economic & construction MARKET REVIEW

Barbour ABI · Building · bd

MAY 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.

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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MAY 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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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

FIRST QUARTER GDP GROWTH LOWER THAN EXPECTATIONS

The latest GDP figures for the UK economy were released in the last month and they showed that the UK economy had grown by 0.3% in the first quarter of 2017.

This was below the 0.7% rate of growth experienced in the final quarter of 2016 but was actually higher than the 0.2% growth experienced in the first quarter of last year (see Fig. 1.1). Over the last three years the growth levels in the first quarter have been significantly below the rates experienced in subsequent quarters. It will be interesting to see if this trend continues in 2017.

The latest figures showed that the dominant service sector grew by 0.3% in the first quarter which is significantly slower than the average of 0.7% over the past four years (see Fig. 1.2). This was due to a slowdown in consumer focussed services such as retail trade which is consistent with the recent slowdown in retail sales volumes. Comparing growth rates in the consumer focussed services with wider service sector shows that for the first time since 2015, growth was lower in consumer focussed services.

The rate of inflation increased once again in April to 2.7%, up from 2.3% in March (see Fig. 1.3). Air fare rises due to the timing of Easter and clothing, vehicle excise duty and electricity were the main reasons for the increase.

Other news this month on the UK economy includes:

- **Data from the Society for Motor Manufactures showed that new car registrations were down by 20% in April from March**
- **The latest Inflation Report from the Bank of England concluded that the outlook for growth in the UK was steady and revised its growth figure for 2017 up slightly to 1.9%**
- **A survey by the British Retail Consortium showed that the value of retail goods sold increased by 6.3% in April 2017, compared to a year earlier**
- **A survey from the Bank of England showed that investment intentions from British businesses increased in the three months to May.**

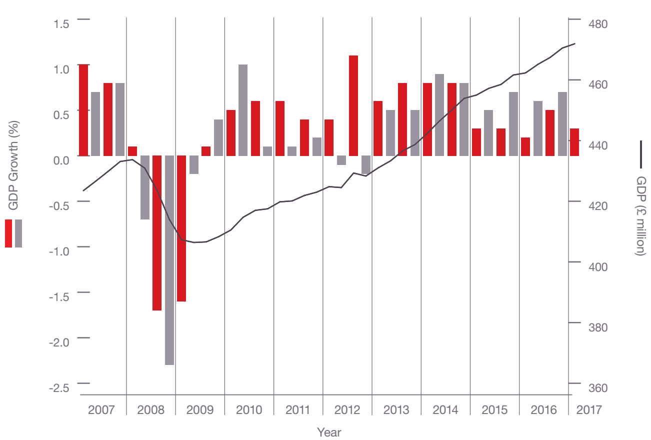

Fig. 1.1 **UK GDP** Source: ONS

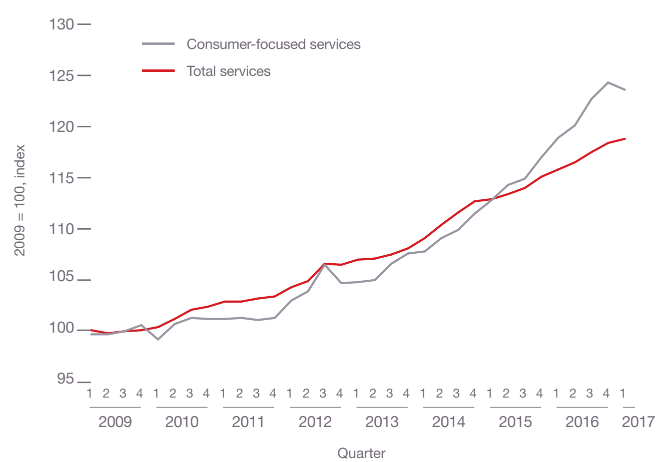

Fig. 1.2 **Service Sector** Source: ONS

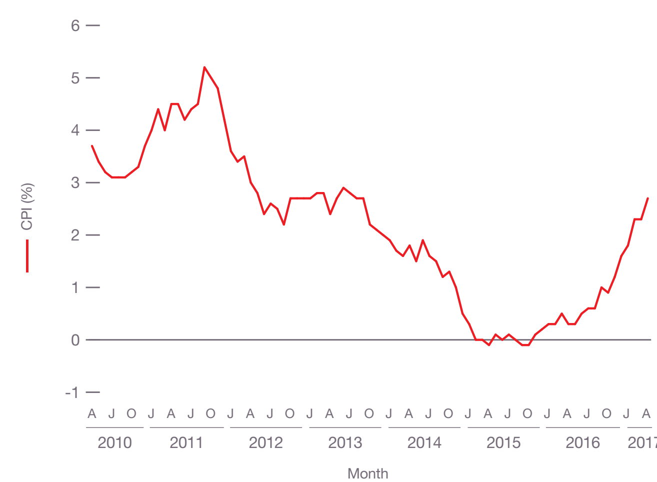

Fig. 1.3 **CPI Inflation** Source: ONS

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About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
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THE CONSTRUCTION SECTOR
CONTRACT ACTIVITY FALLS SHARPLY IN APRIL

The value and number of construction contracts in April 2017 were significantly lower than April 2016.

The latest figures from the ONS indicate the construction sector in the UK grew by 0.2% between Q4 2016 and Q1 2017. However, looking at the monthly figures UK construction output fell 0.7% (see Fig. 2.1).

The main reason for the quarterly increase in output is growth in private commercial and private housing repair and maintenance. However, in the month of March the declines in output were attributed to falls in infrastructure work as well as all types of repair and maintenance. This pattern is indicative of some rebound at the start of 2017 compared to the end of last year but that momentum faltered in March particularly.

	% change	
	Quarter 4 2016 – Quarter 1 2017	February 2017 – March 2017
Total All Work	**0.2**	**-0.7**
All New Work	**0.4**	**-0.1**
Public Housing	4.3	7.6
Private Housing	-0.5	3.2
Infrastructure	-0.3	-5.4
Public (ex Infrastructure)	1.0	-4.7
Private Industrial	-16.6	-1.6
Private Commercial	3.4	0.6
Repairs & Maintenance	**-0.2**	**-1.8**
Public Housing	-3.6	-1.9
Private Housing	1.9	-2.7
Non-Housing	-0.9	-1.0

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

The labour market continues to perform particularly strongly in the UK with unemployment falling to 4.6% and this rate has not been lower since 1975. This is down from a recent high of 8.4% in 2011 and indicates the scale of the drop in recent years (see Fig. 2.2). There are now 1.54 million unemployed people in the UK, 156,000 less than a year earlier. The gender mix of unemployment 852,000 men and 688,000 women. Of those people that are unemployed 385,000 are classed as long term, having been out of work for over 12 months 82,000 than a year before.

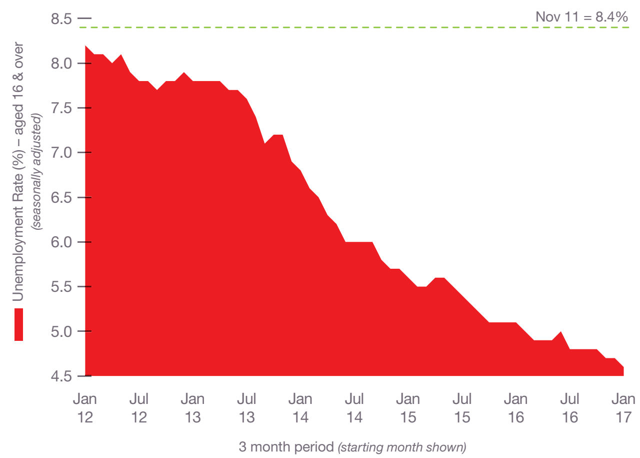

Fig. 2.2 **Unemployment Rate** Source: ONS

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 143 for April. This is an increase from the previous month and continues to support the view that overall activity in the industry remains strong (see Fig. 2.3). The readings for Private Housing were up over the month, but Commercial Offices were lower than last month's level at 115. Commercial Retail increased considerably this month and the reading for Industrial Factories

> The labour market continues to perform particularly strongly

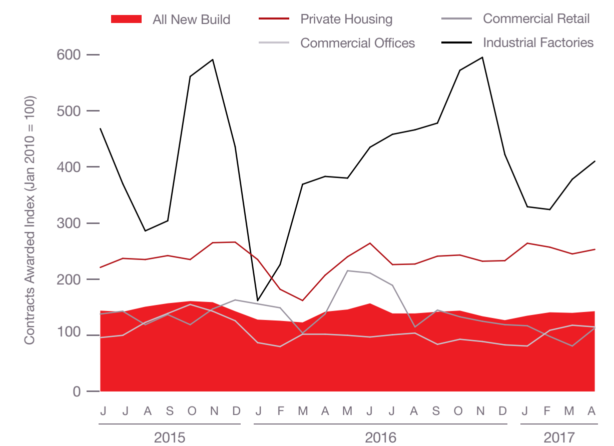

Fig. 2.3 **Contracts Awarded** Source: CPA/Barbour ABI

economic & construction MARKET REVIEW

MAY 2017

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was significantly higher in April. This indicates that the pipeline of work in the private sector remains strong.

Construction Sector

According to Barbour ABI data on all contract activity, April witnessed a sharp decrease in construction levels with the value of new contracts awarded £5.4 billion, based on a three month rolling average (see Fig. 2.5). This is a 15.9% decrease from March and a 10.7% decrease on the value recorded in April 2016. The number of construction projects within the UK in April increased by 25.7% on March, and were 27.3% lower than April 2016.

Projects by Region

The leading region for contracts awarded in April by value were in the North West, accounting for 17% of the UK total. This is followed by London with 15% of contract award value (see Fig. 2.4). The main reason for the North West's figures this month was the award to develop twin water mains in Cumbria. At a value of £300 million it will deliver 30 kilometres of pipelines in the area. London's performance was helped by the One Crown Place development in Hackney which is a mixed use residential and commercial scheme. With two office and retail buildings proposed, as well as 247 residential units and a hotel the contract has a value of £80 million, with Mace acting as the lead contractor.

Types of Project

Residential had the highest proportion of contracts awarded by value in April with 40% of the total (see Fig. 2.6). The Wardian development in London was the largest residential contract awarded in April at an estimated £80 million. A 55 storey development in Poplar the scheme is set to deliver 792 units and is being delivered by Ballymore Properties. Another large residential contract awarded was the Bristol Street scheme in Birmingham, a 772 unit development by Barratt Homes valued at £77.2 million.

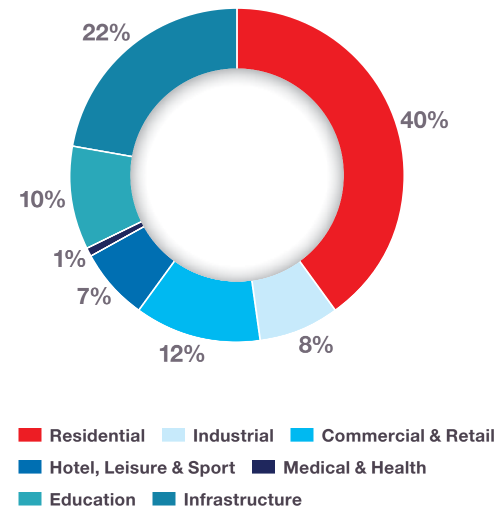

Fig. 2.6 **Type of Projects** Source: Barbour ABI

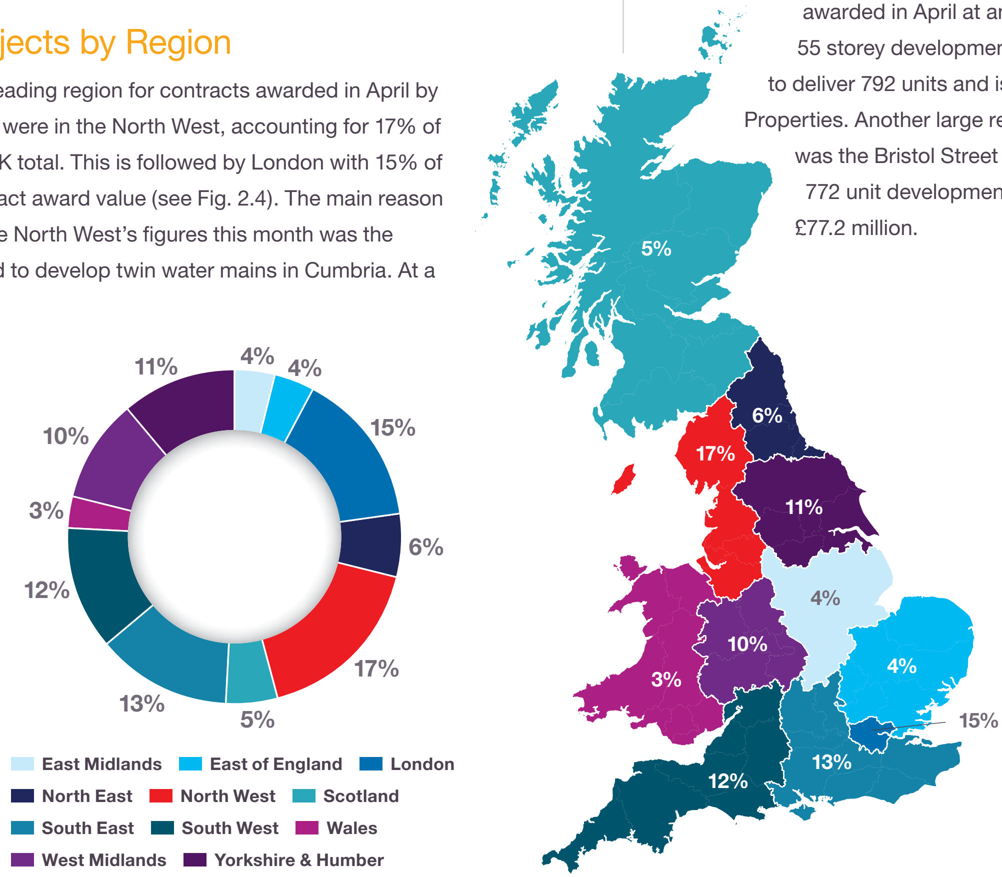

Fig. 2.4 **Locations of Contracts Awarded** Source: Barbour ABI

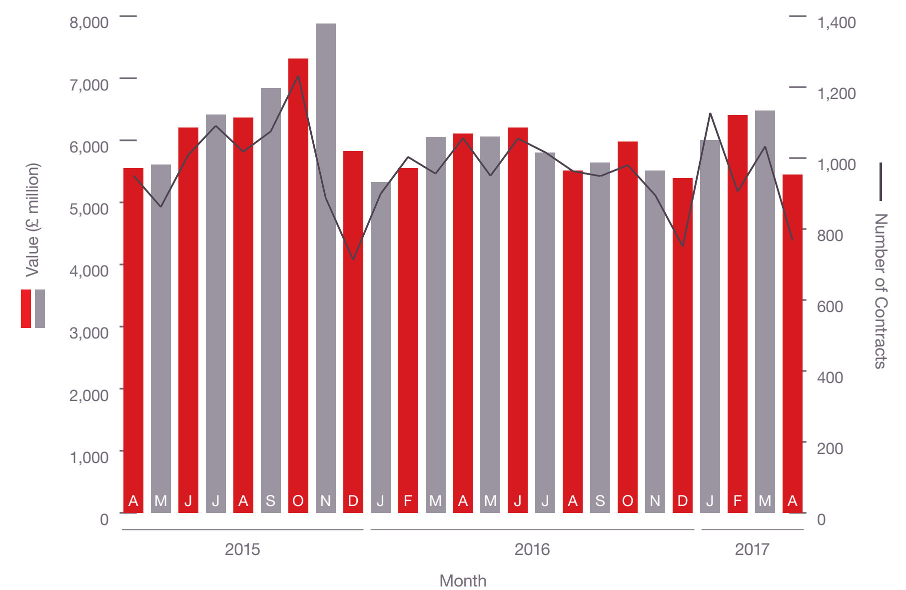

Fig. 2.5 **Construction Activity Trends** Source: Barbour ABI

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MAY 2017

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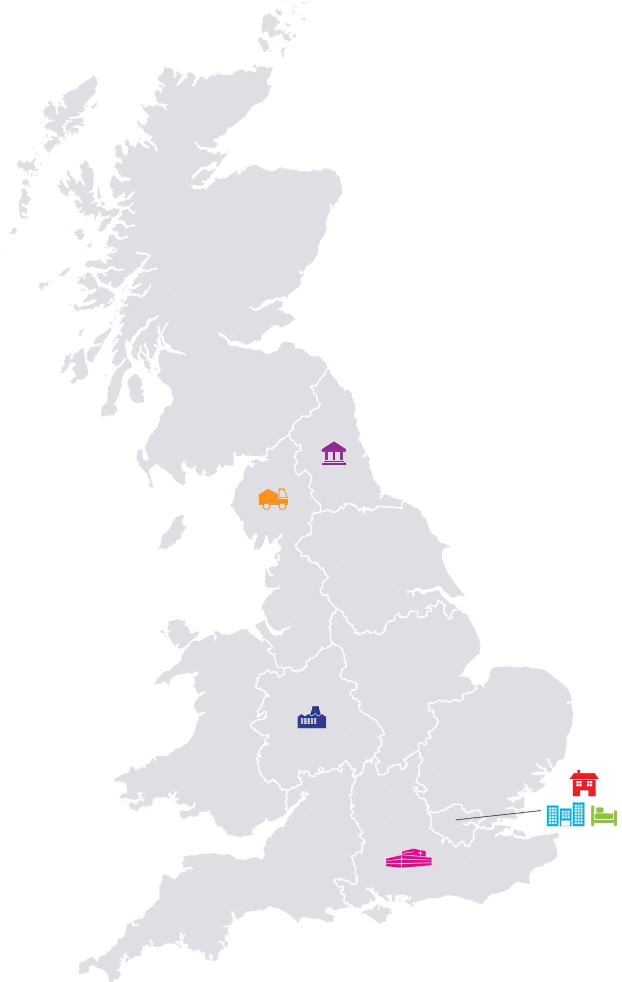
A snippet of this month's regional activity

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
Capital Quarter Development – Student Accommodation
£28,000,000

INFRASTRUCTURE
Bishopton Interchange
£14,100,000

COMMERCIAL & RETAIL
Better Barnsley Regeneration – The Glass Works
£120,000,000

HOTEL, LEISURE & SPORT
Park Community Arena – Olympic Legacy Park
£10,500,000

INDUSTRIAL
Newcastle Laboratory, Newcastle Science Central – Plot 4
£21,500,000

MEDICAL & HEALTH
Colchester General Hospital – Gainsborough Wing Extension
£550,000

EDUCATION
Claires Court School Development
£21,000,000

economic & construction MARKET REVIEW

MAY 2017

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RESIDENTIAL

RESIDENTIAL CONTRACT ACTIVITY SUBDUED

There were large monthly and yearly falls in the value of residential but follows strong growth at the start of the year.

Activity in the residential sector decreased significantly in April with the total value of projects valued at £1.7 billion based on a three month rolling average (see Fig. 3.1). This is a 29.7% decrease compared to March and is 19.7% lower than April 2016. The number of units associated with residential contracts awarded decreased by 4.5% between March and April based on a three month rolling average, but are 6.8% higher than April 2016. While this was a disappointing month for residential values it comes after high values of work were recorded at the start of 2017.

Sector Performance

The latest house price indices for April from Halifax showed that average house prices are rising at 3.8% annually, no change from March. However, there was a quarterly decline in house prices which was the first fall since 2012 indicating a softening in house price movement that will likely be reflected in the annual figures in future releases. Nationwide reported annual house price rises at 2.6% in April, down from 3.5% in March. In further evidence of lessening housing market activity the British Bankers Association reported a 2.7% decline in mortgage approvals in March, the second consecutive monthly fall.

Projects by region

London is the main location of activity in the residential sector this month, accounting for 16.9% of the value of contracts awarded, an increase from 12% recorded in the same month last year (see Fig. 3.2 & 3.4). The Wardian development made a significant contribution to the region's share of contracts in April. This contract is valued at an estimated £80 million and is set to provide 792 units in this area of Poplar. The West Midlands had the next highest proportion of contract award value in April with 14.6% of total value awarded, an increase from the 11.7% in April 2016. The largest

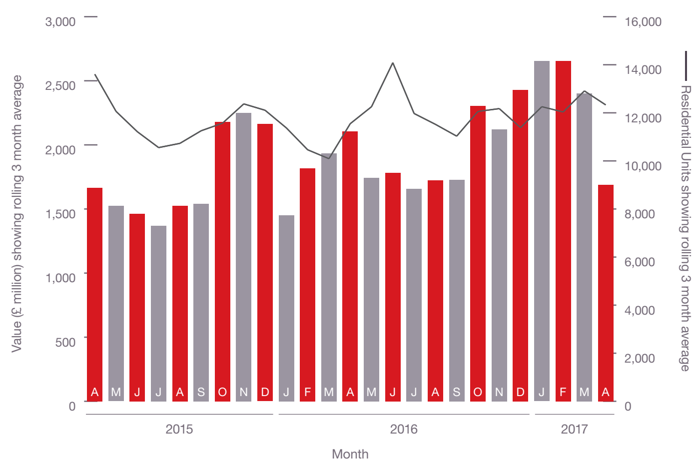

FIG. 3.1

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

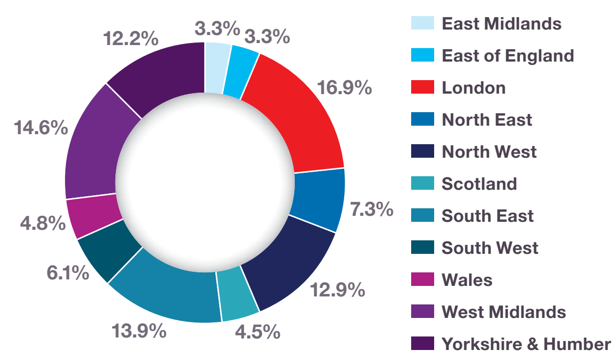

FIG. 3.2

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

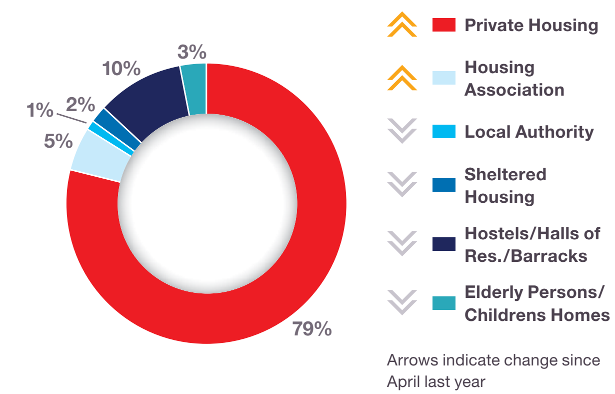

FIG. 3.3

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

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MAY 2017

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

		-6.7%	Scotland
-3.1%	East Midlands	-3.9%	South East
-3.2%	East of England	-5.4%	South West
+4.9%	London *HOTTEST REGION*	+3.3%	Wales
+2.9%	North East	+2.9%	West Midlands
+3.7%	North West	+4.7%	Yorkshire & Humber

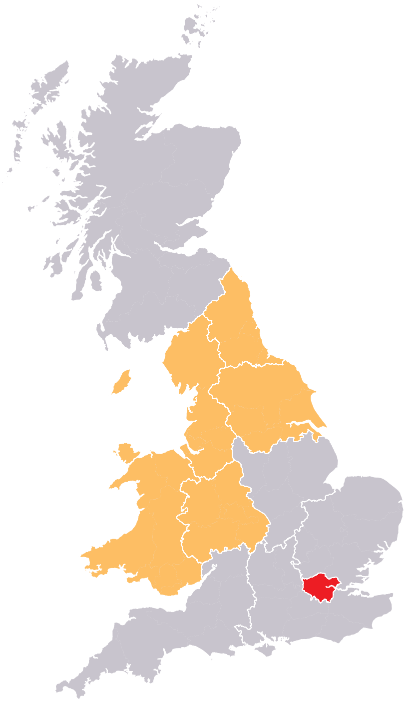

FIG. 3.4

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

contract awarded in the region was the 772 unit development at Bristol Street in Birmingham which had a construction value of £77.2 million.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing this month. Private housing accounted for 79% of the value of contracts awarded this month, an increase from the 67% in the corresponding month last year. After private housing, the next largest project type were hostels/halls of residence projects which accounted for 10% of the value awarded, a decrease from 14% in the corresponding month last year (see Fig. 3.5).

PROJECT IN FOCUS

Capital Quarter Development – Student Accommodation £28,000,000

County	South Glamorgan
Primary Category Sector	Residential
Government Region	Scotland
Start Date	April 2017
End Date	October 2018
Contract Award Date	April 2017
Funding	Private
Stage	Subcontract
Contractor	ISG Limited

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TOP TEN Key Clients

May 2016 – Apr 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	133	2,130
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	145	1,977
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	105	1,501
4	The Berkeley Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	34	848
5	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717	78	847
6	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	36	808
7	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	54	741
8	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	34	656
9	UOL Group Limited	101 Thompson Road, 33-00 United Square, Singapore, 307591	0065 6255 0233	1	500
10	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	36	465

TOP TEN Key Architects

May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	78	897
2	PLP Architecture	Ibex House, 42-47 Minories, City, London, EC3N 1DY	020 3006 3900	5	706
3	MSMR Architects	The Old School, Exton Street, Southwark, London, SE1 8UE	020 7928 6767	2	540
4	JTP	23-25 Great Sutton Street, City, London, EC1V 0DN	020 7017 1780	23	535
5	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	36	496
6	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	31	485
7	Broadway Malyan	3 Weybridge Business Park, Addlestone Road, Weybridge, Surrey, KT15 2BW	01932 845599 (TPS)	20	427
8	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	5	426
9	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	18	396
10	Pegasus Planning Group	Suite 4B, 113 Portland Street, Manchester, Greater Manchester, M1 6DW	0161 393 3399	28	394

TOP TEN Key Contractors

May 2016 – Apr 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	139	2,360
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	148	2,002
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	106	1,510
4	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	62	1,243
5	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	76	873
6	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717	79	855
7	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	54	741
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	38	675
9	The Berkeley Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	31	647
10	Lendlease Construction (EMEA) Limited	EMEA Head Office, 20 Triton Street, Regents Place, London, NW1 3BF	0203 430 9000	1	500

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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MAY 2017

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INFRASTRUCTURE IMPROVES AGAIN IN APRIL

Infrastructure contract values increased in April with two significant utilities projects contributing to continued growth in the sector.

The value of contracts awarded in the infrastructure sector in April totalled £1.7 billion based on a three month rolling average (see Fig. 4.1). This is 10.3% higher than the previous month but 17.3% lower than April 2016. In the three months to April the total value of contract awards was £4.6 billion based on a three month rolling average. This is 21.4% higher than the previous three months but 10.3% lower than the same period in 2016.

Projects by region

The main location of infrastructure projects this month was the North West with 36.8% of the value, up from 31.8% in April 2016 (see Fig. 4.2 & 4.4). The main project awarded in the region was the Thirlmere to West Cumbria water mains contract valued at £300 million. The South West was the next most active location accounting for 31.9%, much higher than the 3.4% recorded in April 2016. The highest value contract in the region was the Avonmouth 33MW waste to energy plant in Bristol valued at £252 million.

Type of Projects

The award of these contracts in April means that utilities was the dominant sector within infrastructure which accounted for 64% of the contract value awarded the month (see Fig. 4.3).

> The main location of projects this month was the North West

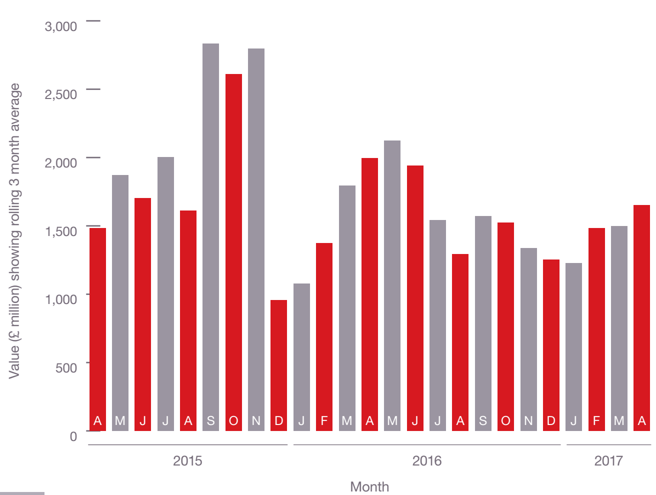

FIG. 4.1

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

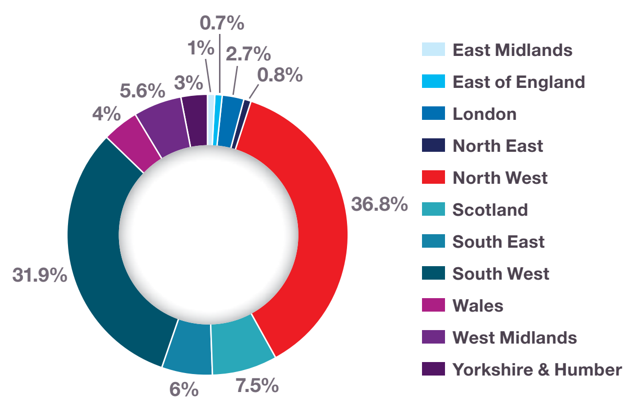

FIG. 4.2

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

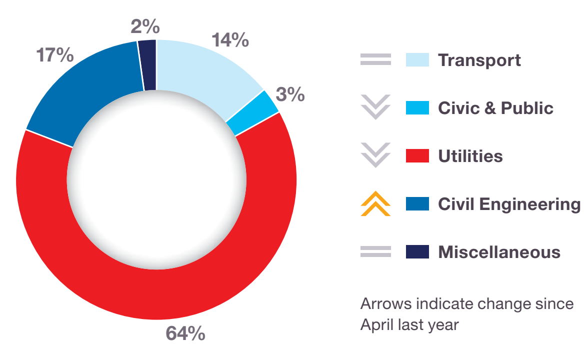

FIG. 4.3

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

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		-22.3%	Scotland
-1.8%	East Midlands	+3.0%	South East
-5.1%	East of England	+28.6%	South West *HOTTEST REGION*
-8.8%	London	+0.9%	Wales
-2.7%	North East	+3.1%	West Midlands
+5.0%	North West	+0.1%	Yorkshire & Humber

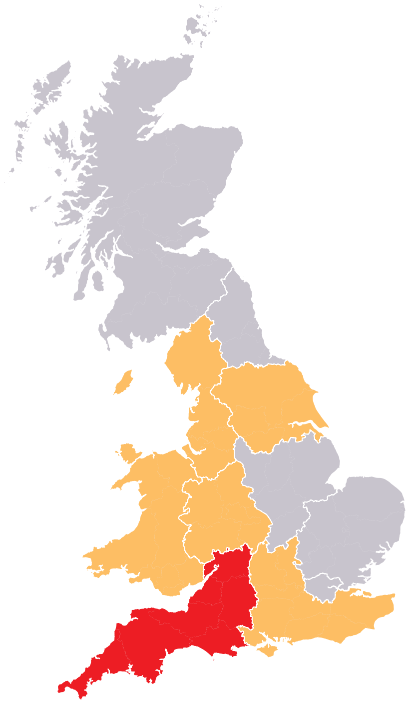

FIG. 4.4

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

PROJECT IN FOCUS

www.glasgows-motorways.co.uk

Bishopton Interchange

£14,100,000

County	Strathclyde
Primary Category Sector	Infrastructure
Government Region	Glasgow
Start Date	January 2017
End Date	January 2020
Contract Award Date	April 2017
Funding	Private
Stage	Contract
Contractor	Morgan Sindall (Construction) Plc

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MAY 2017

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TOP TEN Key Clients

May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	41	2,515
2	SSE Limited	55 Vastern Road, Reading, Berkshire, RG1 8BU	0118 953 4695	5	2,054
3	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	278	1,038
4	RWE NPower Plc	Windmill Hill Business Park, Whitehill Way, Swindon, Wiltshire, SN5 6PB	01793 877777	2	876
5	Gent Fairhead & Company Limited	Court of Noke, Pembridge, Leominster, Herefordshire, HR6 9HW	01206 585017	1	679
6	Wokingham Borough Council	Civic Offices, Shute End, Wokingham, Berkshire, RG40 1BN	0118 974 6000	1	673
7	MGT Teesside Limited	8 White Oak Square, London Road, Swanley, Kent, BR8 7AG	Not Listed	1	650
8	Dover Harbour Board	Harbour House, Marine Parade, Waterloo Crescent, Dover, Kent, CT17 9BU	01304 240400	4	551
9	Spalding Energy Expansion Limited	21 Holborn Viaduct, City, London, EC1A 2AT	01775 717500	2	458
10	Sellafield Limited	Sellafield Sites, Seascale, Cumbria, CA20 1PG	01946 728333 (CTPS)	1	400

TOP TEN Key Architects

May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Barton Willmore	The Blade, Abbey Square, Reading, Berkshire, RG1 3BE	0118 943 0000	2	305
2	Hartwell Architects	9 Chapel Lane, Dover, Kent, CT16 1NP	01304 215336 (TPS)	1	135
3	Halliday Clark Limited	21 The Grove, Ilkley, West Yorkshire, LS29 9LW	01943 604123	1	120
4	Garry Stewart Design Associates	Highland House, Office 101 165 The Broadway, Wimbledon, London, SW19 1NE	020 8544 8085	1	100
5	CPMG Architects	23 Warser Gate, Nottingham, Nottinghamshire, NG1 1NU	0115 958 9500	2	80
6	Renewable Developments Wales Limited	10 Capel Hewore Industrial Estate, Capel Hewore, Ammanford, Dyfed, SA18 3SJ	01269 833080	1	80
7	Fletcher Rae UK Limited	Hill Quays, 5 Jordan Street, Manchester, Greater Manchester, M15 4PY	0161 242 1140	2	71
8	Sergison Bates Architects	44 Newman Street, Westminster, London, W1T 1QD	020 7255 1564 (TPS)	1	70
9	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	1	65
10	Beckside Buildings & Installations	37 High Street, Lincoln, Lincolnshire, LN5 8AS	01522 524750	1	50

TOP TEN Key Contractors

May 2016 – Apr 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	19	779
2	Hitachi Zosen Inova UK Limited	The Hub Fowler Avenue, Farnborough Business Park, Farnborough, Hampshire, GU14 7JF	01252 302373	1	679
3	VolkerFitzpatrick Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	19	657
4	Samsung C & T Uk Limted/Tecnicas Reunidas SA JV	Samsung House, 3 Riverbank Way, Brentford, Middlesex, TW8 9RE	01325 390000	1	650
5	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	26	553
6	Galliford Try/ Costain	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	1	473
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	Farrans (Construction) Limited	99 Kingsway, Dunmurray, Belfast, County Antrim, BT17 9NU	028 9055 1300	2	314
9	Roadbridge Civil Engineering & Building Contractors	Ballyclough House, Ballysheedy, Limerick, Co. Limerick	35361414874	1	300
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.

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

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
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COMMERCIAL & RETAIL

COMMERCIAL CONTRACT ACTIVITY REMAINS LOW

Contract values in the commercial & retail sector were lower in April continuing the trend from the second half of 2016.

The value of contracts awarded in the commercial and retail sector were £627 million in April based on a three month rolling average (see Fig. 5.1). This is an 8% decrease from March and an 11.5% decrease from the April 2016 figure. In the three months to April the value of contracts were 13.8% above the previous three months but 13.9% lower than the same period in 2016, indicating a subdued environment in the sector.

Projects by region

London was the main location of activity in the sector this month accounting for 25.7% of the value of all contracts awarded, which was lower than its 29.7% share in April 2016 (see Fig. 5.2 & 5.4). The largest contract awarded in London in April was the commercially led One Crown Place in Hackney. This is an £80 million contract due to be delivered over three years. Yorkshire & the Humber also attracted a high proportion of commercial contracts this month, with 25.2% of the value of contracts occurring in the region in April, a significant increase from its 8.9% share in April 2016. A major reason for the Yorkshire region's share was the award of the commercially led regeneration scheme of Barnsley town centre valued at £120 million.

> London was the main location of activity in the sector this month

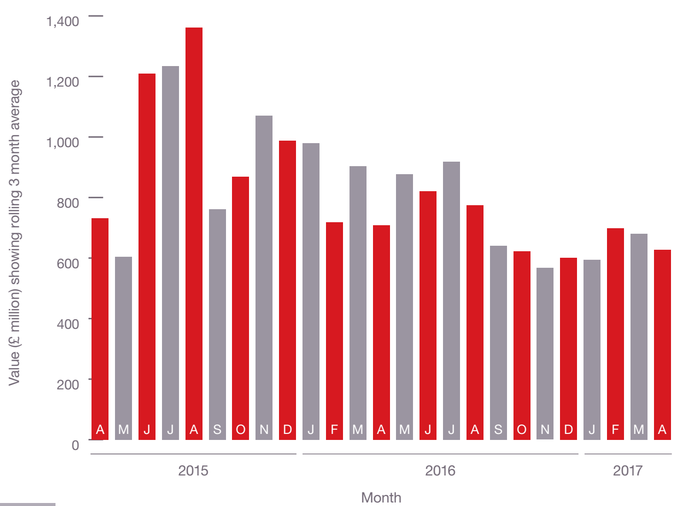

FIG. 5.1

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

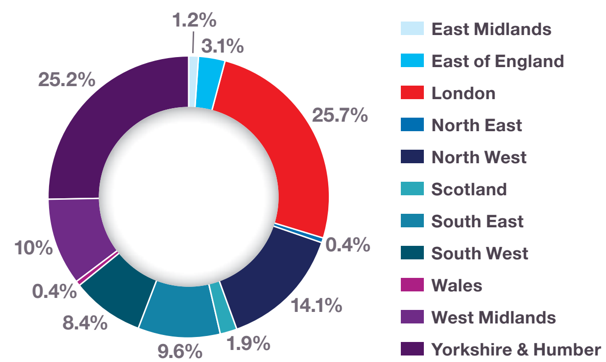

FIG. 5.2

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

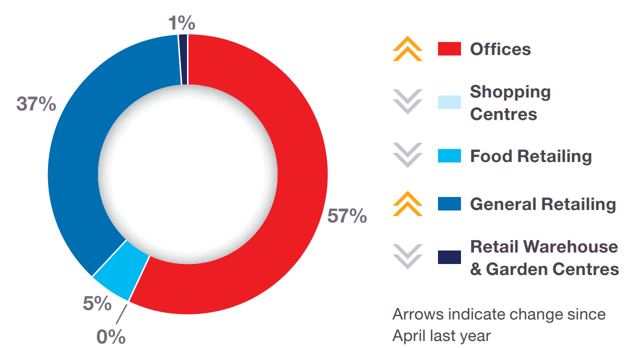

FIG. 5.3

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

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

-3.9%	Scotland		
-2.2%	East Midlands	-15.8%	South East
+0.3%	East of England	+2.9%	South West
-4.0%	London	-2.3%	Wales
-0.4%	North East	+0.6%	West Midlands
+8.6%	North West	+16.3%	Yorkshire & Humber *HOTTEST REGION*

FIG. 5.4

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

Type of Projects

Offices were the dominant type of project in the sector accounting for 57% of the value of contracts awarded this month, which is 10% higher than its share April 2016. General retailing is the next largest sector with 37% of contract award value, which is an increase from its 11% share in April 2016 (see Fig. 5.3).

> In the three months to April the value of contracts were 13.8% above the previous three months

PROJECT IN FOCUS

Better Barnsley Regeneration – The Glass Works £120,000,000

County	South Yorkshire
Primary Category Sector	Commercial & Retail
Government Region	North East
Start Date	August 2016
End Date	April 2018
Contract Award Date	April 2017
Funding	Private
Stage	Contract
Contractor	Henry Boot Construction (UK) Limited

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MAY 2017

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TOP TEN Key Clients

May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Google UK Limited	Belgrave House, 76 Buckingham Palace Road, Westminster, London, SW1W 9TQ	020 7031 3000 (TPS)	1	700
2	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	336
3	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	3	303
4	Legal and General Group PLC	1 Coleman Street, City, London, EC2R 5AA	020 3124 3000	5	295
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 9777766	59	157
8	Westfield Shoppingtowns Limited	Level 6, Midcity Place, 71 High Holburn, Westminster, London, WC1V 6EA	020 7061 1400	3	146
9	British Land Corporation Plc	York House, 45 Seymour Street, Westminster, London, W1H 7LX	020 7486 4466	6	142
10	Goldman Sachs International Limited	Peterborough Court, 133 Fleet Street, City, London, EC4A 2BB	020 7774 1000	1	130

TOP TEN Key Architects

May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	7	720
2	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	700
3	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	11	570
4	Kohn Pedersen Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	4	546
5	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	2	456
6	Rogers Stirk Harbour and Partners	The Leadenhall Building, 122 Leadenhall Street, City, London, EC3V 4AB	020 7385 1235	3	303
7	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	2	253
8	Leslie Jones Architects	121 Great Portland Street, Westminster, London, W1W 6QL	020 7255 1150	3	207
9	Chapman Taylor & Partners	10 Eastbourne Terrace, Paddington, London, W2 6LG	020 7371 3000	2	189
10	Bennetts Associates Architects	1 Rawstorne Place, City, London, EC1V 7NL	020 7520 3300 (CTPS)	3	167

TOP TEN Key Contractors

May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Lendlease Construction (EMEA) Limited	EMEA Head Office, 20 Triton Street, Regents Place, London, NW1 3BF	0203 430 9000	5	996
2	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	27	377
3	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	4	340
4	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	336
5	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	313
6	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	3	280
7	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	9	188
8	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	16	184
9	Sir Robert McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	6	172
10	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	5	168

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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MAY 2017

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HOTEL, LEISURE & SPORT

SHARP FALL IN CONTRACT VALUES IN APRIL

The recent spate of large contract awards in the sector subsided with activity returning to values nearer to the long-term average.

Contract award levels in the hotel, leisure & sport sector were £512 million in April, based on a three month rolling average (see Fig. 6.1). This was 39.5% lower than March but 42.6% higher than April 2016. In the three months to April the value of contracts was £2.1 billion, which was 44.6% higher than the previous three months. This was an increase of 88.8% compared to the same period in 2016 indicating the longer term improvement in the performance of the sector.

Projects by region

London was the main location for hotel, leisure & sport contracts this month accounting for 26.5% of the value awarded (see Fig. 6.2 & 6.4). The largest contract awarded in London during April was the Aldgate Tower Aparthotel on Commercial Street awarded to Ardmore with a value of £30 million. This is set to provide a 178 room hotel and is due to start in May. The South East was the region with the next highest share of contracts awarded at 18.5% an increase from the 8.5% it received in April 2016. The largest contract awarded in the South East in April was the contract to build a replacement leisure centre in Egham at a value of £11.7 million.

> "Contract award levels in the sector were £512 million in April, based on a three month rolling average

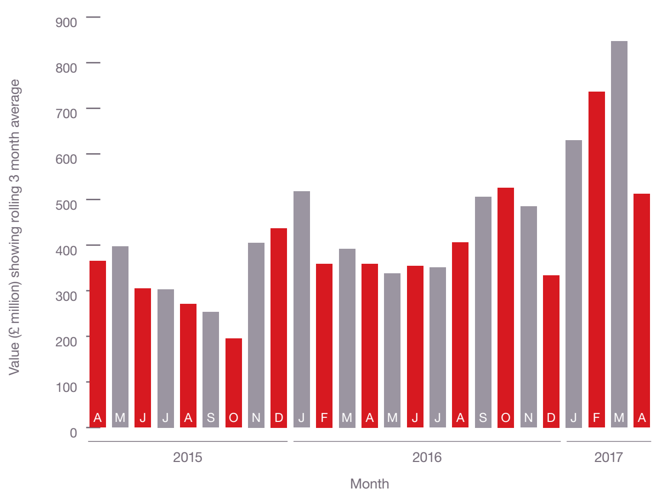

FIG. 6.1

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

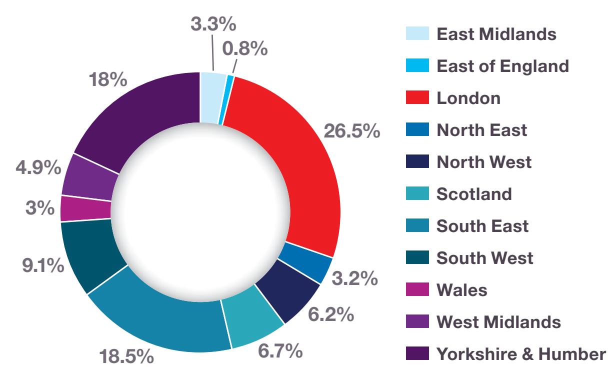

FIG. 6.2

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

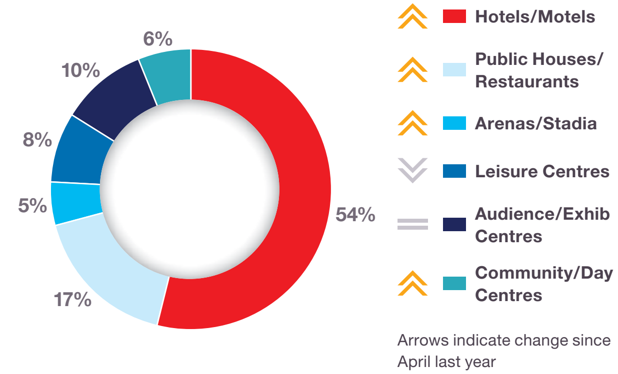

FIG. 6.3

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 April 2016			-3.7%	Scotland	
-1.8%	East Midlands		+9.9%	South East	
-7.5%	East of England		-2.0%	South West	
-3.0%	London		+2.5%	Wales	
-0.9%	North East		-3.9%	West Midlands	
-1.9%	North West		+12.3%	Yorkshire & Humber *HOTTEST REGION*	

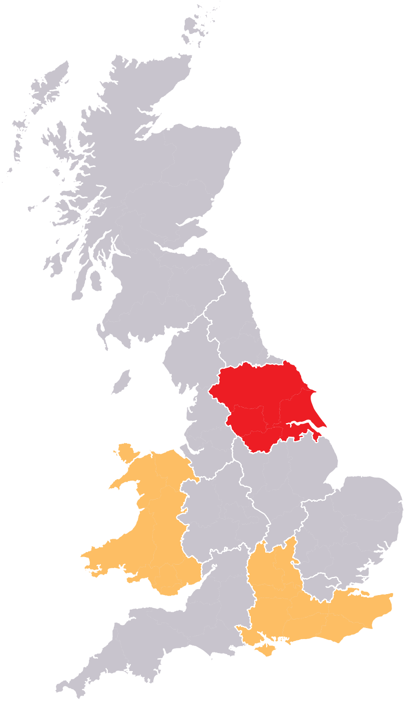

FIG. 6.4

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

Type of Projects

As is often the case the hotels/motels category saw the highest proportion of activity accounting for 54% of contract value awarded in April (see Fig. 6.3). This was up from the 40% it received in the corresponding month in 2016 but still shows signs of a strong hotel market in the UK.

> London was the main location for contracts this month accounting for 26.5% of the value awarded

PROJECT IN FOCUS

Park Community Arena – Olympic Legacy Park
£10,500,000

County	South Yorkshire
Primary Category Sector	Hotel, Leisure & Sport
Government Region	North East
Start Date	June 2017
End Date	March 2018
Contract Award Date	April 2017
Funding	Private
Stage	Contract
Contractor	Technical Building Solutions Limited

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TOP TEN Key Clients

May 2016 – Apr 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	2	331
3	Heads of The Valleys Development Company Limited	The Coach House, 79 Mill Way, Grantchester, Cambridge, Cambridgeshire, CB3 9ND	Not Listed	1	315
4	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499 / 01582 424200	30	137
5	Manchester City Council	Town Hall, Albert Square, Manchester, Greater Manchester, M60 2LA	0161 234 5000	1	110
6	Bristol City Council	The Exchange, Corn Street, Bristol, North East Somerset, BS1 1JQ	0117 922 2000	2	96
7	Stanhope Plc	Second Floor, 100 New Oxford Street, Westminster, London, WC1A 1HB	020 7170 1700	2	77
8	Mandarin Oriental Hotel Group	Kings Court, 2-16 Goodge Street, Westminster, London, W1T 2QA	020 7908 7888	1	60
9	The Rugby Football Union	Rugby House, Twickenham Stadium, 200 Whitton Road, Twickenham, Middlesex, TW2 7BA	020 8892 2000	4	56
10	Jomast Development Limited	Top Floor, Oriel House, Calverts Lane, Bishop Street, Stockton on Tees, Cleveland, TS18 1SW	01642 674203	4	51

TOP TEN Key Architects

May 2016 – Apr 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	Populous	14 Blades Court, Deodar Road, Putney, London, SW15 2NU	020 8874 7666	2	406
3	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	2	331
4	Tew & Smith Architects	Quoits House, 4 Harbour Road, Kingsthorpe, Northampton, Northamptonshire, NN2 7AZ	01604 791197 (CTPS)	2	316
5	Feilden Clegg Bradley Architects	Bath Brewery, Toll Bridge Road, Bath, North East Somerset, BA1 7DE	01225 852545	6	169
6	Simpson Haugh & Partners	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000 (CTPS)	2	124
7	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	8	123
8	OMA Architects	Heer Bokelweg 149, 3032 AD Rotterdam, Netherlands	0031 10 243 82 00	1	110
9	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479 269 (TPS)	19	83
10	Guy Hollaway Architects	The Tramway Stables, Rampart Road, Hythe, Kent, CT21 5BG	01303 260515 (TPS)	1	75

TOP TEN Key Contractors

May 2016 – Apr 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	5	355
3	FCC	13 Federico Salmon, Madrid, Spain, 28016	00 34913595400	1	315
4	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	127
5	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	16	117
6	Vinci Construction	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	2	90
7	Lendlease Construction (EMEA) Limited	EMEA Head Office, 20 Triton Street, Regents Place, London, NW1 3BF	0203 430 9000	1	75
8	Gilbert - Ash Limited	47 Boucher Road, Belfast, County Antrim, BT12 6HR	028 90664334	6	71
9	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	11	69
10	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	5	62

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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MAY 2017

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

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Economic Context
The Construction Sector
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INDUSTRIAL

SLIGHT DECLINE IN THE INDUSTRIAL SECTOR

Continuing its recent volatility contract values decreased in the month but were higher than the values recorded in April 2016.

Activity in the industrial sector decreased slightly in April with the value of contracts awarded £405 million, based on a three month rolling average (see Fig. 7.1). This equates to a decline of 0.5% on the value in March but is 2.5% above the figure recorded this time last year. In the three months to April the total value of contracts was £1.2 billion which was 6.1% lower than the previous three months and 19.7% lower than the same quarter last year.

Projects by region

The West Midlands is the region with the highest value of activity this month with 21.6% of the contracts awarded, an increase of 3.3% on April 2016 (see Fig. 7.2 & 7.4). This was principally due to the award of the contract to build a new distribution centre in Lichfield for trade merchant Screwfix. The contract was valued at £50 million and was awarded to Winvic. The East Midlands had the next highest portion of contract awards accounting for 18.7% of the value awarded in April, a significant 14.9% increase from the corresponding month in 2016. The largest contract by value in the region was the £21.9 million contract to construct an industrial building in Ashby de la Zouch which is primarily to be used for warehousing.

Type of Projects

The types of project awarded in the sector were mainly in warehouse/storage which accounted for 59% of contract values, which is significant but still below the 67% figure from April 2016 (see Fig. 7.3). The two large warehousing contracts in the East and West Midlands were key factors in this type of project's dominance in April.

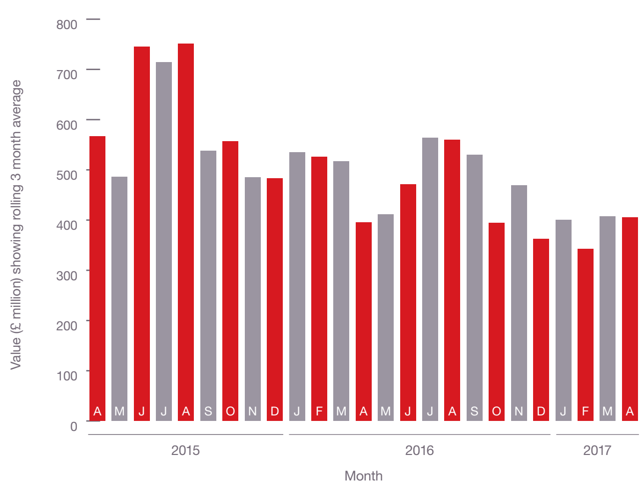

FIG. 7.1

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

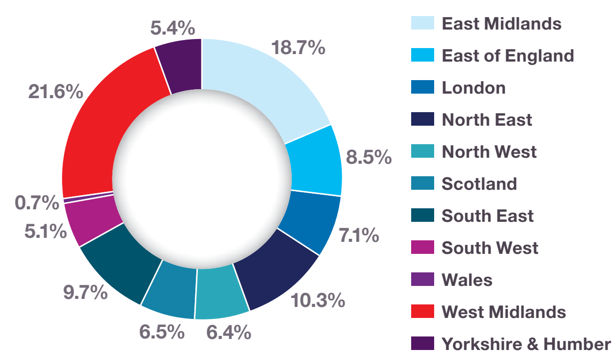

FIG. 7.2

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

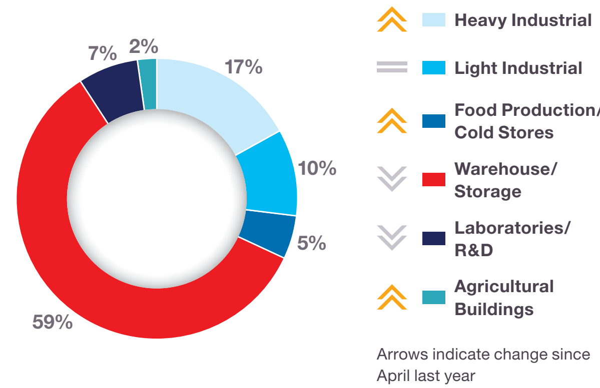

FIG. 7.3

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

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SLIGHT DECLINE IN THE INDUSTRIAL SECTOR

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

+14.9%	East Midlands *HOTTEST REGION*	+1.9%	Scotland
+2.8%	East of England	-24.3%	South East
+6.5%	London	-10.0%	South West
+8.9%	North East	-2.0%	Wales
+3.9%	North West	+3.3%	West Midlands
		-5.9%	Yorkshire & Humber

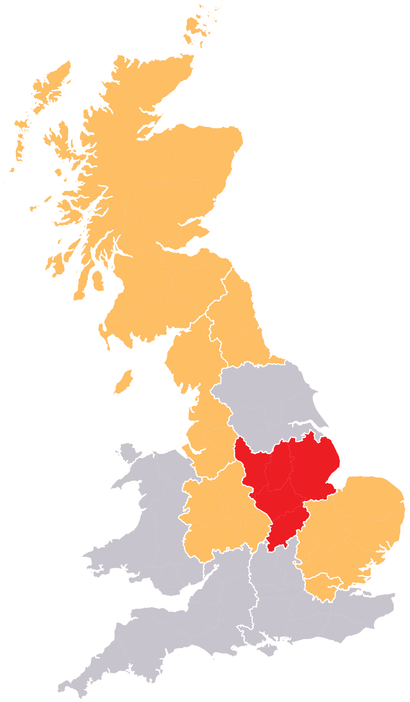

FIG. 7.4

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

PROJECT IN FOCUS

Newcastle Laboratory, Newcastle Science Central – Plot 4
£21,500,000

County	Tyne And Wear
Primary Category Sector	Industrial
Government Region	North East
Start Date	April 2017
End Date	June 2018
Contract Award Date	April 2017
Funding	Private
Stage	Subcontract
Contractor	Kier North East

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SLIGHT DECLINE IN THE INDUSTRIAL SECTOR

TOP TEN
Key Clients
May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	5	743
2	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	2	175
3	Marine Harvest Limited	Farms Office, Units 3-7, Blar Mhor Industrial Estate, Fort William, Highlands, PH33 7PT	01397 701550	3	141
4	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	6	121
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	Mountpark Logistics	22-23 Old Burlington Street, Westminster, London, W1S 2JJ	020 7478 3333 (CTPS)	4	98
9	The Range	Tamar House, Thornbury Road, Estover, Plymouth, Devon, PL6 7PP	01752 725572 (CTPS)	3	96
10	Goodman Logistics Developments UK Limited	Nelson House, Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG	0121 506 8100	4	95

TOP TEN
Key Architects
May 2016 – Apr 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	360
2	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	18	320
3	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	15	280
4	Norr	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	8	145
5	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	8	144
6	PHP Architects	The Old Rectory, 31 Rectory Lane, Milton Malsor, Northampton, Northamptonshire, NN7 3AQ	01604 858916	7	138
7	Orbit Architects Limited	83 Blackfriars Road, Southwark, London, SE1 8HA	020 7593 3380	1	100
8	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	1	100
9	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	3	71
10	Gensler Associates	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AH	020 7073 9600	1	70

TOP TEN
Key Contractors
May 2016 – Apr 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)	25	545
3	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	8	268
4	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	6	260
5	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	13	220
6	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	11	166
7	A & H Construction & Development	Coombs Road, Halesowen, West Midlands, B62 8AE	0121 559 0255	16	162
8	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	9	136
9	Vinci Construction	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	2	130
10	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	7	110

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 23.7% on April 2016.

Levels of activity in the medical & health sector decreased by 0.4% in April 2017 compared to March, with the total value of contracts awarded at £84 million based on a three month rolling average (see Fig. 8.1). This is 23.7% lower than the values in April 2016. In the three months to April the value of contracts decreased by 21% on the previous three months and were 41.1% down on the same period in 2016 indicating lower levels of activity in the sector over the short and long term.

Projects by region

The South East dominated the sector this month capturing 86.8% of activity, a substantial increase from the 44.2% in April 2016 (see Fig. 8.2 & 8.4). This is primarily due to the award for the contract to build a new emergency department at Wexham Park Hospital in Slough. With a construction value of £49 million it is it was the only contract awarded in the month that had a value higher than £5 million.

Type of Projects

Public hospitals are the dominant sub-sector this month accounting for 83% of the value of contracts in April 2017, a small increase from the 80% it attracted in April 2016 (see Fig. 8.3).

> "The South East dominated the sector this month capturing 86.8% of activity

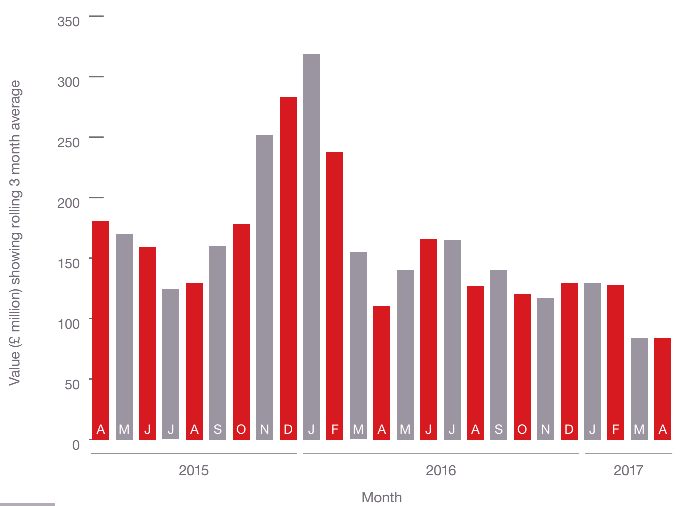

FIG. 8.1

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

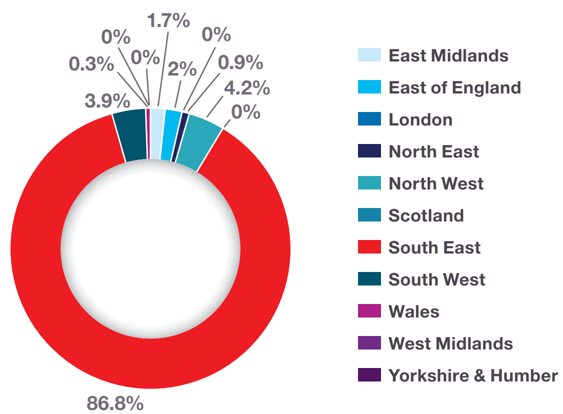

FIG. 8.2

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

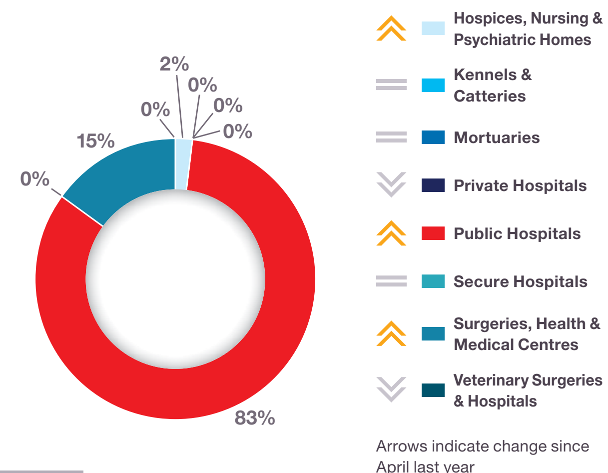

FIG. 8.3

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

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ACTIVITY IN THE SECTOR REMAINS LOW

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

		-3.3%	Scotland
+0.9%	East Midlands	+42.6%	South East *HOTTEST REGION*
+0.7%	East of England	+1.2%	South West
-11.8%	London	-3.6%	Wales
-19.6%	North East	-1.5%	West Midlands
-4.9%	North West	-0.7%	Yorkshire & Humber

FIG. 8.4

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

PROJECT IN FOCUS

Colchester General Hospital – Gainsborough Wing Extension £550,000

County	Essex
Primary Category Sector	Medical & Health
Government Region	East of England
Start Date	April 2017
End Date	December 2017
Contract Award Date	April 2017
Funding	Public
Stage	Contract
Contractor	H & R Strood Contracts Limited

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ACTIVITY IN THE SECTOR REMAINS LOW

TOP TEN Key Clients
May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Aneurin Bevan Health Board	Mamhilad House, Block A, Mamhilad Park Estate, Pontypool, Gwent, NP4 0YP	01873 732732 (CTPS)	2	181
2	NHS Grampian	Summerfield House, 2 Eday Road, Aberdeen, Grampian, AB15 6RE	01224 558734 (CTPS)	4	146
3	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000	2	130
4	Frimley Health NHS Foundation Trust	Wexham Park Hospital, Wexham Street, Wexham, Slough, Berkshire, SL2 4HL	01753 633000	2	121
5	Royal National Orthopaedic Hospital NHS Trust	Brockley Hill, Stanmore, Middlesex, HA7 4LP	020 8954 2300 (TPS)	2	79
6	Great Ormond Street Hospital NHS Trust	Great Ormond Street, Westminster, London, WC1N 3JH	020 7405 9200 (CTPS)	1	60
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	2	50
9	One Healthcare Group	7th Floor, 33 Holborn, City, London, EC1N 2HT	0333 939 0007	1	40
10	NHS Forth Valley Board Headquarters	Carseview House, Castle Business Park, Stirling, Central, FK9 4SW	01786 463031	1	30

TOP TEN Key Architects
May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	5	333
2	Norr	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	3	181
3	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	1	70
4	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	5	61
5	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GJ	020 7880 6400	1	60
6	Boswell Mitchell & Johnson Architects	72-82 Roseberry Avenue, City, London, EC1R 4RW	020 7833 9974	1	42
7	Manning & Elliott	Suite 1 Manelli House, 4 Cowper Road, Penrith, Cumbria, CA11 9BN	01768 868800	1	40
8	IBI Group	Princes Manor Barn, Reading Road, Harwell, Oxford, Oxfordshire, OX11 0LU	01235 820222 (TPS)	5	34
9	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	9	32
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
May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	5	188
2	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	7	166
3	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	13	154
4	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	3	122
5	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	4	94
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)	9	47
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	44
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
DROP IN CONTRACT VALUES RECORDED IN APRIL

Despite some large state school contracts, a lack of university construction resulted in a 14.4% monthly drop in contract values.

The value of contracts awarded in the education sector was £480 million in April based on a three month rolling average, a 14.4% decrease from March (see Fig. 9.1). This figure was 27.8% lower than April 2016 indicating more subdued activity levels at present. The values of contract awards in the three months to April were 15.4% higher than the same period last year however, indicating better long term performance in the sector.

Projects by region

The North East experienced the highest share of the value of education contracts in April accounting for 24.1% of contract value awarded, a significant change from the 2.1% figure in April 2016 (see Fig. 9.2 & 9.4). The largest construction contract awarded in the region April was the development of the Ponteland school in Newcastle. This was valued at £43 million and was awarded to Willmott Dixon. London was the region that attracted the next highest value of construction contracts at 21.3%, up from 15% in April 2016. The largest contract awarded was for the Charter School of East Dulwich which was valued at £31.1 million and awarded to Kier.

Type of Projects

Colleges/universities contracts were the dominant sub sector in education in April. They accounted for 35% of the total value awarded, although this was lower than the 46% in April 2016. Both state primary and secondary schools together were awarded 50% of the total value of contracts in April 2016 (see Fig. 9.3).

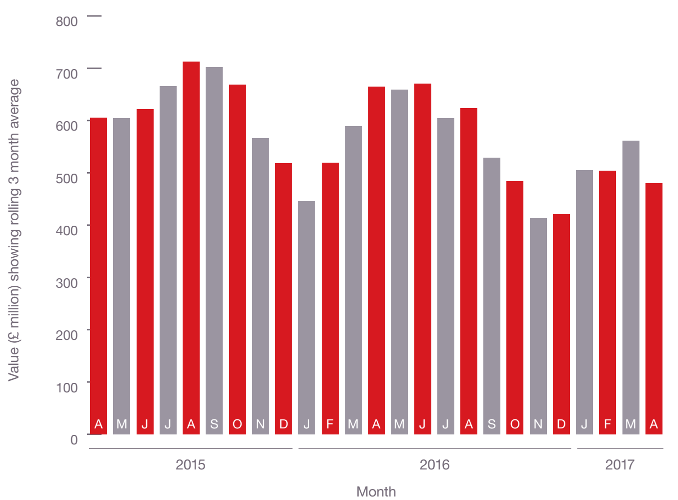

FIG. 9.1
Education: **Project Value showing 3 month moving average** Source: Barbour ABI

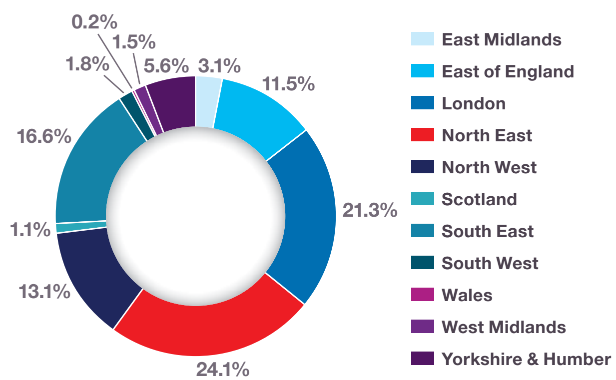

FIG. 9.2
Education: **Value of Contracts by Region** Source: Barbour ABI

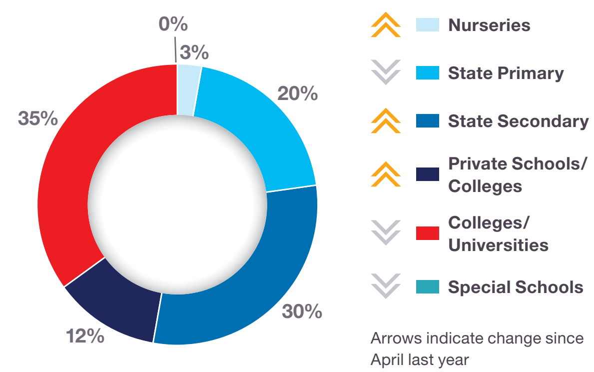

FIG. 9.3
Education: **Type of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since April 2016			
		-22.4%	Scotland
-0.4%	East Midlands	+8.2%	South East
-5.3%	East of England	-3.9%	South West
+6.3%	London	-7.8%	Wales
+21.9%	North East *HOTTEST REGION*	-2.2%	West Midlands
+5.5%	North West	0.0%	Yorkshire & Humber

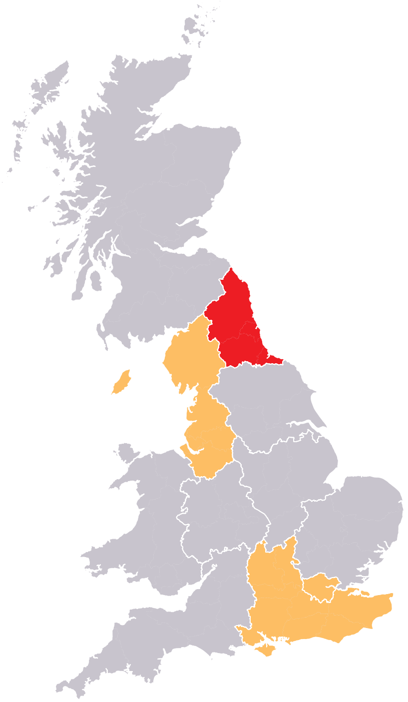

FIG. 9.4

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

PROJECT IN FOCUS

Claires Court School Development
£21,000,000

County	Berkshire
Primary Category Sector	Education
Government Region	East of England
Start Date	January 2018
End Date	July 2019
Contract Award Date	April 2017
Funding	Private
Stage	Contract
Contractor	Kier Construction Southern Limited

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DROP IN CONTRACT VALUES RECORDED IN APRIL

TOP TEN Key Clients
May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Cardiff University	McKenzie House, 30-36 Newport Road, Cardiff, South Glamorgan, CF24 0DE	029 2087 4000	6	318
2	Education Funding Agency	Sanctuary Buildings, 20 Great Smith Street, Westminster, London, SW1P 3BT	0370 000 2288	28	229
3	Bournemouth University	Talbot Campus, Fern Barrow, Poole, Dorset, BH12 5BB	01202 524111	3	115
4	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2BX	020 7589 5111 (CTPS)	4	103
5	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	6	89
6	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	3	88
7	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	5	82
8	London Borough of Hounslow	Civic Centre, Lampton Road, Hounslow, Middlesex, TW3 4DN	020 8583 2000	10	81
9	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	2	81
10	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	11	73

TOP TEN Key Architects
May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Hawkins Brown Architects	159 St John Street, City, London, EC1V 4QJ	020 7336 8030	11	322
2	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	9	271
3	HOK International Limited	Qube, 90 Whitfield Street, Westminster, London, W1T 4EZ	020 7636 2006	2	227
4	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	17	190
5	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	19	170
6	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	21	141
7	Pick Everard (Leicester)	Halford House, Charles Street, Leicester, Leicestershire, LE1 1HA	0116 223 4400 (TPS)	18	137
8	Associated Architects	1 Severn Street Place, The Mailbox, Birmingham, West Midlands, B1 1SE	0121 233 6600	6	111
9	Faulkner Browns	Dobson House, Northumbrian Way, Killingworth, Newcastle Upon Tyne, Tyne And Wear, NE12 6QW	0191 268 3007	5	103
10	Corde	Cantay House, Park End Street, Oxford, Oxfordshire, OX1 1JD	01865 248045 (TPS)	10	97

TOP TEN Key Contractors
May 2016 – Apr 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	89	614
2	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	67	613
3	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	49	351
4	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	23	346
5	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861 000	11	171
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	18	134
7	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	18	127
8	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	5	121
9	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	9	119
10	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	98

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