Primary Category Sector	Hotel, Leisure & Sport
Government Region	West Midlands
Start Date	July 2016
End Date	July 2018
Contract Award Date	August 2016
Funding	Private
Stage	Contract
Contractor	Wates Construction Limited

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TOP TEN Key Clients Sep 2015 – Aug 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	Swansea City and County Council	County Hall, Oystermouth Road, Swansea, West Glamorgan, SA1 3SN	01792 636000	1	250
3	The All England Lawn Tennis and Croquet Club	Church Road, Wimbledon, London, SW19 5AE	020 8944 1066	2	153
4	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499/ 01582 424200	44	142
5	Regal Property Group	1625 Warwick Road, Knowle, Solihull, West Midlands, B93 9LF	01564 330675	1	125
6	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	1	100
7	Bristol City Council	The Exchange, Corn Street, Bristol, North East Somerset, BS1 1JQ	0117 922 2000	3	97
8	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	1	60
9	Hilton International Hotels Plc	Maple Court, Central Park, Reeds Crescent, Watford, Hertfordshire, WD24 4QQ	020 7856 8000	3	51
10	Premier Inn Limited	Whitbread Court, Houghton Business Park, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	0871 527 8000	32	46

TOP TEN Key Architects Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Populous	14 Blades Court, Deodar Road, Putney, London, SW15 2NU	020 8874 7666	2	491
2	Nicholas Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	1	150
3	Glancy Nicholls Architects	3 Greenfield Crescent, Birmingham, West Midlands, B15 3BE	0121 456 7474	1	125
4	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	11	101
5	Urban Innovations	Wellington Buildings, 2 Wellington Street, Belfast, Northern Ireland, BT1 6HT	028 9043 5060	1	100
6	Feilden Clegg Bradley Architects	Bath Brewery, Toll Bridge Road, Bath, North East Somerset, BA1 7DE	01225 852 545	2	93
7	Jestico Whiles & Associates	1 Cobourg Street, Camden Town, London, NW1 2HP	020 7380 0382	5	76
8	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269 (TPS)	18	68
9	ICA Architects & Designers	Merchant Exchange, 20 Bell Street, Glasgow, Strathclyde, G1 1LG	0141 552 2194	4	56
10	David Morley Architects	18 Hatton Place, City, London, EC1N 8RU	020 7430 2444	3	53

TOP TEN Key Contractors Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861 000	5	156
2	Sir Robert McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	4	154
3	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	2	135
4	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	10	127
5	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	12	120
6	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	1	91
7	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	10	82
8	Gilbert - Ash Limited	47 Boucher Road, Belfast, County Antrim, BT12 6HR	028 90664334	7	81
9	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	10	69
10	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	10	68

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INDUSTRIAL

ACTIVITY DECREASES IN THE SECTOR THIS MONTH

The industrial sector experienced a slight decrease in contracts awarded in August and the value of work is significantly lower than the same month in 2015.

Activity in the industrial sector decreased in August with the value of contracts awarded £560 million, based on a three month rolling average (see Fig. 7.1). This equates to a decrease of 0.7% on the value in July and is 25.4% below the figure recorded this time last year. In the three months to August the total value of contracts was £1.6 billion which was 20.6% higher than the previous three months but 27.8% lower than the same quarter last year.

Projects by region

The three regions with the largest share of contract value in August were the East of England, East Midlands and the South West with 15.7%, 15.5% and 15.2% of the value awarded respectively (see Fig. 7.2). The highest value contract awarded in the East of England was the Cambridge Biomedical Campus Abcam Building which has a construction cost of £40 million. In the East Midlands the highest value project awarded in August was the Moy Park development which has a contract value of £20 million. Finally, the highest value contract awarded in the South West was the £22 million Bailey of Bristol production building.

Type of Projects

The types of project awarded in the sector were predominantly in heavy industrial which accounted for 30% of contract values, although this was a decline of 5% from August 2015. The warehouse/storage sub sector had a strong showing accounting for 25% of the contracts awarded, up by 8% from the same month last year (see Fig. 7.3).

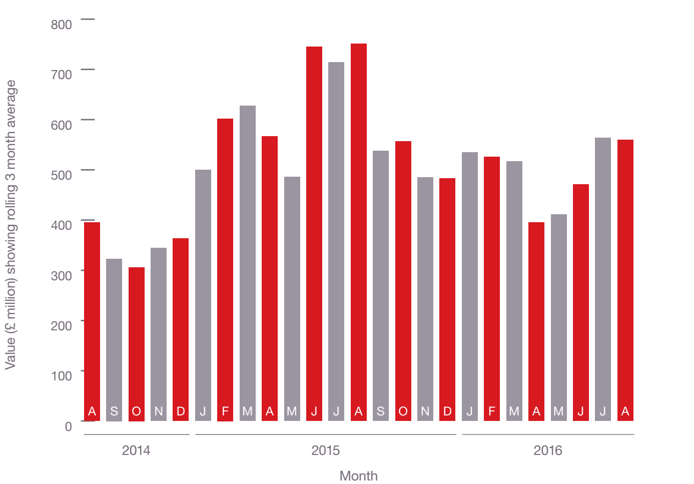

FIG. 7.1

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

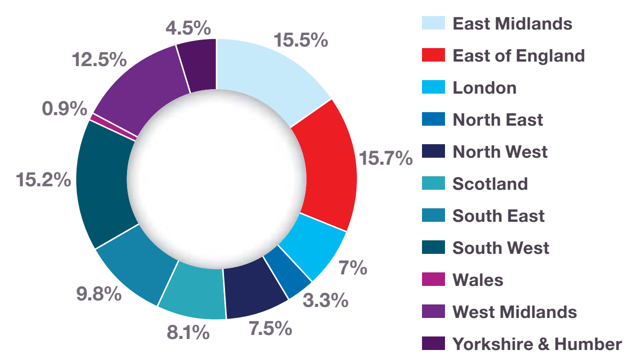

FIG. 7.2

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

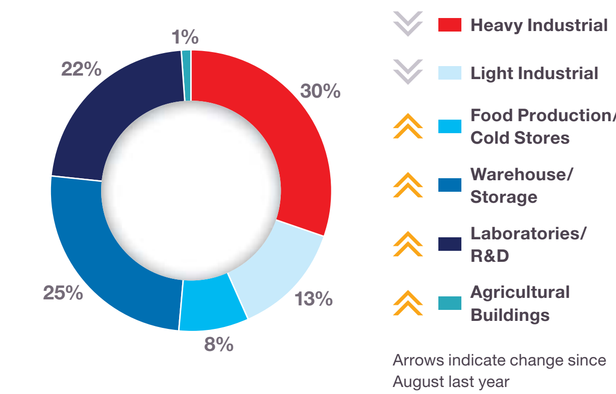

FIG. 7.3

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

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

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

		+5.5%	Scotland
+13.5%	East Midlands *HOTTEST REGION*	-27.7%	South East
+13.2%	East of England	+13.4%	South West
+5.8%	London	-1.2%	Wales
-21.4%	North East	+8.0%	West Midlands
+4.1%	North West	-13.2%	Yorkshire & Humber

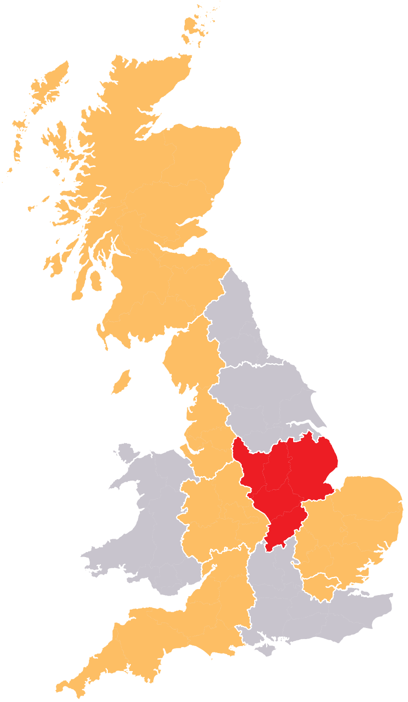

FIG. 7.4

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

PROJECT IN FOCUS

www.nbbj.com

Cambridge Biomedical Campus – The Abcam Building £40,000,000

County	Cambridgeshire
Primary Category Sector	Industrial
Government Region	East England
Start Date	January 2017
End Date	January 2018
Contract Award Date	August 2016
Funding	Private
Stage	Contract
Contractor	Kier

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

TOP TEN Key Clients

Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BAE Systems	Warwick House, Farnborough Aerospace Centre, Farnborough, Hampshire, GU14 6TQ	01252 373232	7	275
2	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	3	168
3	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	6	157
4	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	7	148
5	SNF Gas and Oil Limited	Solutions House, Ripley Close, Normanton Industrial Estate, Normanton, West Yorkshire, WF6 1TB	01924 311000	1	140
6	Reckitt Benckiser Health Care (UK) Limited	Dansom Lane, Hull, East Riding of Yorkshire, HU8 7DS	01482 326151	1	100
7	The Range	Tamar House, Thornbury Road, Estover, Plymouth, Devon, PL6 7PP	01752 725572 (CTPS)	3	96
8	Stoford Properties Limited	Lancaster House, 67 Newhall Street, Birmingham, West Midlands, B3 1NQ	0121 234 6699 (CTPS)	3	94
9	Mountpark Logistics	22-23 Old Burlington Street, Westminster, London, W1S 2JJ	020 7478 3333 (CTPS)	4	91
10	Curtis Real Estate	The Old Barn, West End, Welford, Northampton, Northamptonshire, NN6 6HJ	07500 966625 (TPS)	1	90

TOP TEN Key Architects

Sep 2015 – Aug 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	31	409
2	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	14	288
3	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	11	267
4	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	11	166
5	Fairhursts Design Group	55 King Street, Manchester, Greater Manchester, M2 4LQ	0161 831 7300(CTPS)	4	116
6	Orbit Architects Limited	83 Blackfriars Road, Southwark, London, SE1 8HA	020 7593 3380	1	100
7	AMEC Group PLC	76-78 Old Street, City, London, EC1V 9AZ	020 3215 1700	1	100
8	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	100
9	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	1	100
10	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	2	97

TOP TEN Key Contractors

Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	Brampton House, 19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	22	494
2	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	7	235
3	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	12	218
4	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	8	187
5	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	7	167
6	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	9	132
7	M & W UK	Unit A2, Metheun South, Bath Road, Chippenham, Wiltshire, SN14 0GT	01249 455150	2	126
8	VolkerWessels UK Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	5	101
9	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	2	100
10	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	7	96

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

DECREASE IN VALUE OF CONTRACTS IN AUGUST

The monthly value of medical & health contracts decreased in August and were slightly below the values for August 2015.

Levels of activity in the medical & health sector decreased by 23.3% in August 2016 compared to July, with the total value of contracts awarded £127 million based on a three month rolling average (see Fig. 8.1). This is 1.6% lower than the values in July 2015. The value of contracts awarded was 13.1% higher than the previous three months but was 11.3% up on the same period in 2015 indicating a longer term increase in the value of contracts awarded in the sector.

Projects by region

London was the main location of development in the sector this month with 36.1% of activity, a 9.3% decrease from August 2015 (see Fig. 8.2 & 8.4). This is primarily due to the award for the contract to build the Royal National Orthopaedic Hospital in Brockley Hill which will provide 91 beds and is valued at £30 million. This development also includes associated offices and has been awarded to Balfour Beatty.

Type of Projects

Due to the orthopaedic hospital award it is public hospitals which is the dominant sub-sector this month accounting for 49% of the value of contracts in August 2016, an 18% decrease from August 2015 (see Fig. 8.3).

> “The value of contracts awarded was 13.1% higher than the previous three months

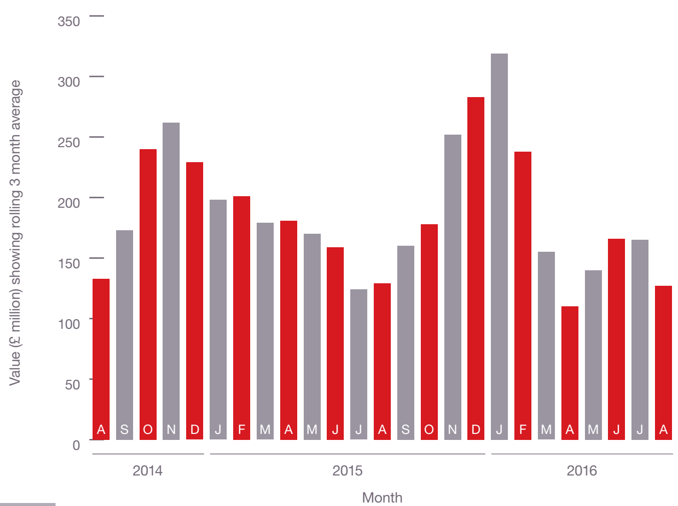

FIG. 8.1

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

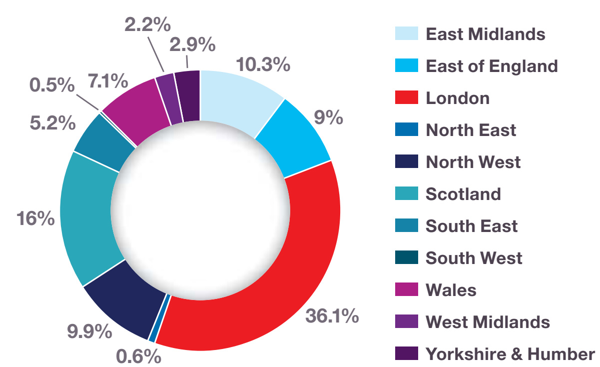

FIG. 8.2

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

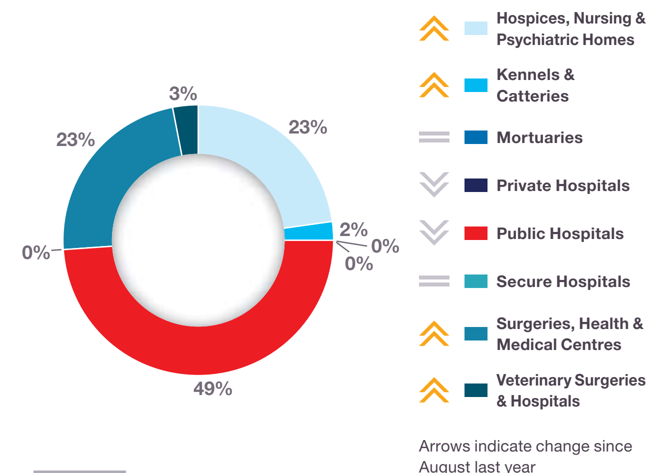

FIG. 8.3

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

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DECREASE IN VALUE OF CONTRACTS IN AUGUST

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

			↑	+15.8%	Scotland *HOTTEST REGION*
↑	+9.6%	East Midlands	↓	-3.6%	South East
↑	+8.0%	East of England	↓	-2.6%	South West
↓	-9.3%	London	↑	+4.7%	Wales
↑	+0.3%	North East	↓	-6.9%	West Midlands
↑	+5.1%	North West	↓	-21.2%	Yorkshire & Humber

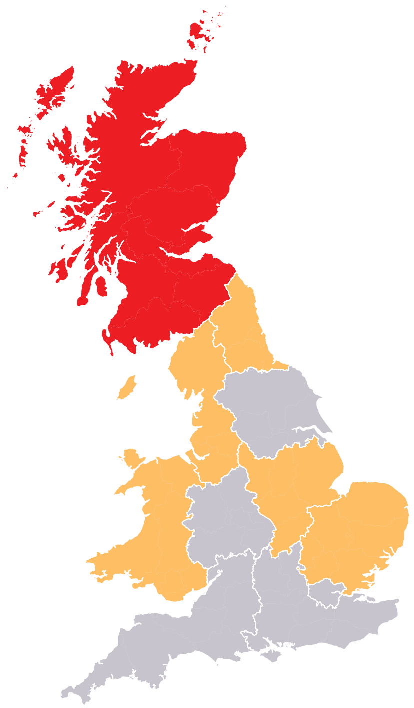

FIG. 8.4

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

> "London was the main location of development in the sector this month with 36.1% of activity

PROJECT IN FOCUS

Royal National Orthopaedic Hospital NHS Trust – Phase 2a
£30,000,000

County	London
Primary Category Sector	Medical & Health
Government Region	London
Start Date	September 2016
End Date	September 2018
Contract Award Date	August 2016
Funding	Private
Stage	Contract
Contractor	Balfour Beatty

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TOP TEN Key Clients

Sep 2015 – Aug 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	1	200
3	Hampshire Hospitals NHS Foundation Trust	Aldermaston Road, Basingstoke, Hampshire, RG24 9NA	01256 473202	2	166
4	University College London Hospital NHS Foundation Trust	2nd Floor 250 Euston Road, City, London, NW1 2PG	020 3456 7890 (CTPS)	3	139
5	Bartholomew & London Hospital (NHS) Trust	Capital & Facilities Directorate, 5th Floor, Queen Mary's Wing, West Smithfield, City, London, EC1A 7BE	020 7377 7000	2	101
6	Frimley Health NHS Foundation Trust	Wexham Park Hospital, Wexham Street, Wexham, Slough, Berkshire, SL2 4HL	01753 633000	2	73
7	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)	1	60
8	Royal Free Hospital	Pond Street, Hampstead, London, NW3 2QG	020 7794 0500	5	54
9	Horizon Care Homes Limited	Unit 1.16, Great House, Redwall Close, Rotherham Road, Dinnington, Sheffield, South Yorkshire, S25 3QA	01909 517737	1	50
10	Ashley House Plc	6 Cliveden Office Village, Lancaster Road, Cressex Business Park, High Wycombe, Buckinghamshire, HP12 3YZ	01628 600340	1	45

TOP TEN Key Architects

Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Bilfinger GVA	65 Gresham Street, Westminster, London, EC2V 7NQ	020 7491 2188 (TPS)	2	283
2	John Simpson & Partners	29 Great James Street, Holborn, Westminster, London, WC1N 3EY	020 7405 1285 (TPS)	1	200
3	Steffian Bradley Architects	45 Gee Street, Fifth Floor, City, London, EC1V 3RS	020 7549 4050	1	200
4	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	9	179
5	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	5	164
6	Hassell	James William House, 9 Museum Place, Cardiff, South Glamorgan, CF10 3BD	029 2072 9071	3	153
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	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	2	63
10	Design Studio North	17-19 Stott Hill, Bradford, West Yorkshire, BD1 4EH	01274 727745 (TPS)	1	50

TOP TEN Key Contractors

Sep 2015 – Aug 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	340
2	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	1	280
3	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	12	257
4	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	6	139
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	5	89
7	Integrated Health Projects	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	3	51
8	Redwall Developments Limited	Suite 2, 10 Redwall House, Waterside Business Park, Rotherham Road, Dinningham, Rotherham, South Yorkshire, S25 3QA	01909 517737	1	50
9	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	5	48
10	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	4	45

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

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EDUCATION
INCREASE IN THE VALUE OF CONTRACTS IN AUGUST

Contract values increased in the education sector in August but activity is lower than this time last year indicating poorer performance in this sector.

The value of contracts awarded in the education sector was £624 million in August based on a three month rolling average, a 3.4% increase from July (see Fig. 9.1). This figure was 12.4% lower than August 2015 indicating the sectors deteriorating performance over the past year. The value of contract awards in the three months to July were 0.7% below the same period last year, emphasising the decline in construction contracts over the longer term.

Projects by region

Scotland experienced the highest share of the value of education contracts in August accounting for 26.4% of contract value awarded, a 13.9% increase from August 2015 (see Fig. 9.2 & 9.4). One of the major construction contracts awarded in Scotland in August was the contract to develop the North West Campus primary and secondary school in Dumfries. This was valued at £27 million and was awarded to John Graham Construction.

Type of Projects

Colleges/universities were the dominant sub sector in education in August. They accounted for 40% of the total value awarded, no change from August 2015 (see Fig. 9.3).

> Scotland experienced the highest share of the value of education contracts in August

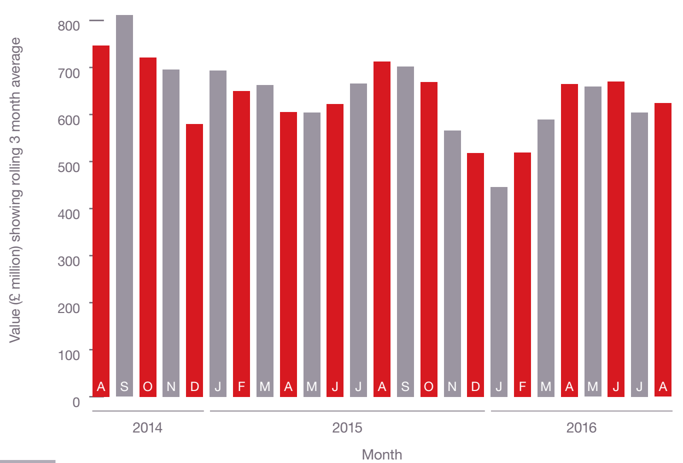

FIG. 9.1

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

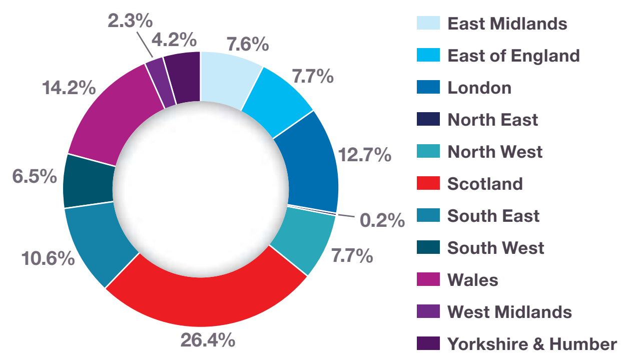

FIG. 9.2

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

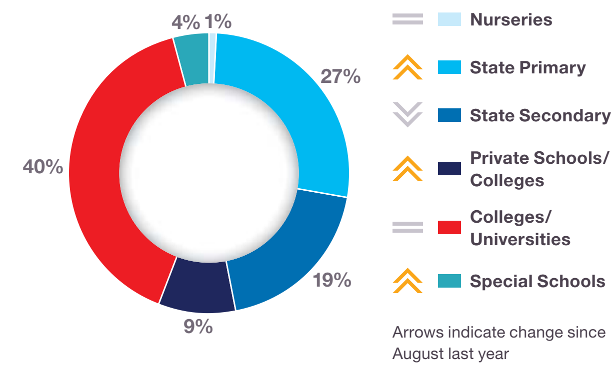

FIG. 9.3

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

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INCREASE IN THE VALUE OF CONTRACTS IN AUGUST

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

+13.9%	Scotland *HOTTEST REGION*		
+1.3%	East Midlands	+5.1%	South East
+0.4%	East of England	+3.6%	South West
-11.2%	London	+12.3%	Wales
-3.1%	North East	-19.9%	West Midlands
+5.0%	North West	-7.3%	Yorkshire & Humber

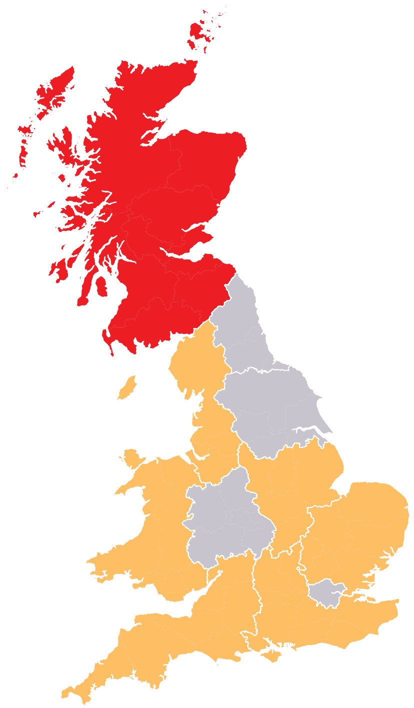


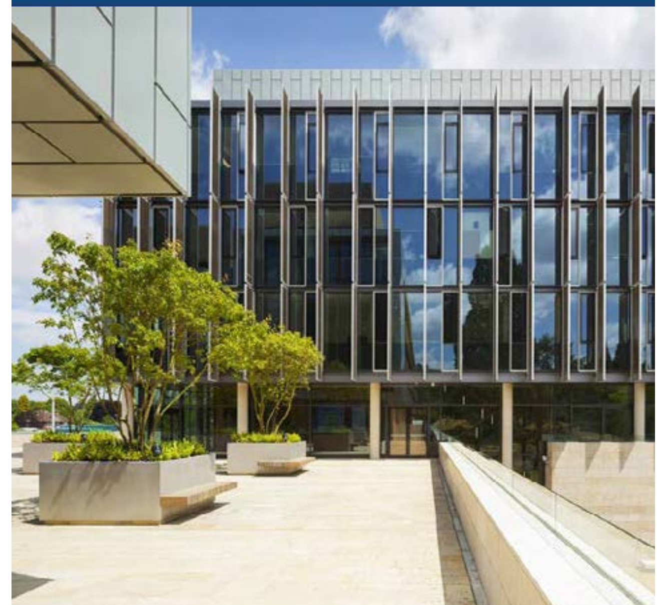
FIG. 9.4

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

Source: Barbour ABI

“The value of contracts awarded in the education sector was £624 million in August based on a three month rolling average

PROJECT IN FOCUS



www.grimshaw-architects.com

University of Southampton – Boldrewood Campus Blocks D&G

£20,000,000

County	Hampshire
Primary Category Sector	Education
Government Region	South East
Start Date	October 2016
End Date	October 2018
Contract Award Date	August 2016
Funding	Public
Stage	Contract
Contractor	Wates Construction Limited

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INCREASE IN THE VALUE OF CONTRACTS IN AUGUST

TOP TEN Key Clients
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Education Funding Agency	Sanctuary Buildings, 20 Great Smith Street, Westminster, London, SW1P 3BT	0370 000 2288	51	465
2	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	14	312
3	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	5	262
4	University of Northampton	Boughton Green Road, Northampton, Northamptonshire, NN2 7AL	01604 735500 (CTPS)	6	138
5	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	5	112
6	Powys County Council	Powys County Hall, Spa Road East, Llandrindod Wells, Powys, LD1 5LG	01597 826000 (CTPS)	6	103
7	University College London	Gower Street, Westminster, London, WC1E 6BT	020 7679 2000 (CTPS)	9	98
8	Birmingham City University	Franchise Street, Perry Barr, Birmingham, West Midlands, B42 2SU	0121 331 5000	4	96
9	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	2	82
10	London Borough of Hounslow	Civic Centre, Lampton Road, Hounslow, Middlesex, TW3 4DN	020 8583 2000	11	79

TOP TEN Key Architects
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	16	281
2	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	3	258
3	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	26	239
4	Mecanoo Architecten	Oude Delft 203, 2611 HD Delft, Holland	+31 15 2798100	1	225
5	Pick Everard (Leicester)	Halford House, Charles Street, Leicester, Leicestershire, LE1 1HA	0116 223 4400 (TPS)	31	203
6	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	7	153
7	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	20	149
8	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	12	140
9	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	11	140
10	Moses Cameron William Architects	Oast House, Malting Lane, Cambridge, Cambridgeshire, CB3 9HF	01223 792500	5	137

TOP TEN Key Contractors
Sep 2015 – Aug 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	108	713
2	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	39	489
3	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	60	458
4	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	10	367
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	32	309
6	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	60	307
7	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	15	260
8	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861 000	12	195
9	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	28	182
10	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	4	160

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