economic & construction MARKET REVIEW

Barbour ABI | Building | bd

FEBRUARY 2017

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

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

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

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economic & construction MARKET REVIEW

FEBRUARY 2017

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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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Bespoke Research and Intelligence

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

Market Insight

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

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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

Economic & Construction Market Review

FEBRUARY 2017

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ECONOMIC CONTEXT

UK ECONOMY GROWS BY 0.6% IN Q4 2016

Economic growth for 2016 recorded at 2% with strong last quarter performance.

The latest GDP figures were released in the last month and they showed that the UK economy had grown by 0.6% in the final quarter of 2016 (see Fig. 1.1). This was the same as the two previous quarters and meant that for the whole of 2016 the economy grew by 2.0%, slightly below the 2.2% recorded in 2015.

Looking over the longer term the yearly figure of 2% GDP growth is significantly below the figure of 3.1% recorded in 2014 and is also below the 2007 pre-recession growth rate of 2.6% (see Fig. 1.2).

Analysing the composition of the 2% growth recorded in 2016 shows an economy that is still dominated by the service sector. Services increased 2.8% in the year, with construction growing by 1.4% and production by 1.1%. Agriculture declined by 0.6% (see Fig. 1.3). This demonstrates the difficulties of rebalancing the economy while the service sector remains so strong.

Putting the UK's economic growth in the context of the other G7 economies suggests that since 2007 the UK has performed strongly (see Fig. 1.4). While Canada has grown the most since the start of 2007, the UK had more subdued growth from 2010 to 2013 but this has improved in recent years and the UK looks set to be the fastest growing economy in the block in 2016 based on current predictions.

Other news this month on the UK economy includes:

- **Consumer confidence dipped in January from -4.6 to -5.1 according to European Commission's latest economic sentiment index**
- **The latest Inflation Report from the Bank of England forecast GDP growth for 2017 would be 2% up from 1.6% in its previous estimate**
- **A survey from the CBI showed that manufacturers are at their most optimistic about export potential since 2014.**

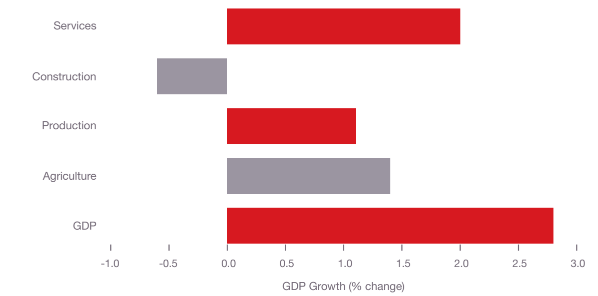

Fig. 1.3 **UK GDP per sector** Source: ONS

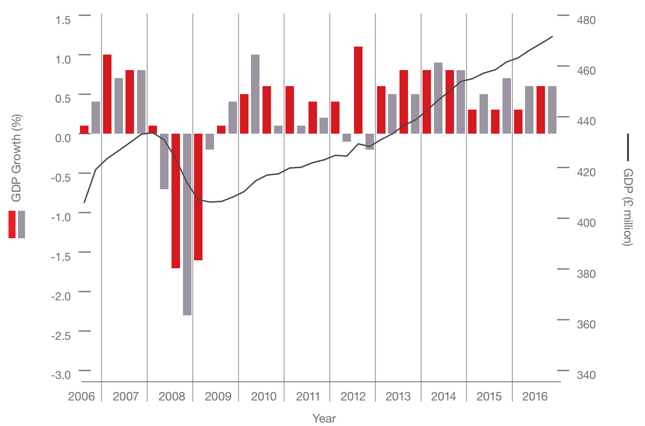

Fig. 1.1 **UK GDP** Source: ONS

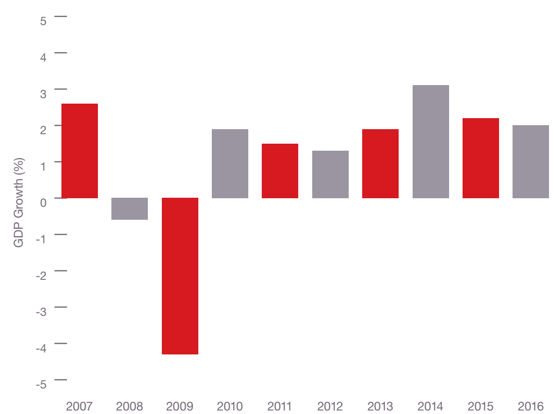

Fig. 1.2 **UK GDP Comparison over 10 years** Source: ONS

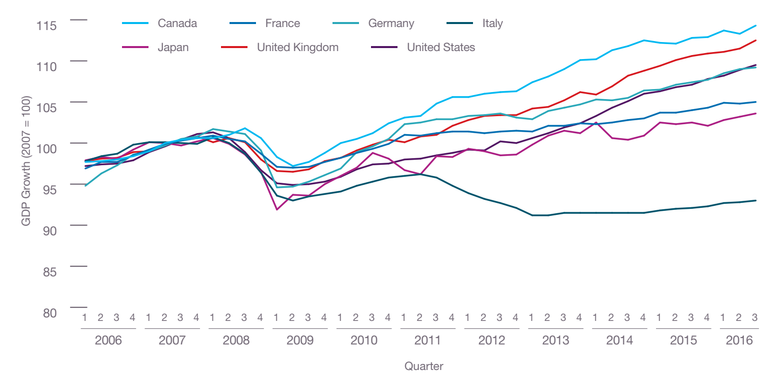

Fig. 1.4 **GDP Country Comparison** Source: ONS

economic & construction MARKET REVIEW

FEBRUARY 2017

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

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THE CONSTRUCTION SECTOR
STRONG START TO 2017 FOR CONSTRUCTION CONTRACTS

The value and number of construction contracts in January 2017 were significantly higher than the previous month and January 2016.

The latest figures from the ONS show that in December 2016 construction output rose by 1.8% compared with November 2016, largely due to an increase in new work. Private commercial work was one of the main drivers behind construction growth, expanding by 5.2% in December (see Fig. 2.1). The underlying pattern as suggested by the 3 month on 3 month movement shows a slight expansion of 0.2% in output, revised up from 0.1% in the preliminary estimate of GDP. Compared with December 2015, construction output increased by 0.6%, the main contribution to this growth came from new housing work.

	% change	
	Quarter 4 2015 – Quarter 4 2016	December 2015 – December 2016
Total All Work	**0.2**	**0.6**
All New Work	**0.3**	**2.0**
Public Housing	1.7	8.0
Private Housing	1.4	6.5
Infrastructure	0.4	-10.2
Public (ex Infrastructure)	-1.7	0.0
Private Industrial	-2.8	-6.8
Private Commercial	0.3	8.2
Public Housing	0.5	-9.8
Private Housing	0.2	4.3
Non-Housing	-0.3	-4.2

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

Despite growing by 0.2% in December, in comparison to 2015, infrastructure continued its month on year decline, falling for the eleventh consecutive month.

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 135 for January, rising by 6% in January. It stands 5% higher than a year ago but there were mixed fortunes across the sectors (see Fig. 2.2). Contract awards rose in private housing, public housing, public health and leisure, suggesting growth in activity in these sectors this year. However, new contract awards in January continued to fall away in sectors such as offices, retail, hotels and factories. Private Housing continued to rise once again and in January rose 13% compared with December and was 12% higher than a year ago.

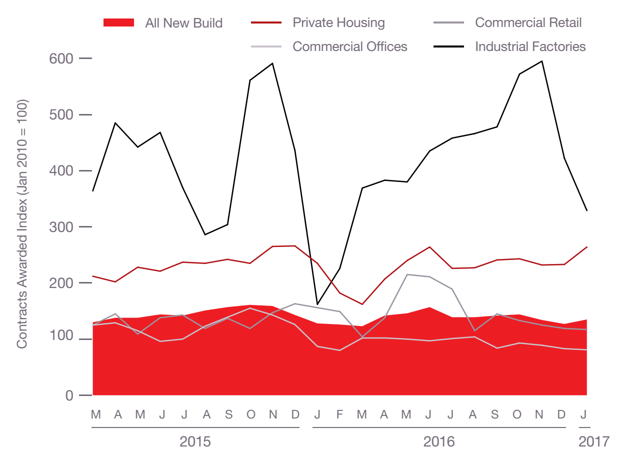

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

The Construction Products Association recently updated its forecasts for 2016 and beyond and in its central scenario the industry is now predicted to grow by 1.5% this year and 1.8% next year (see Fig. 2.3). Housing activity growth is set to moderate, and commercial activity decline, but infrastructure is forecast to increase in the year on the back of increasing government spending.

Construction Sector

According to Barbour ABI data on all contract activity, January witnessed an increase in construction activity levels with the value of new contracts awarded at £6 billion, based on a three month rolling average (see Fig. 2.5). This is an 11.3% increase from December and a 12.6% increase on the value recorded in January 2016. The number of construction projects within the UK in January increased by 50 % on December, and were 25.4% higher than January 2016.

	Output	Growth
2013	72,829	1.0%
2014	79,594	9.3%
2015 (e)	86,387	8.5%
2016 (f)	88,915	2.9%
2017 (p)	90,292	1.5%
2018 (p)	91,880	1.8%
2019 (p)	95,129	3.5%

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

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Projects by Region

The majority of contracts awarded in January by value were in London, accounting for 26% of the UK total (see Fig. 2.4). In London, the award of the One Nine Elms Twin Towers development to Brookfield Multiplex, at a value of £900 million was the largest project in January by construction value. This scheme is set to provide a 58 storey building comprising a 200 bed luxury hotel, offices and circa 500 residential apartments.

The North West had the second highest portion of contract activity by value in January, accounting for 14% of the value awarded. This followed a large number of contracts awarded in the residential sector, the largest of which was the Chapel Wharf development in Salford. This scheme will construct 995 flats at a value of £100 million and was awarded to Sir Robert McAlpine. The South East was the region with the next highest proportion of contracts by value, with 12% of contract value awarded in January. The largest project awarded was the Sandleford Park residential scheme in Newbury to build 1000 houses at a value of £103 million.

Types of Project

Residential had the highest proportion of contracts awarded by value in January with 52% of the total value of projects awarded (see Fig. 2.6). Projects such as the Stanhope Gate development in Westminster, to build 20 flats valued at £80 million and the Cardiff Interchange site in central Cardiff to deliver 195 flats valued at £70 million, were two of the larger projects awarded.

After the residential sector, the next largest in January was hotel, leisure and sport, which accounted for a much smaller 18% of contract value. This proportion was primarily due to the contract for the luxury hotel at One Nine Elms in Battersea which is valued at £900 million alone. The recent pattern of sports stadium development contracts continued with the contract awarded for the refurbishment of the Riverside Stand at Fulham Football Club's Craven Cottage stadium. This contract was valued at £40 million and was awarded to Buckingham Group Contracting Limited.

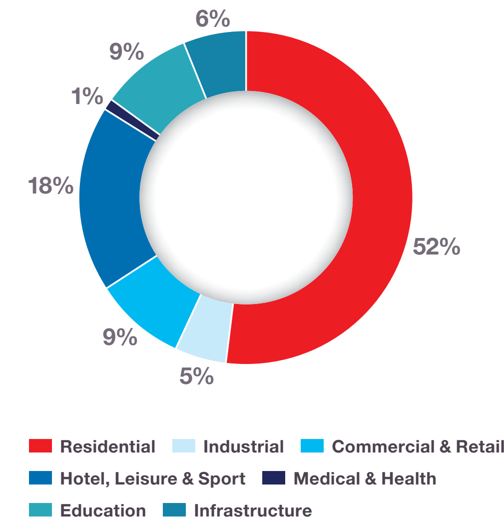
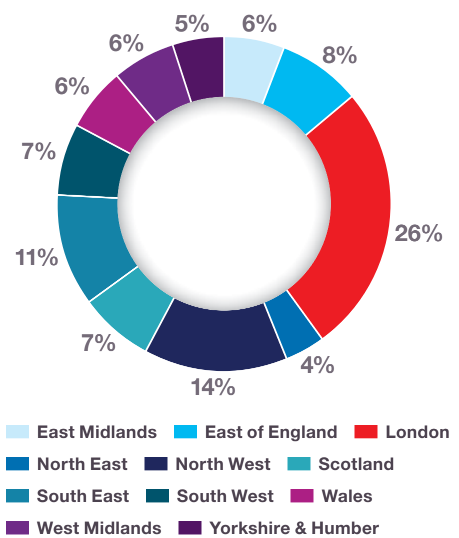


Fig. 2.6 **Type of Projects** Source: Barbour ABI



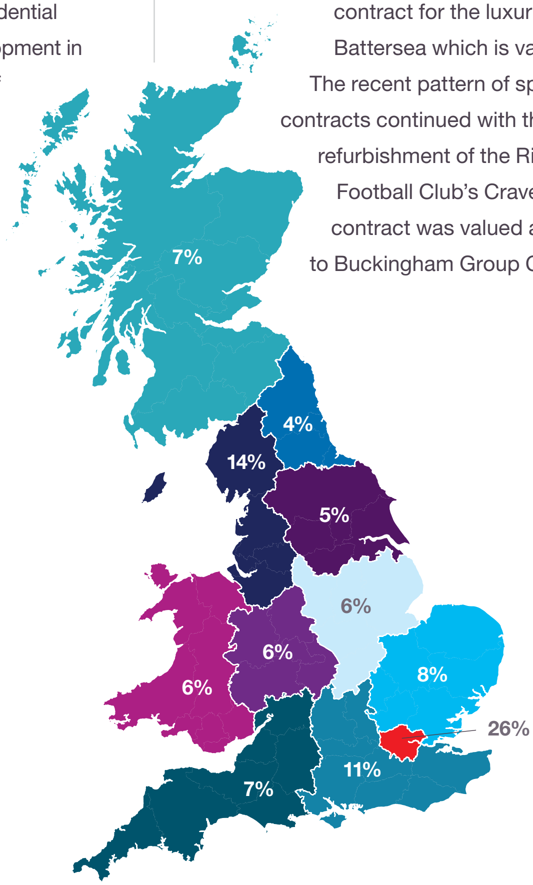


Fig. 2.4 **Locations of Contracts Awarded** Source: Barbour ABI

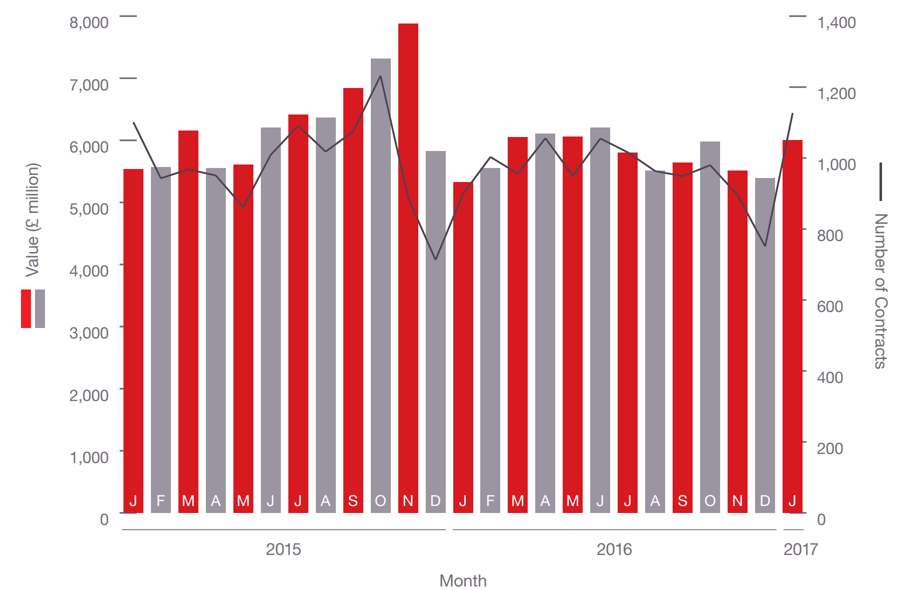


Fig. 2.5 **Construction Activity Trends** Source: Barbour ABI

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FEBRUARY 2017

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About Us
Economic Context
The Construction Sector
Residential
Infrastructure
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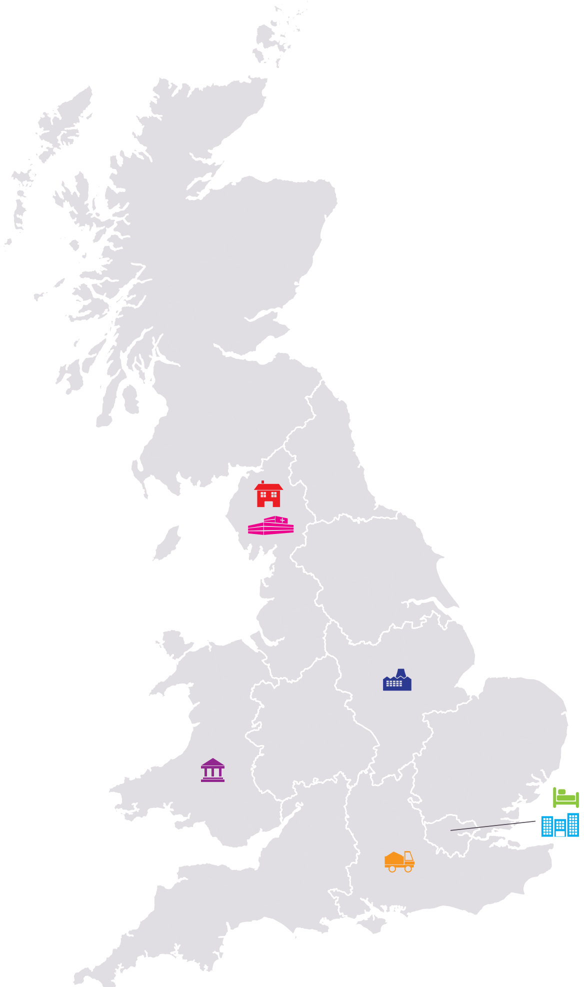
A snippet of this month's regional activity

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
Stanhope Gate – 20 Flats
£80,000,000

INFRASTRUCTURE
Jodrell Bank Observatory – SKA Headquarter Building
£16,000,000

COMMERCIAL & RETAIL
Paradise Circus, Two Chamberlain Square – Offices/Retail
£40,000,000

HOTEL, LEISURE & SPORT
Market Towers – 1 Nine Elms – Twin Tower
£900,000,000

INDUSTRIAL
Plot 2, Centrum West – Warehouse and Office Development
£19,000,000

MEDICAL & HEALTH
Hadwen Medical Practice, Glevum Way – Extension
£2,500,000

EDUCATION
Kingston University – New Town House Building
£30,000,000

economic & construction MARKET REVIEW

FEBRUARY 2017

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RESIDENTIAL
STRONG GROWTH AT THE START OF THE YEAR

Both units and values increased sharply in January with the North West the main location for contracts.

Activity in the residential sector increased in January with a 9.2% increase in contract value compared to December and 82.9% higher than January 2016 (see Fig. 3.1). The number of units associated with residential contracts awarded increased by 7.7% between December and January, based on a three month rolling average, and by 7.8% on January 2016. Taken together, these statistics are suggestive of continued momentum within the largest sector in construction. Given that the long term fundamentals that have been driving growth, in particular help for first time buyers, are set to continue Barbour ABI remain confident that this sector will continue to grow.

Sector Performance

The latest house price indices for February from Halifax showed that average house prices are increasing at 5.7% annually in the three months to January, a decrease from 6.5% in December. This compares to a figure of 9.7% this time last year, which shows the softening in house price growth over recent months. Nationwide reported annual house price rises of 4.3%, slightly lower than the 4.5% recorded in December. This was the same increase recorded in January 2016 demonstrating little change overall. Nationwide also expect house price growth to moderate slightly in 2017 to around 2% as wider economic growth slows. Market conditions for house builders remain strong however with Crest Nicholson recently reporting a 27% increase in full year profits.

Projects by region

The North West was the main location of activity in the residential sector this month, accounting for 19.1% of the value of contracts awarded, an increase from the 15% that it accounted for in January 2016 (see Fig. 3.2 & 3.4). These figures show that the North West is beginning to rival London as the major location of residential development in the UK, with Manchester particularly attractive. The largest residential contract awarded in the North West was the Chapel Wharf development in Salford to build 995 flats at a value

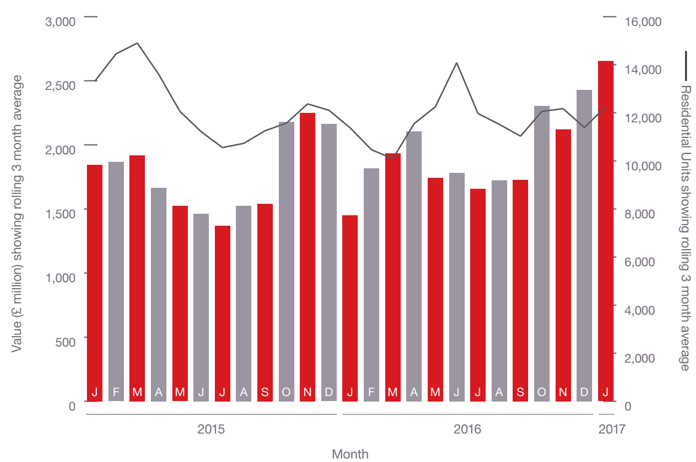

FIG. 3.1

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

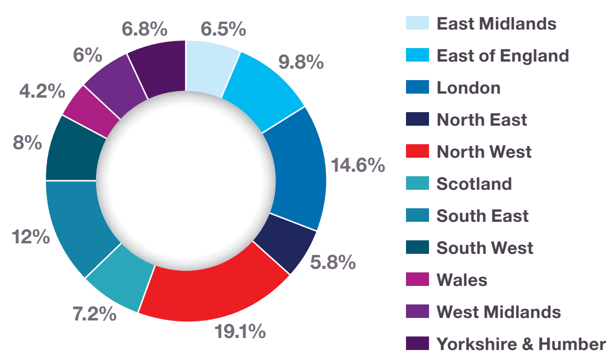

FIG. 3.2

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

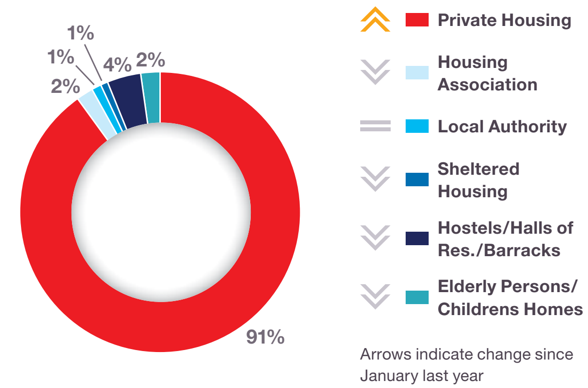

FIG. 3.3

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

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FEBRUARY 2017

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The map and figures show how the activity has changed since January 2016			-2.0%	Scotland
+3.5%	East Midlands		+4.9%	South East
+4.3%	East of England		-12.0%	South West
-7.9%	London		-0.5%	Wales
+5.3%	North East *HOTTEST REGION*		-3.5%	West Midlands
+4.2%	North West		+3.7%	Yorkshire & Humber

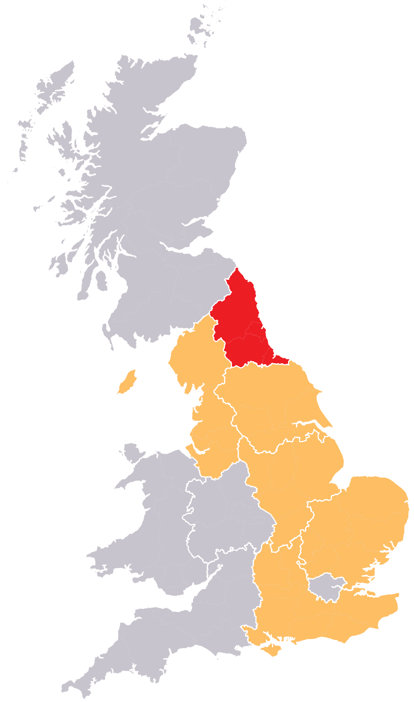

FIG. 3.4

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

of £100 million. Another major contract awarded in the North West in January was Carleton Heights in Penrith, which is a Persimmon Homes scheme to construct 505 houses at a value of £50 million. London was the second most prominent location for residential construction contracts in January, with 14.6% of construction value, lower than the 22.4% it had in the same month in 2016. Princes Gate Mansions, a £150 million development for two luxury houses in Knightsbridge, was the largest individual contract awarded in January in London.

> Private housing accounted for 91% of the value of contracts awarded

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing in January. Private housing accounted for 91% of the value of contracts awarded this month, up from 66% in the corresponding month last year. After private housing, the next largest project type were hostels/halls of residence with 4% of the total value (see Fig. 3.3).

Planning Activity

Looking at the value of contracts at an advanced planning stage shows that the residential sector is well placed to continue its growth in the coming months. There is currently £5.8 billion worth of contracts that are nearing award status suggesting this month's growth is likely to continue over the next few months.

PROJECT IN FOCUS

Stanhope Gate – 20 Flats
£80,000,000

County	London
Primary Category Sector	Residential
Government Region	London
Start Date	November 2015
End Date	November 2017
Contract Award Date	January 2017
Funding	Private
Stage	Subcontract
Contractor	Erith Group

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TOP TEN Key Clients

Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	131	1,917
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	140	1,817
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	113	1,440
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717	105	1,196
5	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	41	675
6	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	53	669
7	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	34	651
8	The Berkeley Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	23	515
9	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 876200 (CTPS)	41	496
10	Miller Homes	Miller House, 2 Lochside View, Edinburgh Park, Edinburgh, Lothian, EH12 9DH	0870 336 5000	32	470

TOP TEN Key Architects

Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	72	759
2	JTP	23-25 Great Sutton Street, City, London, EC1V 0DN	020 7017 1780	26	570
3	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	13	515
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	34	475
5	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	4	406
6	PRP Architects	Ferry Works, Summer Road, Thames Ditton, Surrey, KT7 0QJ	020 8339 3600	34	347
7	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	25	329
8	CZWG Architects	17 Bowling Green Lane, City, London, EC1R 0QB	020 7253 2523	4	320
9	Grid Architects Limited	128 Southwark Street, Westminster, London, SE1 0SW	020 7593 3260	2	315
10	Tetlow King Planning	Unit 2 Eclipse Office Park, Staple Hill, Bristol, North Somerset, BS16 5EL	0117 956 1916 (CTPS)	25	314

TOP TEN Key Contractors

Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	136	2,127
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	144	1,860
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	115	1,449
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717	108	1,259
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	59	1,027
6	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	82	1,026
7	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	43	695
8	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	52	665
9	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	30	554
10	The Berkeley Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	25	537

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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Economic Context
The Construction Sector
Residential
Infrastructure
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INFRASTRUCTURE

POOR PERFORMANCE FOR INFRASTRUCTURE IN JANUARY

Infrastructure contract values decreased in January and are lower over the longer term as the sector awaits government spending boost.

The value of contracts awarded in the infrastructure sector decreased in January with the total value awarded £1.2 billion based on a three month rolling average (see Fig. 4.1). This is a 2.1% decrease from the previous month, but is 14% higher than January 2016. In the three months to January the total value of contract awards was £3.8 billion, based on a three month rolling average. This is 13.1% lower than the previous three months and 21% lower than the same period in 2016. This indicates the more subdued performance in the sector over the longer term, but the monthly increase in January provides hope of better prospects for 2017 as the government's rhetoric on prioritising infrastructure continues.

Projects by region

The South East dominated infrastructure contracts in January, accounting for 20.6% of the value awarded, a large increase on its share of 5.8% in January 2016 (see Fig. 4.2 & 4.4). The contract for Didcot Parkway Railway Station car park was the highest value contracted awarded in the region in January 2017. The six storey car park is valued at £22 million and is due to commence in April 2017.

Scotland attracted the second highest share of contract value in January 2017, with 20.4% of contracts up from 8.3% in January 2016. The largest individual contract in Scotland was for the electrification of the train line between Holytown Junction and Midcalder Junction in Lothian, valued at £49 million.

> "The South East dominated infrastructure contracts in January"

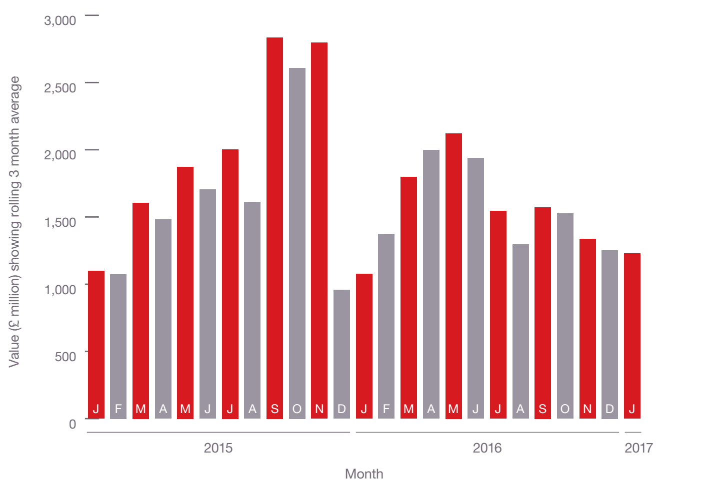

FIG. 4.1

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

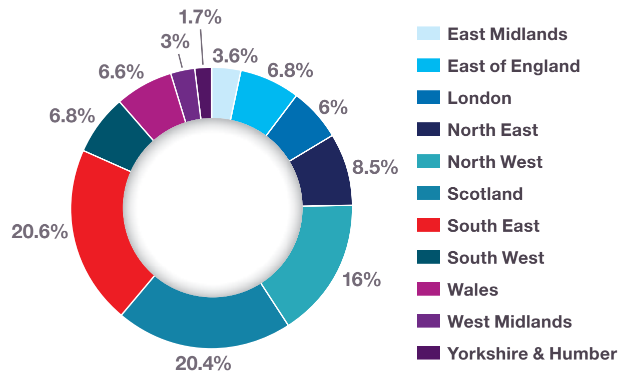

FIG. 4.2

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

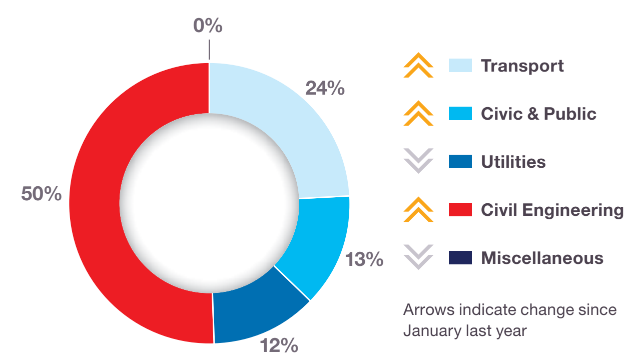

FIG. 4.3

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

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- ABI About Us
- Economic Context
- The Construction Sector
- Residential
- Infrastructure
- Commercial & Retail
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POOR PERFORMANCE FOR INFRASTRUCTURE IN JANUARY

The map and figures show how the activity has changed since January 2016					
			+12.0%	Scotland	
-0.2%	East Midlands		+14.8%	South East *HOTTEST REGION*	
+2.3%	East of England		+2.0%	South West	
+2.7%	London		-38.0%	Wales	
-11.4%	North East		+1.6%	West Midlands	
+13.1%	North West		+1.1%	Yorkshire & Humber	

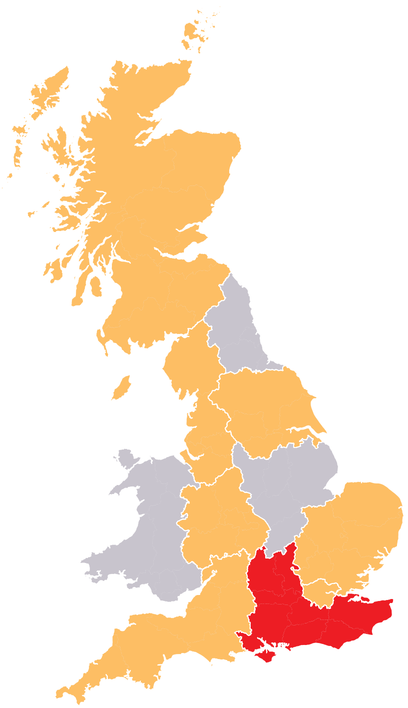

FIG. 4.4

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

Type of Projects

Civil engineering accounted for 50% of the contract values in January 2017, significantly higher than the 6% recorded in January 2016. Transport was second with 24% of contract value, which compared to only 13% in the same month last year (see Fig. 4.3).

Planning Activity

The value of projects at advanced planning stage is low at only £549 million. While these contracts do not usually take as long to go through the planning process as other sectors it is still significantly lower than the amount awarded even at contract award stage, suggesting a subdued outlook for the sector based on the planning activity

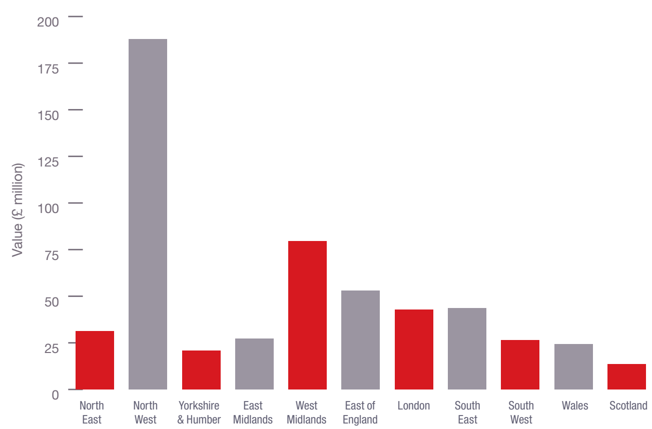

FIG. 4.5

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

PROJECT IN FOCUS

Jodrell Bank Observatory – SKA Headquarter Building £16,000,000

County	Cheshire
Primary Category Sector	Infrastructure
Government Region	North West
Start Date	December 2016
End Date	December 2017
Contract Award Date	January 2017
Funding	Private
Stage	Contract
Contractor	Sir Robert McAlpine Limited

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POOR PERFORMANCE FOR INFRASTRUCTURE IN JANUARY

TOP TEN Key Clients
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	50	2,786
2	SSE Limited	55 Vastern Road, Reading, Berkshire, RG1 8BU	0118 953 4695	4	1,934
3	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	259	1,554
4	RWE NPower Plc	Windmill Hill Business Park, Whitehill Way, Swindon, Wiltshire, SN5 6PB	01793 877777	5	952
5	Sellafield Limited (AMEC)	Sellafield Sites, Seascale, Cumbria, CA20 1PG	01946 728333 (CTPS)	2	900
6	Scottish Power	Cathcart Business Park, Spean Street, Glasgow, Strathclyde, G44 4GP	0141 568 2000	2	718
7	Wokingham Borough Council	Civic Offices, Shute End, Wokingham, Berkshire, RG40 1BN	0118 974 6000	2	687
8	MGT Teesside Limited	8 White Oak Square, London Road, Swanley, Kent, BR8 7AG	Not Listed	1	650
9	Manchester Airport Group Plc	Olympic House Manchester Airport, Ringway, Manchester, Greater Manchester, M90 1QX	0161 489 2785	2	455
10	HS2	1 Canada Square, Poplar, London, E14 5AB	020 7944 4908	1	350

TOP TEN Key Architects
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Pascall & Watson Architects	The Warehouses, 10 Black Friars Lane, City, London, EC4V 6ER	020 3837 2500	1	450
2	Barton Willmore	The Blade, Abbey Square, Reading, Berkshire, RG1 3BE	0118 943 0000	2	305
3	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	150
4	Hartwell Architects	9 Chapel Lane, Dover, Kent, CT16 1NP	01304 215336 (TPS)	1	135
5	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	2	129
6	Fletcher Rae UK Limited	Hill Quays, 5 Jordan Street, Manchester, Greater Manchester, M15 4PY	0161 242 1140	4	103
7	Gebler Tooth	1 World Business Centre, Newall Road, Hounslow, Middlesex, TW6 2RE	020 8283 9926 (CTPS)	1	102
8	Garry Stewart Design Associates	Highland House, Office 101 165 The Broadway, Wimbledon, London, SW19 1NE	020 8544 8085	1	100
9	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	2	90
10	Renewable Developments Wales Limited	10 Capel Hewore Industrial Estate, Capel Hewore, Ammanford, Dyfed, SA18 3SJ	01269 833080	1	80

TOP TEN Key Contractors
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	30	1,355
2	Samsung C & T Uk Limted/Tecnicas Reunidas SA JV	Samsung House, 3 Riverbank Way, Brentford, Middlesex, TW8 9RE	01325 390000	1	650
3	Decommissioning Alliance	Lakes Road, Workington, Cumbria, CA14 3YP	01900 870780	1	500
4	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	23	480
5	Galliford Try/ Costain	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	1	473
6	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	6	465
7	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
8	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	22	380
9	CH2M Hill	Elm House, 43 Brook Green, Hammersmith, London, W6 7EF	020 3479 8000	1	350
10	Dragados S.A	Regina House, 2nd Floor 1-5 Queen Street, City, London, EC4N 1SW	020 7651 0900	1	298

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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FEBRUARY 2017

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COMMERCIAL CONTRACT ACTIVITY REMAINS LOW

Contract values in the commercial & retail sector were lower in January continuing the pattern witnessed in the second half of 2016.

The value of contracts awarded in the commercial and retail sector was £594 million in January based on a three month rolling average (see Fig. 5.1). This is a 1% decrease from December and a 39.4% decrease from the January 2016 figure. In the three months to January the value of contracts was 13.5% lower than the previous three months and 42% lower than the same period in 2016, indicating a decrease in activity over the longer term. It seems to be the one sector that has been negatively impacted by the UK's decision to leave the European Union, with contract values falling since late summer in 2016.

Projects by region

London was the main location for commercial construction activity in January 2017 accounting for 31.7% of contract value, although this was significantly below the 78.7% it had in January 2016 (see Fig. 5.2 & 5.4). The largest contract awarded in London in the month was the £36.5 million office development on Aldgate High Street, which will provide over 24,000 square metres of floorspace. Another large contract awarded is for an office development at the International Quarter in Stratford City. This is a ten storey office block valued at £30 million awarded to Lend Lease Limited.

Type of Projects

These large value contracts also means that offices were the dominant type of project in the sector accounting for 74% of the value of contracts awarded this month, although this is lower than the 80% share in January 2016 (see Fig. 5.3).

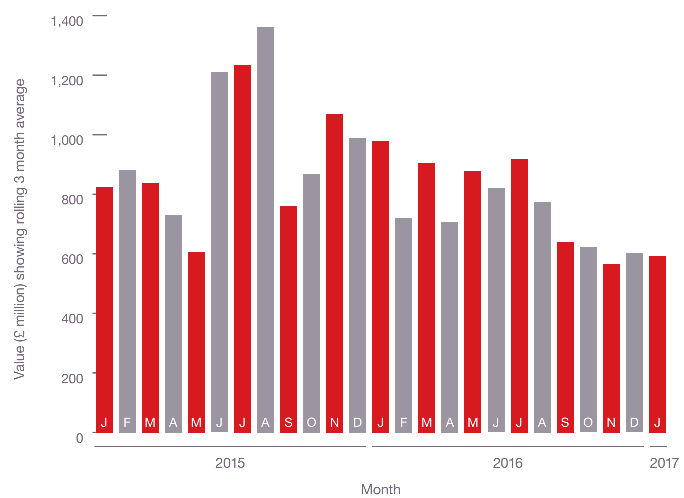

FIG. 5.1
Commercial & Retail: **Project Value showing 3 month moving average** Source: Barbour ABI

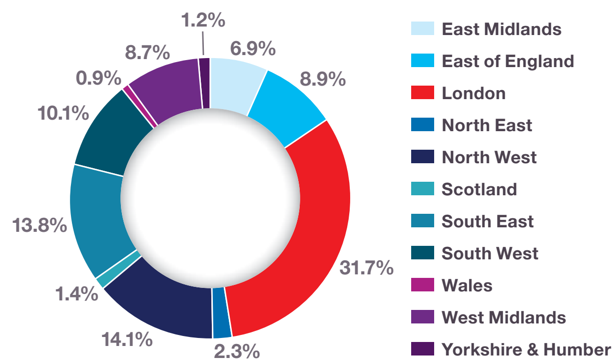

FIG. 5.2
Commercial & Retail: **Value of Contracts by Region** Source: Barbour ABI

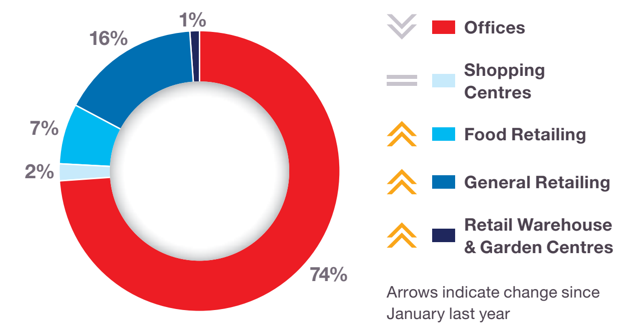

FIG. 5.3
Commercial & Retail: **Type of Projects Awarded** Source: Barbour ABI

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FEBRUARY 2017

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The map and figures show how the activity has changed since January 2016

		-0.3%	Scotland
+5.1%	East Midlands	+10.5%	South East
+7.4%	East of England	+4.2%	South West
-46.9%	London	+0.3%	Wales
+0.6%	North East	+7.4%	West Midlands
+12.0%	North West *HOTTEST REGION*	-0.2%	Yorkshire & Humber

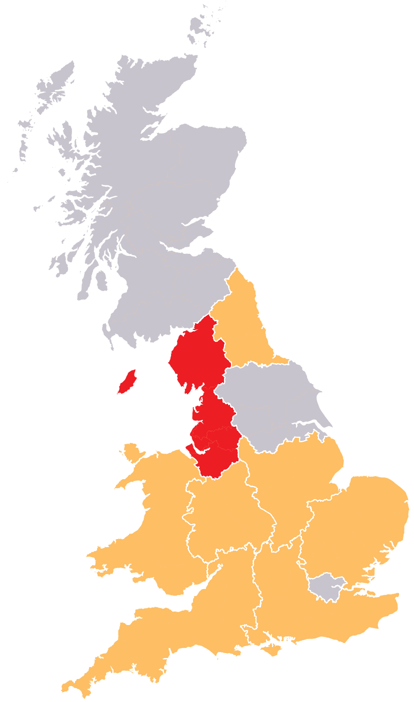

FIG. 5.4

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

Planning Activity

In an interesting move in the retail market this month, Tesco launched a £3.7 billion takeover bid for wholesaler Booker Group. It remains to be seen what impact this will have on construction activity, if any. However, given that Tesco were previously one of the largest clients in the commercial and retail sector, it presents the possibility of higher activity in the sector in the future.

However, an analysis of contracts at detail planning suggests that activity in the sector is likely to remain subdued in the near term. With £868 million at advanced planning, this is around 46% higher than the contract value awarded in January, suggesting a comparatively lower pipeline than other sectors such as residential.

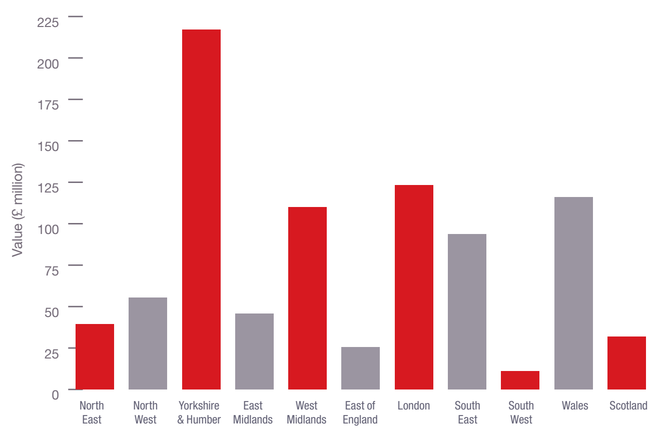

FIG. 5.5

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

PROJECT IN FOCUS

Paradise Circus, Two Chamberlain Square – Offices/Retail £40,000,000

County	Staffordshire
Primary Category Sector	Commercial & Retail
Government Region	West Midlands
Start Date	September 2017
End Date	October 2019
Contract Award Date	January 2017
Funding	Private
Stage	Contract
Contractor	BAM Construction Limited

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FEBRUARY 2017

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COMMERCIAL CONTRACT ACTIVITY REMAINS LOW

TOP TEN Key Clients
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	336
2	Legal and General Group PLC	1 Coleman Street, City, London, EC2R 5AA	020 3124 3000	4	303
3	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	2	280
4	Argent Estates Limited	11 Brindley Place, 2 Brunswick Square, Birmingham, West Midlands, B1 2LP	0121 643 7799	1	250
5	Intu Group	40 Broadway, Westminster, London, SW1H 0BU	020 7960 1200	2	202
6	Lidl UK GMBH	19 Worple Road, Wimbledon, London, SW19 4JS	0800 9777766	69	168
7	Westfield Shoppingtowns Limited	Level 6, Midcity Place, 71 High Holburn, Westminster, London, WC1V 6EA	020 7061 1400	3	146
8	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	56	138
9	LXB Properties PLC	Grafton House, 2nd Floor, 2-3 Golden Square, Westminster, London, W1F 9HR	020 7432 7900	4	100
10	Greater London Authority	The Queen's Walk, London, SE1 2AA	020 7983 4000	1	100

TOP TEN Key Architects
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	10	558
2	Kohn Pedersen Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	3	341
3	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	1	326
4	Rogers Stirk Harbour and Partners	The Leadenhall Building, 122 Leadenhall Street, City, London, EC3V 4AB	020 7385 1235	2	280
5	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	2	253
6	Chapman Taylor & Partners	10 Eastbourne Terrace, Paddington, London, W2 6LG	020 7371 3000	4	229
7	Leslie Jones Architects	121 Great Portland Street, Westminster, London, W1W 6QL	020 7255 1150	4	208
8	Harris Partnership	2 St Johns, Wakefield, West Yorkshire, WF1 3QA	01924 291800	60	199
9	Bennetts Associates Architects	1 Rawstorne Place, City, London, EC1V 7NL	020 7520 3300 (CTPS)	3	167
10	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	2	125

TOP TEN Key Contractors
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	5	415
2	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	336
3	Lendlease Construction (EMEA) Limited	EMEA Head Office, 20 Triton Street, Regents Place, London, NW1 3BF	0203 430 9000	5	316
4	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	2	280
5	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	3	280
6	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	7	275
7	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	28	271
8	Multiplex	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	4	266
9	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	13	208
10	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	19	202

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

HUGE JUMP IN CONTRACT VALUES IN JANUARY

Major contract awarded at Nine Elms in Battersea means large increases in contract values in the sector.

Contract award levels in the hotel, leisure & sport sector were £630 million in January, based on a three month rolling average (see Fig. 6.1). This was 88.5% higher than December and 21.5% higher than January 2016. In the three months to January the value of contracts was £1.4 billion, which was 0.8% higher than the previous three months. This was also an increase of 6.6% compared to the same period in 2016 indicating longer term steadiness in the market.

Projects by region

London had the highest share of the hotel, leisure & sport sector contracts accounting for 74.1% of value awarded, an increase from the 14.9% recorded in January 2016 (see Fig. 6.2 & 6.4). The contract to develop the One Nine Elms hotel in Battersea valued at £900 million is the largest contract let in the region, accounting for its strong performance in January. This contract is to construct a 200 bed, five star hotel, hence the high value of the scheme. Another large contract let in January was to redevelop the Riverside Stand at Fulham Football Club's Craven Cottage stadium, which had a total construction value of £40 million.

Type of Projects

Given the high value of the One Nine Elms contract the hotels/motels category had the highest proportion of project type by value in January accounting for 80% of the value awarded. This is significantly higher than the 43% recorded by the category in January 2016 (see Fig. 6.3).

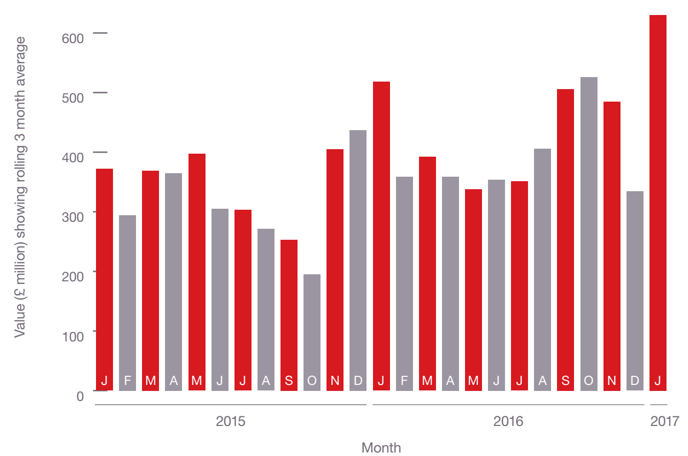

FIG. 6.1

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

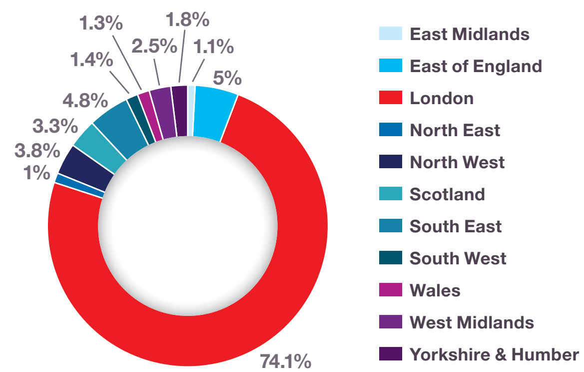

FIG. 6.2

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

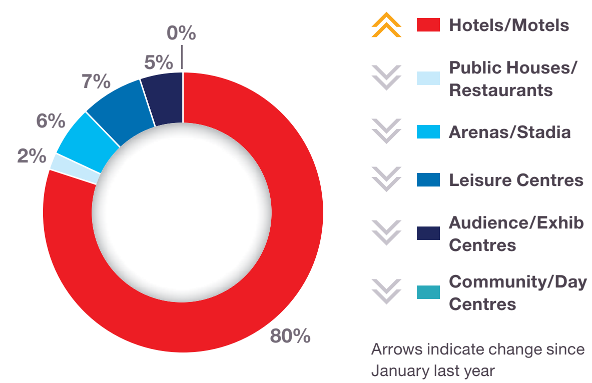

FIG. 6.3

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 January 2016

			↓	-5.9%	Scotland
↓	-7.1%	East Midlands	↓	-6.0%	South East
↓	-1.6%	East of England	↓	-1.8%	South West
↑	+59.2%	London *HOTTEST REGION*	↓	-1.5%	Wales
↓	-4.4%	North East	↓	-16.5%	West Midlands
↓	-6.4%	North West	↓	-7.9%	Yorkshire & Humber

FIG. 6.4

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

Planning Activity

In market related news the Whitbread Group, which owns Costa Coffee and Premier Inn hotels among others, reported strong results for the coffee chain. In the 3 months to December the group reported that sales were up by 4.3% compared to the same period in the previous year. However, the group was less bullish about the prospects in the hotel market with revenue per room at Premier Inn hotels falling by 1% over the year.

Analysing the locations of contracts at advanced planning in the hotel, leisure and sports sector shows that the North West has the largest value of contracts nearing contract award stage (see Fig. 6.5). The largest value project in the region at advanced planning stage, is the Central Park Plaza on Oldham Road in Manchester, valued at circa £41 million.

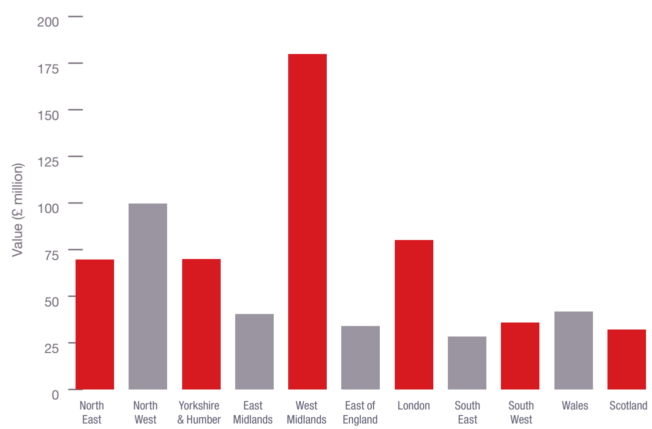

FIG. 6.5

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

PROJECT IN FOCUS

Market Towers – 1 Nine Elms – Twin Tower
£900,000,000

County	London
Primary Category Sector	Hotel, Leisure & Sport
Government Region	London
Start Date	February 2017
End Date	August 2020
Contract Award Date	January 2017
Funding	Private
Stage	Subcontract
Contractor	Multiplex Head Office

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FEBRUARY 2017

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TOP TEN Key Clients
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Wanda Dalian	Floor 28, Wanda Mansion, No. 9 Jiefang Street, Zhongshan District, China	0411-82822888-111	1	900
2	Aberdeen City Council	Town House, Broad Street, Aberdeen, Grampian, AB10 1AQ	01224 522000	3	333
3	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499/ 01582 424200	35	158
4	Manchester City Council	Town Hall, Albert Square, Manchester, Greater Manchester, M60 2LA	0161 234 5000	2	110
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	London Borough of Ealing Council	Perceval House, 14-16 Uxbridge Road, Ealing, London, W5 2HL	020 8825 5000	6	43
8	Premier Inn Limited	Whitbread Court, Houghton Business Park, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	0871 527 8000	23	41
9	Fulham Football Club Limited	Training Ground, Motspur Park, New Malden, Surrey, KT3 6PT	0843 208 1222	1	40
10	Brentford Football Club	Griffin Park, Braemar Road, Brentford, Middlesex, TW8 0NT	020 8847 2511	1	40

TOP TEN Key Architects
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kohn Pedersen Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	1	900
2	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	3	332
3	Feilden Clegg Bradley Architects	Bath Brewery, Toll Bridge Road, Bath, North East Somerset, BA1 7DE	01225 852545	4	127
4	SimpsonHaugh & Partners	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000 (CTPS)	2	124
5	OMA Architects	Heer Bokelweg 149, 3032 AD Rotterdam, Netherlands	0031 10 243 82 00	1	110
6	S+P Architects Limited	The Cornerhouse, 91-93 Farringdon Road, City, London, EC1M 3LN	020 7831 8877	9	110
7	Populous	14 Blades Court, Deodar Road, Putney, London, SW15 2NU	020 8874 7666	1	91
8	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	8	87
9	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269	19	86
10	Faulkner Browns	Dobson House, Northumbrian Way, Killingworth, Newcastle Upon Tyne, Tyne And Wear, NE12 6QW	0191 268 3007	5	86

TOP TEN Key Contractors
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Multiplex	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	2	901
2	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	11	399
3	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	3	126
4	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	4	116
5	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	14	108
6	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	9	107
7	Vinci Construction	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	2	90
8	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	13	84
9	Gilbert - Ash Limited	47 Boucher Road, Belfast, County Antrim, BT12 6HR	028 90664334	7	81
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	10	66

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
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INDUSTRIAL
RETURN TO GROWTH FOR THE INDUSTRIAL SECTOR

Continuing its recent volatility contract values increased in the month but were still lower than the values recorded in January 2016.

Activity in the industrial sector increased in January with the value of contracts awarded £400 million, based on a three month rolling average (see Fig. 7.1). This equates to a 10.6% increase on the value in December but it is still 25.3% below the figure recorded this time last year. In the three months to January the total value of contracts was £1.2 billion, which is 17.1% lower than the previous three months and 18% lower than the same quarter last year. This indicates that the sector has been declining over the longer term.

> The East Midlands attracted the highest share of contract value

Projects by region

Activity in January was fairly evenly spread with the East Midlands attracting the highest share of contract value with 15.1% of the value, an increase from the 5.6% it had in January 2016 (see Fig. 7.2 & 7.4). The largest contract was the Everards Meadows brewery in Leicester, valued at £20 million. Scotland received the second highest share of contract value in January with 14.9%, up from 5% in 2016. The largest project was also alcohol related with a new blend centre for Burn Stewart distillers valued at £17 million.

Type of Projects

The types of project awarded in the sector were predominantly warehouse/storage accounting for 36% of contract value awarded. Food production/cold stores had the second highest proportion of the contract values in January, accounting for 23% of the value awarded, up from only 4% in January 2016 (see Fig. 7.3).

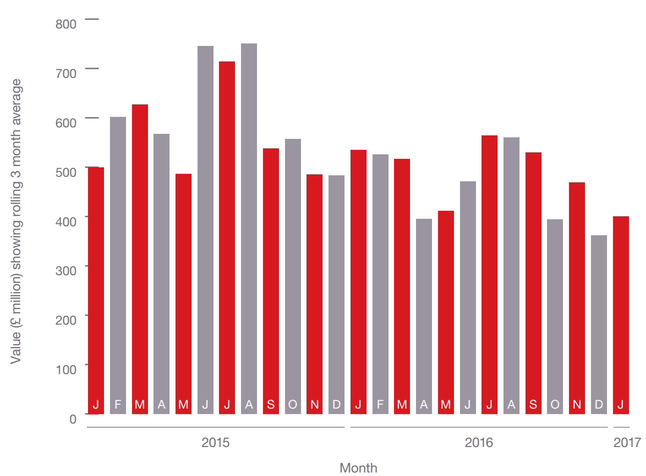

FIG. 7.1
Industrial: **Project Value showing 3 month moving average** Source: Barbour ABI

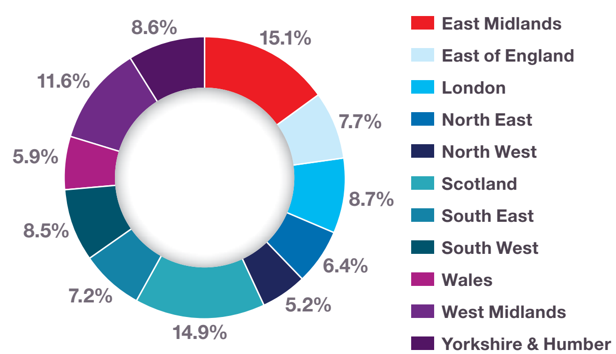

FIG. 7.2
Industrial: **Value of Contracts by Region** Source: Barbour ABI

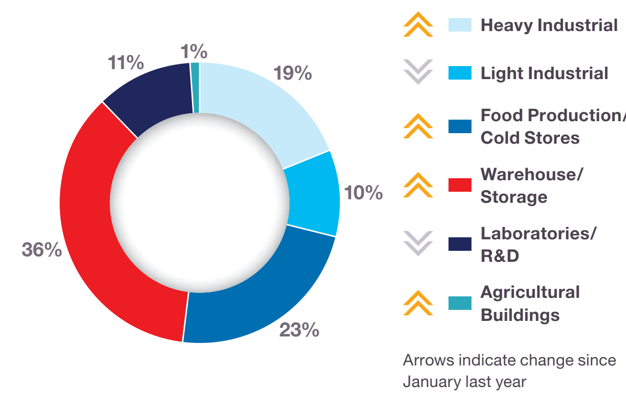

FIG. 7.3
Industrial: **Type of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since January 2016

+9.5%	East Midlands	+9.9%	Scotland *HOTTEST REGION*
+4.8%	East of England	+3.7%	South East
+3.6%	London	+0.7%	South West
+4.6%	North East	+3.6%	Wales
-54.3%	North West	+7.8%	West Midlands
		+6.0%	Yorkshire & Humber

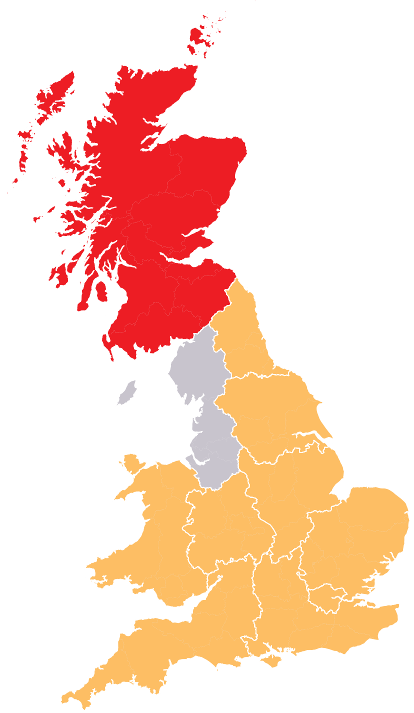

FIG. 7.4

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

Planning Activity

The outlook for the industrial sector is encouraging with the value of contracts at advanced planning totalling £1.3 billion in January. This is three times the value of contracts that were awarded in January, suggesting that the pipeline of work in the industrial sector is healthy.

> In the three months to January the total value of contracts was £1.2 billion, which is 17.1% lower than the previous three months

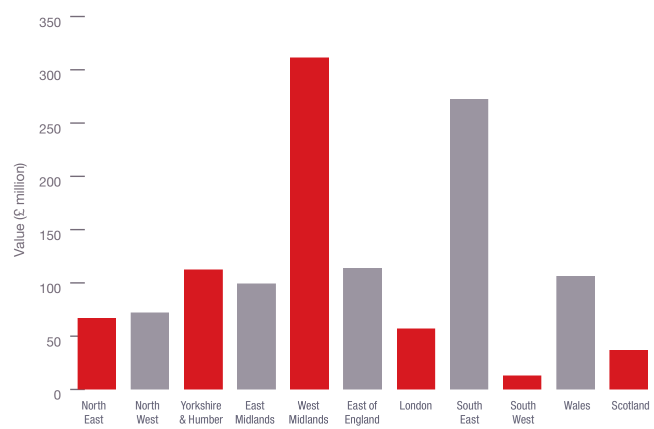

FIG. 7.5

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

PROJECT IN FOCUS

Plot 2, Centrum West – Warehouse and Office Development £19,000,000

County	Staffordshire
Primary Category Sector	Industrial
Government Region	West Midlands
Start Date	December 2016
End Date	TBC
Contract Award Date	January 2017
Funding	Private
Stage	Subcontract
Contractor	Readie Construction Limited

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TOP TEN Key Clients
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	8	891
2	Marine Harvest Limited	Farms Office, Units 3-7, Blar Mhor Industrial Estate, Fort William, Highlands, PH33 7PT	01397 701550	3	173
3	SNF Gas and Oil Limited	Solutions House, Ripley Close, Normanton Industrial Estate, Normanton, West Yorkshire, WF6 1TB	01924 311000	1	140
4	Port of Tyne Authority	Maritime House, Tyne Dock, South Shields, Tyne And Wear, NE34 9PT	0191 455 2671	2	110
5	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	5	105
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 9777766	2	94
10	Roxhill Developments Limited	Lumonics House, Valley Drive, Rugby, Warwickshire, CV21 1TQ	01788 422 200	1	90

TOP TEN Key Architects
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	17	389
2	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	15	286
3	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	13	267
4	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	9	167
5	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	8	155
6	Orbit Architects Limited	83 Blackfriars Road, Southwark, London, SE1 8HA	020 7593 3380	1	100
7	AMEC Group PLC	76-78 Old Street, City, London, EC1V 9AZ	020 3215 1700	1	100
8	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	100
9	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	1	100
10	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	2	97

TOP TEN Key Contractors
Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Aspire Defence Limited	Aspire House, Princes Avenue, Aldershot, Hampshire, GU11 2LF	01252 352600	2	680
2	Winvic Construction	Brampton House, 19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	21	441
3	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	14	264
4	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	8	263
5	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	4	205
6	Vinci Construction	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	3	147
7	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	10	147
8	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	7	123
9	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	8	121
10	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	5	105

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
ACTIVITY IN THE SECTOR REMAINS LOW

There was little sign of an improvement in the sector after its recent struggles, with contract values down 59.7% on January 2016.

Levels of activity in the medical & health sector decreased slightly by 0.1% in January 2017 compared to December, with the total value of contracts awarded £129 million, based on a three month rolling average (see Fig. 8.1). This is 59.7% lower than the January 2016 figure. In the three months to January the values of contracts decreased by 3.2% on the previous three months, and were 56.1% lower than the same period in 2016, indicating a longer term decrease in the value of contracts awarded in the sector.

Projects by region

The North West was the main location of development in the sector this month with 22% of activity, an increase from the 0.3% recorded in January 2016 (see Fig. 8.2 & 8.4). The contract to develop an extension to the emergency department at the Wythenshawe Hospital is the largest single project awarded in the region in January. A comparatively small contract, valued at £12 million, it was awarded to Interserve Construction. The second largest share of contract value was experienced in the East Midlands which attracted 19.3% of the contract value. This compared favourably to the 0.5% awarded in the region in January 2016. The largest contract awarded in the region was the Northampton General Hospital contract to build two new 30 bed wards valued at £9 million.

> The North West was the main location of development in the sector

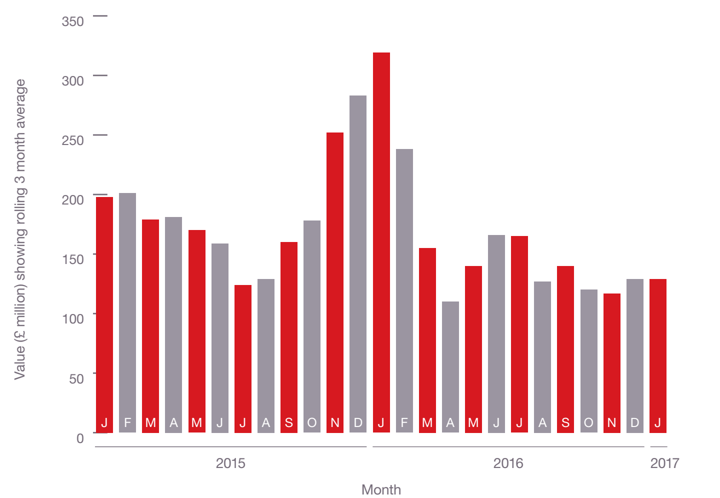

FIG. 8.1

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

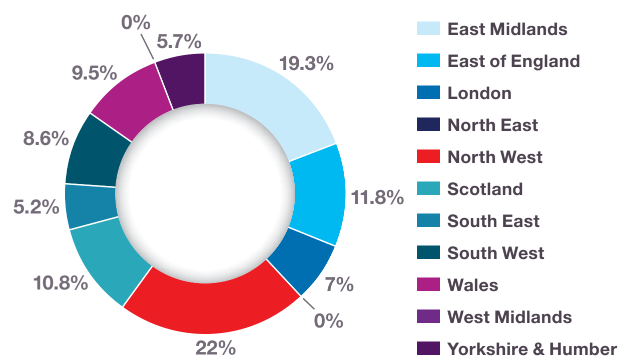

FIG. 8.2

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

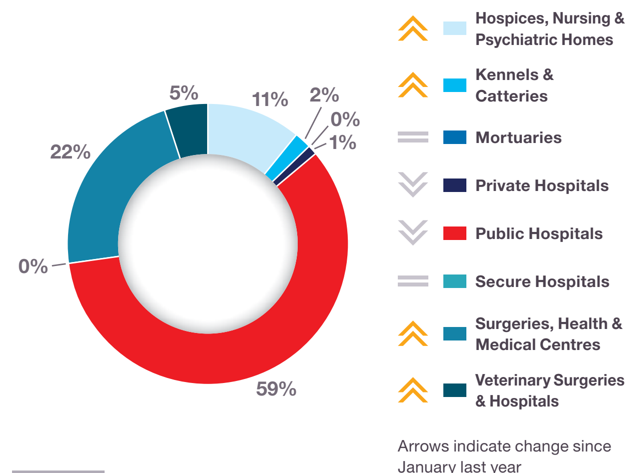

FIG. 8.3

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

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The map and figures show how the activity has changed since January 2016

+18.8%	East Midlands	+10.3%	Scotland
-3.7%	East of England	-56.0%	South East
+4.1%	London	+6.7%	South West
-0.5%	North East	-2.2%	Wales
+21.7%	North West *HOTTEST REGION*	-4.2%	West Midlands
		+5.0%	Yorkshire & Humber

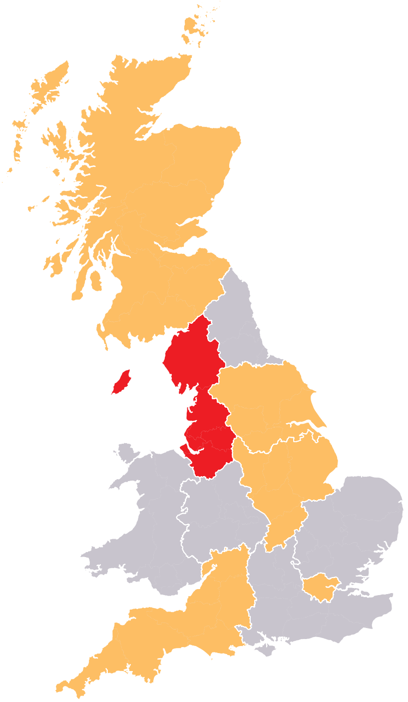

FIG. 8.4

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

Type of Projects

These two contracts result in the public hospitals category receiving the highest share of activity in the month at 59% (see Fig. 8.3). This is actually less than the 88% it attracted in January 2016, but is still by far the largest proportion in the month overall.

Planning Activity

The value of contracts at advanced planning for the medical and healthcare sector totalled £174 million, which does not suggest a major increase in recent levels of contract activity is likely. The South West has the highest value of contracts in the pipeline, with a total of £44.1 million which is 25% of the total value (see Fig. 8.5).

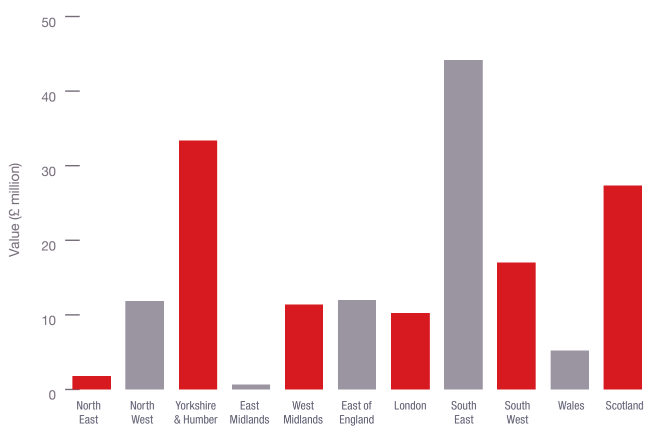

FIG. 8.5

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

PROJECT IN FOCUS

Hadwen Medical Practice, Glevum Way – Extension £2,500,000

County	Gloucestershire
Primary Category Sector	Medical & Health
Government Region	South West
Start Date	January 2017
End Date	January 2018
Contract Award Date	January 2017
Funding	Private
Stage	Contract
Contractor	Speller Metcalfe Limited

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ACTIVITY IN THE SECTOR REMAINS LOW

TOP TEN Key Clients

Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	NHS Grampian	Summerfield House, 2 Eday Road, Aberdeen, Grampian, AB15 6RE	01224 558734 (CTPS)	3	138
2	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000	2	130
3	Frimley Health NHS Foundation Trust	Wexham Park Hospital, Wexham Street, Wexham, Slough, Berkshire, SL2 4HL	01753 633000	3	96
4	Royal National Orthopaedic Hospital NHS Trust	Brockley Hill, Stanmore, Middlesex, HA7 4LP	020 8954 2300 (TPS)	2	79
5	Great Ormond Street Hospital NHS Trust	Great Ormond Street, Westminster, London, WC1N 3JH	020 7405 9200 (CTPS)	1	60
6	Royal Free Hospital	Pond Street, Hampstead, London, NW3 2QG	020 7794 0500	6	55
7	Ashley House Plc	6 Cliveden Office Village, Lancaster Road, Cressex Business Park, High Wycombe, Buckinghamshire, HP12 3YZ	01628 600340	1	45
8	One Healthcare Group	7th Floor, 33 Holborn, City, London, EC1N 2HT	0333 939 0007	1	40
9	Lothian Health Board	Deaconess House, 148 Pleasance, Edinburgh, Lothian, EH8 9RQ	0131 536 9000	1	35
10	Frimley Park NHS Trust	Wexham Park Hospital, Wexham Street, Wexham, Slough, Berkshire, SL2 4HL	01753 633000	2	35

TOP TEN Key Architects

Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	3	181
2	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	8	179
3	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	1	70
4	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GJ	020 7880 6400	1	60
5	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	6	59
6	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	1	45
7	Boswell Mitchell & Johnson Architects	72-82 Roseberry Avenue, City, London, EC1R 4RW	020 7833 9974	1	42
8	Manning & Elliott	Suite 1 Manelli House, 4 Cowper Road, Penrith, Cumbria, CA11 9BN	01768 868800	1	40
9	IBI Group	Princes Manor Barn, Reading Road, Harwell, Oxford, Oxfordshire, OX11 0LU	01235 820222 (TPS)	6	35
10	Jane Darbyshire & David Kendall	Millmoun, Ponteland Road, Newcastle Upon Tyne, Tyne And Wear, NE5 3AL	0191 286 0811	3	31

TOP TEN Key Contractors

Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	15	185
2	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	4	157
3	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	6	99
4	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	4	94
5	Morrison Construction	2rd Floor Rowan House, 1 Robroyston Oval, Robroyston, Glasgow, Strathclyde, G33 1AP	0141 557 6500	1	70
6	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	2	69
7	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	12	58
8	EJ Taylor & Sons Limited	Mill Works, Hazeleigh, Near Purleigh, Chelmsford, Essex, CM3 6QT	01621 828661 (CTPS)	1	45
9	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	3	45
10	Conlon Construction Limited	Charnley Fold Lane, Bamber Bridge, Preston, Lancashire, PR5 6BE	01772 335268 (CTPS)	1	40

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

UNIVERSITY SPENDING BOOSTS THE SECTOR IN JANUARY

Contract activity in the education increased by 20% in January compared to December.

The value of contracts awarded in the education sector was £505 million in January based on a three month rolling average, a 20.2% increase from December (see Fig. 9.1). This figure is 13.4% higher than January 2016, indicating an increase in activity compared to the same time last year. The values of contract awards in the three months to January were 18.2% lower than the previous three months, 1.4% below the figure in the corresponding period in 2016.

Projects by region

Wales accounted for the largest proportion of works awarded in January, with 29.1% of the overall total, a significant increase from the figure in January 2016 (see Fig. 9.2 & 9.4). A contract to construct the Cardiff University Translation Research Facility building valued at £77 million was the largest awarded in January. The development is set to provide laboratories, offices and seminar rooms and was awarded to Kier.

London had the second highest share of education contracts in January, attracting 14.7% of contract value, higher than the 9.5% awarded in January 2016. The largest education contract awarded was at Kingston University to develop a new building to include a welcome centre and 300 seat auditorium, with a value of £30 million.

> Colleges/universities were the sub sector with the largest proportion of contracts

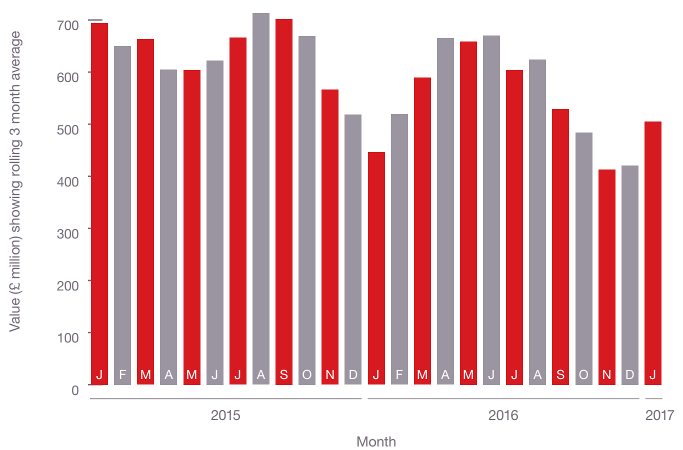

FIG. 9.1

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

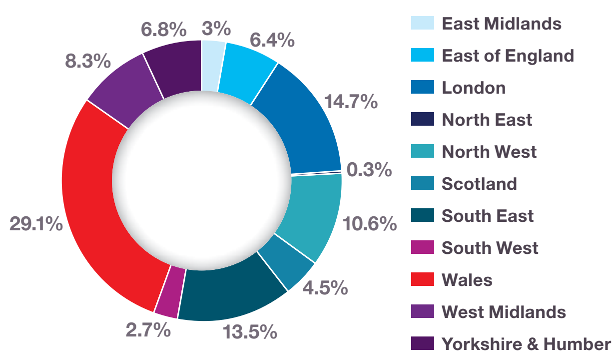

FIG. 9.2

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

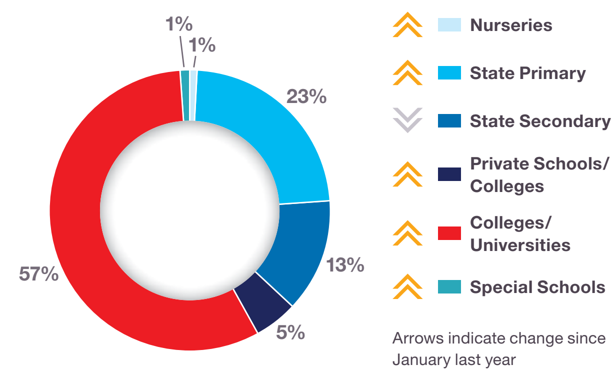

FIG. 9.3

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

economic & construction MARKET REVIEW

FEBRUARY 2017

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The map and figures show how the activity has changed since January 2016		-27.9%	Scotland
+1.7%	East Midlands	-10.6%	South East
+2.2%	East of England	-2.7%	South West
+5.2%	London	+24.4%	Wales *HOTTEST REGION*
-1.5%	North East	+5.3%	West Midlands
+5.6%	North West	-1.7%	Yorkshire & Humber

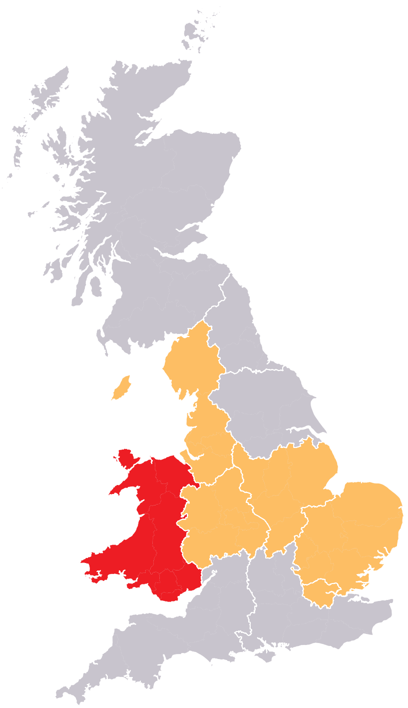

FIG. 9.4

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

Type of Projects

Colleges/universities were the sub sector with the largest proportion of contracts in January 2017, accounting for 57% of total value awarded. State primary followed, contributing 23% of the overall value of contracts awarded (see Fig. 9.3).

Planning Activity

The value of contracts at advanced planning remain in line with recent contract activity with the total in January at £668 million. The North East accounts for the highest proportion of these contracts, with 28% of the total (see Fig. 9.5).

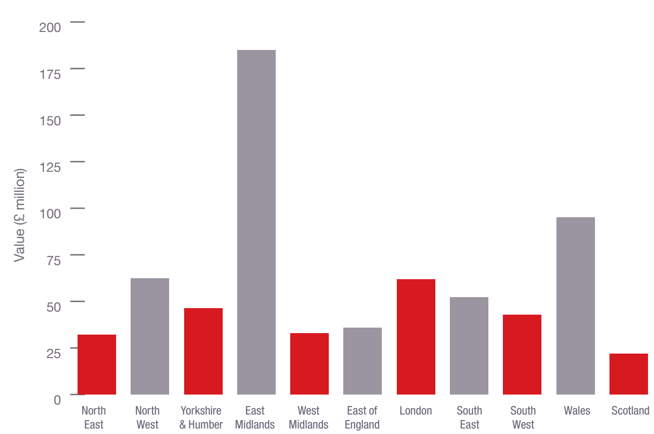

FIG. 9.5

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

PROJECT IN FOCUS

Kingston University – New Town House Building
£30,000,000

County	Surrey
Primary Category Sector	Education
Government Region	South East
Start Date	April 2017
End Date	April 2019
Contract Award Date	January 2017
Funding	Public
Stage	Contract
Contractor	Willmott Dixon Construction

economic & construction MARKET REVIEW

FEBRUARY 2017

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

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
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TOP TEN Key Clients

Feb 2016 – Jan 2017

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	26	240
2	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	11	164
3	University of Northampton	Boughton Green Road, Northampton, Northamptonshire, NN2 7AL	01604 735500 (CTPS)	6	138
4	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	5	105
5	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2BX	020 7589 5111 (CTPS)	4	103
6	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	3	88
7	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	6	83
8	London Borough of Hounslow	Civic Centre, Lampton Road, Hounslow, Middlesex, TW3 4DN	020 8583 2000	12	83
9	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	3	82
10	Cardiff University	McKenzie House, 30-36 Newport Road, Cardiff, South Glamorgan, CF24 0DE	029 2087 4000	3	78

TOP TEN Key Architects

Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	25	232
2	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	8	217
3	Pick Everard (Leicester)	Halford House, Charles Street, Leicester, Leicestershire, LE1 1HA	0116 223 4400 (TPS)	26	171
4	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	18	161
5	Moses Cameron William Architects	Oast House, Malting Lane, Cambridge, Cambridgeshire, CB3 9HF	01223 792500	6	160
6	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	22	153
7	Associated Architects	1 Severn Street Place, The Mailbox, Birmingham, West Midlands, B1 1SE	0121 233 6600	9	120
8	Hawkins Brown Architects	159 St John Street, City, London, EC1V 4QJ	020 7336 8030	8	110
9	Holmes Miller	89 Minerva Street, Glasgow, Strathclyde, G3 8LE	0141 204 2080	7	105
10	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	8	102

TOP TEN Key Contractors

Feb 2016 – Jan 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	99	623
2	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	65	462
3	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	22	356
4	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	55	343
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	28	237
6	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861 000	12	200
7	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	10	189
8	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	12	172
9	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	6	131
10	Farrans (Construction) Limited	New Cambridge House, Bassingbourn Road, Litlington, Royston, Hertfordshire, SG8 0SS	01763 850600	9	116

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

economic & construction MARKET REVIEW

FEBRUARY 2017

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Economic Context
The Construction Sector
Residential
Infrastructure
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FEBRUARY 2017

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