economic & construction MARKET REVIEW

Barbour ABI Building bd

NOVEMBER 2016

Economic Context

Major announcements and developments in the UK economy this month.

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The Construction Sector

The main economic headlines in the construction industry this month.

SKIP TO THIS SECTION

Sectors in Detail

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

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ABOUT US

SPECIALIST PROVIDER OF CONSTRUCTION INTELLIGENCE

Michael Dall

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

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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

ECONOMIC GROWTH UNEXPECTEDLY STRONG IN Q3

The latest GDP figures for the UK economy were released in the last month and they showed that the UK economy had grown by 0.5% in the third quarter of 2016.

This was below the 0.7% rate of growth experienced in the second quarter of 2016 (see Fig. 1.1) and is an indication that while the economy has lost some momentum over the summer months, it is performing better than most analysts expected in the wake of the Brexit vote.

While the total level of output is now comfortably above its pre-recession peak, the pattern of growth within the economy is still very much focussed towards the dominant service sector. The latest figures show that the service sector is now 12.1% higher than its pre-recession peak while construction is currently 1.3% below its pre-recession peak and manufacturing is 5.6% below (see Fig. 1.2). This indicates the scale of the challenge of rebalancing the economy towards manufacturing and construction given the dominance of the service sector.

The labour market continues to perform particularly strongly in the UK however with further falls in the period August to October. The rate of unemployment is currently 4.8% for those aged 16 and over, down from 4.9% in the three months to September 2016 (see Fig. 1.3). The levels of unemployment are at the lowest point in eleven years according to the Office for National Statistics.

The rate of inflation fell to 0.9% in October with the continued decline in clothing and food prices the main reasons for this (see Fig. 1.4). Most commentators expect inflation to start growing next year as the impact of the weaker pound starts to impact on the price of imported goods.

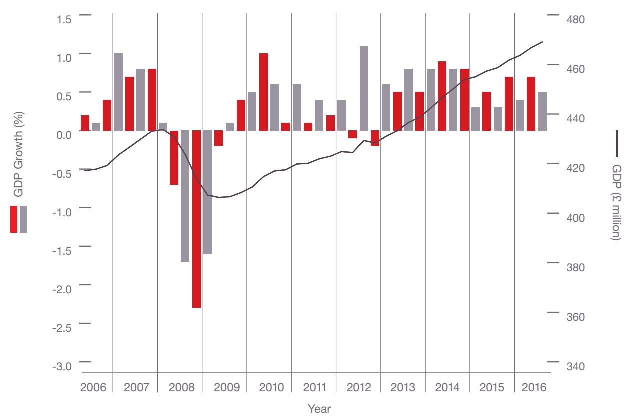

Fig. 1.1 **UK GDP** Source: ONS

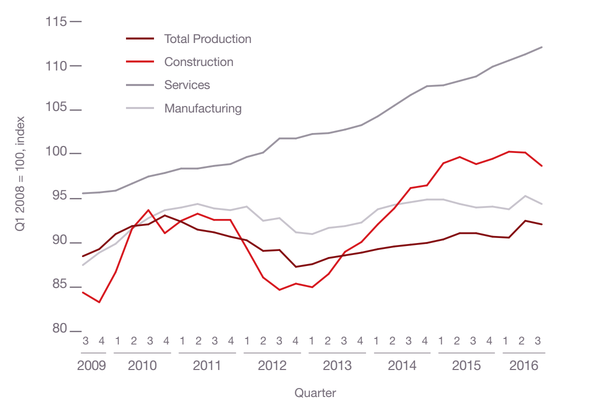

Fig. 1.2 **UK GDP** Source: ONS

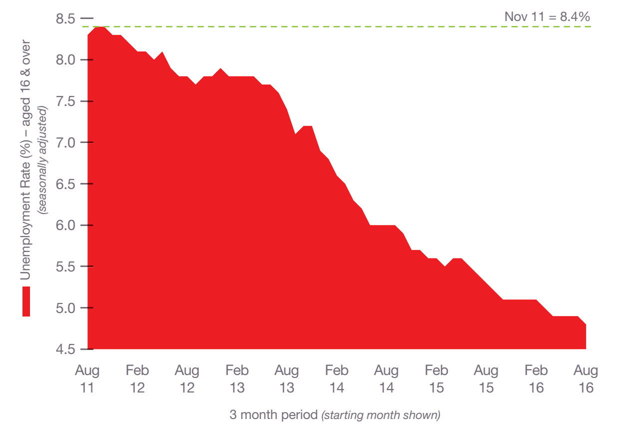

Fig. 1.3 **Unemployment Rate** Source: ONS

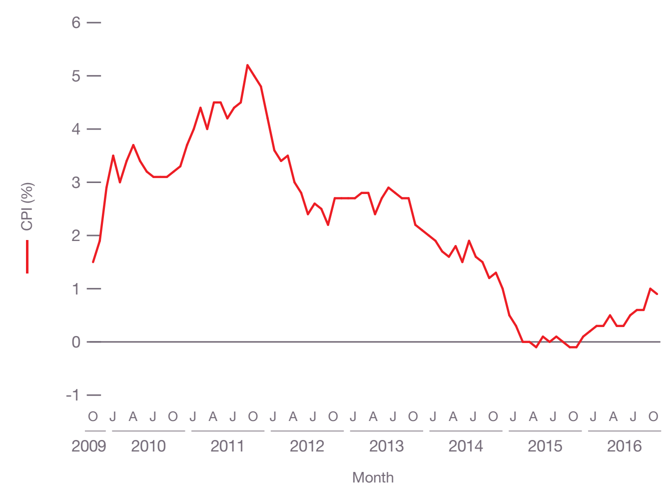

Fig. 1.4 **CPI Inflation** Source: ONS

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CONSTRUCTION CONTRACT ACTIVITY INCREASES IN OCTOBER

The construction sector shows continuing signs of resilience despite the tougher economic headwinds with output steady and contract awards increasing.

The latest figures from the ONS indicate the construction sector in the UK declined by 1.1% between Quarter 2 and Quarter 3 2016. Comparing Q3 output levels with the same period in 2015 showed an increase of 0.1%, demonstrating an industry that is roughly the same size as last year despite the slowdown in recent months.

There were quarterly decreases in new private housing but this was still 10.8% higher than the corresponding time period in 2015. There was also a quarter-on-quarter decrease in private commercial output but this was also higher than the same quarter in 2015. The one sector that showed declines in both comparison periods was industrial which declined by 1.2% over the quarter and 12.3% on the same quarter in 2015. On a positive note infrastructure increased by 1.2% but is 7.7% below the figure of last year (see Fig. 2.1).

	% change	
	Quarter 3 2015 – Quarter 3 2016	Quarter 2 2016 – Quarter 3 2016
Total All Work	**0.1**	**-1.1**
All New Work	**2.0**	**0.3**
Public Housing	-3.1	0.8
Private Housing	10.8	-0.1
Infrastructure	-7.7	1.2
Public (ex Infrastructure)	3.1	0.9
Private Industrial	-12.3	-1.2
Private Commercial	4.5	-0.2
Repair & Maintenance	**-3.4**	**-3.6**
Public Housing	-12.0	-7.0
Private Housing	-1.6	-1.6
Non-Housing	-1.9	-3.9

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 144 for October (see Fig. 2.2). This is an increase from the previous month's figure of 142 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 243, up from 227 the previous month. Commercial offices recovered some of last month's losses with a reading of 93, up from 84 in September. However, that compares to a reading of 155 in October 2015.

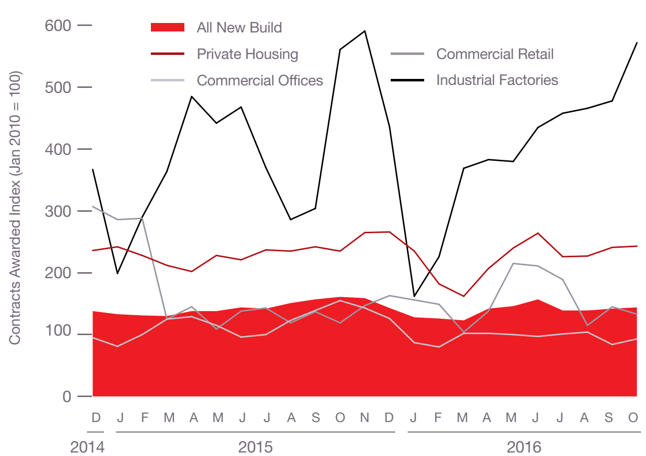

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

Construction Sector

According to Barbour ABI data on all contract activity, October witnessed an increase in construction levels with the value of new contracts awarded £5.9 billion, based on a three month rolling average (see Fig. 2.4). This is a 5.9% increase from September but is 18.3% lower than the value recorded in October 2015. The number of construction projects within the UK increased by 3.3% in October, but were 20.5% lower than October 2015.

> Activity in the industry is increasing after an initial decline after the EU referendum result

The majority of the contracts awarded in October by value were in London, accounting for 22% of the UK total. This is followed by the North West with 14% of contract award value in the month (see Fig. 2.3). The main reason for London's figures this month was the award of two major residential schemes at Chrisp Street in Poplar and in Kidbrooke Village. The Chrisp Street development is a mixed

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use scheme set to deliver 692 units being built by Telford Homes at a value of £300 million and Kidbrooke Village is Phase 4 of this particular development and is valued at £126 million.

Types of Project

Residential had the highest proportion of contracts awarded by value in October with 58% of the total. This is followed by the commercial and retail sector which accounted for 12% of the awarded value (see Fig. 2.5). The two aforementioned contracts are the main reasons for the residential sectors strong showing in October and confirms the continued confidence among house builders which shows no sign of slowing in the wake of the Brexit vote.

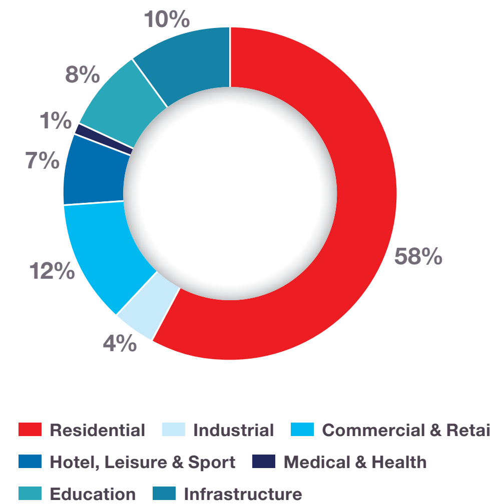

Fig. 2.5 **Type of Projects** Source: Barbour ABI

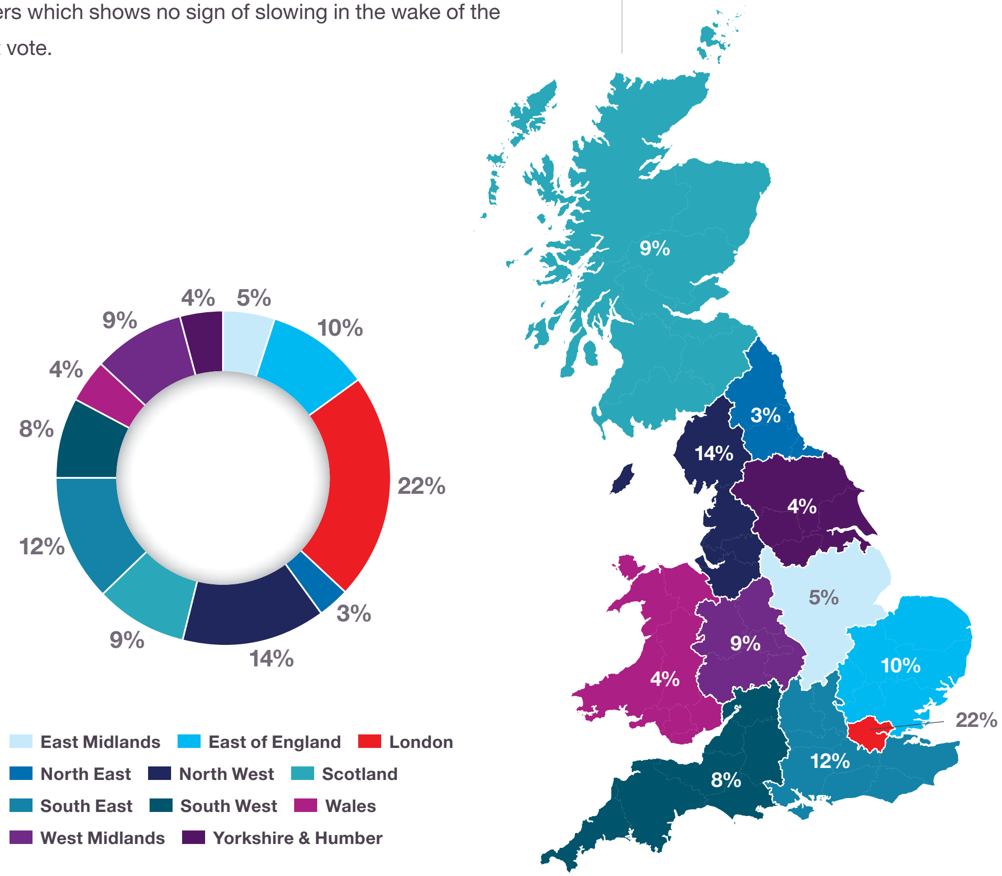

Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

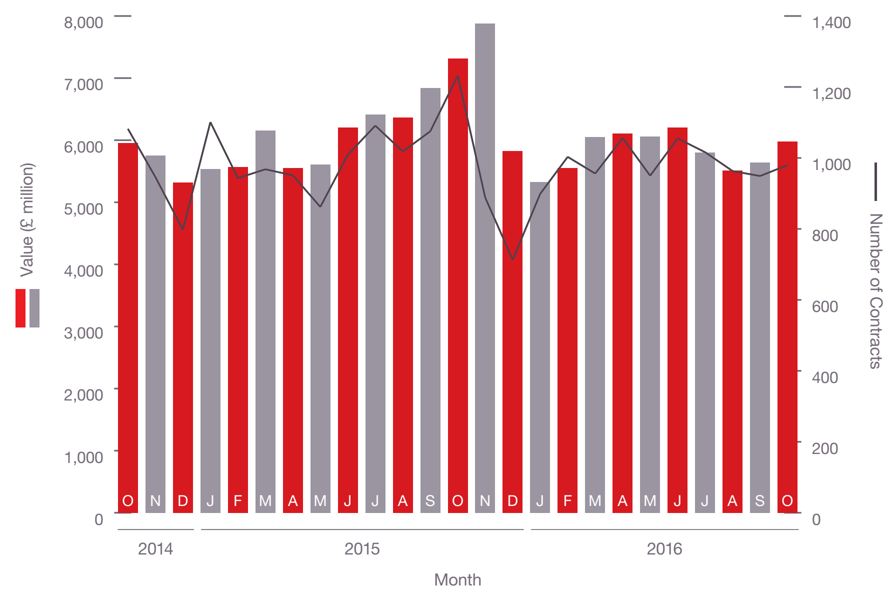

Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

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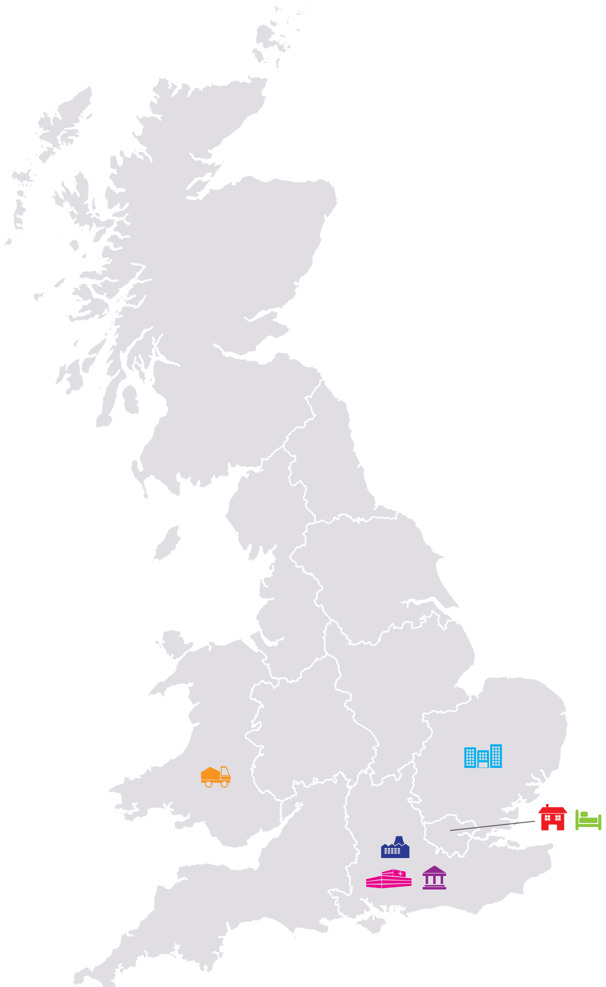
A snippet of this month's regional activity

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
Hackney Road – Redevelopment
£46,725,000

INFRASTRUCTURE
Parc Adfer – North Wales Residual Waste Treatment
£100,000,000

COMMERCIAL & RETAIL
Station Road – CB1 New City Quatre
£87,000,000

HOTEL, LEISURE & SPORT
Hampton By Hilton Hotel – Fountainbridge
£18,000,000

INDUSTRIAL
Granta Park, Phase 2 Zone 1 – Array Multiplex
£70,000,000

MEDICAL & HEALTH
Royal Sussex County Hospital – (CAB) Clinical Administration Building
£5,300,000

EDUCATION
Branston Road High School Development
£25,000,000

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RESIDENTIAL

SURGE IN RESIDENTIAL CONTRACT VALUES

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

The performance of the residential sector was exceptionally strong in October with the total value of projects awarded valued at £2.3 billion based on a three month rolling average (see Fig. 3.1). This is a 33.5% increase compared to September and is 5.7% higher than October 2015. The number of units associated with residential contracts awarded increased by 9.3% between September and October based on a three month rolling average, and are 4.2% higher than October 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 October from Nationwide showed that average house prices are rising at 4.6% annually, a decrease from 5.3% in September. The conditions within the market are described as "stable" and that the relative strength of the labour market should continue to underpin these levels of increases.

The Halifax reported annual house price rises at 5.2% in October, down from 5.8% in September. In signs that the residential market remains robust, Taylor Wimpey reported its order book had grown since last year despite selling slightly less homes in the year. At the same time Persimmon reported a sales rates increase of 19% in its trading update.

Projects by region

London is the main location of activity in the residential sector this month, accounting for 28% of the value of contracts awarded, an increase of 12.6% from the same month last year. The North West had the next highest proportion of contract award value in October with 15.2% of total value awarded, an increase of 0.5%

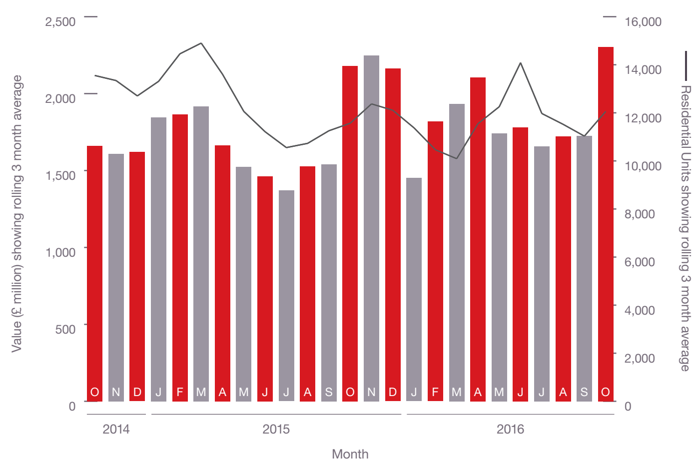

FIG. 3.1

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

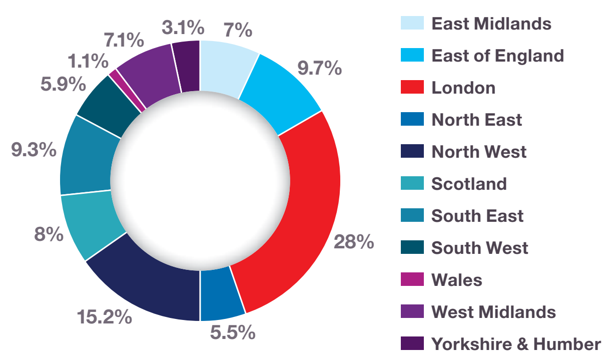

FIG. 3.2

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

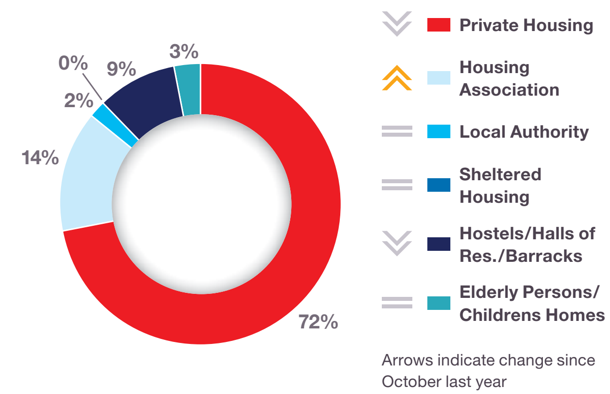

FIG. 3.3

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

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SURGE IN RESIDENTIAL CONTRACT VALUES

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

			↑	+0.5%	Scotland
↓	-0.4%	East Midlands	↓	-2.5%	South East
↑	+0.2%	East of England	↓	-0.3%	South West
↑	+12.6%	London *HOTTEST REGION*	↓	-6.5%	Wales
↓	-0.2%	North East	↓	-1.0%	West Midlands
↑	+0.5%	North West	↓	-2.8%	Yorkshire & Humber

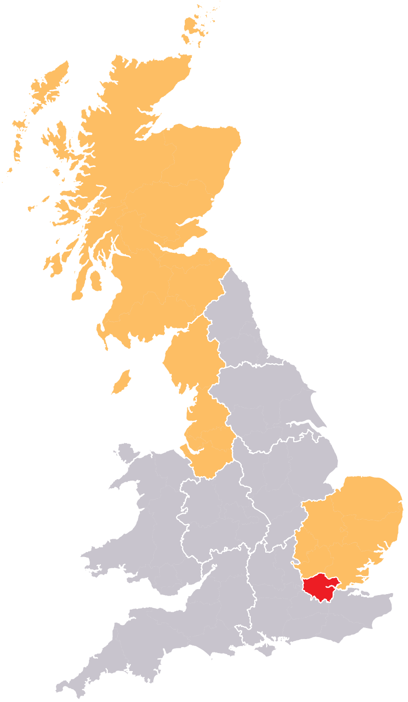

FIG. 3.4

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

from October 2015 (see Fig. 3.2 & 3.4). Outside of London the largest residential contract award by value was in Glasgow at the Dalmarnock Riverside development, a scheme set to provide 550 units at a value of £81.2 million awarded to McTaggart Construction.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing this month. Private housing accounted for 72% of the value of contracts awarded this month, a 9% decrease from the corresponding month last year. After private housing, the next largest project type were housing association which accounted for 14% of the value awarded, a 12% increase from the corresponding month last year (see Fig. 3.3).

PROJECT IN FOCUS

Hackney Road – Redevelopment
£46,725,000

County	London
Primary Category Sector	Residential
Government Region	London
Start Date	November 2016
End Date	November 2018
Contract Award Date	October 2016
Funding	Private
Stage	Contract
Contractor	Regal Homes

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TOP TEN
Key Clients
Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	146	1,907
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	140	1,882
3	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	104	1,230
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	100	1,204
5	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	55	674
6	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 876200 (CTPS)	48	595
7	The Berkeley Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	20	583
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	40	507
9	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	29	444
10	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	24	402

TOP TEN
Key Architects
Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	72	725
2	CZWG Architects	17 Bowling Green Lane, City, London, EC1R 0QB	020 7253 2523	4	416
3	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	4	406
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	27	395
5	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	9	387
6	Pollard Thomas & Edwards Architects	Diespeker Wharf, 38 Graham Street, Islington, London, N1 8JX	020 7336 7777	19	354
7	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	22	337
8	Tetlow King Planning	Unit 2 Eclipse Office Park, Staple Hill, Bristol, North Somerset, BS16 5EL	0117 9561916 (CTPS)	25	331
9	JTP	23-25 Great Sutton Street, City, London, EC1V 0DN	020 7017 1780	20	329
10	Simon Cooper Associates Limited	Connaught House, 22/24 Guildford Road, Bagshot, Surrey, GU19 5JN	01276 450866	22	318

TOP TEN
Key Contractors
Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	150	1,940
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	143	1,923
3	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	111	1,312
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	103	1,210
5	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	77	1,087
6	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	54	675
7	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	57	638
8	The Berkeley Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	22	605
9	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 876200 (CTPS)	48	595
10	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	29	545

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 OCTOBER

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

The value of contracts awarded in the infrastructure sector in October totalled £1.5 billion based on a three month rolling average (see Fig. 4.1). This is 3% lower than the previous month and 41.6% lower than October 2015. In the three months to October the total value of contract awards was £4.4 billion based on a three month rolling average. This is 21.6% lower than the previous three months and 37.8% lower than the same period in 2015.

Projects by region

The main location of infrastructure projects this month was Wales with 23.1% of the value, and this was 23% higher than October 2015 (see Fig. 4.2 & 4.4). The main project awarded in the region was the Parc Adfer residual waste treatment scheme in Clwyd valued at £100 million. The South East was the next most active location accounting for 17.5% of contract value, a 15.3% increase since October 2015.

Type of Projects

Utilities was the dominant sector within infrastructure, accounting for 42% of the contract value awarded. Civil engineering was the second major sector accounting for 29% of the value of contracts (see Fig. 4.3).

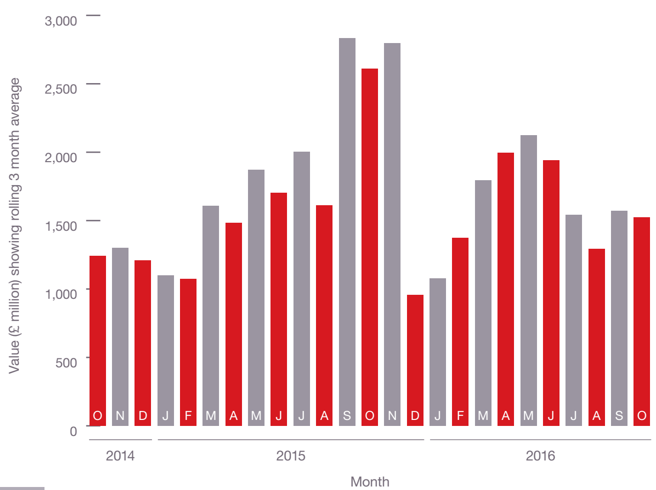

FIG. 4.1
Infrastructure: **Project Value showing 3 month moving average** Source: Barbour ABI

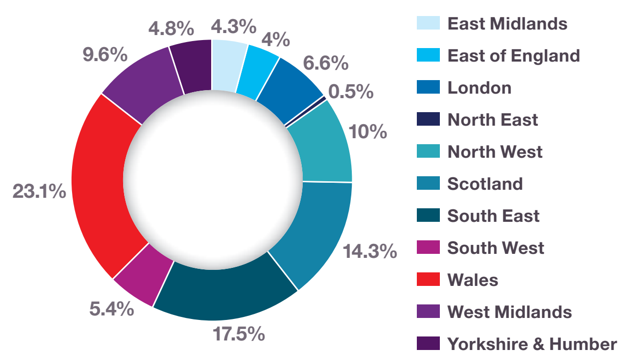

FIG. 4.2
Infrastructure: **Value of Contracts by Region** Source: Barbour ABI

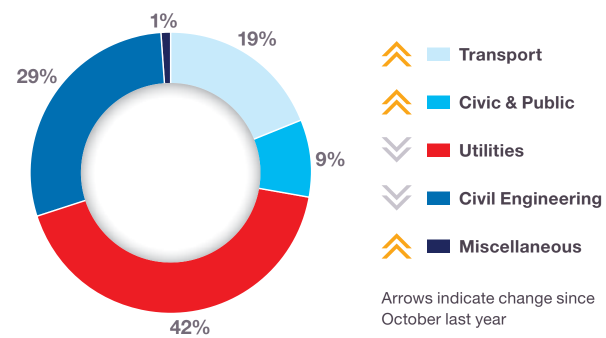

FIG. 4.3
Infrastructure: **Type of Projects Awarded** Source: Barbour ABI

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

		+9.3%	Scotland
+3.3%	East Midlands	+15.3%	South East
+3.4%	East of England	+4.1%	South West
-22.0%	London	+23.0%	Wales *HOTTEST REGION*
-4.6%	North East	+9.1%	West Midlands
+6.9%	North West	+3.8%	Yorkshire & Humber

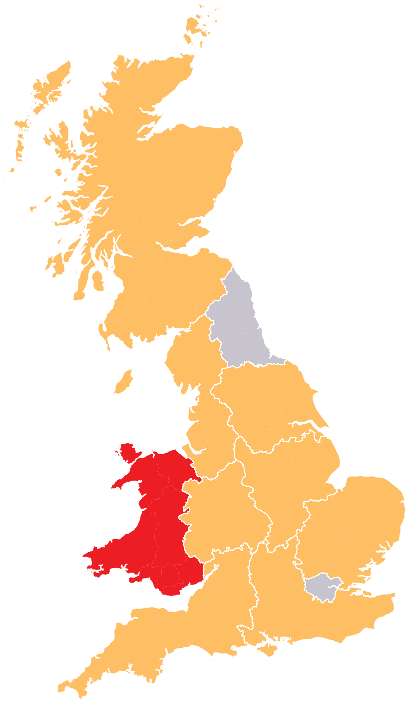

FIG. 4.4

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

Source: Barbour ABI

"The main location of infrastructure projects this month was Wales with 23.1% of the value

PROJECT IN FOCUS

Parc Adfer – North Wales Residual Waste Treatment £100,000,000

County	Clwyd
Primary Category Sector	Infrastructure
Government Region	Wales
Start Date	December 2016
End Date	December 2019
Contract Award Date	October 2016
Funding	Public
Stage	Subcontract
Contractor	Wheelabrator Technologies

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Hotel, Leisure & Sport

Industrial

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TOP TEN Key Clients

Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	63	1,491
2	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	238	1,477
3	SSE Limited	55 Vastern Road, Reading, Berkshire, RG1 8BU	0118 953 4695	3	1,424
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

Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Gebler Tooth	1 World Business Centre, Newall Road, Hounslow, Middlesex, TW6 2RE	020 8283 9926 (CTPS)	1	170
2	Elevation Projects Limited	1st Floor, 16 Wright Street, Hull, East Riding of Yorkshire, HU2 8JU	01482 221155	1	150
3	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	150
4	Fletcher Rae UK Limited	Hill Quays, 5 Jordan Street, Manchester, Greater Manchester, M15 4PY	0161 242 1140	2	130
5	Renewable Developments Wales Limited	10 Capel Hewore Industrial Estate, Capel Hewore, Ammanford, Dyfed, SA18 3SJ	01269 833080	1	80
6	John Hill Associates	6 Shaw Wood Way, Shaw Wood Business Park, Doncaster, South Yorkshire, DN2 5TB	01302 364565 (TPS)	3	65
7	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	1	65
8	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	1	50
9	Mott MacDonald Group Limited	Mott MacDonald House, 8-10 Sydenham Road, Croydon, Surrey, CR0 2EE	020 8774 2000	2	42
10	Glanville Consultants	Cornerstone House, 62 Foxhall Road, Didcot, Oxfordshire, OX11 7AD	01235 515550	1	40

TOP TEN Key Contractors

Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Costain Group Plc	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	16	1,021
2	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	45	905
3	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	12	851
4	Bachy Soletanche Limited	Henderson House, Langley Place, Higgins Lane, Burscough, Ormskirk, Lancashire, L40 8JS	01704 895686 (CTPS)	1	800
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	16	348
9	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	17	340
10	Costain/ Skanska JV	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444 / 01923 842444	1	290

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 OCTOBER

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

The value of contracts awarded in the commercial and retail sector were £623 million in October based on a three month rolling average (see Fig. 5.1). This is a 2.7% decrease from September and a 28.4% decrease from the October 2015 figure. In the three months to October the value of contracts were 22.1% below the previous three months and 31.9% lower than the same period in 2015, indicating poorer performance in the sector over the longer term.

Projects by region

The East of England was the main region of activity in the sector this month accounting for 23.7% of the value of all contracts awarded, which was 16.6% higher than October 2015 (see Fig. 5.2 & 5.4). The largest contract awarded in the East of England in October was the Kao Park project in Harlow to construct four data centres with an estimated value of £60 million. The South West received the second highest share of contracts awarded in October with 18.2% of the value, which was 13.5% above the share in October 2015. There were two large commercial contracts awarded in the region in October, the first the contract to build the UK Hydrographic head office in Taunton and the construction of a John Lewis store in Cheltenham both valued at £30 million.

Type of Projects

Offices were the dominant type of project in the sector accounting for 76% of the value of contracts awarded this month, which is 3% lower than October 2015. General retailing is the next largest sector with 14% of contract award value, which is a 3% decrease from the October 2015 figure (see Fig. 5.3).

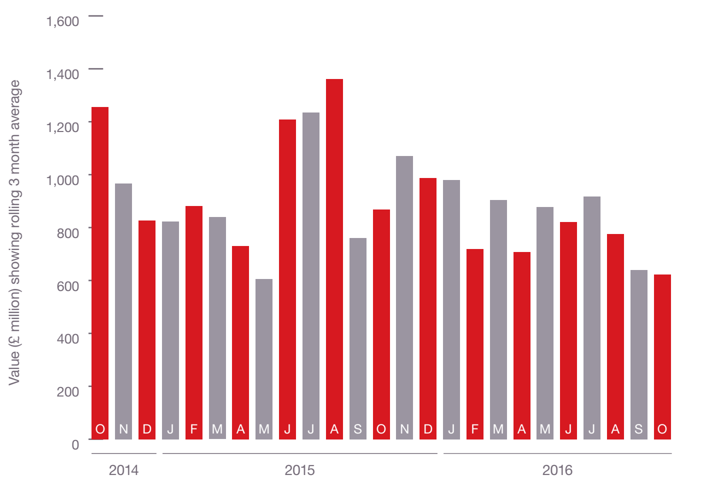

FIG. 5.1

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

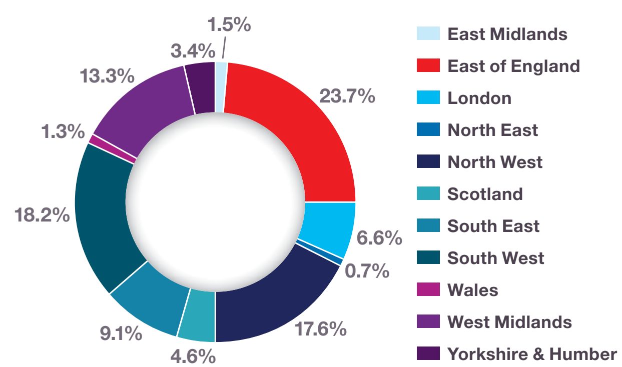

FIG. 5.2

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

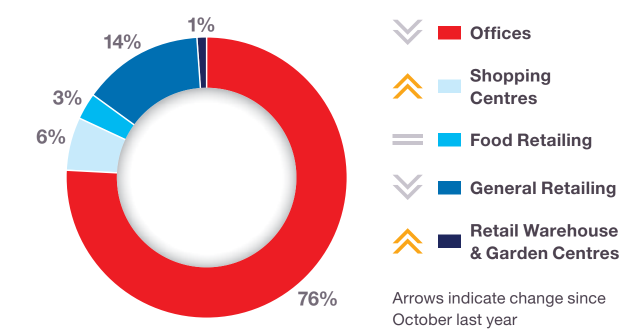

FIG. 5.3

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

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DECREASE IN CONTRACT VALUES IN OCTOBER

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

		-7.2%	Scotland
-0.7%	East Midlands	+3.4%	South East
+16.6%	East of England *HOTTEST REGION*	+13.5%	South West
-37.4%	London	+1.1%	Wales
+0.3%	North East	+6.0%	West Midlands
+10.4%	North West	-6.0%	Yorkshire & Humber

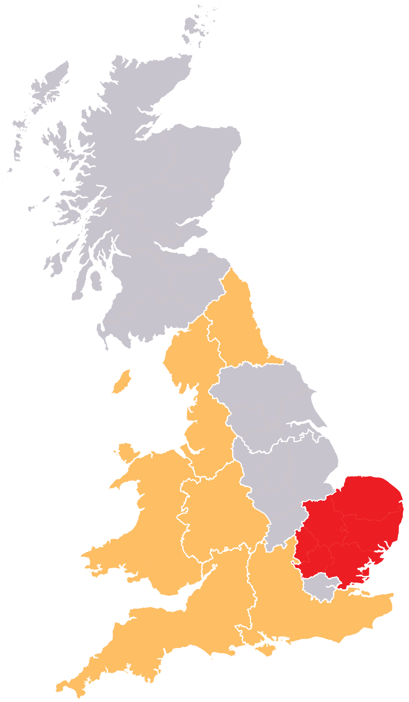

FIG. 5.4

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

PROJECT IN FOCUS

Station Road – CB1 New City Quarter £87,000,000

County	Cambridgeshire
Primary Category Sector	Commercial & Retail
Government Region	East England
Start Date	January 2017
End Date	May 2019
Contract Award Date	October 2016
Funding	Private
Stage	Contract
Contractor	Galliford Try

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DECREASE IN CONTRACT VALUES IN OCTOBER

TOP TEN

Key Clients

Nov 2015 – Oct 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	Intu Group	40 Broadway, Westminster, London, SW1H 0BU	020 7960 1200	2	202
7	Lidl UK GMBH	19 Worple Road, Wimbledon, London, SW19 4JS	0800 977 7766 / 0870 444 1234	70	173
8	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	55	124
9	Westfield Shoppingtowns Limited	Level 6, Midcity Place, 71 High Holburn, Westminster, London, WC1V 6EA	020 7061 1400	1	120
10	Derwent London	25 Savile Row, Westminster, London, W1S 2ER	020 7659 3000 (CTPS)	4	108

TOP TEN

Key Architects

Nov 2015 – Oct 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	560
5	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	2	253
6	Bennetts Associates Architects	1 Rawstorne Place, City, London, EC1V 7NL	020 7520 3300 (CTPS)	4	252
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	Harris Partnership	2 St Johns, Wakefield, West Yorkshire, WF1 3QA	01924 291800	69	188
10	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	9	167

TOP TEN

Key Contractors

Nov 2015 – Oct 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	415
3	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	29	370
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	8	306
8	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	18	263
9	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	12	169
10	Sir Robert McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	8	154

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 OCTOBER

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

Contract award levels in the hotel, leisure & sport sector were £526 million in October, based on a three month rolling average (see Fig. 6.1). This was 4% higher than September and 169% higher than October 2015. In the three months to October the value of contracts was £1.4 billion, which was 38% higher than the previous three months. This was an increase of 99.8% compared to the same period in 2015 indicating a significant increase in activity in the sector over the past year.

Projects by region

London was the main location for hotel, leisure & sport contracts this month accounting for 34.5% of the value awarded, 30.8% higher than October 2015 (see Fig. 6.2 & 6.4). The largest individual contract was the renovation of the Mandarin Oriental Hyde Park hotel valued at £60 million. In what was a busy month for the hotel sector in London other major contracts included the award for the development of the Moxy Hotel at Heathrow Airport with a value of £25 million and the Premier Inn in West Smithfield valued at £18 million.

Type of Projects

The plethora of hotel contracts means that hotels/motels accounted for the highest proportion of activity at 65%, a 35% increase from October 2015. Leisure centres accounted for 16% of the value awarded, albeit a 29% drop from last year (see Fig. 6.3).

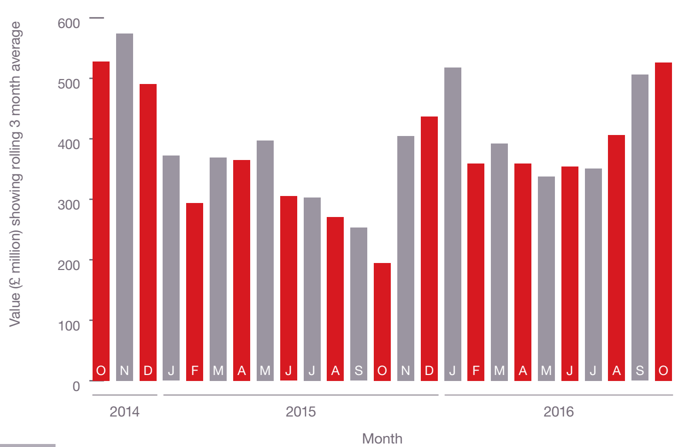

FIG. 6.1

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

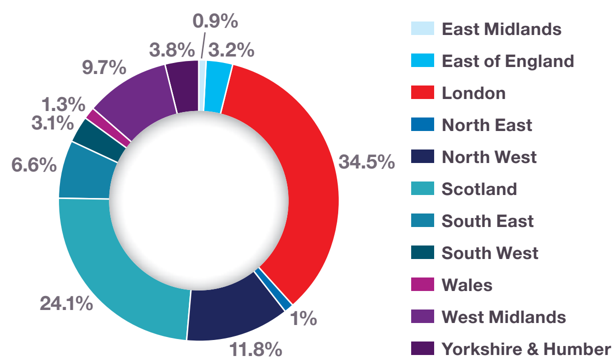

FIG. 6.2

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

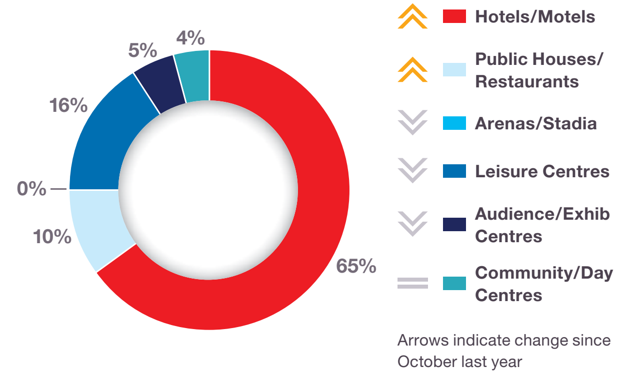

FIG. 6.3

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

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INCREASE IN CONTRACT VALUE IN OCTOBER

The map and figures show how the activity has changed since October 2015		+6.3%	Scotland
-0.8%	East Midlands	-5.7%	South East
-17.7%	East of England	-0.8%	South West
+30.8%	London *HOTTEST REGION*	-0.9%	Wales
-1.2%	North East	-9.0%	West Midlands
+0.2%	North West	-1.1%	Yorkshire & Humber

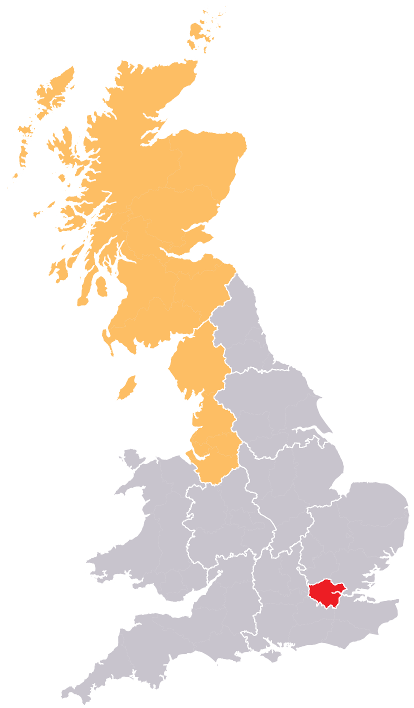

FIG. 6.4

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

> Hotels/motels accounted for the highest proportion of activity at 65%, a 35% increase from October 2015

PROJECT IN FOCUS

Hampton By Hilton Hotel – Fountainbridge
£18,000,000

County	Lothian
Primary Category Sector	Hotel, Leisure & Sport
Government Region	Scotland
Start Date	October 2016
End Date	October 2017
Contract Award Date	October 2016
Funding	Private
Stage	Subcontract
Contractor	Bowmer & Kirkland

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TOP TEN Key Clients
Nov 2015 – Oct 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	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499 / 01582 424200	44	162
4	The All England Lawn Tennis and Croquet Club	Church Road, Wimbledon, London, SW19 5AE	020 8944 1066	2	153
5	Bristol City Council	The Exchange, Corn Street, Bristol, North East Somerset, BS1 1JQ	0117 922 2000	3	97
6	Mandarin Oriental Hotel Group	Kings Court, 2-16 Goodge Street, Westminster, London, W1T 2QA	020 7908 7888	1	60
7	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	1	60
8	Premier Inn Limited	Whitbread Court, Houghton Business Park, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	0871 527 8000	30	51
9	Hull City Council	Guildhall, Alfred Gelder Street, Kingston Upon Hull, East Riding of Yorkshire, HU1 2AA	01482 609100	3	46
10	Stanley Dock Properties Limited	New Street Square, Westminster, London, EC4A 3LX	Not Listed	1	43

TOP TEN Key Architects
Nov 2015 – Oct 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	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	3	332
3	Nicholas Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	1	150
4	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	10	109
5	AFL Architects Limited	The Cornerhouse, 91-93 Farringdon Road, City, London, EC1M 3LN	020 3457 0758	8	95
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	6	91
8	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269	18	83
9	Faulkner Browns	Dobson House, Northumbrian Way, Killingworth, Newcastle Upon Tyne, Tyne And Wear, NE12 6QW	0191 268 3007	4	66
10	ICA Architects & Designers	Merchant Exchange, 20 Bell Street, Glasgow, Strathclyde, G1 1LG	0141 552 2194	4	55

TOP TEN Key Contractors
Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	11	446
2	Sir Robert McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	4	154
3	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	9	113
4	Gilbert - Ash Limited	47 Boucher Road, Belfast, County Antrim, BT12 6HR	028 90664334	8	107
5	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	12	97
6	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	1	91
7	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	3	80
8	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	10	78
9	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	2	74
10	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	12	73

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 October and the value of work is significantly lower than the same month in 2015.

Activity in the industrial sector decreased in October with the value of contracts awarded £394 million, based on a three month rolling average (see Fig. 7.1). This equates to a decrease of 25.6% on the value in September and is 29.2% below the figure recorded this time last year. In the three months to October the total value of contracts was £1.5 billion which was 2.7% higher than the previous three months but 19.6% lower than the same quarter last year.

Projects by region

The South East had the largest share of contract value in October with 21.1%, an increase of 13.9% from October 2015 (see Fig. 7.2 & 7.4). The highest value contract awarded in the South East was the Sagentia laboratory at its existing site in Epsom valued at £14.6 million. In the South West it was the Horizon 38 scheme in Bristol which is to construct five industrial units at a total value of £12 million.

Type of Projects

The types of project awarded in the sector were predominantly in warehouse/storage which accounted for 40% of contract values, an increase of 13% from October 2015. The heavy industrial sub sector had a strong showing accounting for 23% of the contracts awarded, down by 7% from the same month last year (see Fig. 7.3).

> "The South East had the largest share of contract value in October"

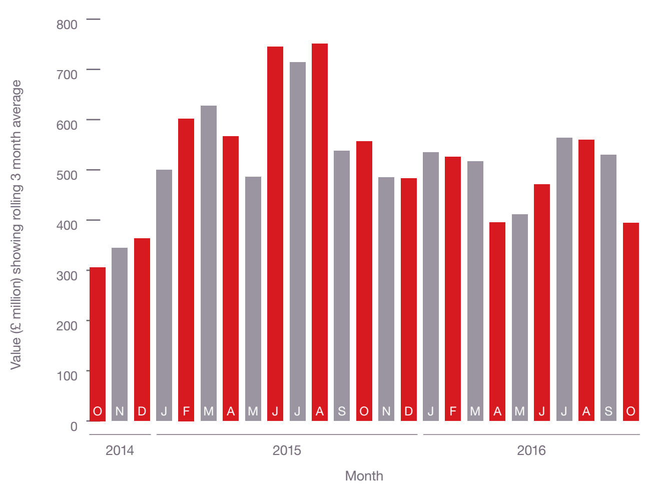

FIG. 7.1
Industrial: **Project Value showing 3 month moving average** Source: Barbour ABI

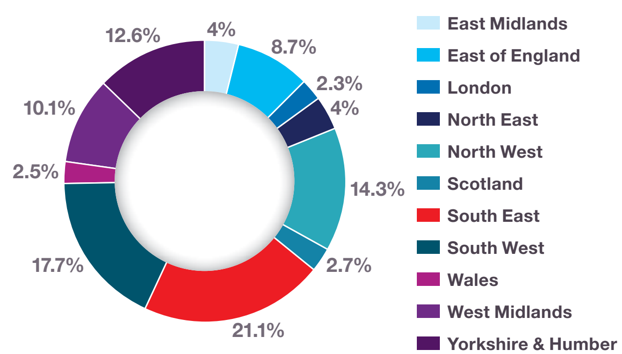

FIG. 7.2
Industrial: **Value of Contracts by Region** Source: Barbour ABI

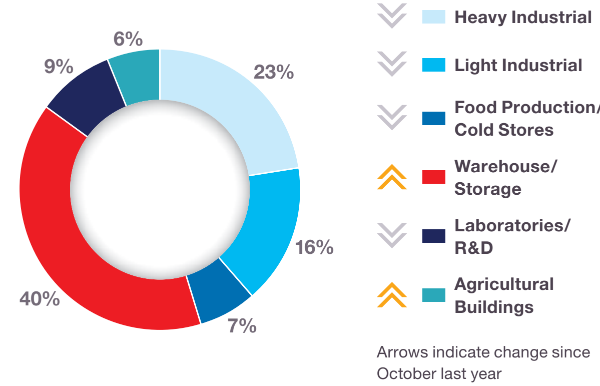

FIG. 7.3
Industrial: **Type of Projects Awarded** Source: Barbour ABI

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

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

		-9.5%	Scotland
-11.7%	East Midlands	+13.9%	South East
-9.7%	East of England	+15.6%	South West *HOTTEST REGION*
-0.3%	London	+2.0%	Wales
+2.6%	North East	-11.3%	West Midlands
+1.9%	North West	+6.5%	Yorkshire & Humber

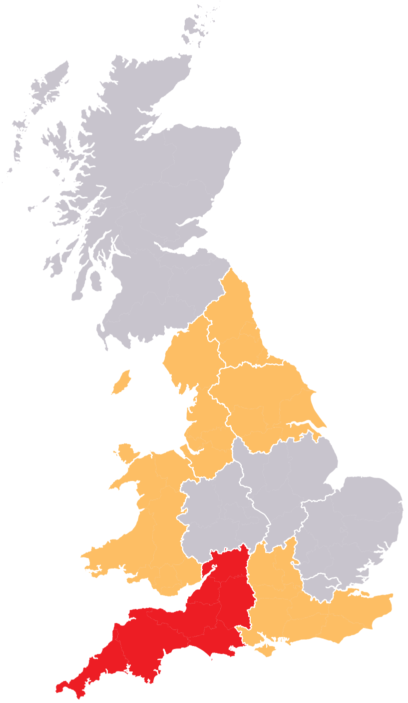

FIG. 7.4

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

PROJECT IN FOCUS

Granta Park, Phase 2 Zone 1 – Array Multiplex
£70,000,000

County	Cambridgeshire
Primary Category Sector	Industrial
Government Region	East England
Start Date	August 2016
End Date	December 2018
Contract Award Date	October 2016
Funding	Private
Stage	Subcontract
Contractor	Vinci Construction UK

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

TOP TEN
Key Clients
Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	5	208
2	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	3	168
3	SNF Gas and Oil Limited	Solutions House, Ripley Close, Normanton Industrial Estate, Normanton, West Yorkshire, WF6 1TB	01924 311000	1	140
4	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	6	113
5	Port of Tyne Authority	Maritime House, Tyne Dock, South Shields, Tyne And Wear, NE34 9PT	0191 455 2671	2	110
6	Edrington Group	2500 Great Western Road, Glasgow, Strathclyde, G15 6RW	0141 940 4000	1	100
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	Lidl UK GMBH	19 Worple Road, Wimbledon, London, SW19 4JS	0800 977 7766 / 0870 444 1234	2	94
10	Marine Harvest Limited	Farms Office, Units 3-7, Blar Mhor Industrial Estate, Fort William, Highlands, PH33 7PT	01397 701550	2	93

TOP TEN
Key Architects
Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	24	409
2	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	11	279
3	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	12	265
4	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	11	160
5	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	8	154
6	Fairhursts Design Group	55 King Street, Manchester, Greater Manchester, M2 4LQ	0161 831 7300 (CTPS)	5	149
7	The Bush Consultancy	520 Paint Works, Bath Road, Arnos Vale, Bristol, North Somerset, BS4 3EH	0117 316 0570 (CTPS)	4	105
8	Orbit Architects Limited	83 Blackfriars Road, Southwark, London, SE1 8HA	020 7593 3380	1	100
9	AMEC Group PLC	76-78 Old Street, City, London, EC1V 9AZ	020 3215 1700	1	100
10	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	100

TOP TEN
Key Contractors
Nov 2015 – Oct 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)	21	489
2	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	9	265
3	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	13	235
4	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	8	175
5	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	9	142
6	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	3	125
7	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	5	116
8	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	3	111
9	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	5	103
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

DECREASE IN VALUE OF CONTRACTS IN OCTOBER

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

Levels of activity in the medical & health sector decreased by 13.9% in October 2016 compared to September, with the total value of contracts awarded £120 million based on a three month rolling average (see Fig. 8.1). This is 32.5% lower than the values in October 2015. The value of contracts awarded was 17.9% lower than the previous three months and was 17.3% down on the same period in 2015 indicating a longer term decrease in the value of contracts awarded in the sector.

Projects by region

The South East was the main location of development in the sector this month with 30.8% of activity, a 29.2% increase from October 2015 (see Fig. 8.2 & 8.4). This is primarily due to the award of the St Wilfred's Hospice contract in Chichester valued at £11 million and the contract to develop the administration wing of the Royal Sussex County Hospital in Brighton valued at £5.3 million.

Type of Projects

Public hospitals is the dominant sub-sector this month accounting for 66% of the value of contracts in October 2016, a 23% increase from October 2015 (see Fig. 8.3).

> The value of contracts awarded was 17.9% lower than the previous three months

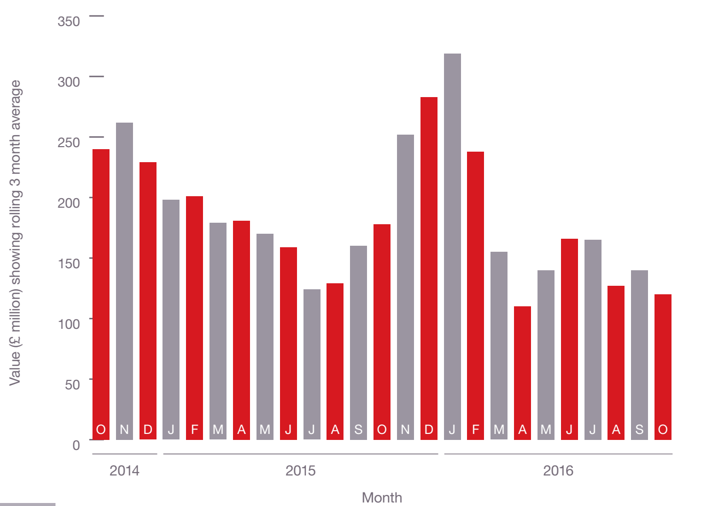

FIG. 8.1

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

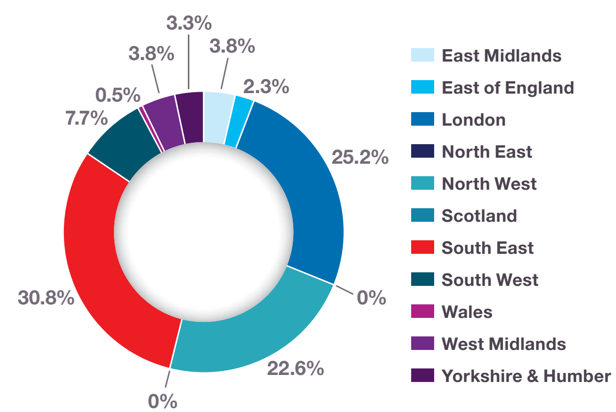

FIG. 8.2

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

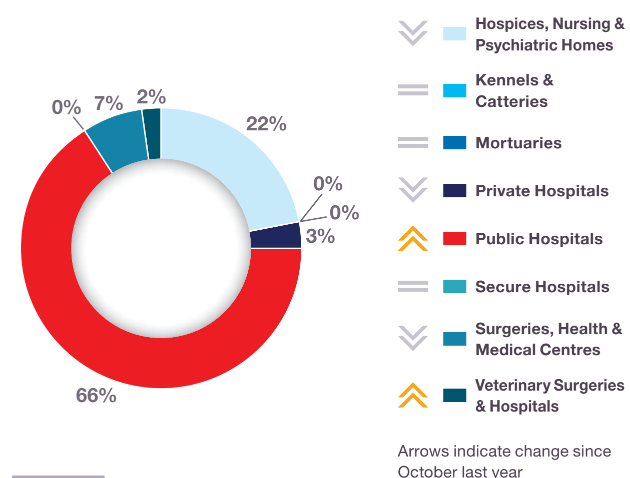

FIG. 8.3

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

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DECREASE IN VALUE OF CONTRACTS IN OCTOBER

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

		-28.4%	Scotland
-38.1%	East Midlands	+29.2%	South East *HOTTEST REGION*
-6.6%	East of England	+5.7%	South West
+18.7%	London	-0.1%	Wales
-0.7%	North East	+3.5%	West Midlands
+15.1%	North West	+1.7%	Yorkshire & Humber

FIG. 8.4

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

> Public hospitals is the dominant sub-sector this month accounting for 66% of the value of contracts in October

PROJECT IN FOCUS

Royal Sussex County Hospital – (CAB) Clinical Administration Building £5,300,000

County	East Sussex
Primary Category Sector	Medical & Health
Government Region	South East
Start Date	December 2016
End Date	December 2017
Contract Award Date	October 2016
Funding	Public
Stage	Contract
Contractor	Galliford Try

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DECREASE IN VALUE OF CONTRACTS IN OCTOBER

TOP TEN Key Clients

Nov 2015 – Oct 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)	2	137
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	53
8	Ashley House Plc	6 Cliveden Office Village, Lancaster Road, Cressex Business Park, High Wycombe, Buckinghamshire, HP12 3YZ	01628 600340	1	45
9	One Healthcare Group	Tallis House, 2 Tallis Street, City, London, EC4Y 0AB	0333 939 0007	1	40
10	Lothian Health Board	Deaconess House, 148 Pleasance, Edinburgh, Lothian, EH8 9RQ	0131 536 9000	1	35

TOP TEN Key Architects

Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	9	181
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	4	162
3	Hassell	James William House, 9 Museum Place, Cardiff, South Glamorgan, CF10 3BD	029 2072 9071	3	153
4	Ellis Williams Architects	151 Roseberry Avenue, 3-11 Pine Street, City, London, EC1R 0JH	020 7841 7200	1	136
5	Scott Tallon Walker Architects	10 Cromwell Place, South Kensington, London, SW7 2JN	020 7589 4949 (TPS)	1	136
6	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	1	70
7	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	2	63
8	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	1	45
9	Boswell Mitchell & Johnson Architects	72-82 Roseberry Avenue, City, London, EC1R 4RW	020 7833 9974	1	42
10	Manning & Elliott	Suite 1 Manelli House, 4 Cowper Road, Penrith, Cumbria, CA11 9BN	01768 868800	1	40

TOP TEN Key Contractors

Nov 2015 – Oct 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	371
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	5	140
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	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	3	45
10	EJ Taylor & Sons Limited	Mill Works, Hazeleigh, Near Purleigh, Chelmsford, Essex, CM3 6QT	01621 828661 (CTPS)	1	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 OCTOBER

Contract values decreased in the education sector in October 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 £484 million in October based on a three month rolling average, an 8.4% decrease from September (see Fig. 9.1). This figure was 27.7% lower than October 2015 indicating the sectors deteriorating performance over the past year. The value of contract awards in the three months to October were 21.5% below the same period last year, emphasising the decline in construction contracts over the longer term.

Projects by region

The South East experienced the highest share of the value of education contracts in October accounting for 21.4% of contract value awarded, an 8.4% increase from October 2015 (see Fig. 9.2 & 9.4). One of the major construction contracts awarded in the South East in October was the contract to build Christ the King College on the Isle of Wight. This was valued at £24 million and was awarded to Sir Robert McAlpine.

Type of Projects

Colleges/universities were the dominant sub sector in education in October. They accounted for 35% of the total value awarded, an 11% decline from October 2015 (see Fig. 9.3).

> "The value of contract awards in the three months to October were 21.5% below the same period last year

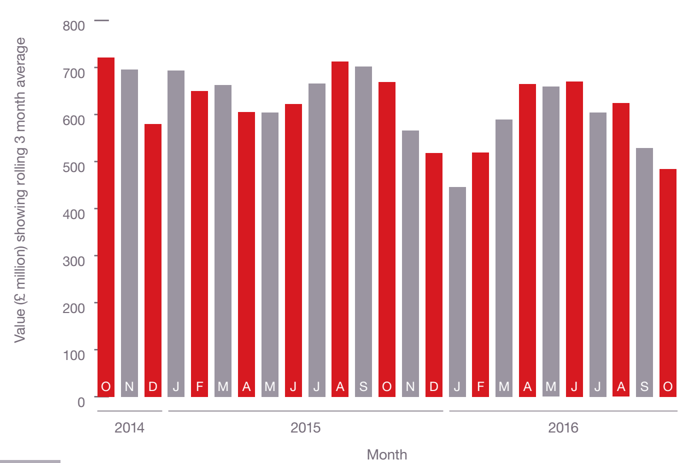

FIG. 9.1

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

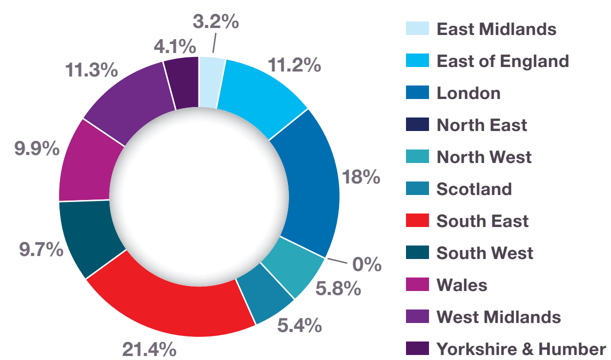

FIG. 9.2

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

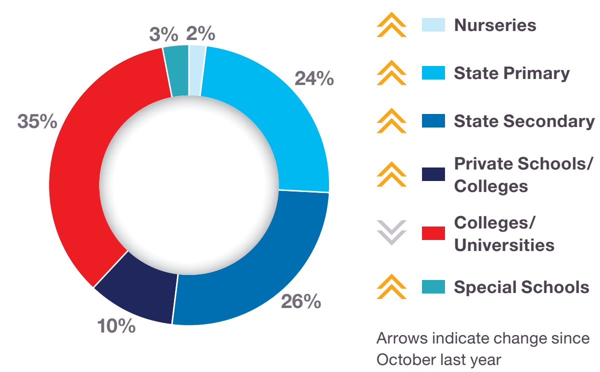

FIG. 9.3

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

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DECREASE IN THE VALUE OF CONTRACTS IN OCTOBER

The map and figures show how the activity has changed since October 2015			-4.0%	Scotland
-3.0%	East Midlands		+8.4%	South East *HOTTEST REGION*
+5.1%	East of England		+5.5%	South West
-6.2%	London		+4.3%	Wales
-1.8%	North East		+2.6%	West Midlands
-7.8%	North West		-3.1%	Yorkshire & Humber

FIG. 9.4

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

> The South East experienced the highest share of the value of education contracts in October accounting for 21.4% of contract value awarded

PROJECT IN FOCUS

Branston Road High School Development
£25,000,000

County	Staffordshire
Primary Category Sector	Education
Government Region	West Midlands
Start Date	October 2016
End Date	July 2018
Contract Award Date	October 2016
Funding	Public
Stage	Subcontract
Contractor	Seddon Construction

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TOP TEN Key Clients

Nov 2015 – Oct 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	39	355
2	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	14	201
3	University of Northampton	Boughton Green Road, Northampton, Northamptonshire, NN2 7AL	01604 735500 (CTPS)	6	138
4	Birmingham City University	Franchise Street, Perry Barr, Birmingham, West Midlands, B42 2SU	0121 331 5000	3	96
5	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	3	82
6	London Borough of Hounslow	Civic Centre, Lampton Road, Hounslow, Middlesex, TW3 4DN	020 8583 2000	10	78
7	Powys County Council	Powys County Hall, Spa Road East, Llandrindod Wells, Powys, LD1 5LG	01597 826000 (CTPS)	1	75
8	University of Bristol	Senate House, Tyndall Avenue, Clifton, Bristol, Avon, BS8 1TH	0117 928 9000 (TPS)	6	74
9	Kent County Council	County Hall, County Road, Maidstone, Kent, ME14 1XQ	0300 041 4141	22	71
10	Liverpool John Moores University	JMU Tower, 24 Norton Street, Liverpool, Merseyside, L3 8PY	0151 231 2121	2	71

TOP TEN Key Architects

Nov 2015 – Oct 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	23	215
2	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	8	214
3	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	10	210
4	Pick Everard (Leicester)	Halford House, Charles Street, Leicester, Leicestershire, LE1 1HA	0116 223 4400 (TPS)	27	185
5	Moses Cameron William Architects	Oast House, Malting Lane, Cambridge, Cambridgeshire, CB3 9HF	01223 792500	5	137
6	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	19	132
7	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 464 6100	5	131
8	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	20	128
9	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	9	126
10	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	17	123

TOP TEN Key Contractors

Nov 2015 – Oct 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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Support the CRASH Charity 'No Christmas Card Appeal 2016'

Ideally Christmas is a time for joy, family and excitement, but for someone who is homeless, or facing their last Christmas in a hospice, it can be a lonely and scary time.

CRASH creates places that care for people when they are at their most vulnerable – this is why we need you to support this appeal. Please help us put a roof over people's heads when they are homeless and help hospices improve their buildings to provide care for adults and children with life limiting illnesses.

It's easy to help. Donate your company's Christmas Card budget to CRASH and in return your company will receive:

- **A personalised e-Christmas card**
- **For donations over £500** – your company name will appear in our 'Thank You' advertisements, which will run in the industry media in the New Year
- **For donations over £2000** – your company logo will also be included in the 'Thank You' advertisements

The Gatehouse, 2 Devonhurst Place, London W4 4JD 020 8742 0717 www.crash.org.uk CRASH is a UK registered charity (no. 1054107) and operates throughout the UK.

You can make a real difference to people who are homeless or in a hospice this Christmas and throughout the year.

To donate:

Complete our online form at **www.crash.org.uk**

Thank you for helping CRASH create places that care for people who are homeless or in a hospice. If you would like further information please call Jenny on **020 8742 0717.**

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