economic & construction MARKET REVIEW

Barbour ABI Building bd

JULY 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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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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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
WEAKER CONSUMER CONFIDENCE WEIGHING ON UK ECONOMY

The UK economy continues to provide mixed messages but the consensus is for growth to pick up in the second quarter.

According to Markit, the UK economy experienced "relatively solid" growth in the second quarter. While the all-sector PMI falling from 54.5 in May to 53.9 in June, down for a second month in a row, this still indicates a growing economy (see Fig. 1.1). This quarter's reading are consistent with second quarter growth of 0.4%, Markit said.

However, these figures are set against a backdrop of falling consumer confidence and slowing growth in the dominant service sector. According to the Eurobarometer Consumer Survey confidence levels have been negative since the Brexit vote in June 2016, after positive readings since the start of 2014. The latest figures showed net confidence had fallen to -7.5, the lowest level since Quarter 2 2013. This was mostly driven by declining expectations of economic performance (see Fig. 1.2).

This decline in confidence is perhaps being exacerbated by the falls in the real levels of earnings in the UK. Adjusting for the level of inflation, which continues to increase, average weekly earnings fell by 0.7% including bonuses and 0.5% without (see Fig. 1.3).

> "Confidence levels have been negative since the Brexit vote in June 2016

Other news this month on the UK economy includes:

- **A survey from the Bank of England found that financial institutions had cut back on the level of unsecured credit lending in the three months to June**
- **Speculation raged that the UK was ready to increase interest rates however the Deputy Governor of the Bank of England dismissed this**
- **A survey by the British Retail Consortium showed that retail sales in June increased by 1.2% in June after a 0.5% fall in May**
- **The headline inflation rate fell unexpectedly from 2.9% to 2.6%.**

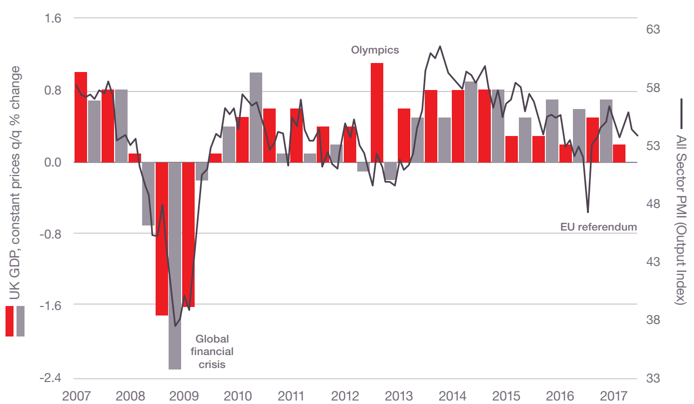

Fig. 1.1 **UK GDP & PMI** Source: IHS Markit

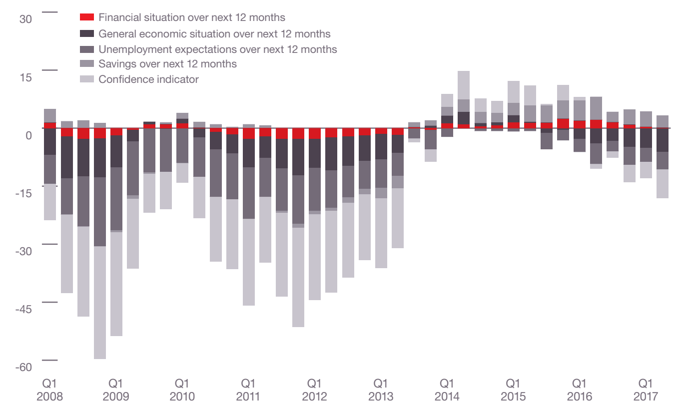

Fig. 1.2 **Contributions to consumer confidence indicator** Source: European Commission

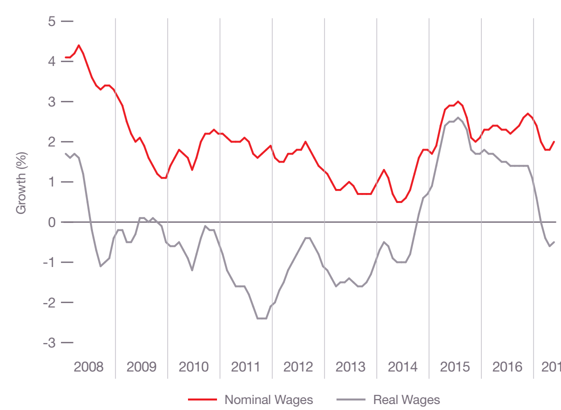

Fig. 1.3 **Average Weekly Earnings Growth** Source: ONS

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THE CONSTRUCTION SECTOR
CONTRACT ACTIVITY REBOUNDS IN JUNE

The value of construction contracts in June 2017 was higher than May but still lags the June 2016 figure.

The latest figures from the ONS indicate the construction sector in the UK shrank by 1.2% between April and May 2017. Industry output was also 0.3% lower than May 2016.

The main reason for the monthly decrease in output is declines in new work in the private commercial, private housing and public sector. New private commercial output shrank by 1.6% over the period, private housing declined by 0.1% and public work fell by 2.7%. Over the longer term new private housing was still 1% higher in May 2017 compared to May 2016. Similarly private commercial was 2% higher than a year ago (see Fig. 2.1). However, looking at the past three months compared to the preceding three months it is clear the level of activity in construction is declining despite the monthly fluctuations.

	% change	
	May 2016 – May 2017	**April 2017 – May 2017**
Total All Work	**-0.3**	**-1.2**
All New Work	**0**	**-1.4**
Public Housing	17.2	6.1
Private Housing	1	-0.1
Infrastructure	0.9	-4
Public (ex Infrastructure)	-8.2	-2.7
Private Industrial	-26.2	-2.2
Private Commercial	2.8	-1.6
Repairs & Maintenance	**-0.9**	**-0.7**
Public Housing	-8.7	0
Private Housing	7.9	-0.3
Non-Housing	-5	-1.3

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

> June witnessed a rebound in construction levels

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 141 for May. This is a decrease from the previous month but continues to support the view that overall activity in the industry remains strong. The readings for Private Housing were up over the month, but Commercial Offices were lower than last month's level at 94. Commercial Retail increased considerably this month and the reading for Industrial Factories was significantly higher in May. This indicates that the pipeline of work in the private sector remains strong.

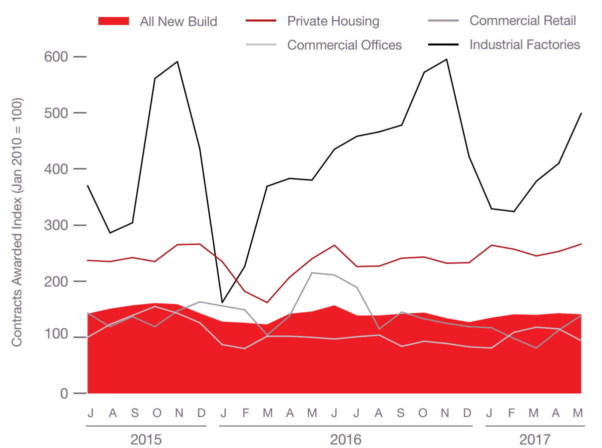

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

Construction Sector

According to Barbour ABI data on all contract activity, June witnessed a rebound in construction levels with the value of new contracts awarded £5.5 billion, based on a three month rolling average (see Fig. 2.4). This is a 12.4% increase from May but an 11.5% decrease on the value recorded in June 2016. The number of construction projects within the UK in June increased by 38.7% on May, and were 18.9% higher than June 2016.

Projects by Region

The majority of the contracts awarded in June by value were in London, accounting for 26% of the UK total. This is followed by the South East with 14% of contract award value (see Fig. 2.3). The highest value contract awarded in London in June was the North Quay development in Poplar which is set to deliver 1243 flats with

> It is clear the level of activity in construction is declining despite the monthly fluctuations

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associated commercial and retail uses. Valued at an estimated £800 million the development will contain four towers and was awarded to the Canary Wharf Group. The other major contract awarded in London in June was a further development in Poplar at 10 Bank Street. This development is for commercial offices and has an estimated value of £187.5 million and will provide 6500 square metres of floorspace.

Types of Project

Residential had the highest proportion of contracts awarded by value in June with 54% of the total (see Fig. 2.5). The North Quay development in Poplar was by far the largest value contract awarded in June. The next highest value residential contract awarded was a 1020 apartment development in Rotherhithe valued at £85 million awarded to Berkeley Homes. Infrastructure secured the second highest share of contracts by type with 12% of the value awarded. The largest infrastructure contract awarded in June was the IFA 2 converter station, an onshore facility which links the UK and France's power grids. This is valued at £100 million and is part of the wider programme known as Interconnexion France-Angleterre 2 (IFA2). The industrial sector accounted for 10% of the contract value awarded in June with a Prologis development in Northampton the largest contract at £150 million.

> "The majority of the contracts awarded in June by value were in London, accounting for 26% of the UK total"

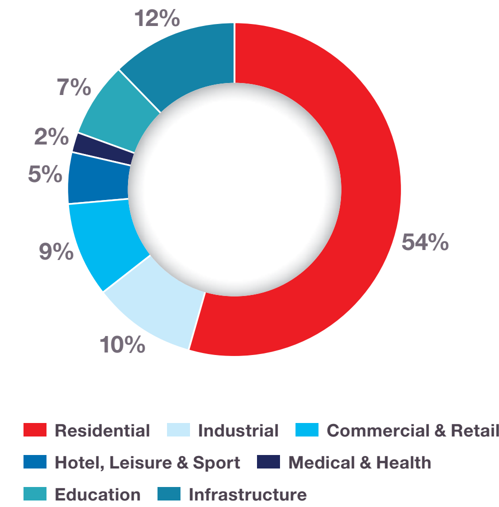
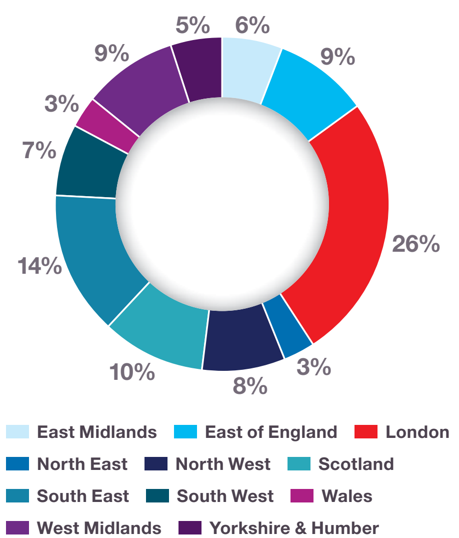


Fig. 2.5 **Type of Projects** Source: Barbour ABI



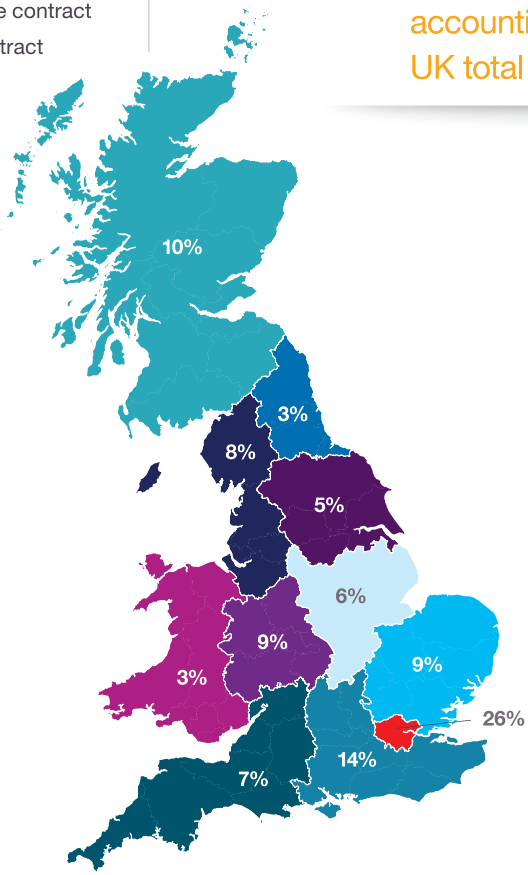


Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

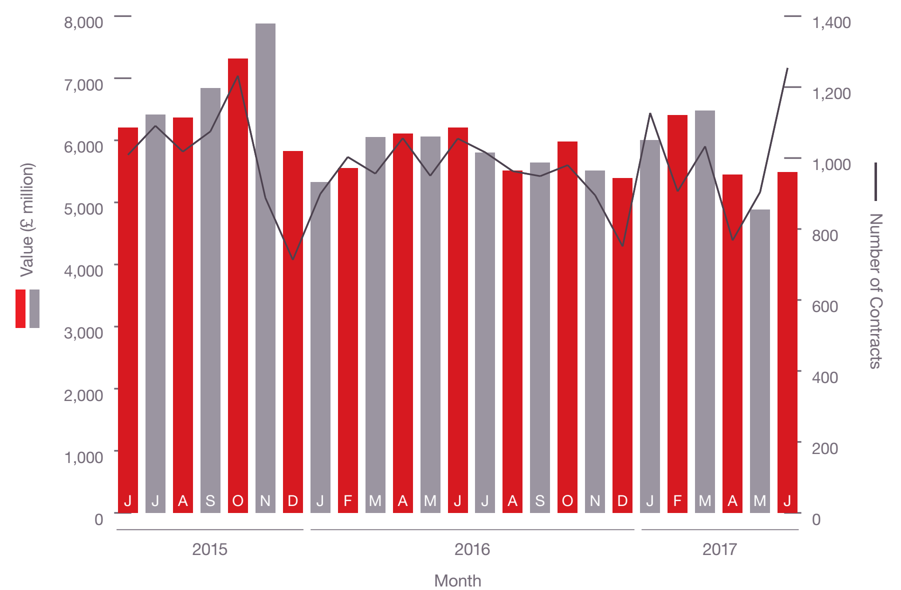


Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

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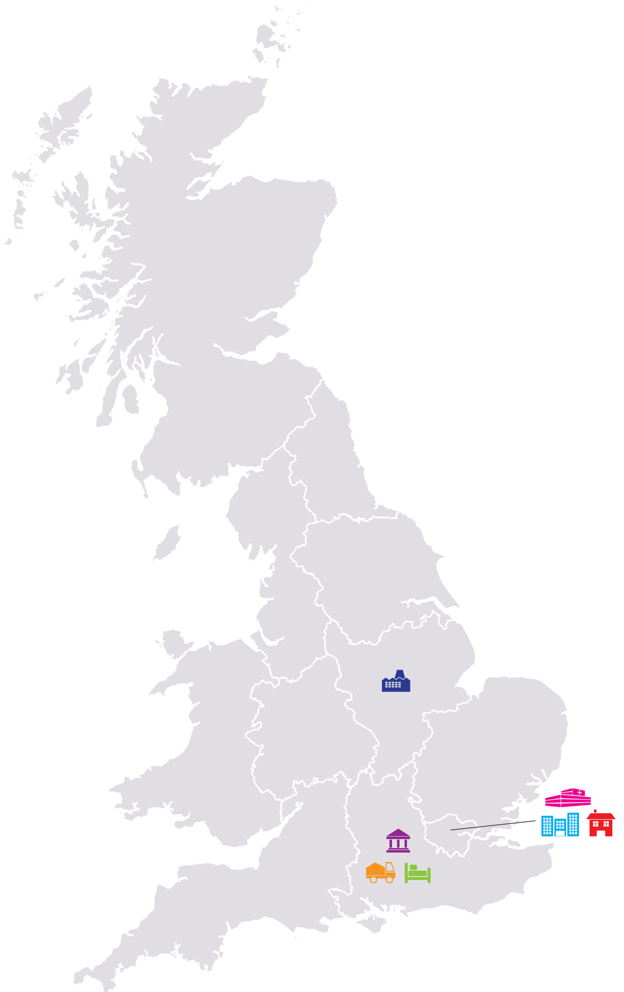
A snippet of this month's regional activity

Take a look at what regions have had the most activity.



- Residential
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- 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
North Stoneham Park, Eastleigh – 564 Houses
£56,400,000

INFRASTRUCTURE
Interchange Project Phase 2 – Wolverhampton Train Station
£40,000,000

COMMERCIAL & RETAIL
Aldwych House – Office Extension
£10,000,000

HOTEL, LEISURE & SPORT
Drake Circus Leisure Scheme
£25,000,000

INDUSTRIAL
Prologis Park Pineham – Plot 1 Zone C
£150,000,000

MEDICAL & HEALTH
Orkney Campus – Health Care Facility
£59,000,000

EDUCATION
University of Warwick – Art Centre 2020 Works
£23,500,000

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RESIDENTIAL

SHARP RISE IN RESIDENTIAL VALUES IN JUNE

After a poor April and May, the award of high value contracts in June means residential grew strongly.

Activity in the residential sector increased significantly in June with the total value of projects valued at £2.5 billion based on a three month rolling average (see Fig.3.1). This is a 43.9% increase compared to April and is 39% higher than June 2016. The number of units associated with residential contracts awarded decreased by 3.9% between May and June based on a three month rolling average, and are 9.2% lower than June 2016. Taken together this data shows the continued popularity of residential developments in the UK, with a refocus on London in June.

Sector Performance

The latest house price indices for June from Halifax showed that average house prices are rising at 2.6% annually, down from 3.3% in May. However, there was a third consecutive quarterly decline in house prices indicating an underlying softening in the housing market. In contrast, the Nationwide reported annual house price rises at 3.1% in June, up from 2.1% in May. In further evidence of lessening housing market activity the Royal Institute of Chartered Surveyors reported that house sales fell in June for the fourth month running.

> London was the main location for residential development in June

Projects by region

London was the main location for residential development in June accounting for 35.1% of the value awarded, largely due to the £800 million North Quay development in Poplar (see Fig. 3.2 & 3.4). The remainder of activity in the housing market was fairly evenly spread with one notable project the Jacksons Row development in Deansgate, Manchester. It is set to

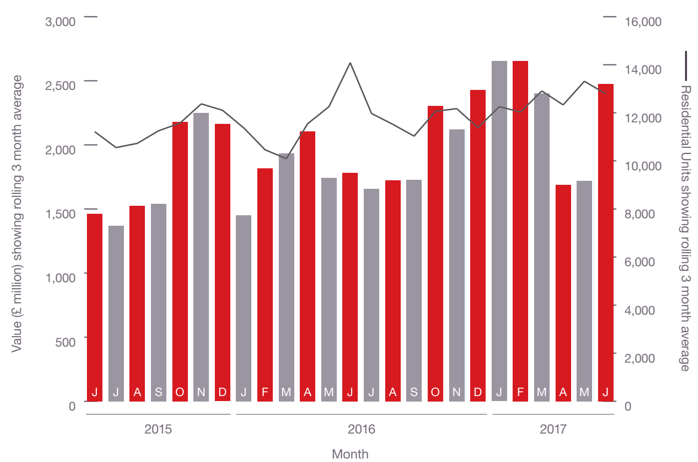

FIG. 3.1

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

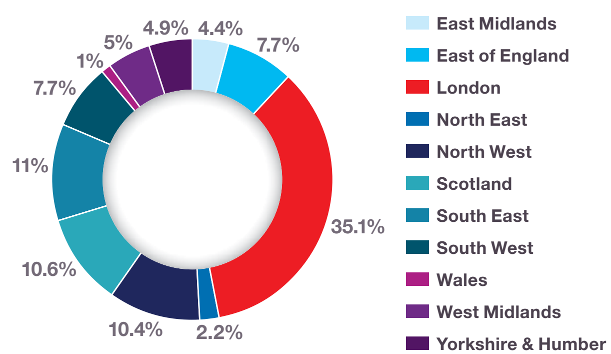

FIG. 3.2

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

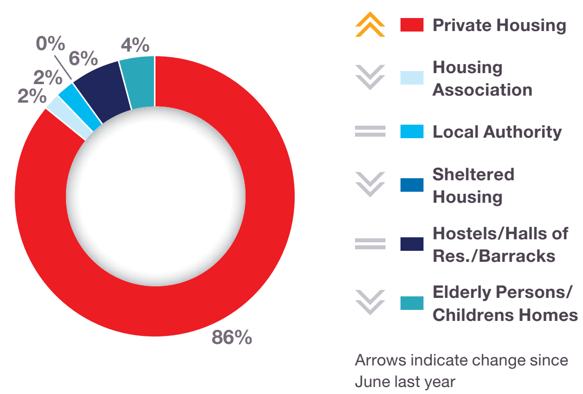

FIG. 3.3

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

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

-3.5%	East Midlands	+3.7%	Scotland
-4.0%	East of England	+3.1%	South East
+11.5%	London *HOTTEST REGION*	-1.3%	South West
+1.5%	North East	-3.4%	Wales
-5.7%	North West	-0.3%	West Midlands
		-1.6%	Yorkshire & Humber

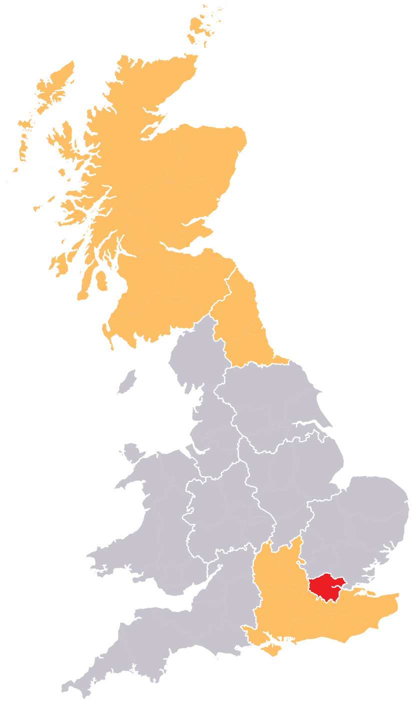

FIG. 3.4

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

include 158 residential units and a 200 bed hotel with a value of £77 million. Another large project awarded in June was the Germany Beck development in York, a 677 unit scheme in York by Persimmon Homes. This contract has a value of £67.7 million and started in June this year.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing this month. Private housing accounted for 86% of the value of contracts awarded this month, an increase from the 79% in the corresponding month last year. After private housing, the next largest project type were hostels/halls of residence projects which accounted for 6% of the value awarded, unchanged from the corresponding month last year (see Fig. 3.3).

PROJECT IN FOCUS

North Stoneham Park, Eastleigh – 564 Houses £56,400,000

County	Hampshire
Primary Category Sector	Residential
Government Region	South East
Start Date	TBC
End Date	TBC
Contract Award Date	June 2017
Funding	Private
Stage	Contract
Contractor	Highwood Group

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SHARP RISE IN RESIDENTIAL VALUES IN JUNE

TOP TEN Key Clients
Jul 2016 – Jun 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	118	1,937
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	138	1,811
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	113	1,545
4	The Berkeley Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	33	961
5	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717	81	896
6	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	830
7	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	35	792
8	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	51	701
9	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	33	649
10	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	37	505

TOP TEN Key Architects
Jul 2016 – Jun 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Foster & Partners	Riverside, 22 Hester Road, Battersea, London, SW11 4AN	020 7738 0455	4	1,132
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	73	833
3	JTP	23-25 Great Sutton Street, City, London, EC1V 0DN	020 7017 1780	32	739
4	PLP Architecture	Ibex House, 42-47 Minories, City, London, EC3N 1DY	020 3006 3900	3	620
5	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	6	572
6	MSMR Architects	The Old School, Exton Street, Southwark, London, SE1 8UE	020 7928 6767	3	543
7	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	21	435
8	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	26	435
9	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	33	430
10	Pegasus Planning Group	Suite 4B, 113 Portland Street, Manchester, Greater Manchester, M1 6DW	0161 393 3399	29	417

TOP TEN Key Contractors
Jul 2016 – Jun 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	123	2,158
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	142	1,860
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	114	1,553
4	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	62	1,277
5	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717	82	934
6	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	73	903
7	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	1	800
8	The Berkeley Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	29	736
9	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	52	728
10	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	37	659

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

INFRASTRUCTURE FALLS FURTHER IN JUNE

Infrastructure contract values decreased again in June with the absence of significant contract awards.

The value of contracts awarded in the infrastructure sector in June totalled £1 billion based on a three month rolling average (see Fig. 4.1). This is 21% lower than the previous month and 47.6% lower than June 2016. In the three months to June the total value of contract awards was £4 billion based on a three month rolling average. This is 6% lower than the previous three months and 34.7% lower than the same period in 2016.

Projects by region

The main location of infrastructure projects this month was the South East with 25.3% of the value, up from 19.5% in June 2016 (see Fig. 4.2 & 4.4). The main project awarded in the region was the IFA onshore converter station valued at an estimated £100 million based in Hampshire. The West Midlands was the next most active location accounting for 18.7% of contract activity, much higher than the 2% recorded in June 2016. The highest value contract in the region was the construction of a new railway terminal at Wolverhampton train station valued at £40 million.

Type of Projects

The award of these contracts in June means that utilities was the dominant sector within infrastructure which accounted for 55% of the contract value awarded the month (see Fig. 4.3).

> The main location of projects this month was the South East

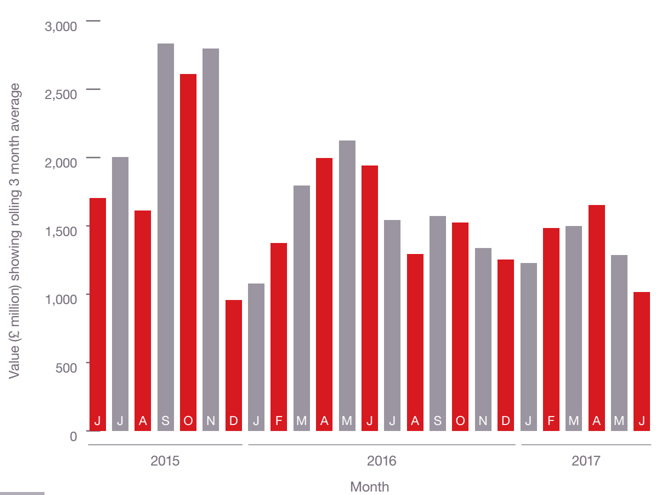

FIG. 4.1

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

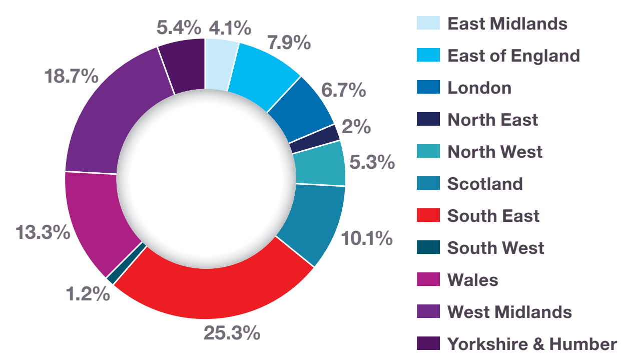

FIG. 4.2

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

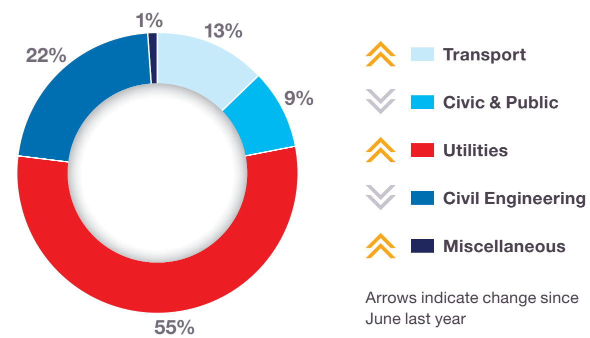

FIG. 4.3

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

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

		-16.1%	Scotland
+3.3%	East Midlands	+5.8%	South East
+6.0%	East of England	-1.8%	South West
-4.5%	London	+9.2%	Wales
-1.9%	North East	+16.7%	West Midlands *HOTTEST REGION*
+2.8%	North West	-19.5%	Yorkshire & Humber

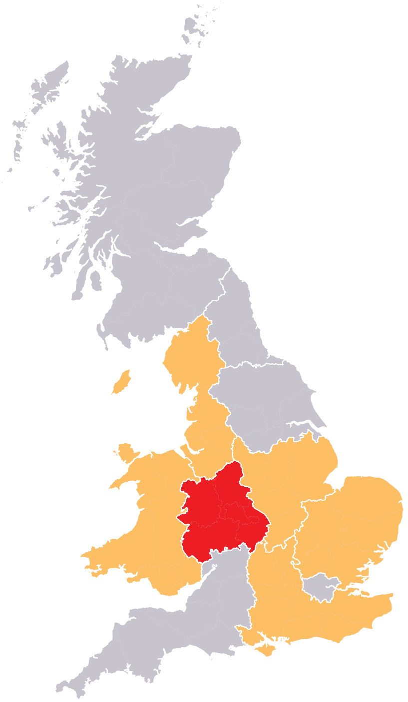

FIG. 4.4

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

PROJECT IN FOCUS

Interchange Project Phase 2 – Wolverhampton Train Station £40,000,000

County	West Midlands
Primary Category Sector	Infrastructure
Government Region	West Midlands
Start Date	July 2017
End Date	July 2018
Contract Award Date	June 2017
Funding	Public
Stage	Contract
Contractor	Galliford Try Plc

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TOP TEN Key Clients
Jul 2016 – Jun 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	35	2,183
2	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	267	893
3	RWE NPower Plc	Windmill Hill Business Park, Whitehill Way, Swindon, Wiltshire, SN5 6PB	01793 877777	2	876
4	EDF Energy	40 Grosvenor Place, Victoria, Westminster, London, SW1X 7EN	020 7242 9050	2	760
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	3	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	1	450
10	Sellafield Limited	Sellafield Sites, Seascale, Cumbria, CA20 1PG	01946 728333 (CTPS)	1	400

TOP TEN Key Architects
Jul 2016 – Jun 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	Sergison Bates Architects	44 Newman Street, Westminster, London, W1T 1QD	020 7255 1564 (TPS)	1	70
8	Mouchel Group	4 Matthew Parker Street, Westminster, London, SW1H 9NP	020 7227 6800	2	53
9	Beckside Buildings & Installations	37 High Street, Lincoln, Lincolnshire, LN5 8AS	01522 524750	1	50
10	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	3	42

TOP TEN Key Contractors
Jul 2016 – Jun 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	23	1,240
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	17	661
4	Samsung C & T Uk Limted/Tecnicas Reunidas SA JV	Samsung House, 3 Riverbank Way, Brentford, Middlesex, TW8 9RE	01325 390000	1	650
5	Galliford Try/ Costain	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	1	473
6	NG Bailey & Company Limited	321 Ordsall Lane, Salford, Manchester, Greater Manchester, M5 3HP	0161 872 0171	1	460
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	4	356
9	Roadbridge Civil Engineering & Building Contractors	Ballyclough House, Ballysheedy, Limerick, Co. Limerick	+353 (0) 61 414 874	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.

economic & construction MARKET REVIEW

JULY 2017

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COMMERCIAL CONTRACT ACTIVITY INCREASES IN JUNE

Contract values in the commercial & retail sector were higher in June but are still well below the levels witnessed last year.

The value of contracts awarded in the commercial and retail sector were £566 million in June based on a three month rolling average (see Fig. 5.1). This is an 8.7% increase from May but a 31.1% decrease from the June 2016 figure. In the three months to June the value of contracts were 13.2% below the previous three months and 28.8% 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 44.9% of the value of all contracts awarded, which was lower than its 54.4% share in June 2016 (see Fig. 5.2 & 5.4). The largest contract awarded in London in June was the 10 Bank Street development at Heron Quays West in Poplar valued at an estimated £187.5 million. Yorkshire & the Humber also attracted a high proportion of commercial contracts this month, with 14.6% of the value of contracts occurring in the region in June, a significant increase from its 6.7% share in June 2016. A major reason for the Yorkshire region's share was the award of Better Barnsley regeneration project, a new shopping centre in the town.

> In the three months to June the value of contracts were 13.2% below the previous three months

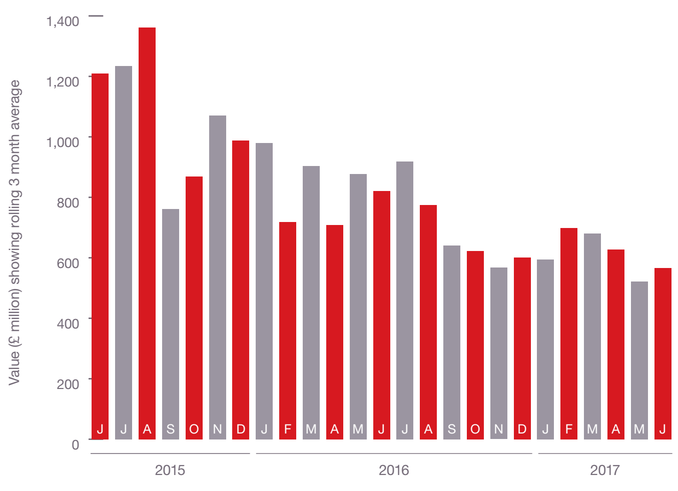

FIG. 5.1
Commercial & Retail: **Project Value showing 3 month moving average** Source: Barbour ABI

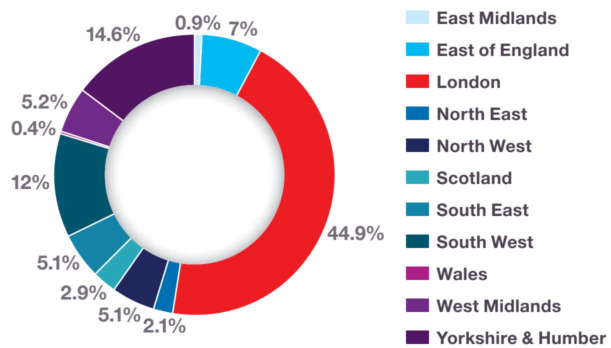

FIG. 5.2
Commercial & Retail: **Value of Contracts by Region** Source: Barbour ABI

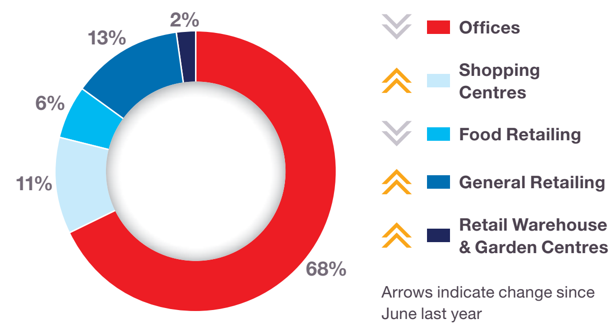

FIG. 5.3
Commercial & Retail: **Type of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since June 2016			↓	-5.4%	Scotland
↓	-2.1%	East Midlands	↑	+2.3%	South East
↑	+3.1%	East of England	↑	+9.6%	South West *HOTTEST REGION*
↓	-9.5%	London	↓	-0.4%	Wales
↑	+0.4%	North East	↓	-3.3%	West Midlands
↓	-2.6%	North West	↑	+7.9%	Yorkshire & Humber

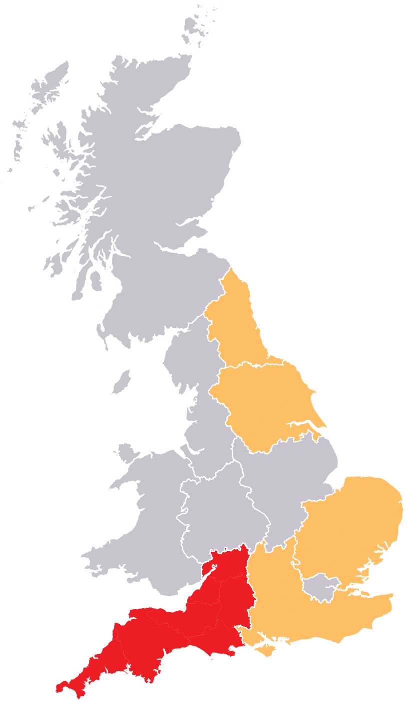

FIG. 5.4

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

The contract was valued at £70 million and was awarded to Henry Boot Construction.

Type of Projects

Offices were the dominant type of project in the sector accounting for 68% of the value of contracts awarded this month, which is 13% lower than its share in June 2016. General retailing is the next largest sector with 13% of contract award value, which is an increase from its 9% share in June 2016 (see Fig. 5.3).

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

PROJECT IN FOCUS

Aldwych House – Office Extension
£10,000,000

County	London
Primary Category Sector	Commercial & Retail
Government Region	London
Start Date	May 2017
End Date	May 2019
Contract Award Date	June 2017
Funding	Private
Stage	Contract
Contractor	Overbury PLC

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COMMERCIAL CONTRACT ACTIVITY INCREASES IN JUNE

TOP TEN Key Clients
Jul 2016 – Jun 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	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	3	312
3	Argent Estates Limited	11 Brindley Place, 2 Brunswick Square, Birmingham, West Midlands, B1 2LP	0121 643 7799	1	250
4	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	198
5	Lidl UK GMBH	19 Worple Road, Wimbledon, London, SW19 4JS	0800 9777766	53	147
6	Westfield Shoppingtowns Limited	Level 6, Midcity Place, 71 High Holburn, Westminster, London, WC1V 6EA	020 7061 1400	3	146
7	Goldman Sachs International Limited	Peterborough Court, 133 Fleet Street, City, London, EC4A 2BB	020 7774 1000	1	130
8	British Land Corporation Plc	York House, 45 Seymour Street, Westminster, London, W1H 7LX	020 7486 4466	3	130
9	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	49	112
10	Lasalle Investment Management	1 Curzon Street, Westminster, London, W1J 5HD	020 7852 4000	3	103

TOP TEN Key Architects
Jul 2016 – Jun 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	4	716
2	All Clear Designs Limited	3b Devonshire Mews, Chiswick, London, W4 2HA	020 8400 5093 (CTPS)	1	700
3	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	700
4	Bjarke Ingels Group	Kloverbladsgade 56, Copenhagen, Denmark, 2500	0045 7221 7227	1	700
5	Kohn Pedersen Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	3	398
6	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	2	318
7	Rogers Stirk Harbour and Partners	The Leadenhall Building, 122 Leadenhall Street, City, London, EC3V 4AB	020 7385 1235	3	312
8	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	10	288
9	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	2	253
10	Hopkins Architects	27 Broadley Terrace, Camden Town, London, NW1 6LG	020 7724 1751	1	120

TOP TEN Key Contractors
Jul 2016 – Jun 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	2	701
2	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	4	340
3	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	26	284
4	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	2	198
5	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	15	175
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	8	158
7	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	11	153
8	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	5	148
9	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	5	142
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	26	139

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
FURTHER FALLS IN VALUES IN JUNE

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

Contract award levels in the hotel, leisure & sport sector were £352 million in June, based on a three month rolling average (see Fig. 6.1). This was 13.4% lower than May and 0.5% lower than June 2016. In the three months to June the value of contracts was £1.3 billion, which was 42.6% lower than the previous three months. This was an increase of 20.9% compared to the same period in 2016 indicating that while there have been recent falls there is evidence of longer term improvement in the performance of the sector.

Projects by region

The South East was the main location for hotel, leisure & sport contracts this month accounting for 30.5% of the value awarded (see Fig. 6.2 & 6.4). The largest contract awarded in the region during June was the redevelopment of the swimming centre at Butlins South Coast world in Bognor Regis. This is set to provide a new swimming pool building valued at £30 million and was awarded to Kier. The South West was the region with the next highest share of contracts awarded at 17%, an increase from the 9.9% it received in June 2016. The largest contract awarded in the South West in June was the Drake Circus leisure scheme in Plymouth to provide a new cinema valued at £25 million.

> "While there have been recent falls there is evidence of longer term improvement in the sector

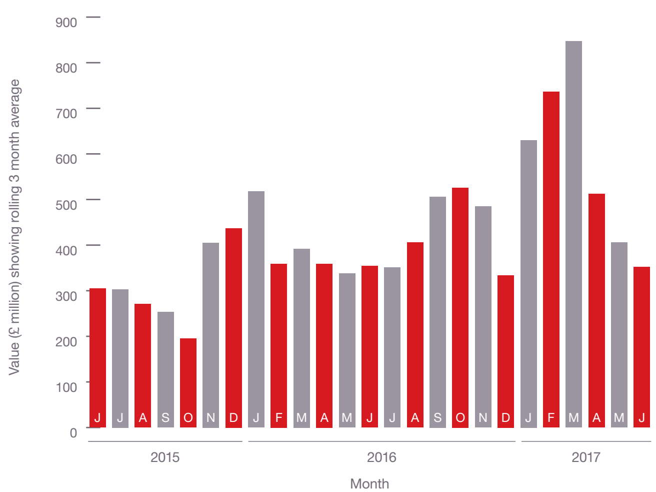

FIG. 6.1

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

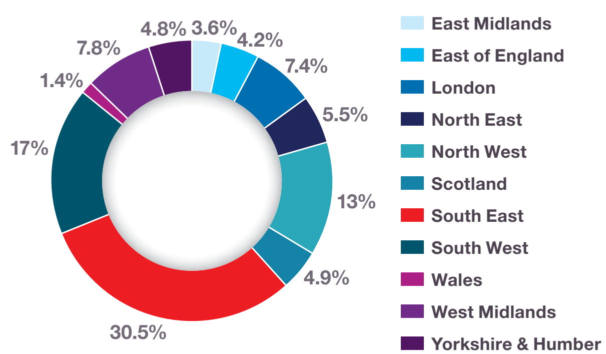

FIG. 6.2

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

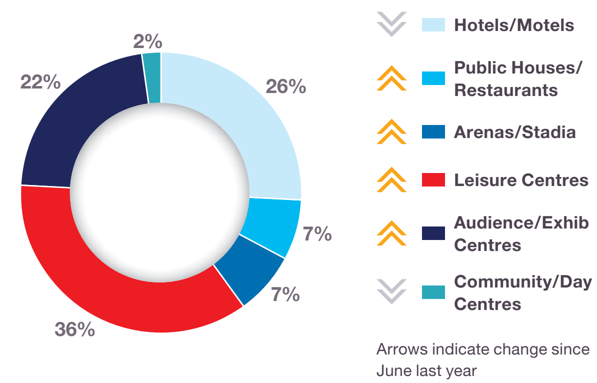

FIG. 6.3

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 June 2016

-13.0%	Scotland		
-8.4%	East Midlands	+16.2%	South East *HOTTEST REGION*
+2.5%	East of England	+7.0%	South West
-7.3%	London	-1.6%	Wales
-0.6%	North East	-0.8%	West Midlands
+4.3%	North West	+1.7%	Yorkshire & Humber

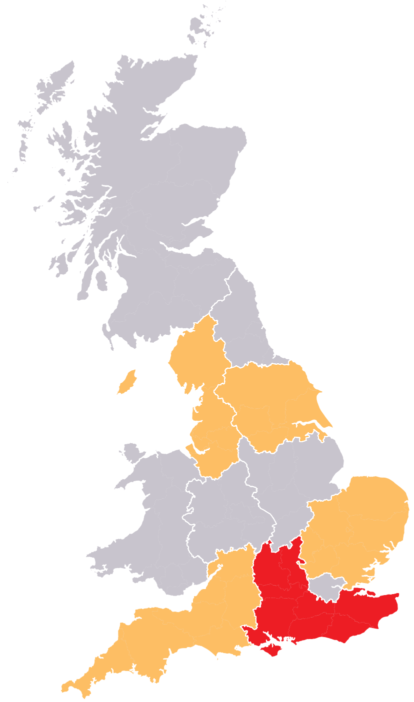

FIG. 6.4

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

Type of Projects

The leisure centres category was the most dominant in the sector this month accounting for 36% of the value awarded. This was up from the 24% it received in the corresponding month in 2016 and demonstrates a strong performance in the leisure sector (see Fig. 6.3).

> The South East was the main location for hotel, leisure & sport contracts this month accounting for 30.5% of the value awarded

PROJECT IN FOCUS

Drake Circus Leisure Scheme
£25,000,000

County	Devon
Primary Category Sector	Hotel, Leisure & Sport
Government Region	South West
Start Date	September 2017
End Date	September 2018
Contract Award Date	June 2017
Funding	Private
Stage	Contract
Contractor	McLaren Construction Limited

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FURTHER FALLS IN VALUES IN JUNE

TOP TEN Key Clients

Jul 2016 – Jun 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	Birchall Properties	Birchall Golf Club, Sheffield Road, Unstone, Dronfield, Derbyshire, S18 4DB	Not Listed	1	400
3	Aberdeen City Council	Town House, Broad Street, Aberdeen, Grampian, AB10 1AQ	01224 522000	2	331
4	Heads of The Valleys Development Company Limited	The Coach House, 79 Mill Way, Grantchester, Cambridge, Cambridgeshire, CB3 9ND	Not Listed	1	200
5	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499/ 01582 424200	27	112
6	Manchester City Council	Town Hall, Albert Square, Manchester, Greater Manchester, M60 2LA	0161 234 5000	1	110
7	Bristol City Council	The Exchange, Corn Street, Bristol, North East Somerset, BS1 1JQ	0117 922 2000	1	91
8	Stanhope Plc	Second Floor, 100 New Oxford Street, Westminster, London, WC1A 1HB	020 7170 1700	2	77
9	Equity Group Limited	Seymour Chambers, 92 London Road, Liverpool, Merseyside, L3 5NW	Not Listed	1	70
10	Elliot Management Group	140A Granby Street, Liverpool, Merseyside, L8 2US	Not Listed	1	70

TOP TEN Key Architects

Jul 2016 – Jun 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	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GJ	020 7880 6400	1	400
3	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	1	330
4	Populous	14 Blades Court, Deodar Road, Putney, London, SW15 2NU	020 8874 7666	2	291
5	Tew & Smith Architects	Quoits House, 4 Harbour Road, Kingsthorpe, Northampton, Northamptonshire, NN2 7AZ	01604 791197	2	201
6	Feilden Clegg Bradley Architects	Bath Brewery, Toll Bridge Road, Bath, North East Somerset, BA1 7DE	01225 852545	8	189
7	Simpson Haugh & Partners	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000	2	124
8	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	8	123
9	OMA Architects	Heer Bokelweg 149, 3032 AD Rotterdam, Netherlands	0031 10 243 82 00	1	110
10	Falconer Chester Hall Architects	12 Temple Street, Liverpool, Merseyside, L2 5RH	0151 243 5800	6	80

TOP TEN Key Contractors

Jul 2016 – Jun 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Multiplex	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	2	900
2	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	5	357
3	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	18	130
4	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	127
5	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	5	107
6	Vinci Construction	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 478400	2	90
7	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	10	90
8	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	13	81
9	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	6	80
10	Lendlease Construction (EMEA) Limited	EMEA Head Office, 20 Triton Street, Regents Place, London, NW1 3BF	0203 430 9000	1	75

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INDUSTRIAL

SURGE IN CONTRACT VALUES IN THE SECTOR

Industrial contracts increased by over 30% in June after a volatile number of months.

Activity in the industrial sector increased in June with the value of contracts awarded £508 million, based on a three month rolling average (see Fig. 7.1). This equates to a rise of 30.8% on the value in May and is 7.8% above the figure recorded this time last year. In the three months to June the total value of contracts was £1.3 billion which was 13.2% higher than the previous three months and 1.9% higher than the same quarter last year.

Projects by region

The East Midlands is the region with the highest value of activity this month with 24.8% of the contracts awarded, an increase from 7.5% in June 2016 (see Fig. 7.2 & 7.4). The largest contract awarded was the Prologis Park Pineham in Northampton for a storage and distribution unit valued at £150 million. The East of England had the next highest portion of contract awards accounting for 21.8% of the value awarded in June, lower than the 26% figure in the corresponding month in 2016. The largest contract by value in the region was the £135 million contract to upgrade the RAF Marham base in Kings Lynn.

Type of Projects

The types of project awarded in the sector were mainly in warehouse/storage which accounted for 55% of contract values, which is the same as the proportion in June 2016. This is followed by laboratories/research and development which accounted for 15% of the value, up from 10% in the corresponding month last year (see Fig. 7.3).

> “The East Midlands is the region with the highest value of activity

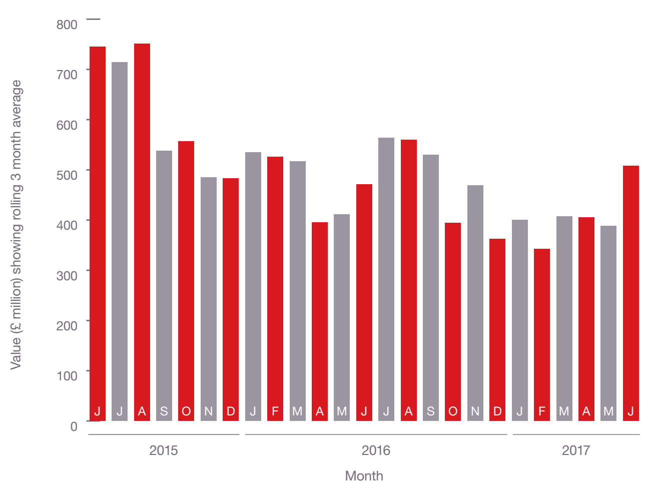

FIG. 7.1

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

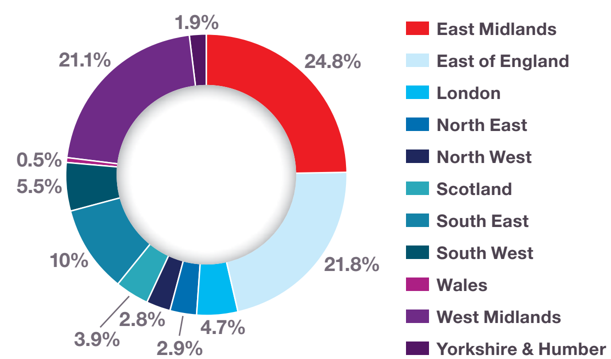

FIG. 7.2

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

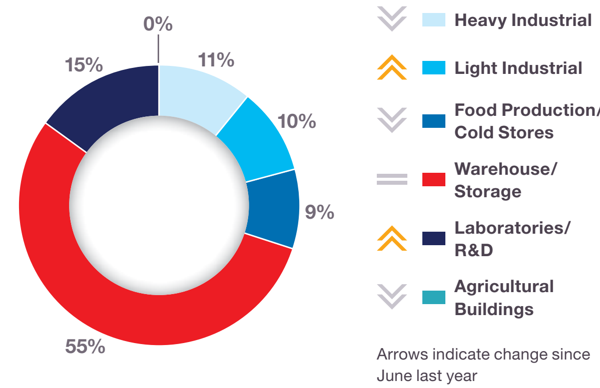

FIG. 7.3

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

economic & construction MARKET REVIEW

JULY 2017

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SURGE IN CONTRACT VALUES IN THE SECTOR

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

		-4.2%	Scotland
+17.3%	East Midlands *HOTTEST REGION*	+8.3%	South East
-4.2%	East of England	-19.9%	South West
-2.1%	London	-2.6%	Wales
+1.5%	North East	+10.5%	West Midlands
-0.4%	North West	-4.3%	Yorkshire & Humber

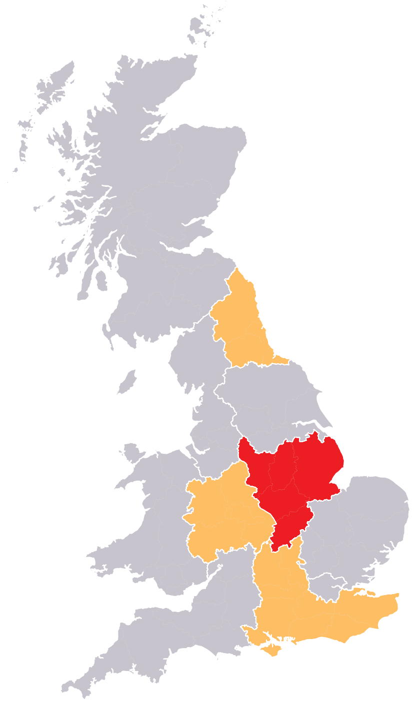

FIG. 7.4

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

PROJECT IN FOCUS

Prologis Park Pineham – Plot 1 Zone C
£150,000,000

County	Northamptonshire
Primary Category Sector	Industrial
Government Region	South East
Start Date	April 2017
End Date	April 2019
Contract Award Date	June 2017
Funding	Private
Stage	Contract
Contractor	Buckingham Group Contracting Limited

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SURGE IN CONTRACT VALUES IN THE SECTOR

TOP TEN Key Clients
Jul 2016 – Jun 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	7	888
2	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	8	322
3	Marine Harvest Limited	Farms Office, Units 3-7, Blar Mhor Industrial Estate, Fort William, Highlands, PH33 7PT	01397 701550	2	133
4	Goodman Logistics Developments UK Limited	Nelson House, Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG	0121 506 8100	5	125
5	Port of Tyne Authority	Maritime House, Tyne Dock, South Shields, Tyne And Wear, NE34 9PT	0191 455 2671	2	110
6	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	2	105
7	Edrington Group	2500 Great Western Road, Glasgow, Strathclyde, G15 6RW	0141 940 4000	1	100
8	Reckitt Benckiser Health Care (UK) Limited	Dansom Lane, Hull, East Riding of Yorkshire, HU8 7DS	01482 326151	1	100
9	Jaguar Land Rover Limited	Abbey Road, Whitley, Coventry, West Midlands, CV3 4LF	024 7630 3080	2	91
10	Curtis Real Estate	The Old Barn, West End, Welford, Northampton, Northamptonshire, NN6 6HJ	07500 966625 (TPS)	1	90

TOP TEN Key Architects
Jul 2016 – Jun 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	19	521
2	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	11	252
3	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	12	172
4	Norr	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	8	155
5	PHP Architects	The Old Rectory, 31 Rectory Lane, Milton Malsor, Northampton, Northamptonshire, NN7 3AQ	01604 858916	6	137
6	Jacobs Limited	1180 Eskdale Road, Wokingham, Berkshire, RG41 5TU	0118 946 7000	2	133
7	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	1	100
8	Orbit Architects Limited	83 Blackfriars Road, Southwark, London, SE1 8HA	020 7593 3380	1	100
9	Ridge & Partners LLP	The Cowyards, Blenheim Park, Oxford Road, Woodstock, Oxfordshire, OX20 1QR	01993 815000	3	96
10	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	3	71

TOP TEN Key Contractors
Jul 2016 – Jun 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	427
3	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	12	335
4	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	8	278
5	A & H Construction & Development	Coombs Road, Halesowen, West Midlands, B62 8AE	0121 559 0255	15	192
6	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	5	172
7	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	11	169
8	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	8	146
9	Vinci Construction	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 478400	3	137
10	Galliford Try Lagan Construction JV	Leicester Road, Wolvey, Hinckley, Leicestershire, LE10 3JH	01455 222777	1	135

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

Despite increases in contract values in June the values are still 27.8% lower than June 2016.

Levels of activity in the medical & health sector increased by 27.8% in June 2017 compared to May, with the total value of contracts awarded £100 million based on a three month rolling average (see Fig. 8.1). This is 27.8% higher than the values in June 2016. In the three months to June the value of contracts decreased by 23.2% on the previous three months and were 37.1% down on the same period in 2016 indicating lower levels of activity in the sector over the long term.

Projects by region

London dominated the sector this month capturing 40.3% of activity, a substantial increase from the 2.2% share in June 2016 (see Fig. 8.2 & 8.4). This is primarily due to the award of the private medical contract at the London Clinic in Marylebone valued at £25 million. Scotland accounted for 35.4% of the contract value awarded, up from the 20.3% awarded in June 2016. The highest value contract awarded was a new health campus in Orkney, including a general hospital, valued at £59 million.

Type of Projects

The award of the Orkney health centre project means that public hospitals are the dominant sub-sector this month accounting for 51% of the value of contracts in June 2017, a decrease from the 57% it attracted in June 2016 (see Fig. 8.3).

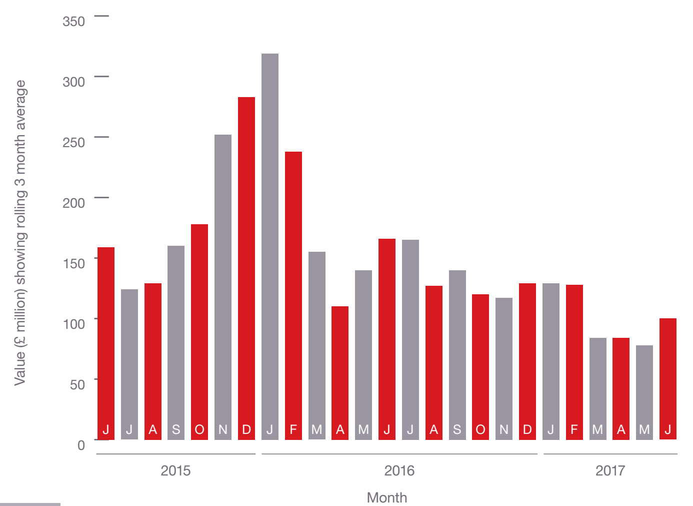

FIG. 8.1

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

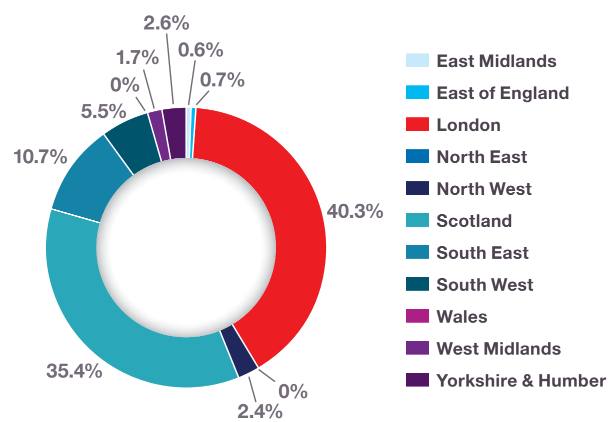

FIG. 8.2

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

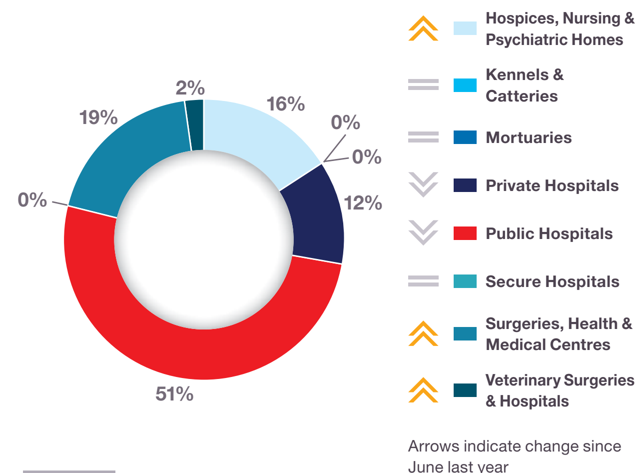

FIG. 8.3

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

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

+0.2%	East Midlands	+15.1%	Scotland
-31.9%	East of England	-0.3%	South East
+38.1%	London *HOTTEST REGION*	-0.1%	South West
-21.6%	North East	-0.3%	Wales
-1.4%	North West	+1.7%	West Midlands
		+0.5%	Yorkshire & Humber

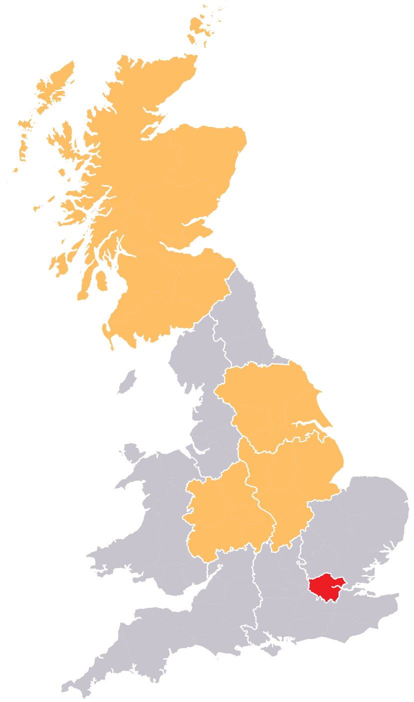
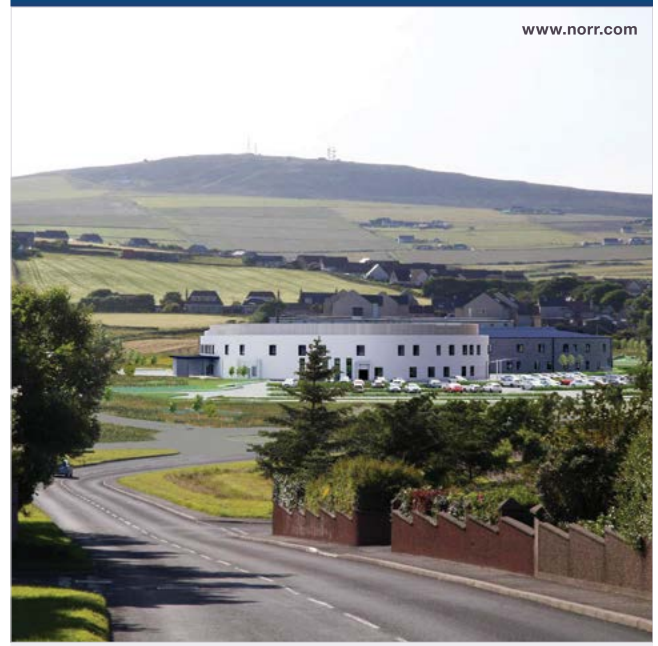


FIG. 8.4

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

PROJECT IN FOCUS



Orkney Campus – Health Care Facility
£59,000,000

County	Islands
Primary Category Sector	Medical & Health
Government Region	Scotland
Start Date	March 2017
End Date	March 2019
Contract Award Date	June 2017
Funding	Public
Stage	Contract
Contractor	Robertson Group Limited

> Public hospitals are the dominant sub-sector this month accounting for 51% of the value of contracts

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TOP TEN Key Clients

Jul 2016 – Jun 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	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	NHS Orkney	Garden House, New Scapa Road, Kirkwall, Orkney, KW15 1BL	01856 888000 (CTPS)	1	59
7	Frimley Health NHS Foundation Trust	Wexham Park Hospital, Wexham Street, Wexham, Slough, Berkshire, SL2 4HL	01753 633000	1	49
8	One Healthcare Group	7th Floor, 33 Holborn, City, London, EC1N 2HT	0333 939 0007	1	40
9	The London Clinic	20 Devonshire Place, Westminster, London, W1G 6BW	020 7935 4444	1	25
10	The Howard de Walden Estates	23 Queen Anne Street, Westminster, London, W1G 9DL	020 7580 3163	4	22

TOP TEN Key Architects

Jul 2016 – Jun 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	6	296
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	2	129
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	IBI Group	Princes Manor Barn, Reading Road, Harwell, Oxford, Oxfordshire, OX11 0LU	01235 820222 (TPS)	7	51
7	Manning & Elliott	Suite 1 Manelli House, 4 Cowper Road, Penrith, Cumbria, CA11 9BN	01768 868800	2	40
8	Tangram Architects	Unit 2, The willows, 80 Willow Walk, Southwark, London, SE1 5SY	020 7394 6487	6	36
9	Murphy Philipps Architects Limited	16 Wenlock Road, City, London, N1 7TA	020 7490 8008	3	30
10	Mackie Ramsay & Taylor	47 Victoria Street, Aberdeen, Grampian, AB10 1QA	01224 639295 (TPS)	3	26

TOP TEN Key Contractors

Jul 2016 – Jun 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	184
2	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	2	121
3	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	6	106
4	Kier Construction Limited-Building UK	6 Cavendish Place, London, W1G 9NB	01767 640111 (CTPS)	12	99
5	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	3	94
6	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	2	69
7	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	1	59
8	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	10	45
9	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	4	43
10	Conlon Construction Limited	Charnley Fold Lane, Bamber Bridge, Preston, Lancashire, PR5 6BE	01772 335268	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
SLIGHT FALL IN CONTRACT VALUES RECORDED IN JUNE

A fall in education construction in June and longer term declines still evident in the sector.

The value of contracts awarded in the education sector was £473 million in June based on a three month rolling average, a 2.4% decrease from May (see Fig. 9.1). This figure was 29.4% lower than June 2016 indicating more subdued activity levels at present. The values of contract awards in the three months to June were 8.5% lower than the same period last year however, indicating poorer long term performance in the sector.

Projects by region

The South East experienced the highest share of the value of education contracts in Juney accounting for 17.7% of contract value awarded, albeit lower than the 21.3% figure in June 2016 (see Fig. 9.2 & 9.4). The largest construction contract awarded in the region in June was the development of the University of Southampton teaching centre. This was valued at £25 million and was awarded to BAM Construction. Scotland was the region that attracted the next highest value of construction contracts at 13.2%, down from 18.8% in June 2016. The largest contract awarded was for the a new innovation centre at Heriot Watt University in Edinburgh which was valued at £19 million and awarded to Bowmer and Kirkland.

Type of Projects

Colleges/universities contracts were the dominant sub sector in education in June. They accounted for 36% of the total value awarded, marginally higher than the 30% in June 2016. Both state primary and secondary schools together were awarded 51% of the total value of contracts over the month. (see Fig. 9.3).

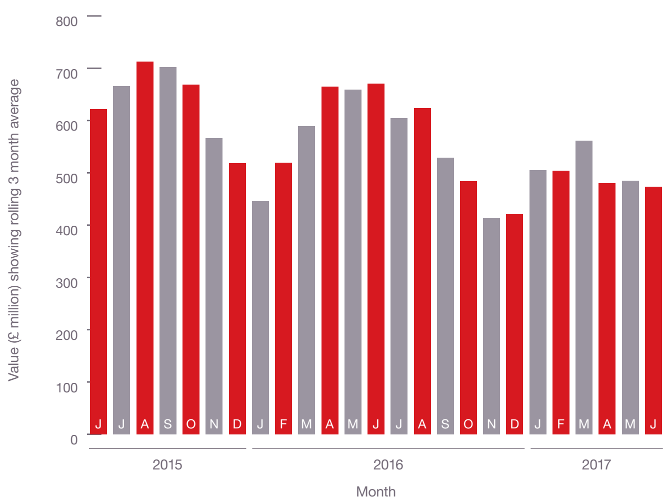

FIG. 9.1
Education: **Project Value showing 3 month moving average** Source: Barbour ABI

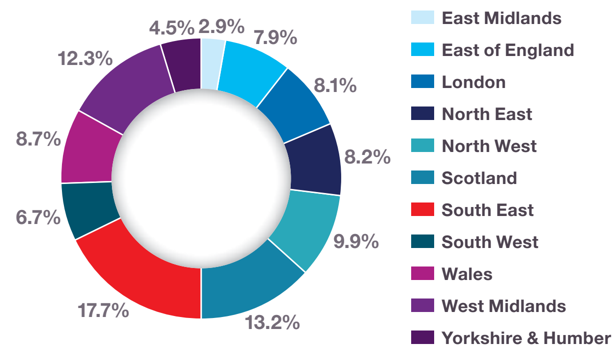

FIG. 9.2
Education: **Value of Contracts by Region** Source: Barbour ABI

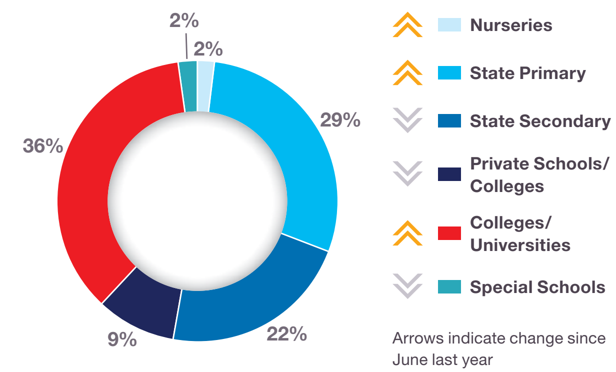

FIG. 9.3
Education: **Type of Projects Awarded** Source: Barbour ABI

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SLIGHT FALL IN CONTRACT VALUES RECORDED IN JUNE

The map and figures show how the activity has changed since June 2016		-5.6%	Scotland
-2.7%	East Midlands	-3.6%	South East
+1.4%	East of England	+0.5%	South West
-19.6%	London	+6.9%	Wales
+7.7%	North East *HOTTEST REGION*	+6.0%	West Midlands
+5.7%	North West	+3.2%	Yorkshire & Humber

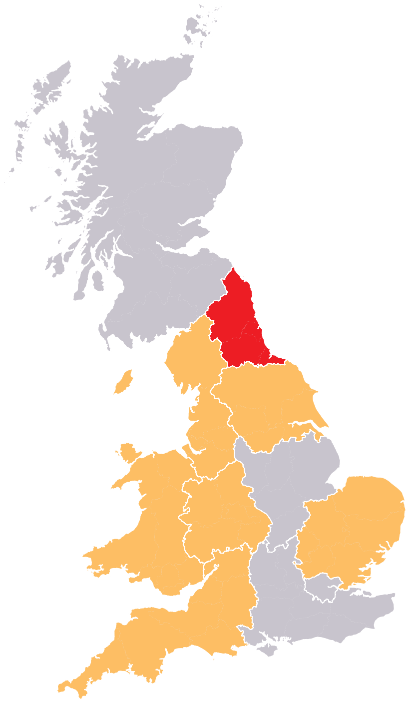

FIG. 9.4

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

PROJECT IN FOCUS

www.ewa.co.uk

University of Warwick – Art Centre 2020 Works

£23,500,000

County	West Midlands
Primary Category Sector	Education
Government Region	West Midlands
Start Date	November 2017
End Date	November 2019
Contract Award Date	June 2017
Funding	Public
Stage	Contract
Contractor	Wates Construction Limited

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SLIGHT FALL IN CONTRACT VALUES RECORDED IN JUNE

TOP TEN Key Clients
Jul 2016 – Jun 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	24	202
3	Department for Education	Sanctuary Building, Great Smith Street, Westminster, London, SW1P 3BT	0370 000 2288	11	104
4	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2BX	020 7589 5111 (CTPS)	4	103
5	Powys County Council	Powys County Hall, Spa Road East, Llandrindod Wells, Powys, LD1 5LG	01597 826000 (CTPS)	7	103
6	Dumfries & Galloway Council	Militia House, English Street, Dumfries, Dumfries and Galloway, DG1 2HR	0303 333 3000	6	102
7	Bournemouth University	Talbot Campus, Fern Barrow, Poole, Dorset, BH12 5BB	01202 524111	2	100
8	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	2	83
9	Essex County Council	County Hall, Market Road, Chelmsford, Essex, CM1 1QH	0345 743 0430	30	68
10	St Modwen Developments Plc	Park Point, 17 High Street, Longbridge, Birmingham, West Midlands, B31 2UQ	0121 222 9400	3	67

TOP TEN Key Architects
Jul 2016 – Jun 2017

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	11	295
2	Hawkins Brown Architects	159 St John Street, City, London, EC1V 4QJ	020 7336 8030	9	277
3	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	27	241
4	HOK International Limited	Qube, 90 Whitfield Street, Westminster, London, W1T 4EZ	020 7636 2006	2	227
5	Holmes Miller	89 Minerva Street, Glasgow, Strathclyde, G3 8LE	0141 204 2080	14	179
6	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	14	168
7	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	17	143
8	Feilden Clegg Bradley Architects	Bath Brewery, Toll Bridge Road, Bath, North East Somerset, BA1 7DE	01225 852545	3	106
9	CRGP Limited	Herbert House, 26 Herbert Street, Glasgow, Strathclyde, G20 6NB	0141 337 2255	5	100
10	Corde	Cantay House, Park End Street, Oxford, Oxfordshire, OX1 1JD	01865 248045 (TPS)	10	98

TOP TEN Key Contractors
Jul 2016 – Jun 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	557
2	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	63	525
3	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	25	404
4	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	54	364
5	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861 000	10	188
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	16	162
7	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	19	127
8	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	9	127
9	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	6	124
10	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	13	81

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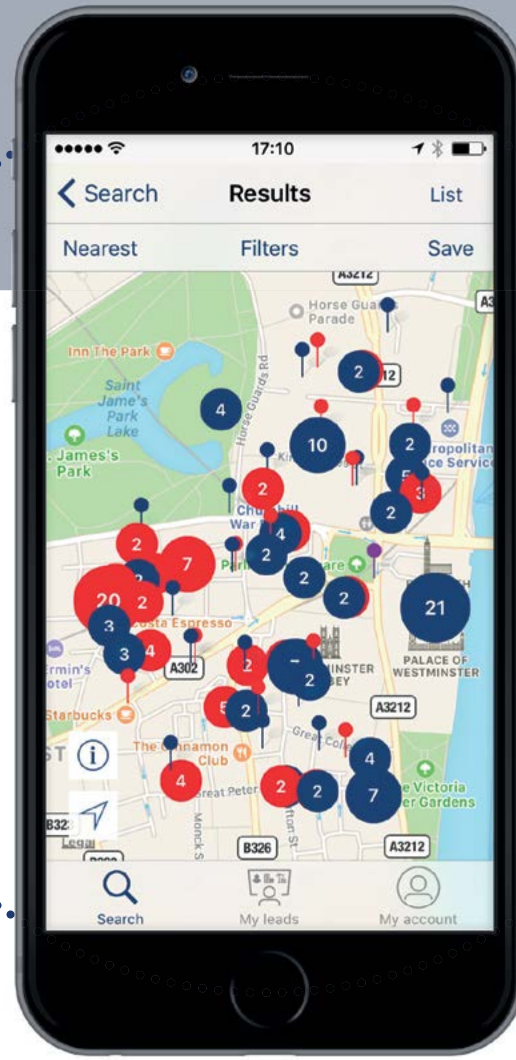

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