economic & construction MARKET REVIEW

Barbour ABI Building bd

OCTOBER 2016

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economic & construction MARKET REVIEW

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ABOUT US
SPECIALIST PROVIDER OF CONSTRUCTION INTELLIGENCE

Michael Dall

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

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

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Barbour ABI

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 GROWTH REVISED UPWARDS IN SECOND QUARTER

The UK economy held up well in the run up to the Brexit vote but the Pound has suffered since then.

The ONS revised its initial estimate for the second quarter up to 0.7% growth, from the original figure of 0.6% (see Fig. 1.1). It re-confirmed the patterns of economic activity in the lead up to the EU referendum with strong growth occurring between April and June.

The value of Sterling continued to fall and is the worst performing major currency this year as the markets reacted to the possibility of the UK leaving the single market. According to Reuters the Pound reached its lowest value since the launch of the Euro in 1999 and fell below $1.21, compared to $1.48 on the 23rd June, the day of the referendum (see Fig. 1.2).

The fall in the value of the pound is expected to herald in a period of higher inflation and there is evidence of this in the latest figures. The latest data release shows that the Consumer Price Index rose to 1% in September, 0.4% higher than the previous month (see Fig. 1.3).

> According to Reuters the Pound reached its lowest value since the launch of the Euro in 1999

The increase is attributable to higher prices for clothing, hotel stays and motor fuels.

Other news this month on the UK economy includes:

- **A survey by Deloitte found that nine out of ten CFOs surveyed said the level of business uncertainty was higher than normal**
- **The International Monetary Fund revised its forecast for UK growth in 2017 down to 1.1% from 1.3% in July**
- **The British Retail Consortium and KPMG survey showed that retail sales rose by 1.3% in September compared to last year**

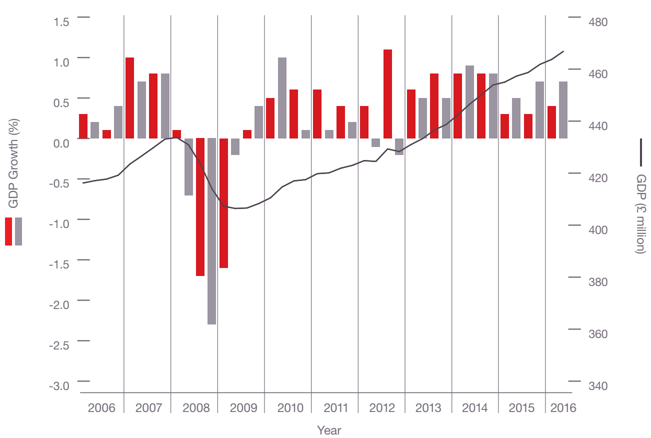

Fig. 1.1 **UK GDP** Source: ONS

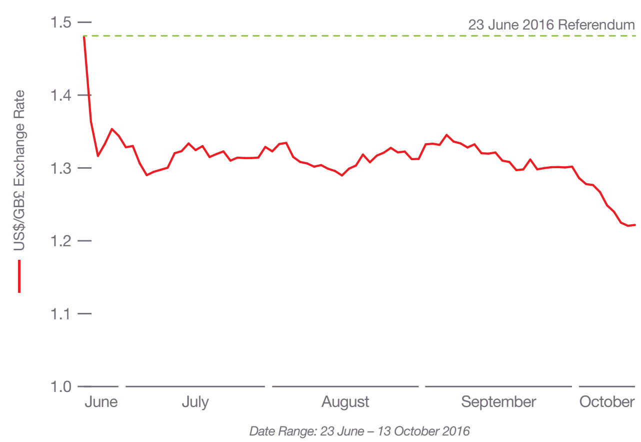

Fig. 1.2 **Value of Sterling** Source: Bank of England

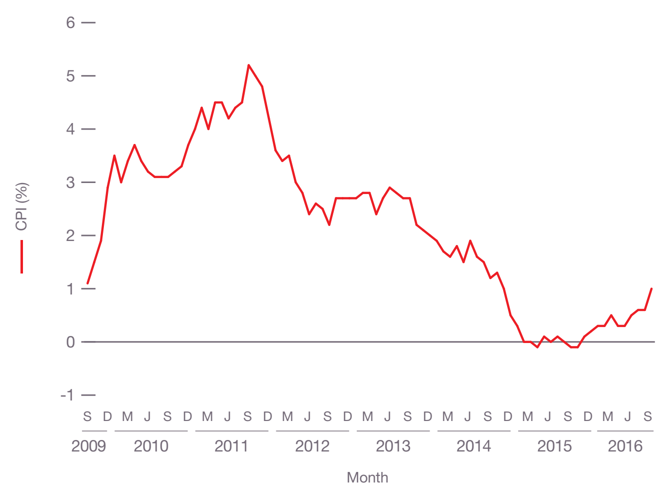

Fig. 1.3 **CPI Inflation** Source: ONS

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CONSTRUCTION CONTRACT ACTIVITY INCREASES IN SEPTEMBER

Post referendum data for construction shows the industry has remained resilient.

The latest figures from the ONS indicate the construction sector in the UK declined by 1.5% between July and August 2016. Comparing August output levels with the same period in 2015 showed an increase of 0.2%.

There were monthly decreases across all sectors in construction, except for private commercial work which increased by 1.5%. Infrastructure and public housing output saw the largest declines of 5.1% and 6.3% respectively. Comparing the figures to the corresponding month last year showed that private housing output was 9.4% higher but infrastructure was 9.3% lower than August 2015 (see Fig. 2.1).

	% change	
	August 2015 – August 2016	July 2016 – August 2016
Total All Work	**0.2**	**-1.5**
All New Work	**1.1**	**-1.4**
Public Housing	-0.8	-2.1
Private Housing	9.4	-1.2
Infrastructure	-9.3	-5.1
Public (ex Infrastructure)	2.5	-1.6
Private Industrial	-13.1	-2.9
Private Commercial	3.6	1.5
Repair & Maintenance	**-1.3**	**-1.5**
Public Housing	-14.5	-6.3
Private Housing	0.7	-0.4
Non-Housing	1.5	-0.9

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 142 for September (see Fig. 2.2). This is an increase from the previous month's figure of 139 and suggests that activity in the industry is increasing after an initial decline after the EU referendum result. The readings for Private Housing improved to register a reading of 241, up from 227 the previous month. Commercial retail increased sharply from 115 to 145 but commercial offices fell from 104 to 84 presenting a mixed picture at a sector level.

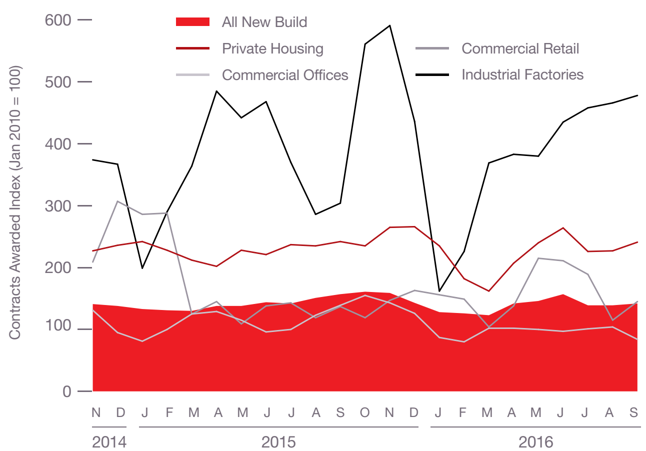

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

Construction Sector

According to Barbour ABI data on all contract activity, September witnessed an increase in construction levels with the value of new contracts awarded £5.6 billion, based on a three month rolling average (see Fig. 2.4). This is a 2.4% increase from August but is 17.6% lower than the value recorded in September 2015. The number of construction projects within the UK in September decreased by 1.5% on August, and were 11.7% lower than September 2015.

The majority of the contracts awarded in September by value were in London, accounting for 21% of the UK total. This is followed by the South East with 20% of contract award value in the month (see Fig. 2.3). The main reason for London's figures this month was the award for the residential development Crown House on City Road. The development at is set to deliver 302 units at a value

> "The number of construction projects within the UK in September decreased by 1.5% on August, 11.7% lower than September 2015

of £170 million and was awarded to Mace. In the South East the largest contract award was the M4 junction 3-12 smart motorway scheme which was awarded to Balfour Beatty and Vinci at a value of £657.3 million.

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Types of Project

Infrastructure had the highest proportion of contracts awarded by value in September with 32% of the total. This is closely followed by the residential sector which accounted for 29% of the awarded value (see Fig. 2.5). The two aforementioned contracts are the main reasons for the sectors strong showing in September.

> "Main reason for London's figures this month was the award for the residential development Crown House on City Road

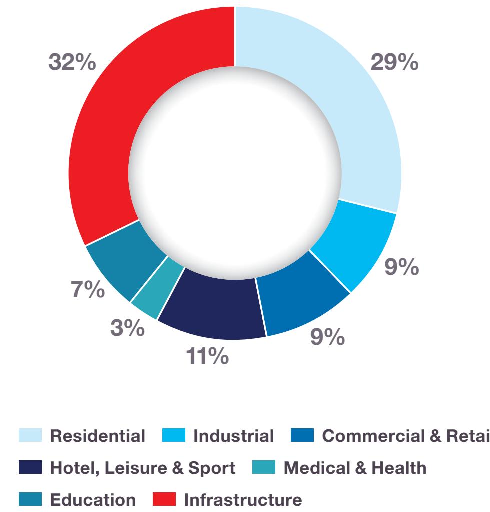

Fig. 2.5 **Type of Projects** Source: Barbour ABI

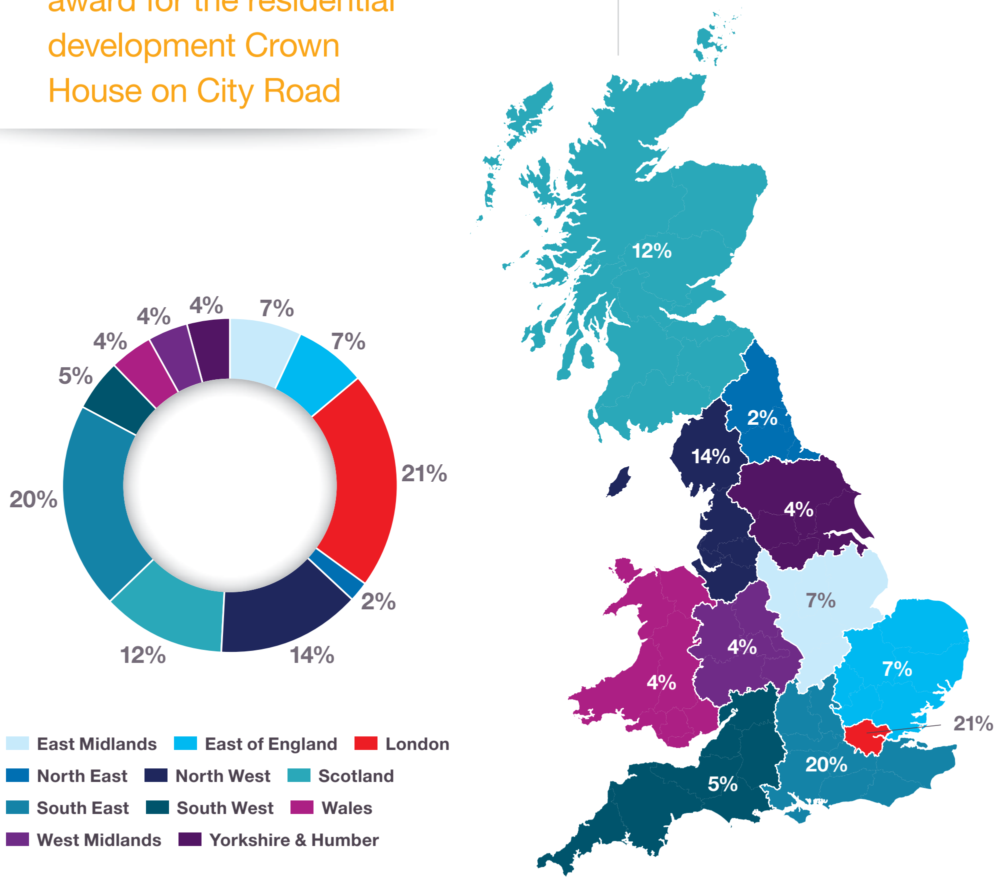

Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

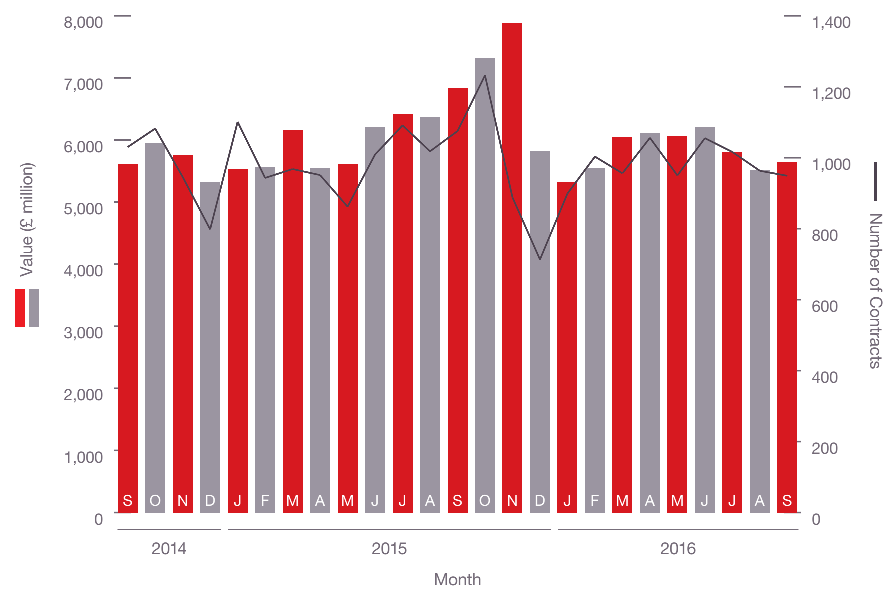

Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

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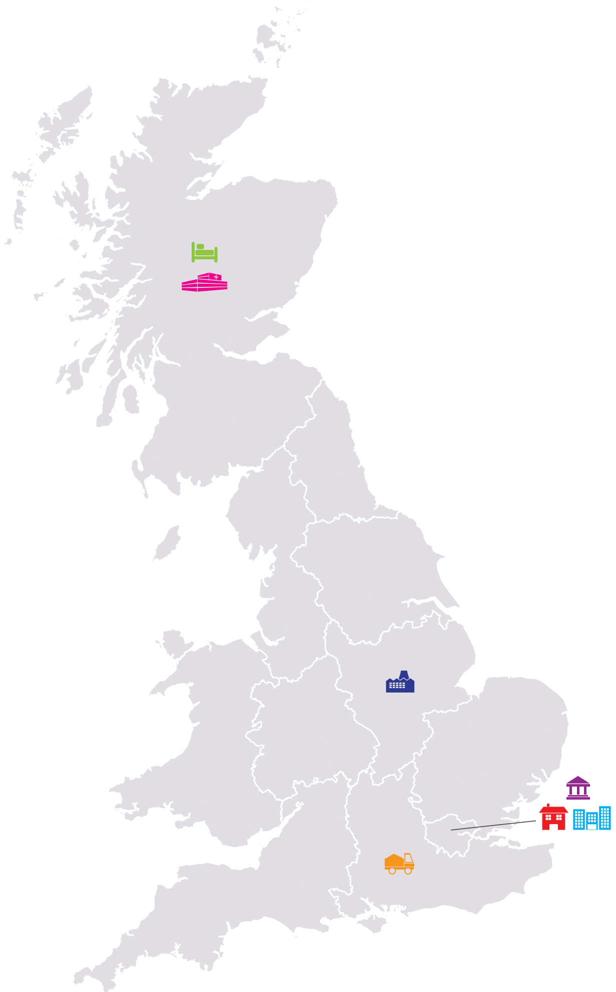
A snippet of this month's regional activity

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
Crown House City Road – The Atlas Building
£170,000,000

INFRASTRUCTURE
M4 Junctions 3-12 Smart Motorway Scheme
£657,370,000

COMMERCIAL & RETAIL
Lincoln House Redevelopment
£30,000,000

HOTEL, LEISURE & SPORT
Aberdeen Exhibition and Conference Centre Development
£330,000,000

INDUSTRIAL
ALDI Distribution Centre – Sawley Crossroads
£60,000,000

MEDICAL & HEALTH
Roodlands Hospital Site – East Lothian Community Hospital
£70,000,000

EDUCATION
University Of Wales – SA1 Waterfront Innovation Quarter – Phase 1 – FACE Building
£25,000,000

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RECOVERY IN RESIDENTIAL CONTRACT VALUES

The value of residential contracts awarded increased in September after sharp falls in immediate aftermath of the Brexit vote.

The performance of the residential sector improved in September 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 0.2% increase compared to August and is 12.1% higher than September 2015. The number of units associated with residential contracts awarded decreased by 4.3% between August and September based on a three month rolling average, and are 2% lower than August 2015. The monthly increases in residential values suggest a continuing recovery in the housing market after the initial post Brexit "shock" in July. However, subsequent month's data will be more revealing as to the extent of the Brexit effect upon residential and the construction sector more generally.

Sector Performance

The latest house price indices for September from Nationwide showed that average house prices are rising at 5.3% annually, a decrease from 5.6% in August. This is little change and it is predicted that the relative strength of the labour market should continue to underpin these levels of increases. The Halifax reported annual house price rises at 5.8% in September, down from 6.9% in August. In signs that the residential market remains robust, Countryside and Telford Homes reported that reported growth in trading updates to the stock market.

Projects by region

London is the main location of activity in the residential sector this month, accounting for 36.6% of the value of contracts awarded, an increase of 6.9% from the same month last year. The South East had the next highest proportion of contract award value in September with 13.4% of total value awarded, an increase of 3.6% from September 2015 (see Fig. 3.2 & 3.4). The Atlas Building development on City Road was the largest contract awarded in London during September, with a value of £170 million. Other

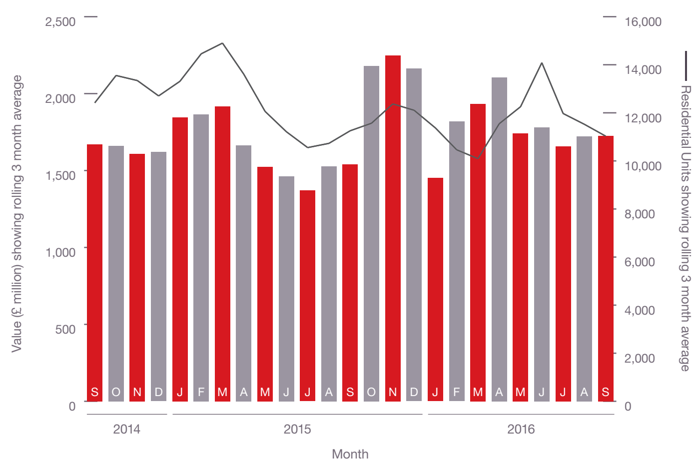

FIG. 3.1

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

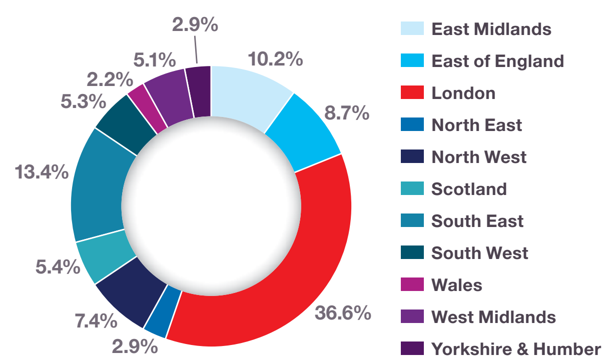

FIG. 3.2

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

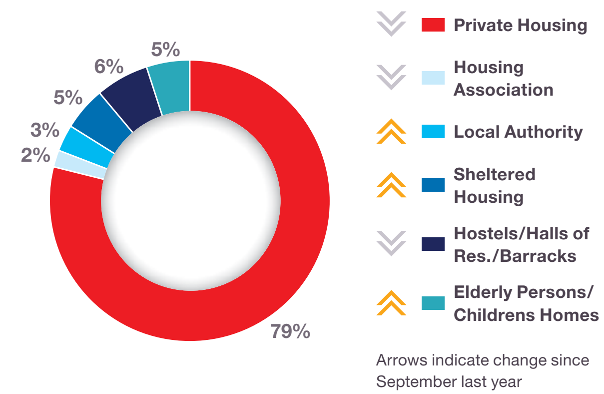

FIG. 3.3

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

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

		-2.4%	Scotland
+7.6%	East Midlands *HOTTEST REGION*	+3.6%	South East
+3.5%	East of England	+1.2%	South West
+6.9%	London	-1.5%	Wales
-2.4%	North East	-6.1%	West Midlands
-8.1%	North West	-2.3%	Yorkshire & Humber

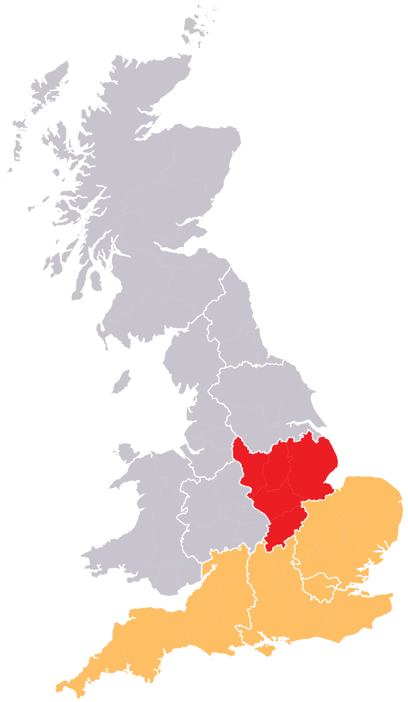

FIG. 3.4

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

residential contracts awarded in London this month include the £95 million South Quay Plaza development in Tower Hamlets and the South Thames College site in Wandsworth valued at £50 million.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing this month. Private housing accounted for 79% of the value of contracts awarded, a 2% decrease from the corresponding month last year. After private housing, the next largest project type were hostels which accounted for 6% of the value awarded, a 2% decrease from the corresponding month last year (see Fig. 3.3).

PROJECT IN FOCUS

Crown House City Road – The Atlas Building £170,000,000

County	London
Primary Category Sector	Residential
Government Region	London
Start Date	July 2016
End Date	July 2018
Contract Award Date	September 2016
Funding	Private
Stage	Subcontract
Contractor	Mace Limited

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TOP TEN Key Clients

Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	168	2,164
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	144	1,901
3	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	105	1,305
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	108	1,225
5	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 876200 (CTPS)	53	680
6	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	57	604
7	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	45	587
8	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	27	478
9	The Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	19	460
10	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	45	417

TOP TEN Key Architects

Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	86	909
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	32	434
3	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	9	387
4	Pollard Thomas & Edwards Architects	Diespeker Wharf, 38 Graham Street, Islington, London, N1 8JX	020 7336 7777	20	360
5	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	23	352
6	Tetlow King Planning	Unit 2 Eclipse Office Park, Staple Hill, Bristol, North Somerset, BS16 5EL	0117 9561916 (CTPS)	25	338
7	Simon Cooper Associates Limited	Connaught House, 22/24 Guildford Road, Bagshot, Surrey, GU19 5JN	01276 450866	23	323
8	Rolfe Judd Group Practice	Old Church Court, Claylands Road, The Oval, South Lambeth, London, SW8 1NZ	020 7556 1500	6	321
9	EMA Architecture and Design	42 Charlotte Square, Edinburgh, Lothian, EH2 4HQ	0131 247 1450	28	296
10	CZWG Architects	17 Bowling Green Lane, City, London, EC1R 0QB	020 7253 2523	4	291

TOP TEN Key Contractors

Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	172	2,197
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	147	1,920
3	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	114	1,422
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	110	1,214
5	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	77	940
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	68	740
7	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 876200 (CTPS)	54	690
8	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	56	620
9	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	46	592
10	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	31	576

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 INCREASE IN SEPTEMBER

Infrastructure contract values were up month-on-month but are lower than the same month in 2015.

The value of contracts awarded in the infrastructure sector in September totalled £1.6 billion based on a three month rolling average (see Fig. 4.1). This is 21.4% higher than the previous month but 44.5% lower than September 2015. In the three months to September the total value of contract awards was £4.4 billion based on a three month rolling average. This is 27.2% lower than the previous three months and 31.6% lower than the same period in 2015.

Projects by region

The main location of infrastructure projects this month was the South East with 41.4% of the value, and this was 39.2% higher than September 2015 (see Fig. 4.2 & 4.4). The main project awarded in the region was the M4 smart motorway scheme in Berkshire valued at £657 million. The North West was the next most active location accounting for 26.2% of contract value, a 23.1% increase since September 2015. The award of the Sellafield clean up and decommissioning works was the highest value contract awarded in the region at £400 million.

Type of Projects

Utilities was the dominant sector within infrastructure, accounting for 68% of the contract value awarded. Civil engineering was the second major sector accounting for 26% of the value of contracts (see Fig. 4.3).

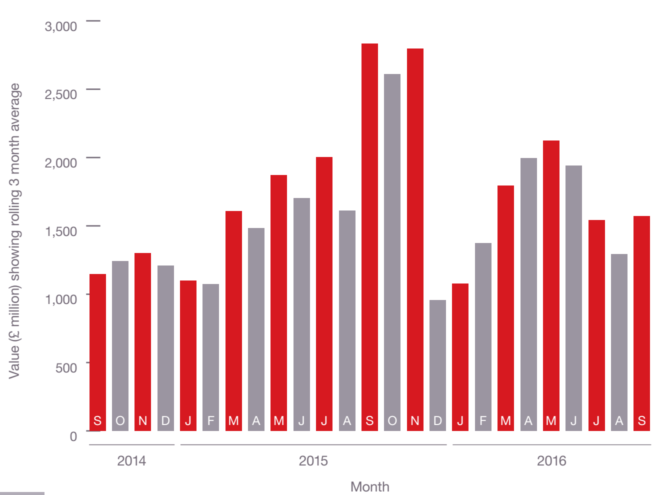

FIG. 4.1

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

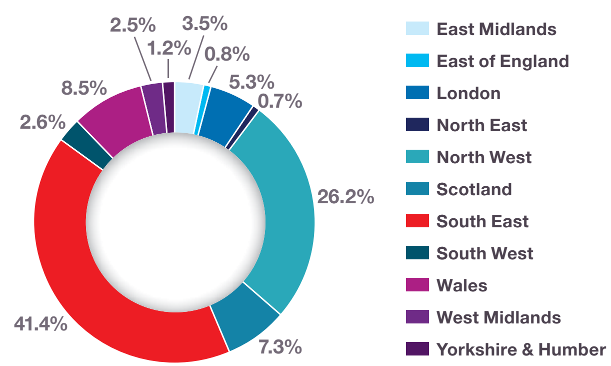

FIG. 4.2

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

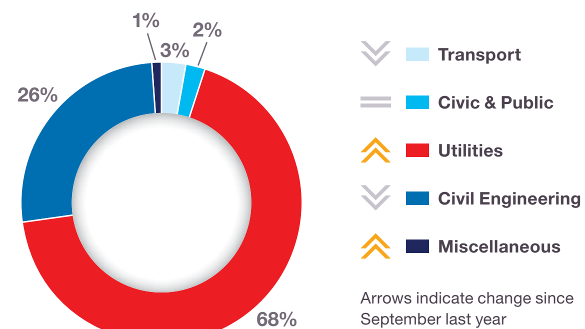

FIG. 4.3

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

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

+2.3%	Scotland	-49.0%	East Midlands
+39.2%	South East *HOTTEST REGION*	+0.2%	East of England
+1.2%	South West	-23.3%	London
+8.3%	Wales	-4.3%	North East
+2.1%	West Midlands	+23.1%	North West
+0.2%	Yorkshire & Humber		

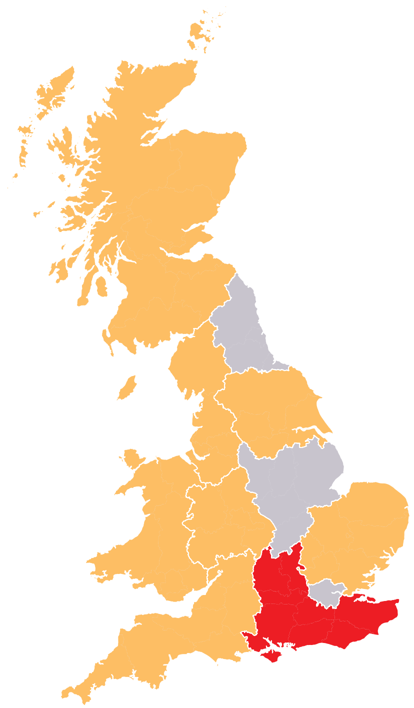

FIG. 4.4

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

> The main location of infrastructure projects this month was the South East with 41.4% of the value

PROJECT IN FOCUS

M4 Junctions 3-12 Smart Motorway Scheme
£657,370,000

County	Berkshire
Primary Category Sector	Infrastructure
Government Region	South East
Start Date	March 2017
End Date	March 2022
Contract Award Date	September 2016
Funding	Public
Stage	Contract
Contractor	Balfour Beatty/Vinci

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TOP TEN Key Clients

Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	252	1,562
2	SSE Limited	55 Vastern Road, Reading, Berkshire, RG1 8BU	0118 953 4695	3	1,424
3	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	62	1,303
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	Sellafield Limited (AMEC)	Sellafield Sites, Seascale, Cumbria, CA20 1PG	01946 728333 (CTPS)	2	900
8	Thames Water Utilities Limited	Clearwater Court, Vastern Road, Reading, Berkshire, RG1 8DB	0800 316 9800	4	816
9	Scottish Power	Cathcart Business Park, Spean Street, Glasgow, Strathclyde, G44 4GP	0141 568 2000	4	719
10	Wokingham Borough Council	Civic Offices, Shute End, Wokingham, Berkshire, RG40 1BN	0118 974 6000	1	657

TOP TEN Key Architects

Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Elevation Projects Limited	1st Floor, 16 Wright Street, Hull, East Riding of Yorkshire, HU2 8JU	01482 221155	1	150
2	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	150
3	Fletcher Rae UK Limited	Hill Quays, 5 Jordan Street, Manchester, Greater Manchester, M15 4PY	0161 242 1140	2	130
4	WSP Parsons Brinckerhoff	WSP House, 70 Chancery Lane, Westminster, London, WC2A 1AF	020 7314 5000	1	97
5	Renewable Developments Wales Limited	10 Capel Hewore Industrial Estate, Capel Hewore, Ammanford, Dyfed, SA18 3SJ	01269 833080	1	80
6	Sergison Bates Architects	44 Newman Street, Westminster, London, W1T 1QD	020 7255 1564 (TPS)	1	70
7	CPMG Architects	23 Warser Gate, Nottingham, Nottinghamshire, NG1 1NU	0115 958 9500	1	70
8	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	2	66
9	John Hill Associates	6 Shaw Wood Way, Shaw Wood Business Park, Doncaster, South Yorkshire, DN2 5TB	01302 364565 (TPS)	3	65
10	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	1	50

TOP TEN Key Contractors

Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Costain Group Plc	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	19	1,029
2	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	13	880
3	Bachy Soletanche Limited	Henderson House, Langley Place, Higgins Lane, Burscough, Ormskirk, Lancashire, L40 8JS	01704 895686 (CTPS)	1	800
4	Vinci Construction	6230 Bishops Court, Birmingham Business Park, Bromsgrove, Birmingham, West Midlands, B37 7YB	01527 575588 (TPS)	2	751
5	Decommissioning Alliance	Lakes Road, Workington, Cumbria, CA14 3YP	01900 870780	1	500
6	Amec Foster Wheeler, Hertel (UK) Ltd, Shepley Engineering	Robinson House, Westlakes Science Park, Moor Row, Moor Row, Cumbria, CA24 3HY	01946 599 022	1	400
7	CH2M Hill	Elm House, 43 Brook Green, Hammersmith, London, W6 7EF	020 3479 8000	1	350
8	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	17	337
9	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	16	337
10	Waystone Limited	8 Swannick Court, Swannick, Alfreton, Derbyshire, DE55 7AS	01773 524500	1	300

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

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COMMERCIAL & RETAIL
DECREASE IN CONTRACT VALUES IN SEPTEMBER

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

The value of contracts awarded in the commercial and retail sector was £640 million in September based on a three month rolling average (see Fig. 5.1). This is a 17.4% decrease from August and a 15.9% decrease from the September 2015 figure. In the three months to September the value of contracts were 3% below the previous three months and 30.5% 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 48.3% of the value of all contracts awarded, which was 27.5% higher than September 2015 (see Fig. 5.2 & 5.4). The largest contract awarded in London in September was the expansion of the Westfield shopping centre in Hammersmith to provide an additional 75,000 square metres of retail floorspace. Yorkshire & the Humber received the second highest share of contracts awarded in September with 14.7% of the value, which was 6.3% above the share in September 2015. The largest commercial contract awarded in the region was the development of two offices in Sheffield known as Digital Campus which has a construction value of £40 million.

Type of Projects

Offices were the dominant type of project in the sector accounting for 49% of the value of contracts awarded this month, which is 21% lower than September 2015. General retailing is the next largest sector with 36% of contract award value, which is a 22% increase from the September 2015 figure (see Fig. 5.3).

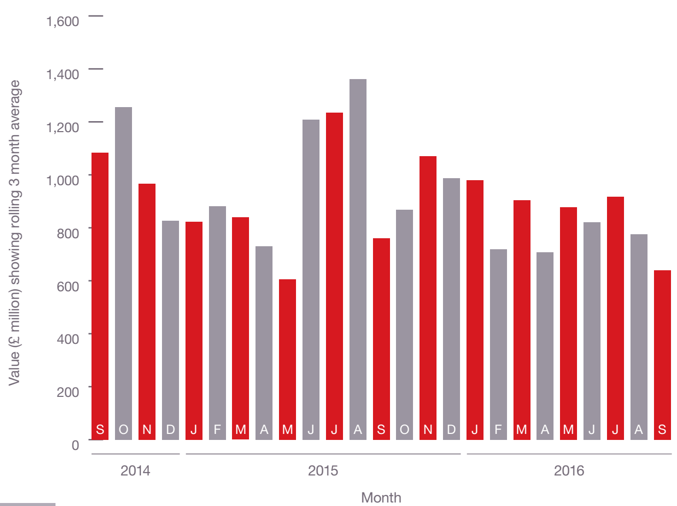

FIG. 5.1

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

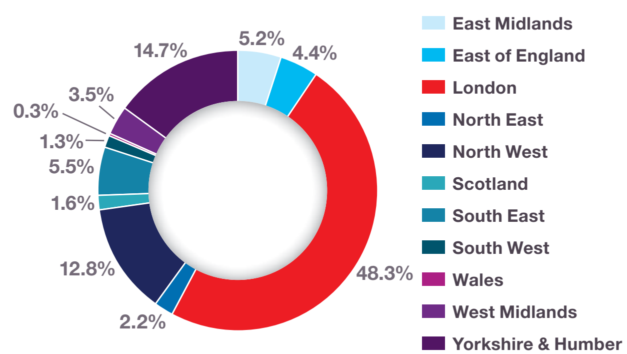

FIG. 5.2

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

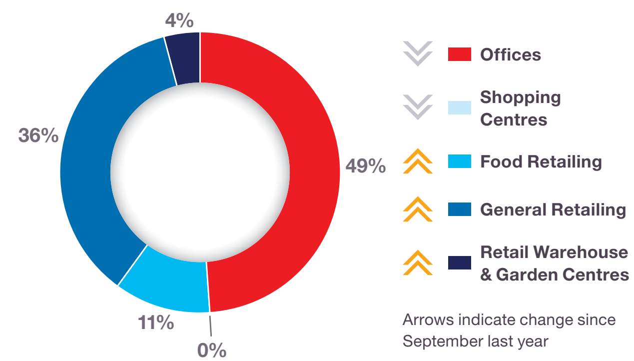

FIG. 5.3

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

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

		-3.3%	Scotland
+3.1%	East Midlands	-4.4%	South East
-18.7%	East of England	-2.1%	South West
+27.5%	London *HOTTEST REGION*	-2.1%	Wales
+0.5%	North East	-5.9%	West Midlands
-0.8%	North West	+6.3%	Yorkshire & Humber

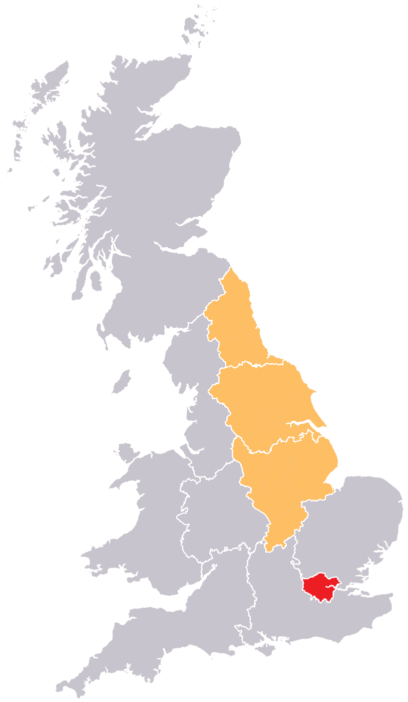

FIG. 5.4

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

PROJECT IN FOCUS

Lincoln House Redevelopment
£30,000,000

County	Greater Manchester
Primary Category Sector	Commercial & Retail
Government Region	North West
Start Date	March 2017
End Date	March 2019
Contract Award Date	September 2016
Funding	Private
Stage	Contract
Contractor	Worthington Properties

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TOP TEN Key Clients
Oct 2015 – Sep 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	Legal and General Group PLC	1 Coleman Street, City, London, EC2R 5AA	020 3124 3000	4	303
5	Argent Estates Limited	11 Brindley Place, 2 Brunswick Square, Birmingham, West Midlands, B1 2LP	0121 643 7799	1	250
6	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	2	210
7	Intu Group	40 Broadway, Westminster, London, SW1H 0BU	020 7887 4220	2	202
8	Lidl UK GMBH	19 Worple Road, Wimbledon, London, SW19 4JS	0800 977 7766/ 0870 444 1234	69	164
9	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	55	127
10	Westfield Shoppingtowns Limited	Level 6, Midcity Place, 71 High Holburn, Westminster, London, WC1V 6EA	020 7061 1400	1	120

TOP TEN Key Architects
Oct 2015 – Sep 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	643
4	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	10	540
5	Bennetts Associates Architects	1 Rawstorne Place, City, London, EC1V 7NL	020 7520 3300 (CTPS)	5	267
6	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	2	266
7	Leslie Jones Architects	121 Great Portland Street, Westminster, London, W1W 6QL	020 7255 1150	6	229
8	Chapman Taylor & Partners	10 Eastbourne Terrace, Paddington, London, W2 6LG	020 7371 3000	3	218
9	Rogers Stirk Harbour and Partners	The Leadenhall Building, 122 Leadenhall Street, City, London, EC3V 4AB	020 7385 1235	3	212
10	Harris Partnership	2 St Johns, Wakefield, West Yorkshire, WF1 3QA	01924 291800	73	199

TOP TEN Key Contractors
Oct 2015 – Sep 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	5	410
3	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	29	395
4	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	3	328
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	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	7	276
8	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	21	275
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 SEPTEMBER

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

Contract award levels in the hotel, leisure & sport sector were £506 million in September, based on a three month rolling average (see Fig. 6.1). This was 24.5% higher than August and 99% higher than September 2015. In the three months to September the value of contracts was £1.3 billion, which was 20.1% higher than the previous three months. This was an increase of 52.6% compared to the same period in 2015 indicating an increase in activity in the sector over the past year.

Projects by region

Scotland was the main location for hotel, leisure & sport contracts this month accounting for 54.1% of the value awarded, 27.4% higher than September 2015 (see Fig. 6.2 & 6.4). The largest individual contract was the Aberdeen Exhibition and Conference Centre development in the city valued at £330 million. This development includes a 200 bedroom hotel and includes the demolition of existing buildings. London was the region with the next highest share of contract value with 16.2% of contract value, an increase of 0.4% from the previous year. The largest contract awarded in the region during September was the Brentford Football Club Stadium in Lionel Road with a value of £40 million.

Type of Projects

The Aberdeen Exhibition Centre contract means that audience/exhibition centres accounted for the highest proportion of activity at 57%, a 41% increase from September 2015. The usually dominant hotels/motels sector accounted for 21% of the value of contracts awarded, a 35% decrease from the corresponding month in the previous year (see Fig. 6.3).

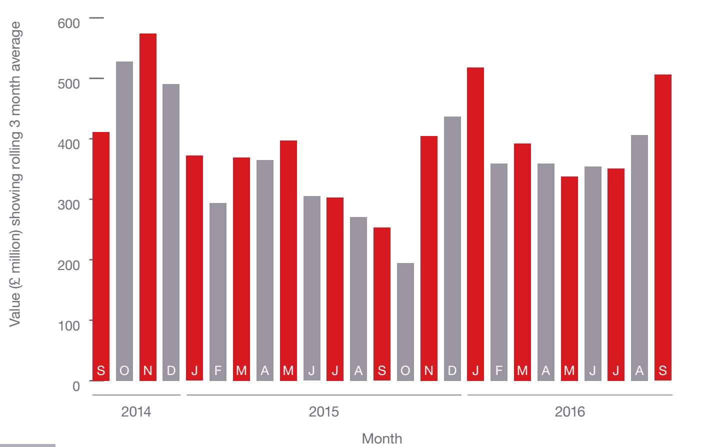

FIG. 6.1

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

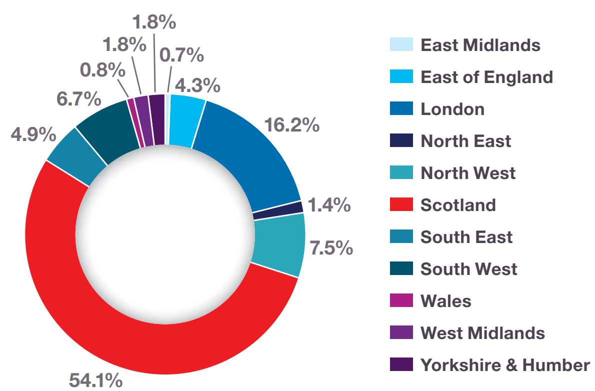

FIG. 6.2

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

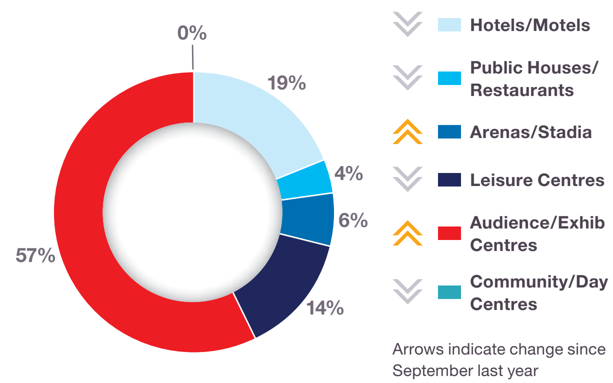

FIG. 6.3

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

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

+27.4%	Scotland *HOTTEST REGION*		
-4.4%	East Midlands	+0.9%	South East
-0.2%	East of England	-13.6%	South West
+0.4%	London	+0.6%	Wales
+1.0%	North East	+0.6%	West Midlands
-3.5%	North West	-9.3%	Yorkshire & Humber

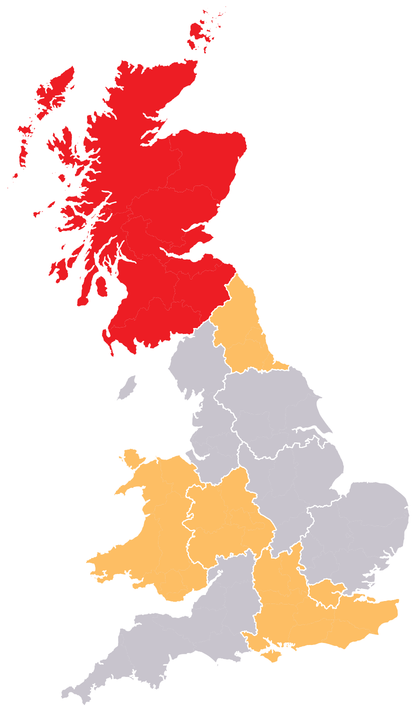

FIG. 6.4

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

"Audience/exhibition centres accounted for the highest proportion of activity at 57%, a 41% increase from September 2015

PROJECT IN FOCUS

Aberdeen Exhibition and Conference Centre Development £330,000,000

County	Grampian
Primary Category Sector	Hotel, Leisure & Sport
Government Region	Scotland
Start Date	July 2016
End Date	July 2019
Contract Award Date	September 2016
Funding	Private
Stage	Contract
Contractor	Robertson Construction Group

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TOP TEN Key Clients

Oct 2015 – Sep 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	Aberdeen City Council	Town House, Broad Street, Aberdeen, Grampian, AB10 1AQ	01224 522000	3	338
3	Swansea City and County Council	County Hall, Oystermouth Road, Swansea, West Glamorgan, SA1 3SN	01792 636000	1	250
4	The All England Lawn Tennis and Croquet Club	Church Road, Wimbledon, London, SW19 5AE	020 8944 1066	2	153
5	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499/ 01582 424200	42	140
6	Regal Property Group	1625 Warwick Road, Knowle, Solihull, West Midlands, B93 9LF	01564 330675	1	125
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	Premier Inn Limited	Whitbread Court, Houghton Business Park, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	0871 527 8000	32	54
10	Stanley Dock Properties Limited	New Street Square, Westminster, London, EC4A 3LX	Not Listed	1	43

TOP TEN Key Architects

Oct 2015 – Sep 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	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	10	202
3	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	4	162
4	Hassell	James William House, 9 Museum Place, Cardiff, South Glamorgan, CF10 3BD	029 2072 9071	3	153
5	Scott Tallon Walker Architects	10 Cromwell Place, South Kensington, London, SW7 2JN	020 7589 4949 (TPS)	2	138
6	Ellis Williams Architects	151 Roseberry Avenue, 3-11 Pine Street, City, London, EC1R 0JH	020 7841 7200	1	136
7	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	1	70
8	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	2	63
9	Design Studio North	17-19 Stott Hill, Bradford, West Yorkshire, BD1 4EH	01274 727745 (TPS)	1	50
10	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	1	45

TOP TEN Key Contractors

Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	12	447
2	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861 000	5	156
3	Sir Robert McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	4	154
4	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	10	117
5	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	13	96
6	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	1	91
7	Gilbert – Ash Limited	47 Boucher Road, Belfast, County Antrim, BT12 6HR	028 90664334	7	89
8	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	3	80
9	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	9	78
10	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	2	65

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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INDUSTRIAL

ACTIVITY DECREASES IN THE SECTOR THIS MONTH

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

Activity in the industrial sector decreased in September with the value of contracts awarded £530 million, based on a three month rolling average (see Fig. 7.1). This equates to a decrease of 5.4% on the value in August and is 1.4% below the figure recorded this time last year. In the three months to September the total value of contracts was £1.7 billion which was 29.5% higher than the previous three months but 17.4% lower than the same quarter last year.

Projects by region

The East Midlands had the largest share of contract value in September with 21%, an increase of 12.7% from September 2015 (see Fig. 7.2 & 7.4). The highest value contract awarded in the East Midlands was the Aldi Distribution Centre in Derbyshire which has a construction cost of £60 million. The East of England had the next highest proportion of industrial contracts with 19.3%, an increase of 14.5% from 2015. The highest value project awarded in September was the Project Ant distribution centre in Tilbury which has a contract value of £90 million.

Type of Projects

The types of project awarded in the sector were predominantly in warehouse/storage which accounted for 42% of contract values, although this was a decline of 6% from September 2015. The heavy industrial sub sector had a strong showing accounting for 22% of the contracts awarded, down by 1% from the same month last year (see Fig. 7.3).

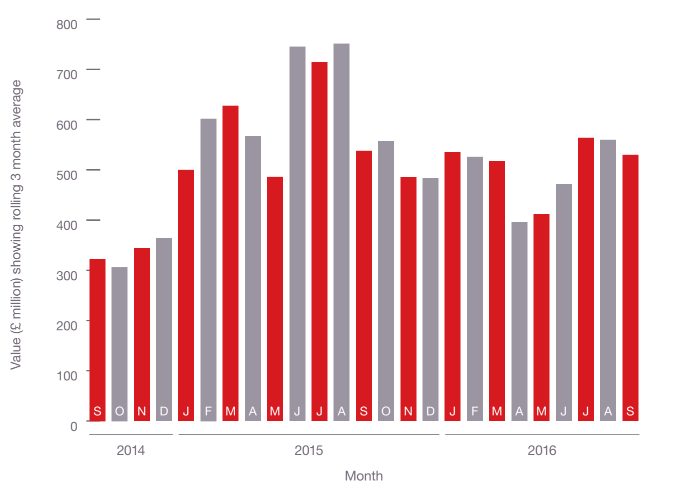

FIG. 7.1

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

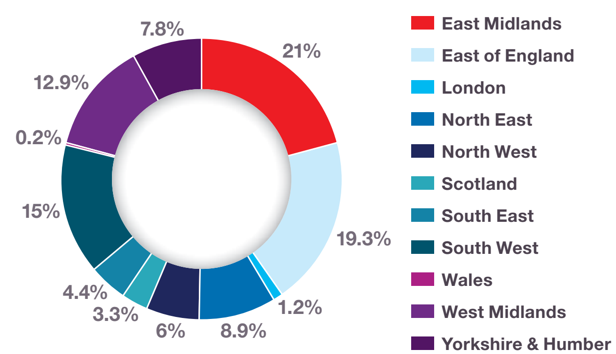

FIG. 7.2

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

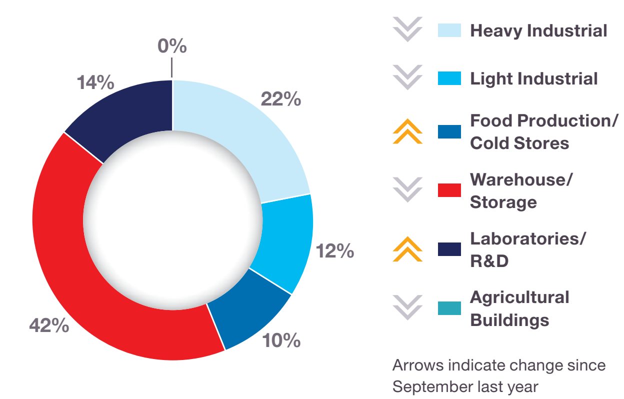

FIG. 7.3

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 September 2015

		-0.3%	Scotland
+12.7%	East Midlands	-21.0%	South East
+14.5%	East of England *HOTTEST REGION*	+11.4%	South West
-9.6%	London	-1.8%	Wales
+4.1%	North East	+11.9%	West Midlands
-10.1%	North West	-11.8%	Yorkshire & Humber

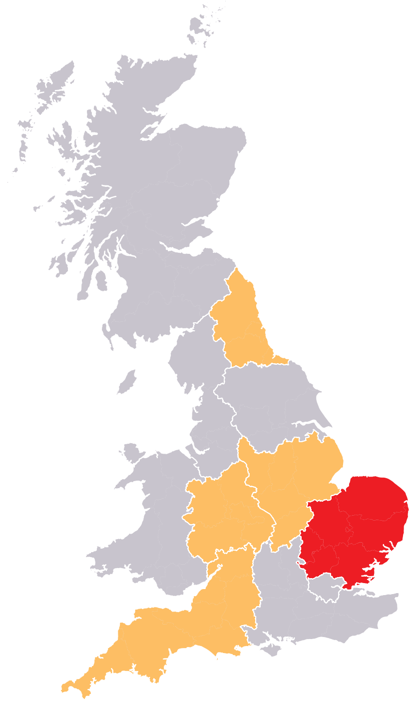

FIG. 7.4

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

PROJECT IN FOCUS

ALDI Distribution Centre – Sawley Crossroads
£60,000,000

County	Derbyshire
Primary Category Sector	Industrial
Government Region	East Midlands
Start Date	TBC
End Date	TBC
Contract Award Date	September 2016
Funding	Private
Stage	Contract
Contractor	DSP Construction Management

economic & construction MARKET REVIEW

OCTOBER 2016

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

TOP TEN Key Clients
Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	6	215
2	BAE Systems	Warwick House, Farnborough Aerospace Centre, Farnborough, Hampshire, GU14 6TQ	01252 373232	6	190
3	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	3	168
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	Port of Tyne Authority	Maritime House, Tyne Dock, South Shields, Tyne And Wear, NE34 9PT	0191 455 2671	2	110
7	Reckitt Benckiser Health Care (UK) Limited	Dansom Lane, Hull, East Riding of Yorkshire, HU8 7DS	01482 326151	1	100
8	The Range	Tamar House, Thornbury Road, Estover, Plymouth, Devon, PL6 7PP	01752 725572 (CTPS)	3	96
9	Stoford Properties Limited	Lancaster House, 67 Newhall Street, Birmingham, West Midlands, B3 1NQ	0121 234 6699 (CTPS)	3	94
10	Lidl UK GMBH	19 Worple Road, Wimbledon, London, SW19 4JS	0800 977 7766/ 0870 444 1234	2	94

TOP TEN Key Architects
Oct 2015 – Sep 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	27	449
2	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	12	302
3	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	12	276
4	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	13	191
5	Fairhursts Design Group	55 King Street, Manchester, Greater Manchester, M2 4LQ	0161 831 7300(CTPS)	6	181
6	The Bush Consultancy	520 Paint Works, Bath Road, Arnos Vale, Bristol, North Somerset, BS4 3EH	0117 316 0570 (CTPS)	4	105
7	Orbit Architects Limited	83 Blackfriars Road, Southwark, London, SE1 8HA	020 7593 3380	1	100
8	AMEC Group PLC	76-78 Old Street, City, London, EC1V 9AZ	020 3215 1700	1	100
9	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	100
10	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	1	100

TOP TEN Key Contractors
Oct 2015 – Sep 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	538
2	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	9	265
3	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	7	235
4	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	11	210
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	8	137
7	M & W UK	Unit A2, Metheun South, Bath Road, Chippenham, Wiltshire, SN14 0GT	01249 455150	2	126
8	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	5	118
9	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	8	116
10	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	2	100

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

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MEDICAL & HEALTH

INCREASE IN VALUE OF CONTRACTS IN SEPTEMBER

The monthly value of medical & health contracts increased in September but were significantly below the values for September 2015.

Levels of activity in the medical & health sector increased by 10.4% in September 2016 compared to August, with the total value of contracts awarded £140 million based on a three month rolling average (see Fig. 8.1). This is 12.8% lower than the values in September 2015. The value of contracts awarded was 3.8% higher than the previous three months and was 4.5% up on the same period in 2015 indicating a longer term increase in the value of contracts awarded in the sector.

Projects by region

Scotland was the main location of development in the sector this month with 35.8% of activity, a 35.4% increase from September 2015 (see Fig. 8.2 & 8.4). This is primarily due to the award for the contract to build a Community Hospital in East Lothian which will provide 122 beds and is valued at £70 million. This development also includes associated offices and has been awarded to Morrison Construction.

Type of Projects

Due to the community hospital award it is public hospitals which is the dominant sub-sector this month accounting for 69% of the value of contracts in September 2016, a 61% increase from September 2015 (see Fig. 8.3).

> Scotland was the main location of development in the sector this month with 35.8% of activity

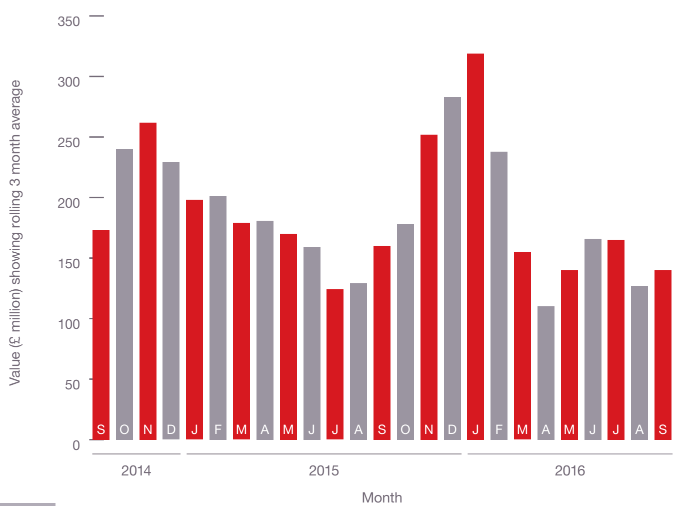


FIG. 8.1

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

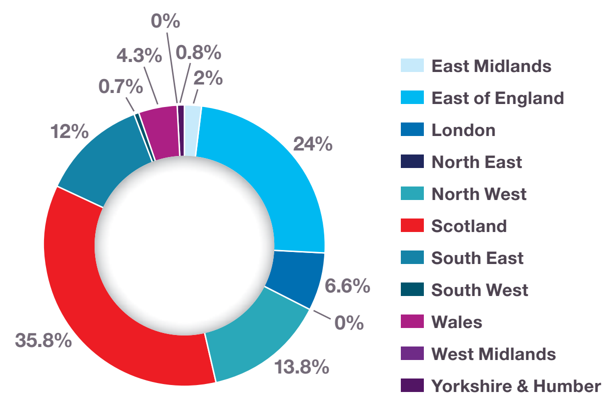
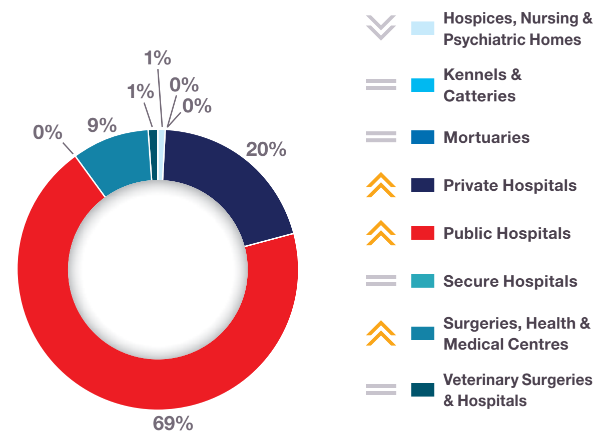


FIG. 8.2

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



Arrows indicate change since September last year

FIG. 8.3

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

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The map and figures show how the activity has changed since September 2015			+35.4%	Scotland *HOTTEST REGION*
-83.4%	East Midlands		+7.8%	South East
+22.0%	East of England		-0.6%	South West
+5.5%	London		+4.3%	Wales
-0.3%	North East		-1.0%	West Midlands
+10.8%	North West		-0.5%	Yorkshire & Humber

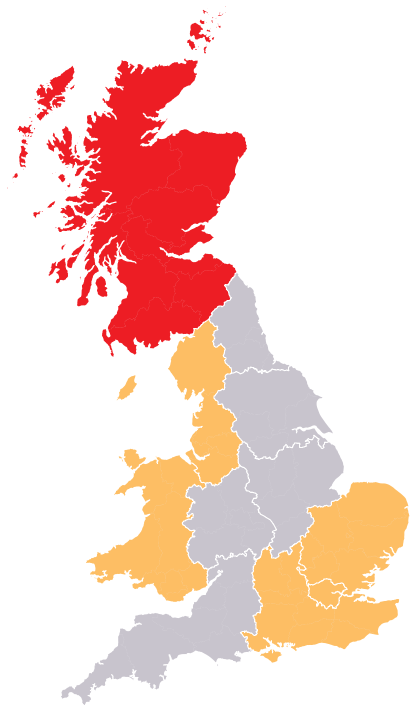

FIG. 8.4

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

The value of contracts awarded was 3.8% higher than the previous three months and was 4.5% up on the same period in 2015

PROJECT IN FOCUS

Roodlands Hospital Site – East Lothian Community Hospital
£70,000,000

County	East Lothian
Primary Category Sector	Medical & Health
Government Region	Scotland
Start Date	January 2017
End Date	January 2020
Contract Award Date	September 2016
Funding	Public
Stage	Contract
Contractor	Morrison Construction

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INCREASE IN VALUE OF CONTRACTS IN SEPTEMBER

TOP TEN Key Clients
Oct 2015 – Sep 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	Hampshire Hospitals NHS Foundation Trust	Aldermaston Road, Basingstoke, Hampshire, RG24 9NA	01256 473202	2	166
3	University College London Hospital NHS Foundation Trust	2nd Floor 250 Euston Road, City, London, NW1 2PG	020 3456 7890 (CTPS)	3	139
4	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)	2	130
5	Bartholomew & London Hospital (NHS) Trust	Capital & Facilities Directorate, 5th Floor, Queen Mary's Wing, West Smithfield, City, London, EC1A 7BE	020 7377 7000	3	103
6	Frimley Health NHS Foundation Trust	Wexham Park Hospital, Wexham Street, Wexham, Slough, Berkshire, SL2 4HL	01753 633000	3	96
7	Royal Free Hospital	Pond Street, Hampstead, London, NW3 2QG	020 7794 0500	5	54
8	Horizon Care Homes Limited	Unit 1.16, Great House, Redwall Close, Rotherham Road, Dinnington, Sheffield, South Yorkshire, S25 3QA	01909 517737	1	50
9	Ashley House Plc	6 Cliveden Office Village, Lancaster Road, Cressex Business Park, High Wycombe, Buckinghamshire, HP12 3YZ	01628 600340	1	45
10	Lothian Health Board	Deaconess House, 148 Pleasance, Edinburgh, Lothian, EH8 9RQ	0131 536 9000	2	44

TOP TEN Key Architects
Oct 2015 – Sep 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	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	10	202
3	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	4	162
4	Hassell	James William House, 9 Museum Place, Cardiff, South Glamorgan, CF10 3BD	029 2072 9071	3	153
5	Scott Tallon Walker Architects	10 Cromwell Place, South Kensington, London, SW7 2JN	020 7589 4949 (TPS)	2	138
6	Ellis Williams Architects	151 Roseberry Avenue, 3-11 Pine Street, City, London, EC1R 0JH	020 7841 7200	1	136
7	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	1	70
8	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	2	63
9	Design Studio North	17-19 Stott Hill, Bradford, West Yorkshire, BD1 4EH	01274 727745 (TPS)	1	50
10	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	1	45

TOP TEN Key Contractors
Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	18	364
2	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	1	280
3	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	6	151
4	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	1	136
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	5	89
6	Morrison Construction	2rd Floor Rowan House, 1 Robroyston Oval, Robroyston, Glasgow, Strathclyde, G33 1AP	0141 557 6500	1	70
7	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	5	51
8	Integrated Health Projects	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	3	51
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	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

DECREASE IN THE VALUE OF CONTRACTS IN SEPTEMBER

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

The value of contracts awarded in the education sector was £529 million in September based on a three month rolling average, a 15.4% decrease from August (see Fig. 9.1). This figure was 24.7% lower than September 2015 indicating the sectors deteriorating performance over the past year. The value of contracts awarded in the three months to September were 15.6% below the same period last year, emphasising the decline in construction contracts over the longer term.

Projects by region

London experienced the highest share of the value of education contracts in September, accounting for 36.4% of contract value awarded, a 16% increase from September 2015 (see Fig. 9.2 & 9.4). One of the major construction contracts awarded in London in September was the contract to fit out the molecular sciences research hub at Imperial College. This was valued at £61 million and was awarded to ISG.

Type of Projects

Colleges/universities were the dominant sub sector in education in September. They accounted for 41% of the total value awarded, a 1% decline from September 2015 (see Fig. 9.3).

> London experienced the highest share of the value of education contracts in September

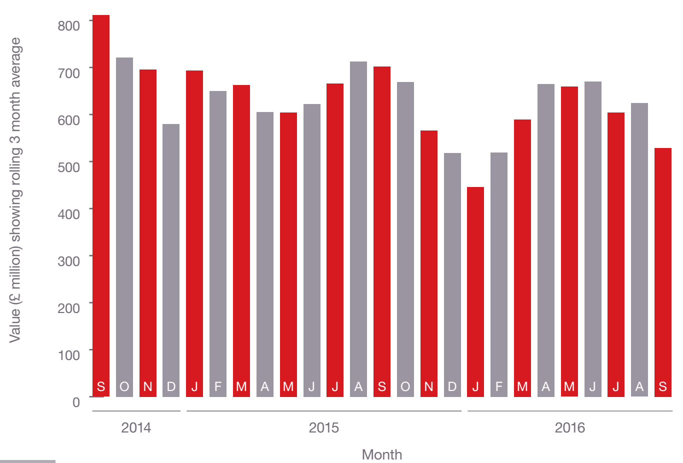

FIG. 9.1

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

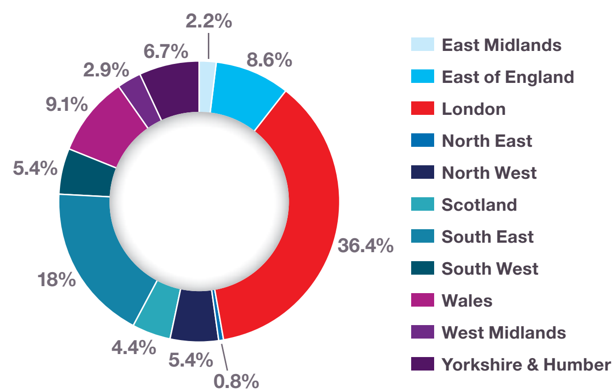

FIG. 9.2

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

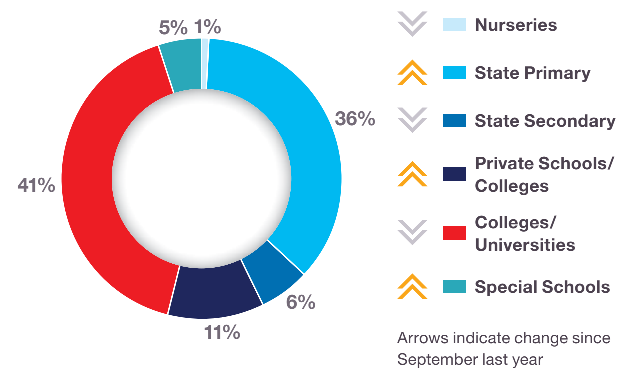

FIG. 9.3

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

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DECREASE IN THE VALUE OF CONTRACTS IN SEPTEMBER

The map and figures show how the activity has changed since September 2015		-16.7%	Scotland
-5.7%	East Midlands	+5.7%	South East
+3.5%	East of England	-1.1%	South West
+16.0%	London *HOTTEST REGION*	+6.9%	Wales
-3.9%	North East	0.0%	West Midlands
-5.8%	North West	+1.1%	Yorkshire & Humber

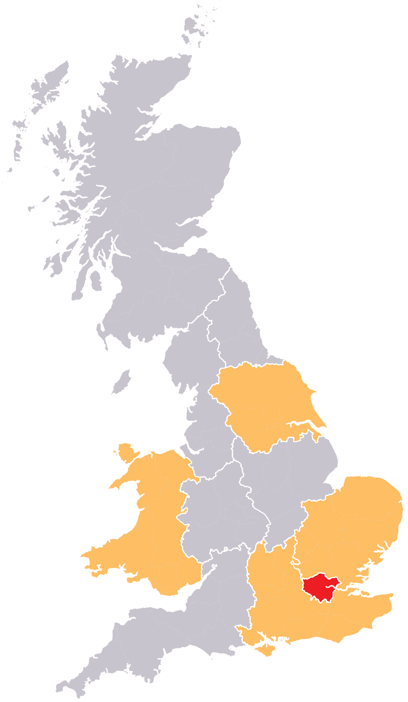

FIG. 9.4

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

> The value of contract awards in the three months to September were 15.6% below the same period last year

PROJECT IN FOCUS

University Of Wales – SA1 Waterfront Innovation Quarter – Phase 1 – FACE Building
£25,000,000

County	West Glamorgan
Primary Category Sector	Education
Government Region	Wales
Start Date	October 2016
End Date	August 2018
Contract Award Date	September 2016
Funding	Public
Stage	Contract
Contractor	ESHA Architects Limited

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DECREASE IN THE VALUE OF CONTRACTS IN SEPTEMBER

TOP TEN Key Clients
Oct 2015 – Sep 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	48	438
2	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	5	272
3	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	15	224
4	University of Northampton	Boughton Green Road, Northampton, Northamptonshire, NN2 7AL	01604 735500 (CTPS)	6	138
5	Birmingham City University	Franchise Street, Perry Barr, Birmingham, West Midlands, B42 2SU	0121 331 5000	4	96
6	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	3	82
7	University College London	Gower Street, Westminster, London, WC1E 6BT	020 7679 2000 (CTPS)	7	79
8	Kent County Council	County Hall, County Road, Maidstone, Kent, ME14 1XQ	0300 041 4141	23	79
9	London Borough of Hounslow	Civic Centre, Lampton Road, Hounslow, Middlesex, TW3 4DN	020 8583 2000	10	78
10	Powys County Council	Powys County Hall, Spa Road East, Llandrindod Wells, Powys, LD1 5LG	01597 826000 (CTPS)	1	75

TOP TEN Key Architects
Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	4	299
2	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	14	260
3	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	26	255
4	Mecanoo Architecten	Oude Delft 203, 2611 HD Delft, Holland	+31 15 2798100	1	225
5	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	8	214
6	Pick Everard (Leicester)	Halford House, Charles Street, Leicester, Leicestershire, LE1 1HA	0116 223 4400 (TPS)	30	214
7	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	20	147
8	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	11	137
9	Moses Cameron William Architects	Oast House, Malting Lane, Cambridge, Cambridgeshire, CB3 9HF	01223 792500	5	137
10	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 464 6100	5	131

TOP TEN Key Contractors
Oct 2015 – Sep 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	104	686
2	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	36	475
3	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	11	407
4	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	51	385
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	30	291
6	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	55	267
7	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	14	251
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)	24	164
10	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	4	160

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