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Barbour ABI Building

JANUARY 2014

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

Barbour ABI

Barbour ABI is a leading provider of construction intelligence services. With a team of in-house research specialists and a dedicated lead economist, it provides commercially relevant insight and unique analysis of trends and developments within the building and construction industry. Barbour ABI is the chosen provider of industry data and indicators for Government bodies including the Office for National Statistics and the UK Government's Construction and Infrastructure Pipeline, which outlines future construction and infrastructure projects where public funding is agreed. Barbour ABI also provides data for independent organisations, such as the Construction Products Association.

Barbour ABI is part of global events-led marketing services and communications company, UBM.

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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. Prior to this Michael worked for GVA Grimley as a Principal Economist focussing on the commercial property sector.

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ECONOMIC CONTEXT

OFFICIAL DATA PROVIDES GOOD NEWS FOR THE UK ECONOMY

December recorded a string of positive news stories for the economy and this has continued into 2014 with unemployment and inflation falling.

The closely watched PMI indicators dipped slightly in November and December but were still significantly above the level of 50 which indicates expansionary activity (see Fig. 1.1).

One of the most important indicators of the UK economy's improving performance was the convergence of the Consumer Price Index to its target level of 2% in December, the first time it had reached it since November 2009 (see Fig. 1.2).

Unemployment also fell further in the period August to October with the figure now sitting at 7.4% down from a peak in recent years of 8.4% (see Fig. 1.3).

The National Institute of Economic and Social Research estimate that the economy grew by 0.7% in the final three months of last year which translates to 1.9% growth in 2013. This shows the significant positive change in outlook that occurred during the year, as most analysts were predicting growth of between 0.6% and 1% in the first half of 2013.

There were a number of other positive stories for the economy in the last month which indicate upturns in demand including:

- **UK car sales stood at 2.26 million in 2013, the highest level since 2007**
- **An Ipsos MORI poll of business leaders showed 93% thought the economy would improve in 2014**
- **Figures from High Fliers Research predicts an 8.7% increase in graduate recruitment this year**

With inflation and unemployment falling the Bank of England Governor Mark Carney has plenty to cheer at the moment. However, there are still a number of potential headwinds for the economy including low productivity levels, stagnating wages and a persistent trade deficit which will continue to prove a drag on the scale and durability of economic growth. The downside risks from the Eurozone, while lessening, still remain for the UK but overall things look better now than six months ago. It is Barbour ABI's view that the near term outlook for the UK economy has improved but the challenges of addressing the output gap, the trade deficit and encouraging greater business investment will be vital in ensuring sustainable economic growth in 2014 and beyond.

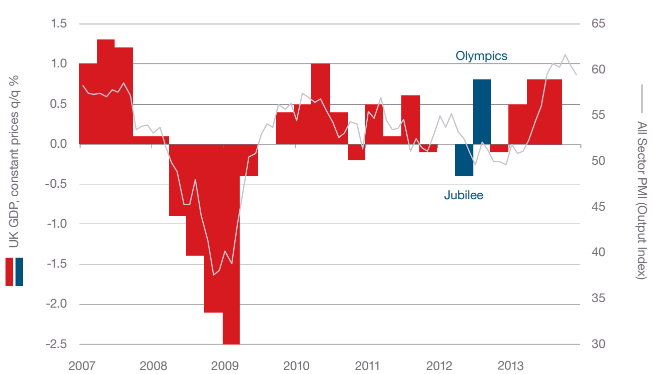

Fig. 1.1 **UK GDP & PMI** Source: ONS, Markit

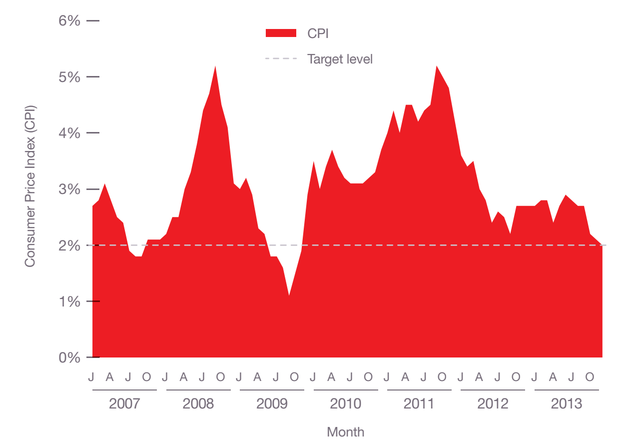

Fig. 1.2 **CPI Inflation** Source: ONS

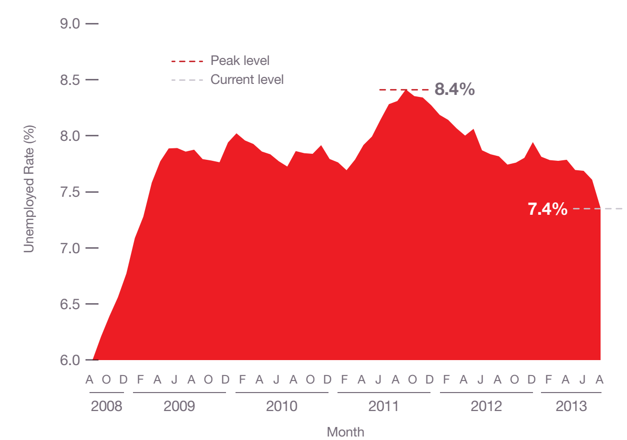

Fig. 1.3 **Unemployment Rate** Source: ONS

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THE CONSTRUCTION SECTOR
LOWER DECEMBER VALUES BUT STRONG 2013 OVERALL

The latest figures from the ONS showed that the UK construction sector declined by 4.0% between October and November 2013, but had grown year on year.

This decline was unexpected, although the figures had been revised significantly upwards last month which in part may explain this fall. More importantly, output in the sector increased by 2.2% compared to November 2012, and is further evidence of the improving performance of the sector in 2013 in line with wider economic growth.

Only Public Housing and Private Industrial grew between October and November (see Fig. 2.1). However, Public Housing, Private Housing and Private Commercial all showed strong year on year growth rates. Private Housing increased by 14% and Public Housing by 20%, demonstrating its good performance in the last year. Private Commercial grew by 6.4% between November 2012 and November 2013, an encouraging sign for constructions largest individual sector.

	% change	
	Nov 12 – Nov 13	**Oct – Nov 13**
Total All Work	**2.2**	**-4.0**
All New Work	**3.2**	**-3.9**
Public Housing	20.0	1.3
Private Housing	14.0	-3.2
Infrastructure	-6.3	-4.8
Public (ex Infrastructure)	-4.9	-0.4
Private Industrial	-21.9	0.4
Private Commercial	6.4	-7.1
Repairs & Maintenance	**0.6**	**-4.2**
Public Housing	-9.9	-6.3
Private Housing	3.8	-3.5
Non-Housing	2.1	-3.9

Fig. 2.1 **Activity in the Construction Sector** 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 113 for December (see Fig. 2.2). While lower than the months of October and November it is still above its December 2012 levels, supporting the view that activity in the industry remains strong. As well as Private Housing, the reading for Commercial Retail continued to rise in December 2013 while Commercial Offices fell to 82 after a number of months of growth.

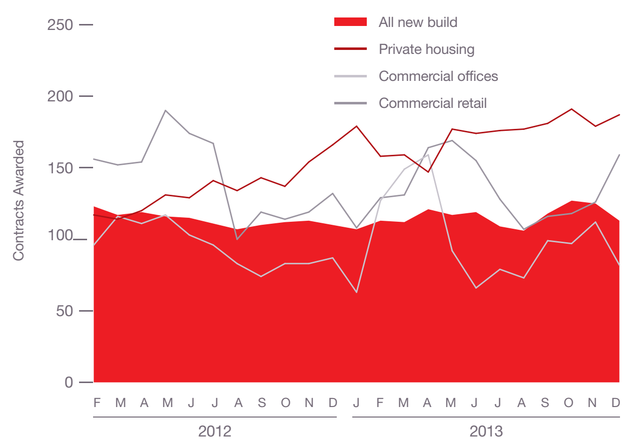

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

Construction Products Association (CPA) Forecasts

The improved statistics and sentiment surrounding the construction industry has led to an upgrading in forecasts for its future performance by the CPA (see Fig. 2.3). Growth levels in 2013 are estimated to be 1% for 2013 and the industry is now forecast to grow by 3.4% in 2014, and 5.2% in 2015.

While this is welcome news for the industry it is important to note that it will be 2017 before the industry exceeds the levels of activity occurring in 2007 before the recession took hold.

> Private Housing increased by 14% and Public Housing by 20%.

	Output	Growth
2011	120,097	2.3%
2012	111,115	-7.9%
2013 (e)	112,258	1.0%
2014 (f)	116,081	3.4%
2015 (f)	122,128	5.2%
2016 (p)	127,543	4.4%
2017 (p)	132,352	3.8%

Fig. 2.3 **Future Performance Forecasts** Source: CPA

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Construction Sector

According to Barbour ABI data on all contract activity, December witnessed a slight fall in construction levels with the value of new contracts awarded £6 billion, based on a three month rolling average (see Fig. 2.5). This is a decrease of 1.4% from November but a 67.1% increase on the value recorded in December 2012, an indication of a significant upturn in construction activity in the UK in 2013. The number of construction projects within the UK in December was down 27.7% on November, but levels were 17.5% higher than December 2012.

Project Locations

The majority of the contracts awarded in December by value were in Wales, which accounted for 19% of the UK total (see Fig. 2.4). This was largely attributable to an £800 million waste treatment project announced in Clwyd. London was the next most prominent location with 18% of the contract award value, with major residential project The Glebe and the Heathrow Tunnels Refurbishment project awarded this month. Yorkshire & the Humber and the South East were the next highest accounting for 13% and 12%of the total respectively.

Types of Project

Infrastructure had the highest proportion of contracts awarded by value in December with 36% of the total (see Fig. 2.6). This is largely attributable to the waste treatment project in Clwyd and a carbon capture project at Drax Power Station in Selby. Contracts awarded in the residential sector remain high accounting for 32% of the contracts awarded in December. Of the remaining sectors Education (12%), received a high proportion of contracts awarded.

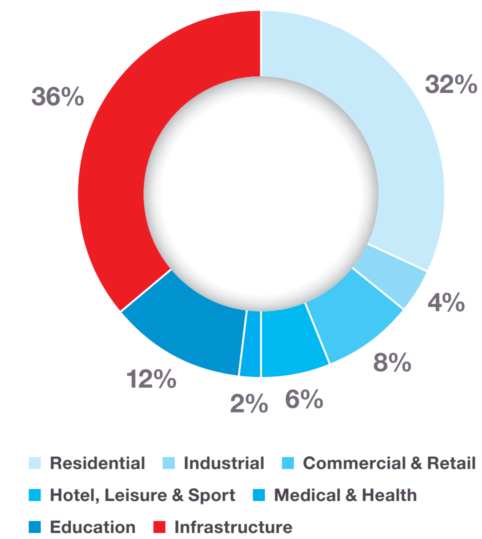
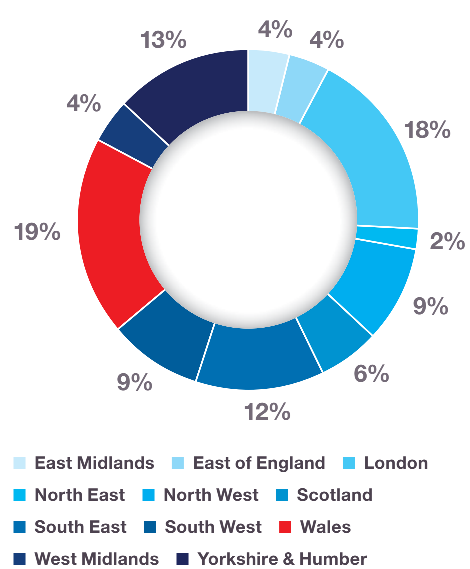


Fig. 2.6 **Types of Project** Source: Barbour ABI



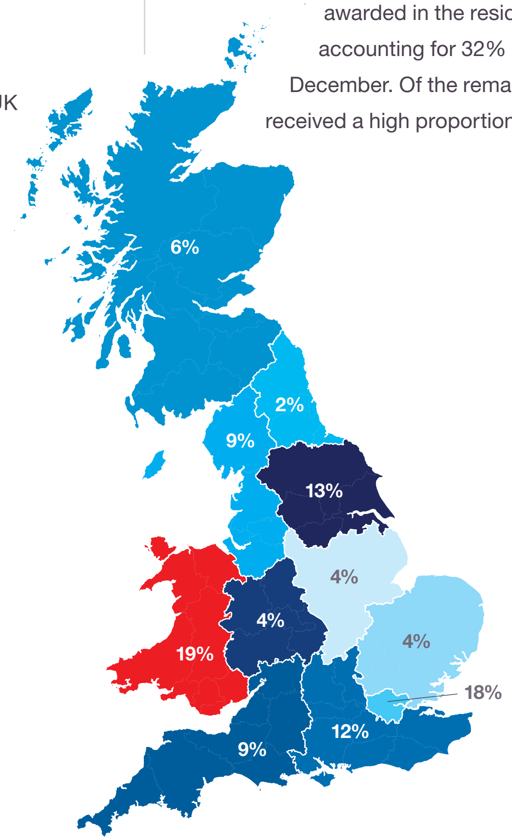


Fig. 2.4 **Locations of Contracts Awarded** Source: Barbour ABI

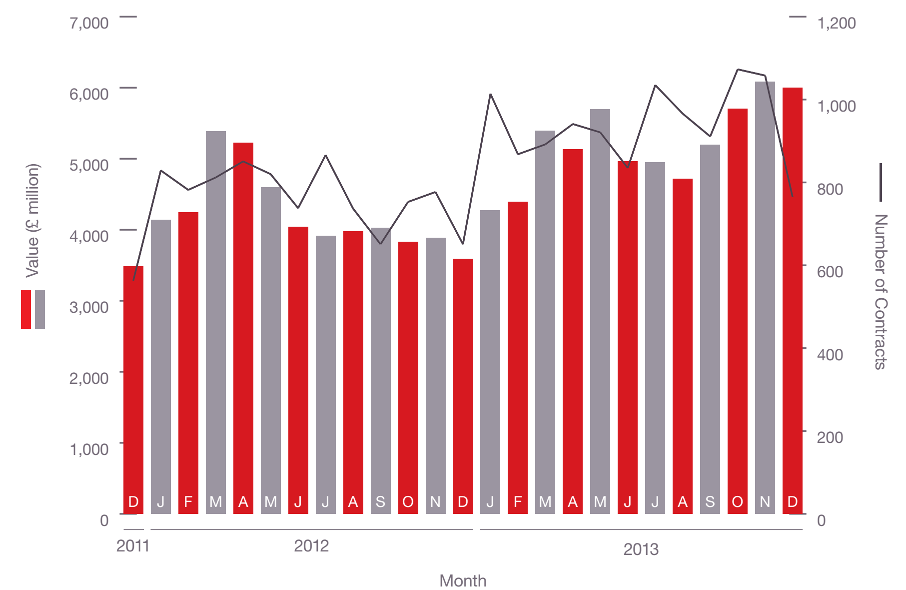


Fig. 2.5 **Construction Activity** Source: Barbour ABI

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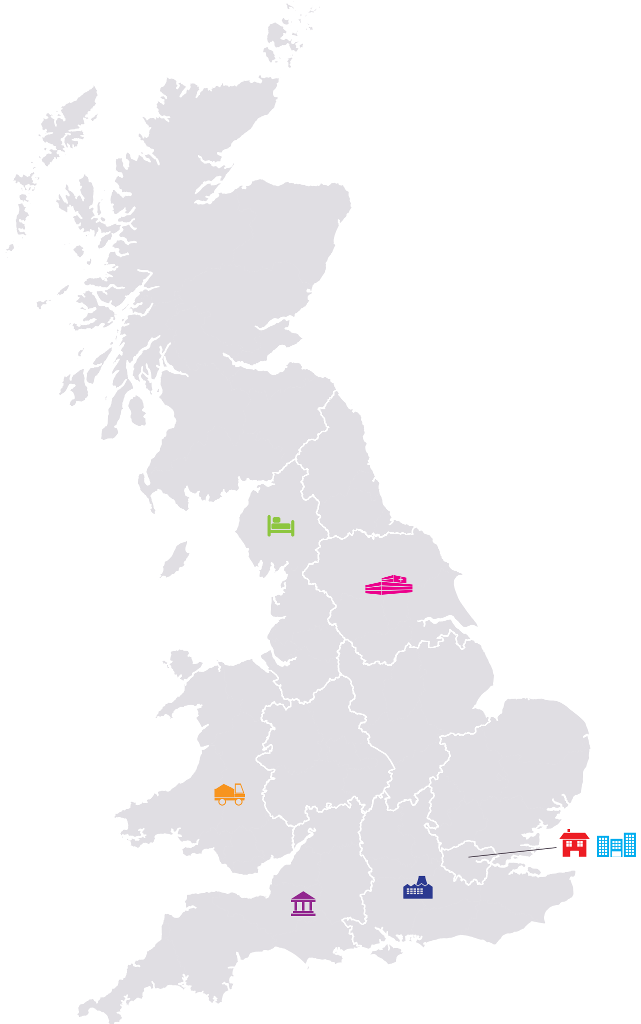
A snippet of this month's regional activity

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



- Residential
- Industrial
- Commercial & Retail
- Hotel, Leisure & Sport
- Medical & Health
- Education
- Infrastructure

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.

St Marys Island – Chatham

White Rose Carbon Capture and Storage Project

Eastgate Quarter – Victoria Gate – John Lewis Plot HQ1

Etihad Stadium – Expansion

Aldi Regional Distribution Centre – Goldthorpe

Nuffield Hospital – Cambridge – Phase 1

Imperial College Amp Phases 2-4

> "The majority of the contracts awarded in December by value were in Wales.

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SLIGHT FALL IN RESIDENTIAL IN DECEMBER

The residential sector experienced a drop in contract award values in December, but strong year on year growth.

Activity in the residential sector remained strong in December with the total value of contracts awarded at £1.86 billion, based on a three month rolling average (see Fig. 3.1). This is a slight drop of 1.6% compared to November but is 88.2% higher than December 2012, indicating the sharp upturn activity experienced in the sector over the last 12 months. Importantly, while the number of units associated with residential contracts awarded fell 13.3% between November and December 2013 they were 85.1% higher than December 2012, confirming the scale of the upturn in the market in 2013.

Help to Buy Scheme

Government initiatives, most notably the Help to Buy Scheme, are clearly having a strong impact on this sector. This is feeding through into various data series with the Bank of England Credit Conditions Survey for Q4 2013, showing that demand for secured lending for house purchases is at its highest level since 2007. Additionally, Halifax recorded the number of first time buyers increasing by 22% between 2012 and 2013. The increase in residential activity is also having an impact on price levels, with the UK's average annual house price rise in November 2013 recorded at 5.4%, though in London this was 11.6%. However, the continuing worry is that the rate of house building will not keep pace with increased demand created by schemes such as Help to Buy, and this topic will be a major debating point in the run up to the 2015 General Election.

Projects by region

As expected it is London that is the main location of activity in this sector, accounting for 31.2% of the value of contracts awarded this month (see Fig. 3.2 & 3.4), an increase of 11.7% from the same month last year. The South East was the other major location of residential development by value in December accounting for 14.6% of contracts awarded, a 3.5% decrease from the corresponding month last year. The North West was also prominent with 10.9% of the contracts awarded by value, a slight 0.2% decrease from December 2012.

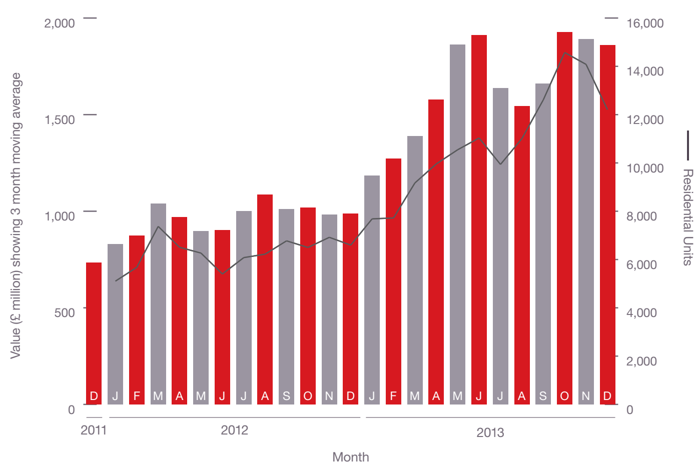

Fig. 3.1 **Project Value showing 3 month moving average** Source: Barbour ABI

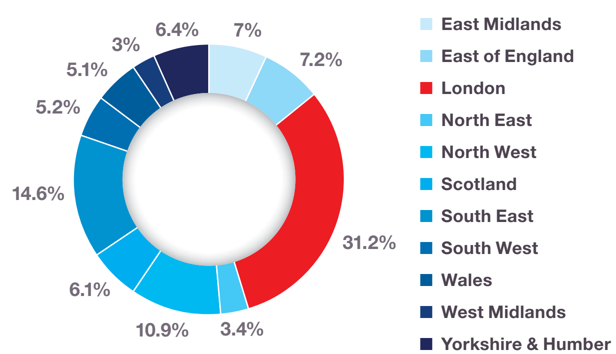

Fig. 3.2 **Value of Contracts by Region** Source: Barbour ABI

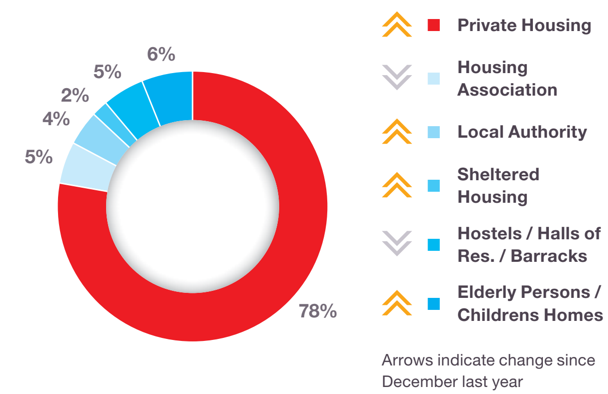

Fig. 3.3 **Types of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since December 2012			
		-2.4%	Scotland
+0.8%	East Midlands	-3.5%	South East
+2.8%	East of England	-7.4%	South West
+11.7%	London *HOTTEST REGION*	+3.4%	Wales
+0.8%	North East	-4.6%	West Midlands
-0.2%	North West	-1.2%	Yorkshire & Humber

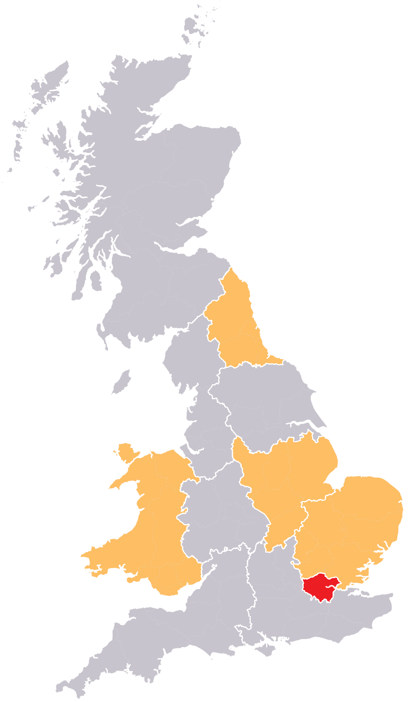

Fig. 3.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Private New Housing							
Output	16,186	15,829	17,254	18,979	20,877	21,921	22,359
Growth	9.1%	-2.2%	9.0%	10.0%	10.0%	5.0%	2.0%
Private Housing RM&I							
Output	14,538	13,755	14,030	14,526	15,107	15,711	16,496
Growth	0.9%	-5.4%	2.0%	3.5%	4.0%	4.0%	5.0%
Public New Housing							
Output	4,998	4,196	4,364	4,364	4,495	4,675	4,862
Growth	2.1%	-16.0%	4.0%	0.0%	3.0%	4.0%	4.0%
Public Housing RM&I							
Output	7,227	7,284	6,701	6,567	6,633	6,633	6,633
Growth	-8.2%	0.8%	-8.0%	-2.0%	1.0%	0.0%	0.0%

Fig. 3.5 **Sector Forecasts** Source: Construction Products Association

Types of project

The types of projects awarded in the residential sector were dominated by private housing which accounted for 78% of residential contracts, a 2% increase from the same month last year (see Fig. 3.3). Elderly Persons / Children Homes were the next most prominent category accounting for 6% of the value of awards, 3% higher than the same month last year.

Outlook

The CPA Forecasts for the sector (see Fig. 3.5) shows that Private Housing is set to continue its growth levels both for new build and repair and maintenance this year and beyond. This is largely attributable to the impact of Help to Buy and other measures designed to boost the private housing sector. Public Housing is set to stay relatively stable but to increase slightly after 2014 once investment in the sector returns.

PROJECT IN FOCUS

St Marys Island – Chatham
£60,000,000

County	Kent
Government Region	South East
Start/End Date	1st May 2014 – 1st May 2019
Funding	Private
Stage	Contract Awarded
Contractor	Countryside Properties

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SLIGHT FALL IN RESIDENTIAL IN DECEMBER

TOP TEN Key Clients
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	01530 278279	182	3820
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323		164	3318
3	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	01904 610014	175	2291
4	Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG			20	1594
5	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	01474 873849 (FPS)	55	1116
6	Homes & Communities Agency	Arpley House, 110 Birchwood Boulevard, Birchwood, Warrington, Cheshire, WA3 7QH	0300 1234 500	01925 644745	19	971
7	The Peel Group	Peel Management, Peel Dome, The Trafford Centre, Manchester, Greater Manchester, M17 8PL	0161 629 8200	0161 629 8334 (FPS)	4	821
8	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 / 678 9980	0191 236 6230 (FPS)	81	813
9	St Modwen Developments Plc	Sir Stanley Clarke House, 7 Ridgeway,Quinton Business Park, Birmingham, West Midlands, B32 1AF	0121 222 9400 (CTPS)	0121 222 9401	12	808
10	Miller Construction Limited	Miller House, 2 Lockside View, Edinburgh Park, Edinburgh, Lothian, EH12 9DH	0870 336 5000	0870 336 5315	37	493

TOP TEN Key Architects
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	020 7921 0101	8	1266
2	Simpson Architects	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000 (CTPS)	020 7490 5331 (FPS)	3	925
3	RPS Group Plc	20 Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 438000	01235 864451 (FPS)	21	881
4	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	01530 278279	49	845
5	Foster & Partners	Riverside, 22 Hester Road, Battersea, London, SW11 4AN	020 7738 0455	020 7738 1107	3	750
6	5plus Architects	5th Floor Grange House, John Dalton Street, Manchester, Greater Manchester, M2 6FW	0161 228 0211		3	712
7	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	01483 575830 (FPS)	13	698
8	Aedas Architects Limited	5-8 Hardwick Street, City, London, EC1R 4RG	020 7837 9789	020 7283 7242	2	651
9	PRP Architects	Ferry Works, Summer Road, Thames Ditton, Surrey, KT7 0QJ	020 8339 3600	020 8481 8111	42	644
10	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	01904 610014	62	618

TOP TEN Key Contractors
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	01530 278279	201	4004
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323		165	3022
3	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	01904 610014	181	2204
4	Berkeley Group Plc / St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG			15	975
5	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 / 678 9980	0191 236 6230 (FPS)	79	812
6	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	01277 697400 / 697498	33	736
7	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	01474 873849 (FPS)	52	690
8	Galliford Try Construction South	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	01895 855099	69	652
9	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	31	633
10	Redrow Group Plc	Redrow House, St David's Park, Hawarden, Deeside, Clwyd, CH5 3RX	01244 520044	01244 520580	48	589

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INFRASTRUCTURE

INFRASTRUCTURE MAINTAINS ITS MOMENTUM

The Infrastructure sector continued its recent increase in the value of contracts awarded this month.

The recent increase in the value of contracts awarded in the infrastructure sector continued in December with the total value awarded of £2.2 billion, based on a three month rolling average (see Fig. 4.1). This is 10.6% higher than the previous month, and 101.6% higher than December 2012. In the three months to December the total value of contract awards was £5.8 billion, based on a three month rolling average. This is 49.0% higher than the previous three months and 71.4% higher than the same period of 2012. This indicates the stronger performance of the infrastructure sector in 2013 and, as a major contributor to construction, is potentially good news for its future growth.

Projects by region

The main location of infrastructure projects this month was Wales with 45.4% of the total value, an increase of 43.8% from December 2012 (see Fig. 4.2 & 4.4). This is largely attributable to the waste treatment plant project in Clwyd. Yorkshire & the Humber is the other major location of infrastructure projects this month accounting for 16.7% of projects awarded, a 9.2% increase from December 2012. The carbon capture project at Drax Power Station in Selby is the main reason for the region's strong performance.

Types of project

Utilities projects dominated the infrastructure sector in December 2013 accounting for 76% of the total value which is due to the major projects awarded in Clwyd and Selby this month (see Fig. 4.3).

> "The total value of contract awards was £5.8 billion based on a three month rolling average.

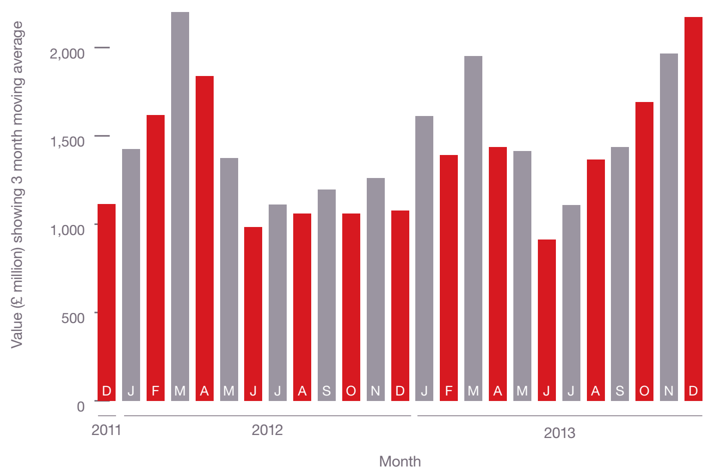

Fig. 4.1 **Project Value showing 3 month moving average** Source: Barbour ABI

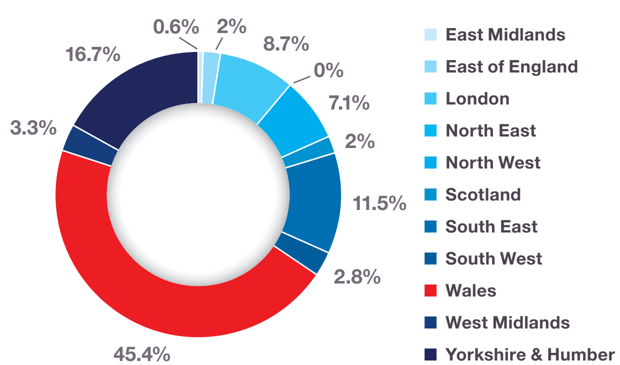

Fig. 4.2 **Value of Contracts by Region** Source: Barbour ABI

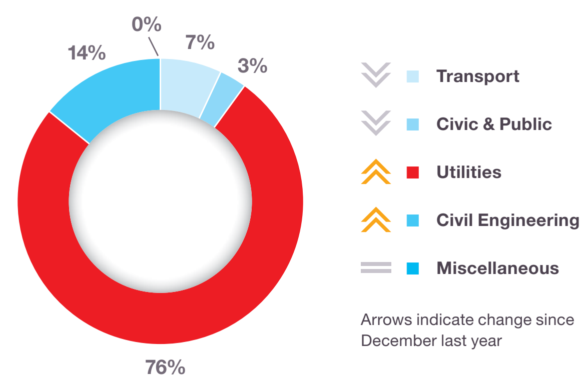

Fig. 4.3 **Types of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since December 2012

-3.9%	East Midlands	-12.7%	Scotland
-19.0%	East of England	-3.8%	South East
-10.0%	London	-4.6%	South West
-5.9%	North East	+43.8%	Wales *HOTTEST REGION*
+4.4%	North West	+2.5%	West Midlands
		+9.2%	Yorkshire & Humber

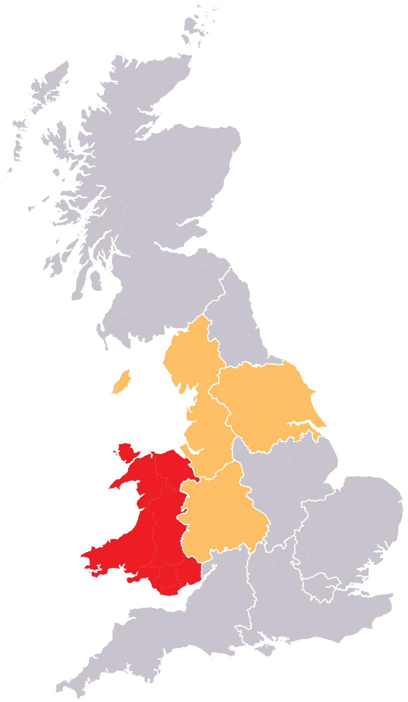


Fig. 4.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

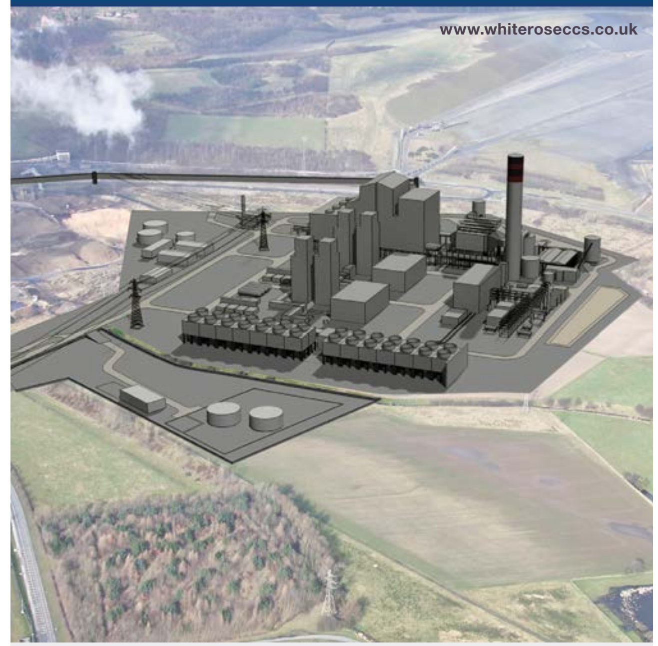
	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	14,705	13,025	13,203	14,101	15,434	17,138	18,441
Growth	8.6%	-11.4%	1.4%	6.8%	9.5%	11.0%	7.6%

Fig. 4.5 **Sector Forecasts** Source: Construction Products Association

Outlook

The National Infrastructure Plan updated the top 40 infrastructure projects within the UK and continues to provide a potential boost to the infrastructure sector. Most significant was the potential for private pension funds to help deliver infrastructure projects as well as a series of renewable energy deals and confirmation that the A14 project will now be publically funded. The CPA Forecasts for the sector (see Fig. 4.5) predict modest growth of 1.4% in 2013 rising to 6.8% in 2014 largely in line with the expectations of further government investment in major infrastructure projects. The increase in new orders recorded by Barbour ABI in 2013 suggests growth rates of 6.8% or higher are possible in 2014.

PROJECT IN FOCUS



White Rose Carbon Capture and Storage Project £300,000,000

County	North Yorkshire
Primary Category Sector	Infrastructure
Government Region	Yorkshire & Humber
Start Date	2016
End Date	2020
Contract Award Date	December 2013
Funding	Private
Stage	Contract Awarded
Contractor	Linde AG

economic & construction MARKET REVIEW

JANUARY 2014

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TOP TEN Key Clients
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	EDF Energy	40 Grosvenor Place, Victoria, Westminster, London, SW1X 7EN	020 7242 9050	020 7331 3108 (FPS)	4	1120
2	Department for Transport (DfT)	Great Minster House, 76 Marsham Street, Westminster, London, SW1P 4DR	0300 330 3000		2	1039
3	Sellafield Limited (AMEC)	Sellafield Sites, Seascale, Cumbria, CA20 1PG	01946 728333 (CTPS)	01946 728987	2	1025
4	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	020 3356 9245 (FPS)	88	976
5	Flintshire County Council	County Hall, Mold, Clwyd, CH7 6NB	01352 702121		1	800
6	Crossrail Limited	25 Canada Square, Canary Wharf, Poplar, London, E14 5LQ	020 3229 9100	020 7719 0955	10	779
7	Highways Agency	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	08459 55 65 75		55	777
8	E.ON Limited	Newstead Court, Little Oak Drive, Annesley, Nottingham, Nottinghamshire, NG15 0DR	024 7618 1684	0115 906 2580	1	700
9	Gateway Energy Centre Limited	Manorway, Stanford Le Hope, Essex, SS17 9PD	0800 169 5290		1	600
10	Intergen Limited	81 George Street, Edinburgh, Lothian, EH2 3ES	0131 624 7500	0131 624 7550	1	600

TOP TEN Key Architects
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Studio E Architects Limited	Palace Wharf, Rainville Road, Chiswick, London, W6 9HN	020 7385 7126	020 7381 4995	3	865
2	HLN Architects	21-22 Neptune Court, Vanguard Way, Cardiff, South Glamorgan, CF24 5PJ	029 2039 8611	029 2037 4690 (FPS)	1	400
3	WA Fairhurst & Partners	225 Bath Street, Glasgow, Strathclyde, G2 4GZ	0141 204 8800	0141 204 8801	2	370
4	Wilkinson Eyre Architects	33 Bowling Green Lane, City, London, EC1R 0BJ	020 7608 7900	020 7608 7901	2	348
5	RPS Group Plc	20 Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 438000	01235 864451 (FPS)	3	266
6	Austin Smith Lord	Port Of Liverpool Building, Pier Head, Liverpool, Merseyside, L3 1BY	0151 227 1083	0151 258 1448	4	215
7	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	020 7833 8400	1	200
8	Hyder Consulting UK Limited	Manning House, 22 Carlisle Place, Westminster, London, SW1P 1JA	020 3014 9000 (CTPS)	020 7828 8428	1	177
9	URS Global	Scott House, Alencon Link Basing View, Basingstoke, Hampshire, RG21 7PP	01256 310200	01256 310201 (FPS)	4	164
10	ADF Architects	23 Blythswood Square, Glasgow, Strathclyde, G2 4BG	0141 226 8010 (TPS)	0141 429 8773	1	154

TOP TEN Key Contractors
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Amey Group	The Sherard Building, Edmund Halley Road, Oxford Science Park, Oxford, Oxfordshire, OX4 4DQ	01865 713100	01865 713300	12	1473
2	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	16	1120
3	Siemens Limited	Brunel House, Sir William Siemens Square, Frimley, Camberley, Surrey, GU16 8QD	01276 690000 (CTPS)	0870 850 8473	2	1100
4	Costain Limited	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	01628 674477	18	886
5	WTI UK Limited	Portland House (5th Floor), Stag Place, Westminster, London, SW1E 5BH	020 3651 1520		1	800
6	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	74	795
7	Burmeister & Wain Scandinavian Contractor A/S	Gydevang 35, P.O. Box 235, DK-3450, Allerod, Denmark	0045 48140022	0045 48140150	4	420
8	Alstom Hydro Limited	Newbold Road, Rugby, Warwickshire, CV21 2NH	01788 577111 (TPS)	01788 531 700 (FPS)	1	401
9	VolkerWessels UK Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	01992 305001	15	372
10	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	01276 66060	22	352

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COMMERCIAL & RETAIL
DROP IN THE VALUE OF COMMERCIAL CONTRACTS

The Commercial & Retail sector experienced a fall in the value of contracts awarded this month, but still higher than last year.

The value of contracts awarded in the Commercial & Retail market was £618 million in December, based on a three month rolling average (see Fig. 5.1). This is a 19.9% decrease from November but a 31% rise from the December 2012 figure. In the three months to November the value of contracts was 18% above the previous three months and 48.6% higher than the same period in 2012. This suggests a much stronger finish to 2013 in the sector than the previous year.

Projects by region

London was the main location of activity in the sector this month with 22.6% of the value of all contracts awarded, a 3.5% decrease from December 2012 (see Fig. 5.2 & 5.4). The projects contributing to this increase were the commercial led redevelopment of St Giles Circus in Oxford Street which has a value of £30 million. Yorkshire & the Humber was the next most significant location of activity accounting for 18% of contract value, a 15.3% increase from the corresponding month last year. The North West and the South East were the two other regions of note and were the locations for 13.7% and 11.7% of the value of contracts awarded in November respectively.

Types of project

Offices were the dominant type of project in the sector accounting for 48% of the value of contracts awarded in December 2013, though this was a 28% decrease on December 2012 (see Fig. 5.3). General retailing is the other significant sector with 36% of contract award value, 18% higher than December 2012.

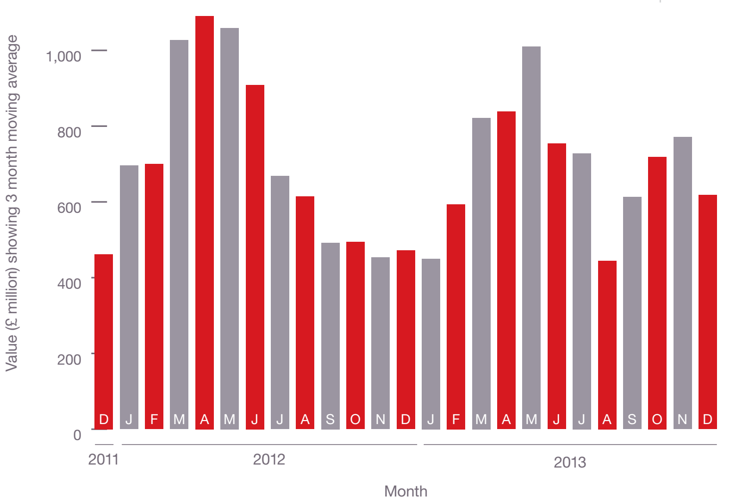

Fig. 5.1 **Project Value showing 3 month moving average** Source: Barbour ABI

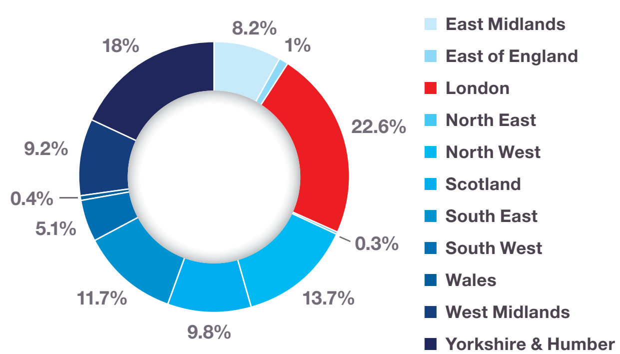

Fig. 5.2 **Value of Contracts by Region** Source: Barbour ABI

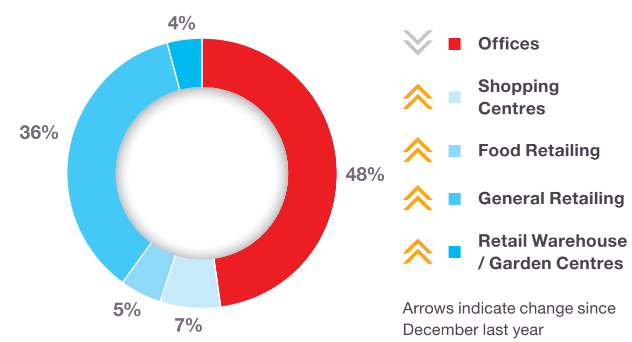

Fig. 5.3 **Types of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since December 2012

		-21.8%	Scotland
+2.9%	East Midlands	+6.0%	South East
-3.2%	East of England	-2.7%	South West
-3.5%	London	-1.1%	Wales
-0.7%	North East	+4.4%	West Midlands
+4.4%	North West	+15.3%	Yorkshire & Humber *HOTTEST REGION*

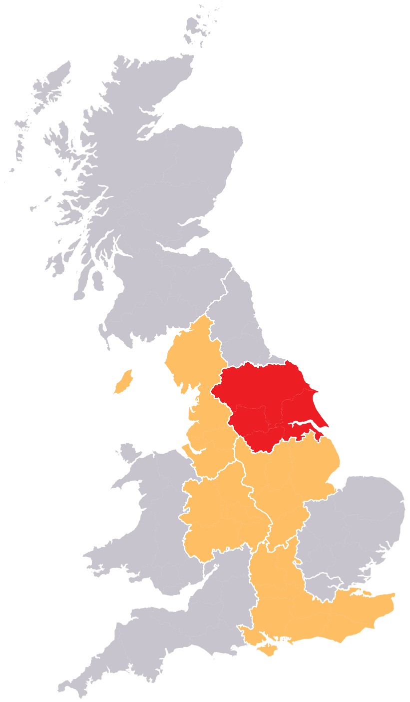

Fig. 5.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	24,296	21,492	22,075	22,596	23,961	25,048	26,225
Growth	2.5%	-11.5%	2.7%	2.4%	6.0%	4.5%	4.7%

Fig. 5.5 **Sector Forecasts** Source: Construction Products Association

Outlook

The CPA Forecasts for the sector (see Fig. 5.5) show that after a solid year in 2013, where output is estimated to increase by 2.7%, a similar level of growth is forecast for 2014. As the levels of investment in the offices and retail sector increase this is forecast to have a positive impact on the levels of output in 2015 and beyond.

> London was the main location of activity with 22.6% of the value of all contracts awarded.

PROJECT IN FOCUS

www.hammerson.com

Eastgate Quarter – Victoria Gate – John Lewis Plot HQ1 £45,000,000

County	West Yorkshire
Primary Category Sector	Commercial & Retail
Government Region	Yorkshire & Humber
Start Date	April 2014
End Date	April 2016
Contract Award Date	December 2013
Funding	Private
Stage	Contract Award/Detail Planning
Contractor	Sir Robert McAlpine

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TOP TEN Key Clients

December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Land Securities Group	5 The Strand, Westminster, London, WC2N 5HR	020 7413 9000 (CTPS)	020 7024 5007	7	675
2	W R Berkley Insurance (Europe) Limited	2nd Floor, 40 Lime Street, City, London, EC3M 7AW	020 7280 9000	020 7280 9090 (FPS)	1	500
3	Oxford Properties	6 New Street Square, New Fetter Lane, Suite 1200, City, London, EC4A 3BF	020 7822 8300		2	350
4	Almacantar	3 Quebec Mews, City, London, W1H 7NX	020 7535 2900 (CTPS)		1	350
5	Brookfield Office Properties	Brookfield Place New York, 250 Vesey St., 15th Floor, New York, 10281	001 212 417 7000		1	340
6	Westfield Shoppingtowns Limited	Level 6, Midcity Place, 71 High Holburn, Westminster, London, WC1V 6EA	020 7061 1400	020 7061 1401 (FPS)	2	301
7	Google UK Limited	Belgrave House, 76 Buckingham Palace Road, Westminster, London, SW1W 9TQ	020 7031 3000 (TPS)	020 7031 3001	1	300
8	Derwent Holdings Limited	PO Box 1711, Celtic House, Victoria Street, Port Erin, Isle of Man, IM99 1PL	01624 661662 (CTPS)		7	232
9	Crown Estate	16 New Burlington Place, Westminster, London, W1S 2HX	020 7851 5000		11	224
10	J Sainsbury Plc	33 Holborn, City, London, EC1N 2HJ	020 7695 6000	020 7695 7610 (FPS)	27	179

TOP TEN Key Architects

December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Make Architects	13 Fitzroy Street, Westminster, London, W1T 4BQ	020 7636 5151	020 7636 5252 (FPS)	7	548
2	Kohn Pederson Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	020 7497 1175	3	502
3	Allford Hall Monaghan Morris	2nd Floor, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	020 7251 5123 (FPS)	5	424
4	Mather Architects	123 Camden High Street, Camden Town, London, NW1 7JR	020 7284 1727 (TPS)	020 7267 7826 (FPS)	1	350
5	Conran & Partners	22 Shad Thames, Southwark, London, SE1 2YU	020 7403 8899	020 7357 0832 (FPS)	1	350
6	PLP Architecture	2 Seething Lane, London, EC3N 4AT	020 3006 3900	020 3006 3900	1	350
7	Hadfield Cawkwell Davidson	17 Broomgrove Road, Sheffield, South Yorkshire, S10 2LZ	0114 266 8181	0114 266 6246 (FPS)	9	326
8	Lynch Architects Limited	1 Amwell Street, Pentonville, Southwark, London, EC1R 1UL	020 7278 2553		2	310
9	AEW Architects & Designers Limited	The Zenith Building, Spring Gardens, Manchester, Greater Manchester, M2 1AB	0161 214 4370	0161 214 4371	10	254
10	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	020 7504 1701 (FPS)	4	218

TOP TEN Key Contractors

December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	01923 423900 (FPS)	8	606
2	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	01442 243819 / 230024	11	522
3	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	020 7247 8656 (FPS)	88	504
4	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	020 7659 3501	4	455
5	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	15	364
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	01773 856710	32	284
7	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	01277 205900 (FPS)	8	210
8	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	020 7375 1606	12	193
9	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	44	186
10	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	01767 640002	20	168

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HOTEL, LEISURE & SPORT
DECLINE IN CONTRACT VALUE IN DECEMBER

The Hotel, Leisure & Sport sector continued its recent mixed performance with lower values of contracts awards in December but better performance overall compared to the previous quarter.

Contract award levels in the Hotel, Leisure & Sport sector were £336 million in December, based on a three month rolling average (see Fig. 6.1). This was 21.5% lower than November and 29.2% lower than December 2012. However in the three months to December the value of contracts was 9.9% higher than the previous three months, indicating an upturn activity in recent months. Overall value of contracts awarded are down by 25.7% in the three months to December, compared to the same period in 2012 painting a mixed picture for the sector overall.

Projects by region

December was a particularly strong month in this sector for the North West which was the location of 23.6% of the value of contracts awarded, an increase of 8.9% from December 2012 (see Fig. 6.2 & 6.4). Yorkshire & the Humber also performed strongly with 19.4% of contracts awarded occurring in the region, an 18.1% increase on the same period last year.

Types of project

Hotels are the major types of contracts awarded this month at 37% of total value which is 12% higher than December 2012 (see Fig. 6.3). The other major type of project awarded this month was leisure centres which equated to 33% of the total value, though this was a 15% decrease from December 2012.

> Overall value of contracts awarded are down by 25.7% in the three months to December.

Fig. 6.1 **Project Value showing 3 month moving average** Source: Barbour ABI

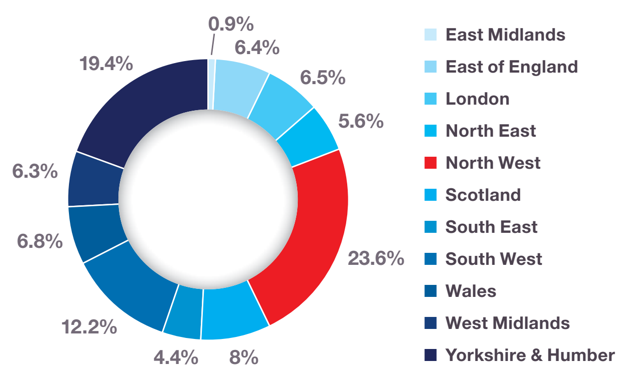

Fig. 6.2 **Value of Contracts by Region** Source: Barbour ABI

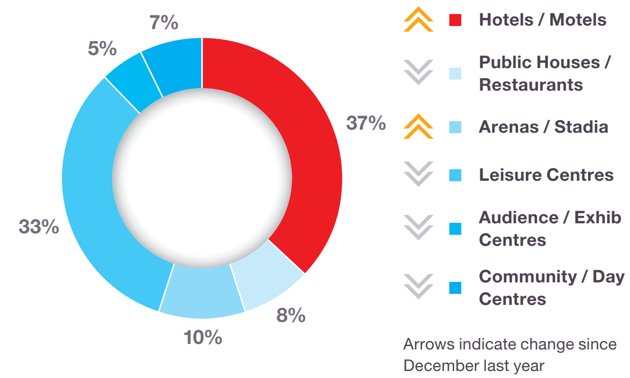

Fig. 6.3 **Types of Projects Awarded** Source: Barbour ABI

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DECLINE IN CONTRACT VALUE IN DECEMBER

The map and figures show how the activity has changed since December 2012

+7.7%	Scotland		
-0.3%	East Midlands	-5.7%	South East
+2.8%	East of England	+9.9%	South West
-53.5%	London	+6.2%	Wales
+2.0%	North East	+3.9%	West Midlands
+8.9%	North West	+18.1%	Yorkshire & Humber *HOTTEST REGION*

Fig. 6.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	4,636	3,911	4,107	4,189	4,315	4,444	4,578
Growth	-2.7%	-15.6%	5.0%	2.0%	3.0%	3.0%	3.0%

Fig. 6.5 **Sector Forecasts** Source: Construction Products Association

Outlook

The CPA estimates that this sector (see Fig. 6.5) grew by 5% in 2013 and that it will grow by 2% this year roughly in line with overall growth rates in the industry as a whole. With an upbeat forecast for hotel growth in 2014 from analysts it is Barbour ABI's expectation that the forecast for growth this year is likely to be met.

> "December was a particularly strong month in this sector for the North West.

PROJECT IN FOCUS

www.manchester.gov.uk

Etihad Stadium – Expansion
£60,000,000

County	Greater Manchester
Primary Category Sector	Hotel, Leisure & Sport
Government Region	North West
Start Date	28th February 2014
End Date	31st August 2015
Contract Award Date	December 2013
Funding	Private
Stage	Contract Award/Detail Planning
Contractor	Laing O'Rourke

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DECLINE IN CONTRACT VALUE IN DECEMBER

TOP TEN Key Clients
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	London Legacy Development Corporation	Level 10, 1 Stratford Place, Montfichet Road, Stratford, London, E20 1EJ	020 3288 1800		3	333
2	Cardiff County Council	County Hall, Atlantic Wharf, Cardiff, South Glamorgan, CF10 4UW	029 2087 2087	029 2087 3209	2	216
3	Warrington Borough Council	Newtown House, Buttermarket Street, Warrington, Cheshire, WA1 2NH	01925 443322		3	201
4	Shelbourne Senior Living	9 Clifford Street, Westminster, London, W1S 2FT	020 7292 3626	01590 681657	1	150
5	National Exhibition Centre Limited	Bickenhill Lane, Birmingham, West Midlands, B40 1PQ	0121 780 4141	0121 780 4120	2	144
6	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499	01582 474259	29	124
7	Essex County Cricket Club	New Writtle Street, Chelmsford, Essex, CM2 0PG	01245 252420 (CTPS)	01245 254030 (FPS)	1	100
8	Prime Investors Capital Limited	33 St James Square, Westminster, London, SW1Y 4JS	020 3178 4660		1	100
9	London Borough of Bromley	Civic Centre, Stockwell Close, Bromley, Kent, BR1 3UH	020 8464 3333	020 8313 4639	1	90
10	Cheshire West & Chester Council	HQ, 58 Nicholas Street, Chester, Cheshire, CH1 2NP	0300 123 8123	01244 602202	4	69

TOP TEN Key Architects
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	01483 575830 (FPS)	2	216
2	Hole Architects	9th Floor, 69 Park Lane, Croydon, Surrey, CR0 1JD	020 8662 4600		2	216
3	Comprehensive Design Architects	16 Moray Place, Edinburgh, Lothian, EH3 6DT	0131 225 1111 (CTPS) (TPS)	0131 220 0152	3	153
4	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA		020 7580 6688	9	153
5	Murphy Architects	The Breakfast Mission, 15 Old Fishmarket Close, Edinburgh, Lothian, EH1 1RW	0131 220 6125 (CTPS) (TPS)	0131 220 6781 (FPS)	1	150
6	Sutherland Hussey Architects	122 Giles Street, Edinburgh, Lothian, EH6 6BZ	0131 553 4321 (CTPS)		1	150
7	Chetwood Associates	12-13 Clerkenwell Green, City, London, EC1R 0QJ	020 7490 2400	020 7250 1916 (FPS)	1	120
8	Benoy Limited	Handley House, Northgate, Newark, Nottinghamshire, NG24 1EH	01636 672356	01636 707513 (FPS)	1	120
9	Blair Associate Architecture Limited	88 Golden Lane, City, London, EC1Y 0UA	020 7490 4666		3	112
10	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU		01273 483060 (FPS)	33	104

TOP TEN Key Contractors
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	01277 205900 (FPS)	6	195
2	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	0118 932 0206 (FPS)	6	173
3	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	8	163
4	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	01767 640002	4	158
5	Galliford Try Construction South	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	01895 855099	4	142
6	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	01442 238301	8	110
7	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	020 7247 8656 (FPS)	7	107
8	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	01462 681852 (FPS)	12	97
9	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	01773 856710	16	93
10	Anglo-Holt Group Limited	150 Birmingham Road South, West Bromwich, West Midlands, B70 6QT	0121 525 6717	0121 553 4701 (FPS)	14	93

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INDUSTRIAL

GROWTH CONTINUES IN THE INDUSTRIAL SECTOR

The Industrial sector continued its strong recent performance with monthly and yearly increases in contracts awarded.

Activity in the industrial sector continued its recent rise with the value of contracts awarded in December £484 million, based on a rolling three month average (see Fig. 7.1). This is an increase of 4.3% on the value in November and 153.6% above the corresponding month in 2012. In the three months to December the total value of contracts was £1.4 billion which was 48.1% above the previous three months and 148% above the same quarter last year.

Projects by region

The South East is the region with the highest value of activity this month with 18.6% of the contracts awarded, an increase of 17.6% on December 2012 (see Fig. 7.2 & 7.4). The West Midlands also experienced a high proportion of activity with 14.9% of contracts awarded, a 10.7% increase. Yorkshire & the Humber, London and the North West were the other areas that experienced high values of contracts awarded in the industrial sector with 14.1%, 13.9% and 12.9% of contracts awarded respectively.

Types of project

The types of project awarded in the sector were predominantly warehouse/storage which accounted for 54% of contract value in December 2013, a 35% increase on the corresponding month last year (see Fig. 7.3). Heavy industrial projects are the next highest category of contract award with 20% of the total value, a 33% decrease from December 2012. Light industrial projects were 15% of the total value which was a 1% increase from the corresponding month last year.

> "The South East is the region with the highest value of activity.

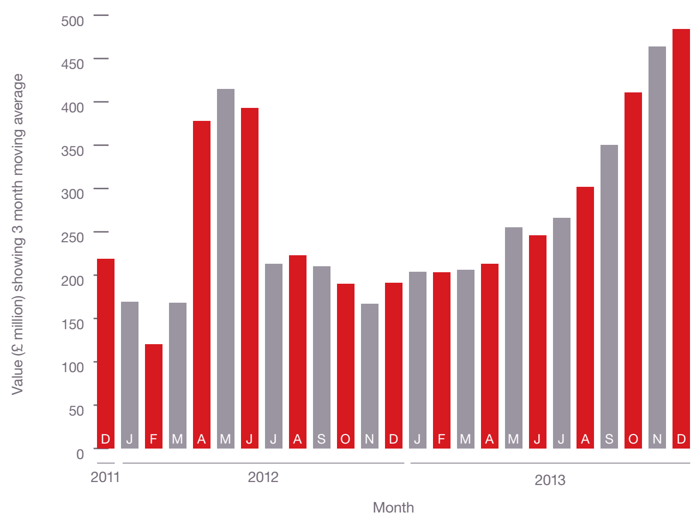

Fig. 7.1 **Project Value showing 3 month moving average** Source: Barbour ABI

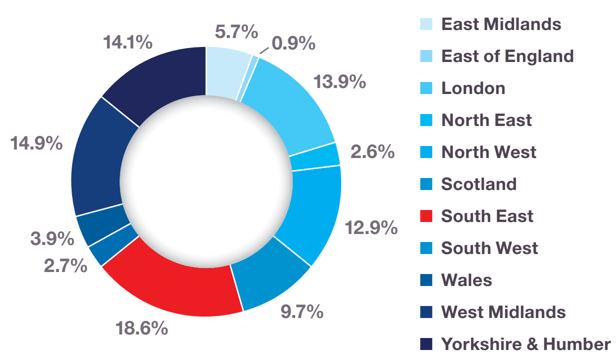

Fig. 7.2 **Value of Contracts by Region** Source: Barbour ABI

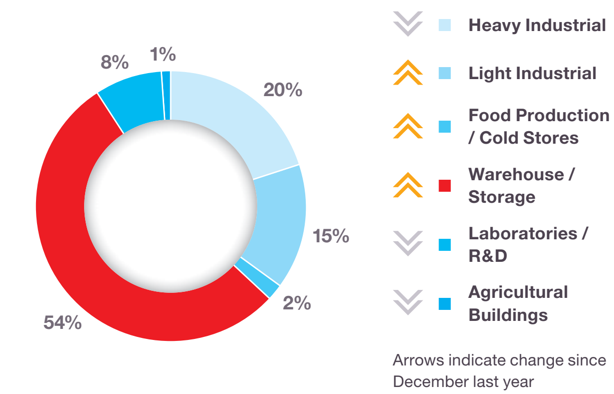

Fig. 7.3 **Types of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since December 2012

+6.2%	Scotland	-45.1%	East Midlands
+17.6%	South East *HOTTEST REGION*	-8.3%	East of England
-6.4%	South West	+13.1%	London
+2.1%	Wales	-1.4%	North East
+10.7%	West Midlands	+1.4%	North West
+10.1%	Yorkshire & Humber		

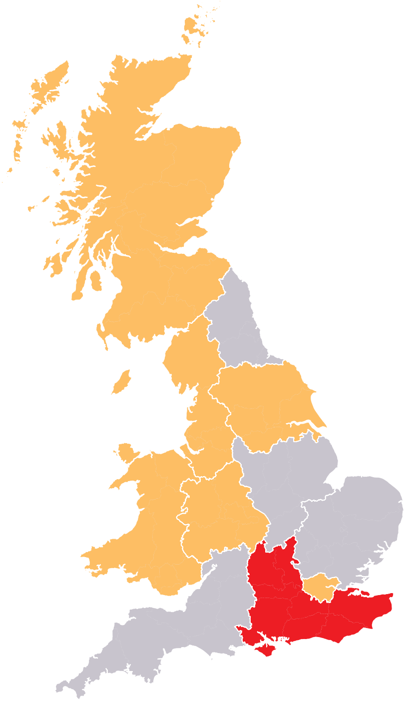

Fig. 7.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	3,209	3,427	3,176	3,395	3,589	3,760	3,939
Growth	-9.6%	6.8%	-7.3%	6.9%	5.7%	4.8%	4.8%

Fig. 7.5 **Sector Forecasts** Source: Construction Products Association

Outlook

The CPA Forecasts for the sector (see Fig. 7.5) shows that the sectors poor performance in 2013 will lead to the sector contracting by 7.3% in 2013. The increase in new orders this year is demonstrated in the CPA Forecasts for the sector with strong growth of 6.9% predicted in 2014 and 5.7% in 2015, albeit from a low base. This is driven in equal measure by factories and warehouse growth suggesting that recent demand for large warehousing facilities and high value manufacturing space will continue.

PROJECT IN FOCUS

Aldi Regional Distribution Centre – Goldthorpe
£25,000,000

County	South Yorkshire
Primary Category Sector	Industrial
Government Region	Yorkshire & Humber
Start Date	2014
End Date	2015
Contract Award Date	December 2013
Funding	Private
Stage	Subcontracts Awarded
Contractor	DSP Construction

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TOP TEN Key Clients

December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	0121 733 8016	5	192
2	British Airways Plc	PO Box 365, Uxbridge, Middlesex, UB7 0GB	0844 493 0787		1	178
3	IM Properties PLC	IM House, South Drive, Coleshill, Birmingham, West Midlands, B46 1DF	0121 730 8050	0121 730 8267	2	151
4	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	01788 422201	6	120
5	BP Exploration Operating Company	Sullom Voe Terminal, Mossbank, Shetland, Islands, ZE2 9TU		01806 243200	1	100
6	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	01827 710842	2	83
7	Merchant Place Developments	The Studio, Sinclair Court, Darrell Street, Newcastle Upon Tyne, Tyne And Wear, NE13 7DS	0191 236 1013		1	82
8	Omega Warrington Limited	2 Miller House, Lochside View, Edinburgh, Lothian, EH12 9DH	Not Listed		3	80
9	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	020 7218 1501 (FPS)	10	76
10	Goodman International	Nelson House, Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG	0121 506 8100	0121 506 8101	4	68

TOP TEN Key Architects

December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND		0116 254 1095	7	235
2	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	024 7625 3210 (FPS)	9	162
3	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	0191 269 5455	4	130
4	Chetwood Associates	12-13 Clerkenwell Green, City, London, EC1R 0QJ	020 7490 2400	020 7250 1916 (FPS)	5	126
5	Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	020 7736 3896 (FPS)	12	90
6	Cornish Architects	Peer House, 8-14 Verulam Street, Westminster, London, WC1X 8LZ	020 7400 2120	020 7253 0846 (FPS)	3	87
7	PHP Architects	The Old Rectory, 31 Rectory Lane, Milton Malsor, Northampton, Northamptonshire, NN7 3AQ	01604 858916	01604 859123 (FPS)	5	74
8	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	020 7812 8399	2	68
9	PRC Architects Limited	5 St Mary's Road, Surbiton, Surrey, KT6 4JG	020 8399 5188	020 8399 3863 (FPS)	2	62
10	Ridge & Partners LLP	The Cowyards, Blenheim Park, Oxford Road, Woodstock, Oxfordshire, OX20 1QR	01993 815000	01993 815001 (FPS)	4	60

TOP TEN Key Contractors

December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	01604 671021 (FPS)	16	229
2	VolkerWessels UK Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	01992 305001	6	163
3	Shepherd Construction Limited	Frederick House, Fulford Road, York, North Yorkshire, YO10 4EA	01904 634431	01904 660242	2	122
4	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	01277 205900 (FPS)	3	101
5	Jacobs Limited	Jacobs House, 427 London Road, Earley, Reading, Berkshire, RG6 1BL	01189 635 331	0118 949 1054	1	100
6	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	01442 238301	3	95
7	Gallagher Group Limited	Leitrim House, Coldharbour Lane, Aylesford, Maidstone, Kent, ME20 7NS	01622 716543	01622 882366 (FPS)	2	86
8	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	01708 332801	5	82
9	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	9	76
10	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	01442 243819/230024	2	62

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MEDICAL & HEALTH

FALL IN VALUE OF CONTRACTS IN DECEMBER

The value of contracts decreased slightly in December concluding what was a challenging year for the Medical & Health sector.

Levels of activity in the Medical & Health sector were down slightly by 6.7% in December 2013 compared to November 2013, with the total value of contracts awarded £155 million based on a three month rolling average (see Fig. 8.1). This is 87.5% higher than the levels in December 2012, which was a particularly low month. In the three months to December, value of contracts are down by 29.7% on the previous three months but 43.9% up on the same period in 2012 indicating a comparatively stronger finish to 2013 than the previous year for the sector.

Projects by region

Yorkshire & the Humber was the main location of development in the sector this month capturing 24.9% of activity, a substantial 16.1% increase from December 2012 (see Fig. 8.2 & 8.4). The East of England was the other notable location of activity for medical and health projects registering 16.8% of activity by value in December 2013, a 16.8% increase from last year.

Types of projects

Public hospitals are the dominant types of contracts within the sector accounting for 42% of the value of contracts in December 2013, a large 39% decrease from the same month last year (see Fig. 8.3). Surgeries, health & medical centres accounted for 21% of the value of contracts this month which was a 5% increase from December 2012.

> Value of contracts down by 29.7% on the previous three months.

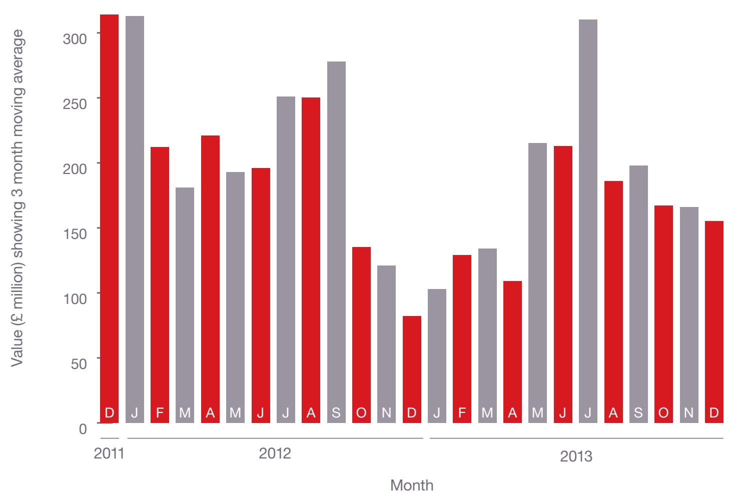

Fig. 8.1 **Project Value showing 3 month moving average** Source: Barbour ABI

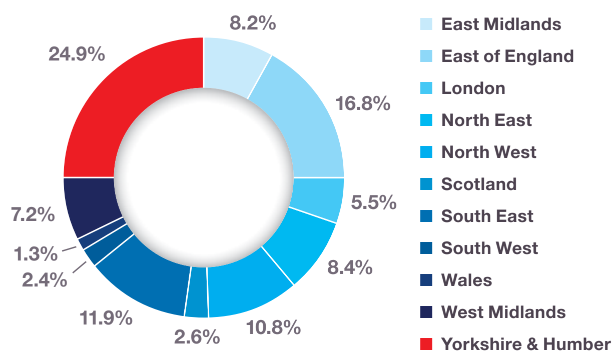

Fig. 8.2 **Value of Contracts by Region** Source: Barbour ABI

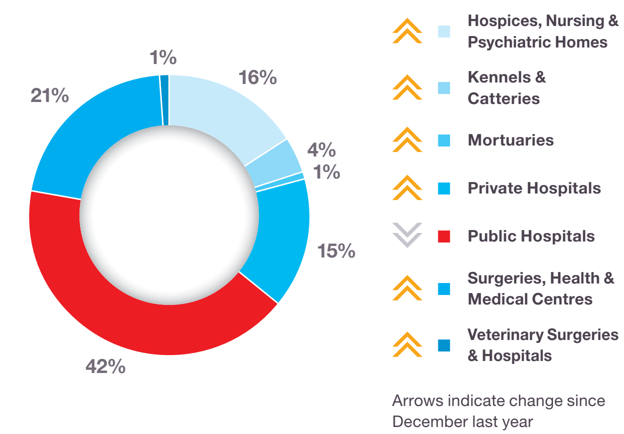

Fig. 8.3 **Types of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since December 2012

		+2.5%	Scotland
+8.2%	East Midlands	-5.8%	South East
+16.8%	East of England *HOTTEST REGION*	+0.4%	South West
-11.7%	London	-5.7%	Wales
+8.4%	North East	-5.0%	West Midlands
-24.3%	North West	+16.1%	Yorkshire & Humber

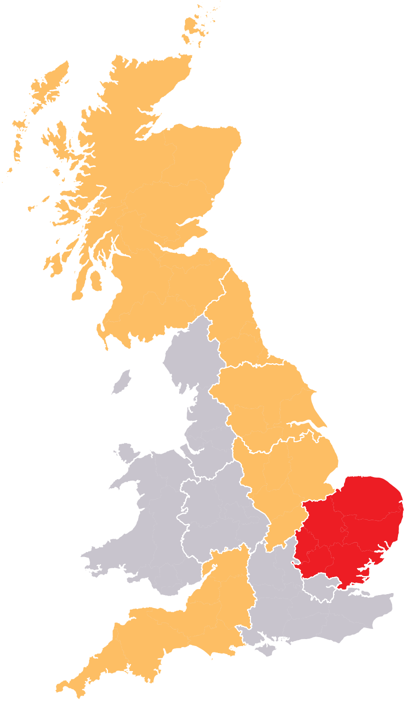

Fig. 8.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	3,458	3,058	3,059	3,127	3,197	3,293	3,392
Growth	-24.9%	-11.6%	0.0%	2.2%	2.2%	3.0%	3.0%

Fig. 8.5 **Sector Forecasts** Source: Construction Products Association

Outlook

The National Infrastructure Plan 2012 commits £4.6 billion in health and social care capital in 2014-2015 and £4.7 billion in 2015-2016, including investment of £1.4 billion in hospital upgrades and redevelopments, which suggests that this sector will improve in the medium term. The commitment to continue to protect health budgets was included in the latest Autumn Statement indicating this spending will occur. This is reflected in the latest CPA Forecasts (see Fig. 8.5) which forecasts growth of 2.2% in 2014 for the sector rising to 3% per annum by 2016.

PROJECT IN FOCUS

Nuffield Hospital – Cambridge – Phase 1
£13,000,000

County	Cambridgeshire
Primary Category Sector	Medical & Health
Government Region	East of England
Start Date	1st February 2014
End Date	1st August 2015
Contract Award Date	December 2013
Funding	Private
Stage	Subcontracts Awarded
Contractor	Simons Construction

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TOP TEN Key Clients
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Royal Liverpool and Broadgreen Hospital NHS Trust	Prescot Street, Liverpool, Merseyside, L7 8XP	0151 706 2000		2	336
2	West London Mental Health NHS Trust	Broadmoor Hospital, Crowthorne, Berkshire, RG45 7EG	01344 773111		1	285
3	Cwm Taff NHS Trust	Prince Charles Hospital, Gurnos, Merthyr Tydfil, Mid Glamorgan, CF47 9DT	01685 721721	01685 728128	1	120
4	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)		1	42
5	Birmingham & Solihull Lift Limited	Unit 5, The Triangle, Wildwood Drive, Worcester, Worcestershire, WR5 2QX	01782 222995	01782 287775	1	31
6	Bupa Limited	15-19 Bloomsbury Way, Westminster, London, WC1A 2BA	020 7656 2000	020 7656 2700	2	31
7	NHS Forth Valley	Stirling Community Hospital, Livilands Gate, Stirling, Stirlingshire, FK8 2AU	01786 434000		2	31
8	NHS Greater Glasgow and Clyde Health Board	Gartnavel Royal Hospital, 1055 Great Western Road, Glasgow, Strathclyde, G12 0XH	0141 211 3600	0141 211 0224	5	30
9	Sheffield Children's Hospital (NHS)	Western Bank, Sheffield, South Yorkshire, S10 2TH	0114 271 7000	0114 272 1870 (FPS)	5	27
10	Darlington Memorial Hospital NHS Foundation	Darlington Memorial Hospital, Hollyhurst Road, Darlington, County Durham, DL3 6HX	01325 380100		3	26

TOP TEN Key Architects
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Nightingale Associates	Princes Manor Barn, Reading Road, Oxford, Oxfordshire, OX11 0LU	01235 820222 (TPS)	01235 820145	8	348
2	HKS International Limited	82 Dean Street, Westminster, London, W1D 3SP	020 7292 9494 (TPS)	020 7292 9495	1	335
3	Cooper Architecture	Capital Tower, 91 Waterloo Road, Southwark, London, SE1 8RT	020 3170 0820		1	335
4	NBBJ	The Clove Building, 4-6 Maguire Street, Greenwich, London, SE1 2NQ	020 7939 3700	020 7939 3799	1	335
5	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	020 7504 1701 (FPS)	1	335
6	Oxford Architects Partnership	Bagley Croft, Hinksey Hill, Oxford, Oxfordshire, OX1 5BS	01865 329100 (TPS)	01865 326822 (FPS)	1	285
7	Avanti Architects Limited	361-373 City Road, City, London, EC1V 1AS	020 7278 3060	020 7278 3366 (FPS)	6	74
8	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA		020 7580 6688	5	57
9	Boswell Mitchell & Johnston	The Hub, 70 Pacific Quay, Glasgow, Strathclyde, G51 1DZ	0141 271 3200	0141 271 3201	3	42
10	One Creative Environment	5 The Triangle, Wildwood Drive, Worcester, Worcestershire, WR5 2QX	01905 362300 (CTPS)	01905 362333	3	37

TOP TEN Key Contractors
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	01902 316371 (FPS)	2	336
2	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	01767 640002	27	48
3	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	0118 932 0206 (FPS)	17	154
4	Galliford Try Construction South	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	01895 855099	12	107
5	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	01442 238301	8	90
6	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	01462 681852 (FPS)	8	66
7	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	17	57
8	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	10	37
9	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433		8	36
10	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	020 7375 1606	1	30

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EDUCATION
CONTRACTS AWARDED RISE THIS MONTH

The Education sector had a good month in December with an increase in the value of contracts awarded concluding a strong end to 2013.

The value of contracts awarded in the Education sector was £637 million in December based on a three month rolling average (see Fig. 9.1), an 8.6% increase from November 2013. This figure was 107.7% higher than December 2012 indicating the sectors comparatively strong year. The values of contract awards in the three months to December were 8.5% higher than the previous three months and 74.8% higher than the same period last year.

Projects by region

The main location of activity this month was the South West which accounted for 38.6% of the value of projects, a 28.8% increase from December 2012 (see Fig. 9.2 & 9.4). London was the next most prominent region accounting for 14.3% of contracts awarded a decrease of 0.1% from December 2012. Scotland also had a strong month accounting for 13.4% of the contracts awarded, which was an increase of 2.1%.

Types of project

Colleges / Universities accounted for the highest proportion of contracts awarded in the education sector in December 2013 (see Fig. 9.3). This type of project was 68% of the total value awarded, which was a 38% increase on December 2012. State primary and state secondary schools were the other major project type in December accounting for 11% and 10% of contracts awarded respectively, but this was a significant decline on the previous year's figures.

> The South West accounted for 38.6% of the value of projects.

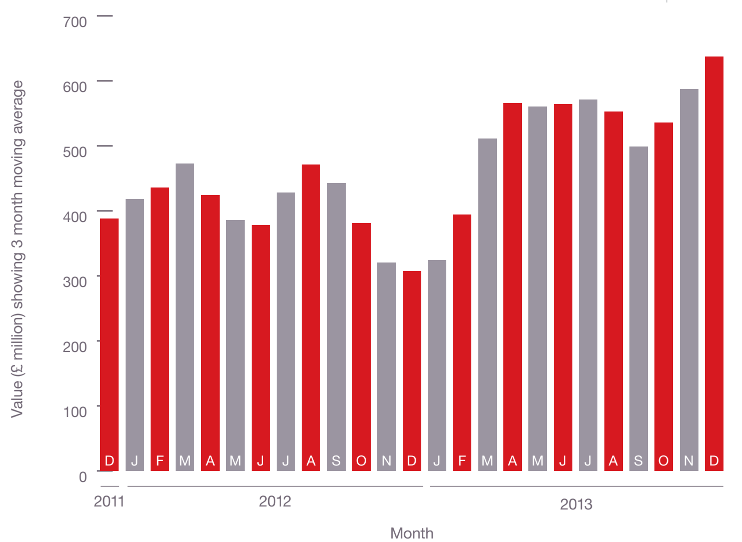

Fig. 9.1 **Project Value showing 3 month moving average** Source: Barbour ABI

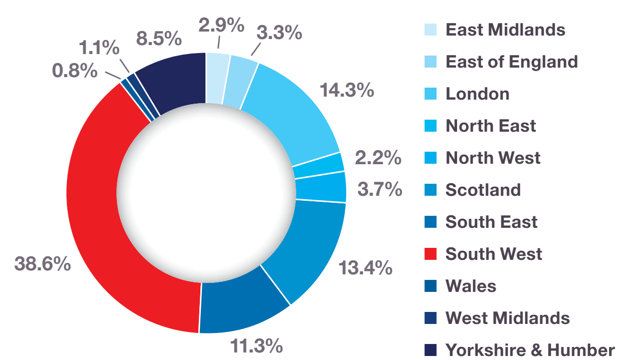

Fig. 9.2 **Value of Contracts by Region** Source: Barbour ABI

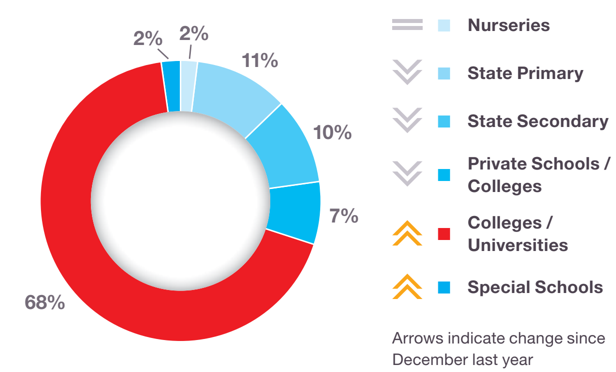

Fig. 9.3 **Types of Projects Awarded** Source: Barbour ABI

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The map and figures show how the activity has changed since December 2012		+2.1%	Scotland
-4.2%	East Midlands	-3.3%	South East
-6.9%	East of England	+28.8%	South West *HOTTEST REGION*
-0.1%	London	-10.5%	Wales
+1.9%	North East	-8.1%	West Midlands
-4.1%	North West	+4.3%	Yorkshire & Humber

Fig. 9.4 **Change of Activity by Region** *(since last year)* Source: Barbour ABI

	2011 Actual	2012 Actual	2013 Estimate	2014 Forecast	2015 Forecast	2016 Prediction	2017 Prediction
Output	9,876	8,043	7,709	7,709	7,788	7,998	8,267
Growth	-1.4%	-18.6%	-4.2%	0.0%	1.0%	2.7%	3.4%

Fig. 9.5 **Sector Forecasts** Source: Construction Products Association

Outlook

In the Autumn Statement the government announced it will remove controls on the number of students who can attend higher education institutions in 2015-2016 and that it will create an additional 30,000 student places at publicly funded institutions in 2014-15. It also committed £40 million to deliver 20,000 apprenticeships in the next two years. This is a potential boost to the levels of output in the sector in the coming years.

In the near term, the levels of output in the sector are forecast to decline by 4.2% in 2013 and to be flat this year (see Fig. 9.5). However, the forecast for 2015 is for 1% growth, followed by 2.7% and 3.4% growth in 2016 and 2017. At present Barbour ABI do not expect any major revisions to these figures given that is government investment that is most likely to drive growth in the sector in the future and that is likely to remain constant in the foreseeable future.

PROJECT IN FOCUS

Imperial College Amp Phases 2-4
£60,000,000

County	London
Primary Category Sector	Education
Government Region	London
Start Date	1st November 2013
End Date	1st November 2018
Contract Award Date	December 2013
Funding	Public
Stage	Contract Awarded
Contractor	Laing O'Rourke

economic & construction MARKET REVIEW

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TOP TEN
Key Clients
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Department For Education	Castle View House, East Lane, Runcorn, Cheshire, WA7 2AA	0370 000 2288	01928 738248	60	515
2	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	020 7218 1501 (FPS)	5	238
3	Newcastle University	7 Park Terrace, Newcastle Upon Tyne, Tyne And Wear, NE1 7RU	0191 222 6000	0191 222 6613	2	200
4	City of Glasgow College	190 Cathedral Street, Glasgow, Strathclyde, G1 2TG	0141 552 3941		1	200
5	Science Central	Citywall, Citygate, St James Boulevard, Newcastle Upon Tyne, Tyne And Wear, NE1 4JH	0191 231 2200		1	200
6	Swansea University	Singleton Park, Swansea, West Glamorgan, SA2 8PP	01792 205678 (TPS)	01792 295157 (FPS)	3	126
7	Cambridge University Hospitals NHS Foundation Trust	Addenbrookes Hospital, Hills Road, Cambridge, Cambridgeshire, CB2 0QQ	01223 245151	01223 217220 (FPS)	1	120
8	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2DB	020 7589 5111 (CTPS)		5	107
9	The Welsh Government	Cardiff Bay, Cardiff, South Glamorgan, CF99 1NA	0845 010 3300 / 0300 061 5630	029 2082 6233 (FPS)	1	100
10	Department for Education & Skills	Caxton House, Tothill Street, Westminster, London, SW1H 9NA	0370 000 2288		11	86

TOP TEN
Key Architects
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Faulkner Browns	Dobson House, Northumbrian Way, Killingworth, Newcastle Upon Tyne, Tyne And Wear, NE12 6QW	0191 268 3007	0191 268 5227	8	268
2	Reiach & Hall	6 Darnaway Street, Edinburgh, Lothian, EH3 6BG	0131 225 8444	0131 225 5079	3	239
3	AMEC Group PLC	76-78 Old Street, City, London, EC1V 9RU	020 3215 1700		1	230
4	Associated Architects	1 Severn Street Place, The Mailbox, Birmingham, West Midlands, B1 1SE	0121 233 6600	0121 200 1564 (FPS)	31	215
5	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	020 7812 8399	14	201
6	Michael Laird Architects	5 Forres Street, Edinburgh, Lothian, EH3 6DE	0131 226 6991	0131 226 2771 (FPS)	1	200
7	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	020 7504 1701 (FPS)	8	145
8	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, Avon, BS8 3NE	0117 974 3271 (TPS)	0117 974 5207	18	142
9	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	0114 268 7021	18	132
10	NBBJ	The Clove Building, 4-6 Maguire Street, Greenwich, London, SE1 2NQ	020 7939 3700	020 7939 3799	2	121

TOP TEN
Key Contractors
December – January

Rank	Company Name	Address	Telephone	Fax	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111	01767 640002	102	613
2	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852	01462 681852 (FPS)	96	589
3	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	020 7216 6950	60	537
4	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	01442 238301	45	407
5	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	01442 243819 / 230024	17	359
6	Bison Manufacturing Limited	Gresley Park, William Nadin Way, Swadlincote, Derbyshire, DE11 0BB	01283 817500	01283 817570	5	256
7	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	020 7307 9201	60	232
8	Miller Construction Limited	Miller House, 2 Lockside View, Edinburgh Park, Edinburgh, Lothian, EH12 9DH	0870 336 5000	0870 336 5315	24	210
9	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861000		34	176
10	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	020 7247 8656 (FPS)	41	142

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