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Barbour ABI | Building | bd

JUNE 2015

Economic Context

Major announcements and developments in the UK economy this month.

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The Construction Sector

The main economic headlines in the construction industry this month.

SKIP TO THIS SECTION

Sectors in Detail

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

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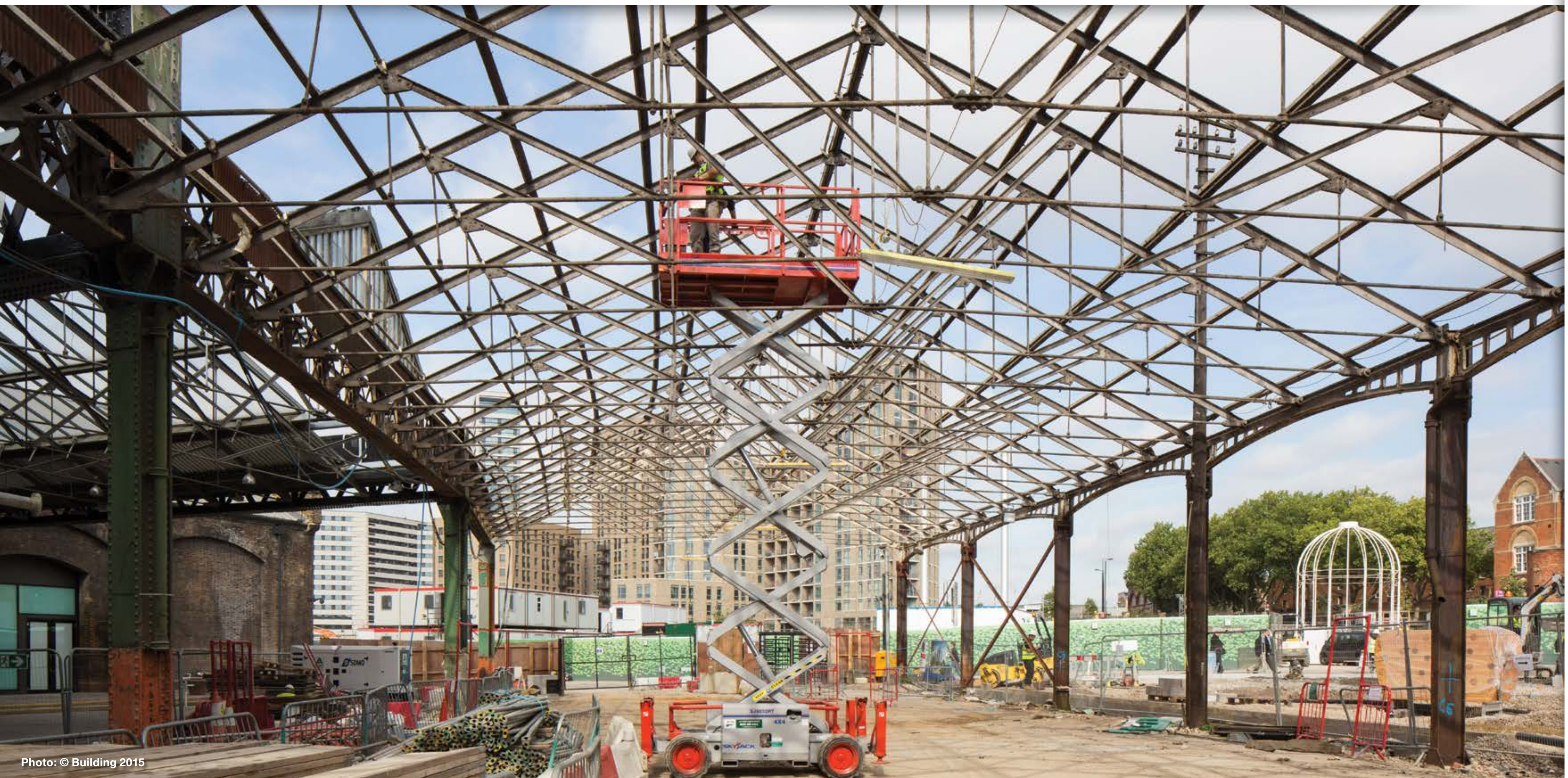

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www.barbour-abi.com

Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ

T: 0151 353 3500
E: info@barbour-abi.com
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ABOUT US

SPECIALIST PROVIDER OF CONSTRUCTION INTELLIGENCE

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

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

Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ

T: 0151 353 3500

E: info@barbour-abi.com

W: www.barbour-abi.com

@BarbourABI

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240 Blackfriars Road, London, SE1 8BF

T: 020 7921 5000

W: www.ubm.com

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

To contact Michael either:

T: 020 7560 4141

E: michael.dall@ubm.com

@MichaelGDall

Provider of the Government's Construction and Infrastructure Pipeline

HM Government

Chosen provider of Construction New Orders estimates to the ONS and communal dwellings data

Office for National Statistics

construction products association

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Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ

T: 0151 353 3500

E: info@barbour-abi.com

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ECONOMIC CONTEXT

MIXED SIGNALS ON UK ECONOMIC PERFORMANCE

The macroeconomic signals have been mixed over the past month with the PMI indicators for services and manufacturing falling in June, but construction increasing.

The PMI indicators are still above 50.0, the level that indicates expansion in the sector, but the decline in particular sectors has led to some to question the durability of economic growth (see Fig. 1.1).

The second estimate of UK GDP confirmed growth of 0.3% in the first quarter of 2015 and this demonstrates a slower rate of growth than the EU average of 0.4% (see Fig. 1.2). While not a significant difference it does diverge starkly from the first quarter of 2014 where the UK grew by 0.9% compared to 0.4% in the EU and 0% in the G7.

While debate remains about the momentum within the economy more widely, the level of inflation fell into negative territory prompting many to comment on the potential impacts of deflation.

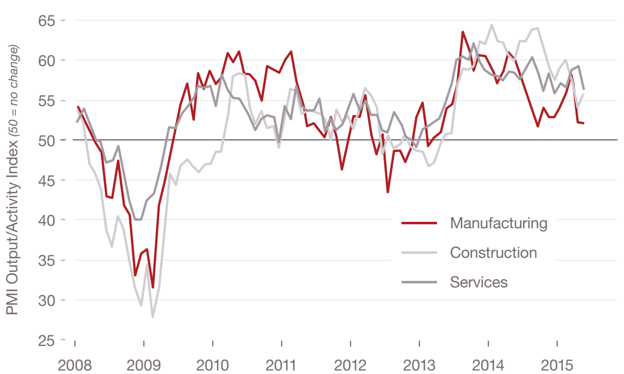

Fig. 1.1 **UK PMI** Source: ONS/Markit

The level of inflation was -0.1% in May and this was largely attributable to continued falls in year-on-year oil price and food (see Fig. 1.3). However, even once these volatile elements are stripped out of, the level of "core CPI" has also been falling in recent months and at 0.8% is at the lowest level since March 2001.

The level of business investment is starting to increase according to the ONS which is encouraging given the recent tendency of economic growth to be focussed on consumer expenditure (see Fig. 1.4). However, this investment has been concentrated on intellectual property and transport equipment while investment in property continues to decline.

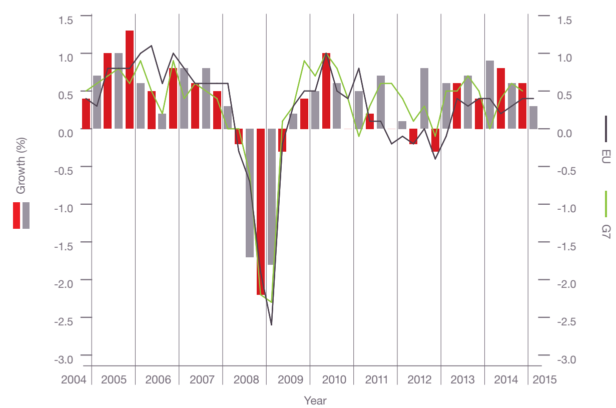

Fig. 1.2 **UK GDP** Source: ONS

Other news this month on the UK economy includes:

- **The CBI downgraded its growth forecasts for the UK economy to 2.4% this year and 2.5% in 2016, compared to previous estimates of 2.7% and 2.6%**
- **The British Retail Consortium reported retail sales in May were up by 1.1% compared to a year earlier which was the lowest growth rate since December**

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

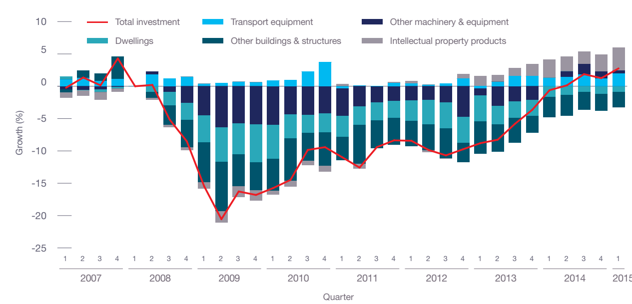

Fig. 1.4 **Economic Growth** Source: ONS

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Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
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THE CONSTRUCTION SECTOR

CONTRACT VALUES INCREASE SLIGHTLY IN MAY

The latest figures from the ONS show that the construction sector in the UK shrank by 0.8% between March and April 2015.

Comparing output levels with April last year showed an increase of 1.5% (see Fig. 2.1), demonstrating the longer term growth trends are improving.

It is clear that the housing sector is the main component of growth within the industry. New Private Housing increased by 4.5% between March and April 2015 and 16.6% from the corresponding month in 2014. At the same time New Public Housing increased by 9.4 and 3.6% respectively. Output in the Private Commercial sector fell by 0.2% between March and April, and by 5.2% on April 2014.

	% change	
	April 2014 – April 2015	March 2015 – April 2015
Total All Work	**1.5**	**-0.8**
All New Work	**4.3**	**1.6**
Public Housing	3.6	9.4
Private Housing	16.6	4.5
Infrastructure	9.7	-2.2
Public (ex Infrastructure)	-5.0	1.3
Private Industrial	2.6	0.6
Private Commercial	-5.2	-0.2
Repair & Maintenance	**-3.1**	**-4.8**
Public Housing	-3.1	-6.2
Private Housing	-0.3	-0.4
Non-Housing	-4.9	-7.2

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

Infrastructure decreased by 2.2% but is 9.7% higher than April 2014. This highlights that the growth patterns within the industry are broadly reliant on housing although the yearly increase in infrastructure output is encouraging.

The ONS/Barbour ABI New Orders for Q1 2015 showed that total order levels increased by 0.4% between Q4 2014 and Q1 2015 and were 8.0% higher than a year ago (see Fig. 2.2). Yearly growth was recorded in the private housing sector, infrastructure, industrial and commercial sectors indicating a broadening growth in new orders.

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 138 for May (see Fig. 2.3). This shows no change from the previous month and continues to support the view that overall activity in the industry remains strong. The readings for Private Housing increased in the month after falling over recent months. However, Commercial Offices decreased to a reading of 115 down from 129 in April.

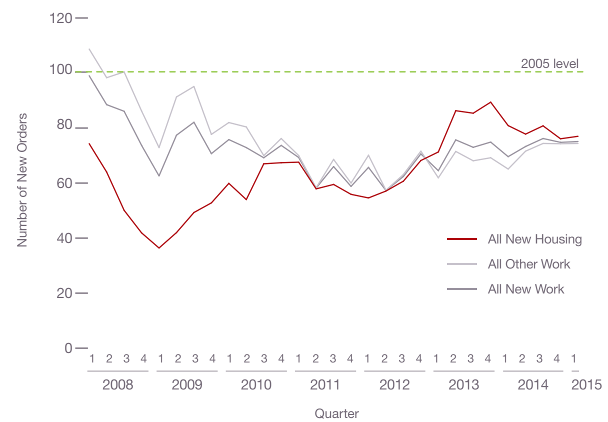

Fig. 2.2 **Construction New Orders** Source: CPA/Barbour ABI

The Construction Sector

According to Barbour ABI data on all contract activity, May witnessed an increase in construction activity levels with the value of new contracts awarded £5.6 billion, based on a three month rolling average (see Fig. 2.5). This is a 1.4% increase from April and a 7% increase on the value recorded in May 2014. The number of construction projects within the UK in May decreased by 9.3% on April, and were 14.9% lower than May 2014.

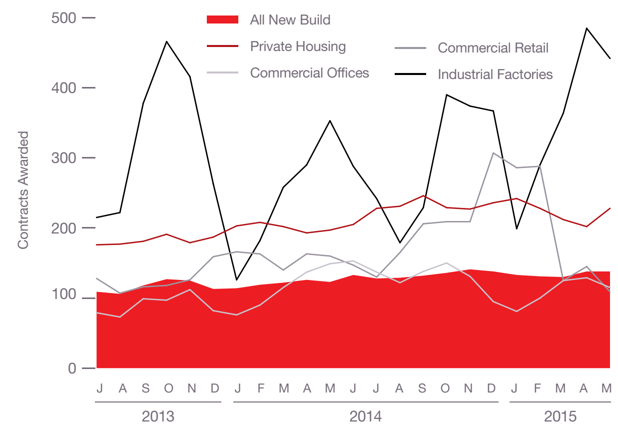

Fig. 2.3 **Contracts Awarded** Source: CPA/Barbour ABI

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Hinderton Point, Lloyd Drive, Cheshire Oaks, Cheshire, CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
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Projects by Region

The majority of the contracts awarded in May by value were in the South East, accounting for 34% of the UK total. This is followed by the North West with 13% of contract value awarded and London with 12% of value (see Fig. 2.4). The strong performance from the South East is primarily due to the award of the £1.3 billion contract to construct the Rampion Offshore wind farm off the Sussex coastline. Another renewable energy project in Cumbria, the Dong Walney offshore windfarm extension, was a major contributor in the large proportion of the contract value in the North West in May. This was valued at £330 million and is set to provide 330 MW of electricity output, with the capacity of the entire scheme 750 MW. The largest individual project in London in May was the mixed use Leicester Square Project which is to redevelop the Odeon site providing a hotel, cinema and residential units. The value of this project is £150 million.

Type of Projects

Infrastructure had the highest proportion of contracts awarded by value in May with 41% of the total value of projects awarded (see Fig. 2.6). The two major offshore renewable contracts contributed to the sector showing presence in May. Residential had a strong month in May accounting for 21% of the value awarded. The largest contract awarded was a 291 unit residential development on Blackpool Road in Preston valued at £29 million.

> The number of construction projects within the UK in May decreased by 9.3% on April

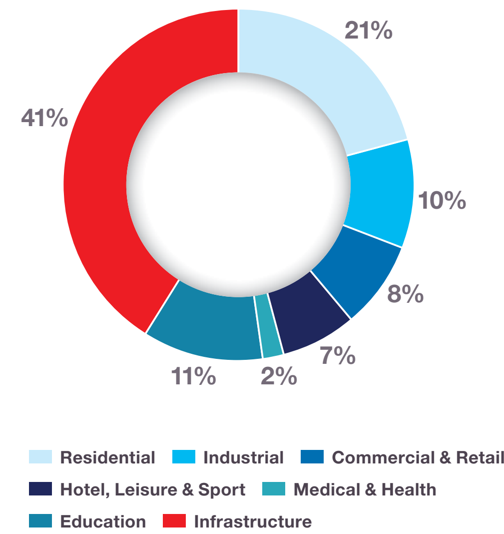
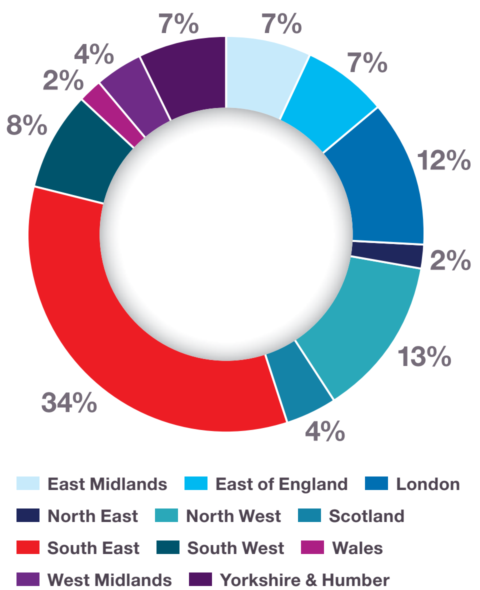


Fig. 2.6 **Type of Projects** Source: Barbour ABI



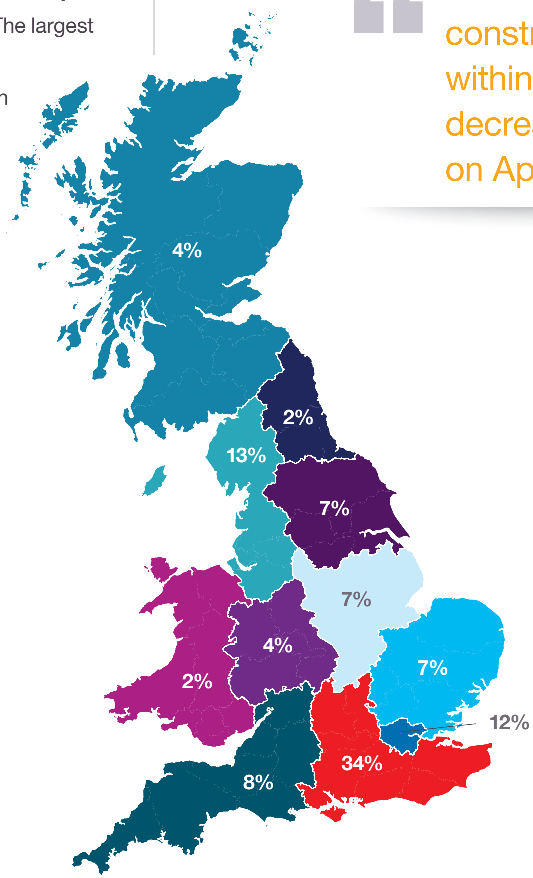


Fig. 2.4 **Locations of Contracts Awarded** Source: Barbour ABI

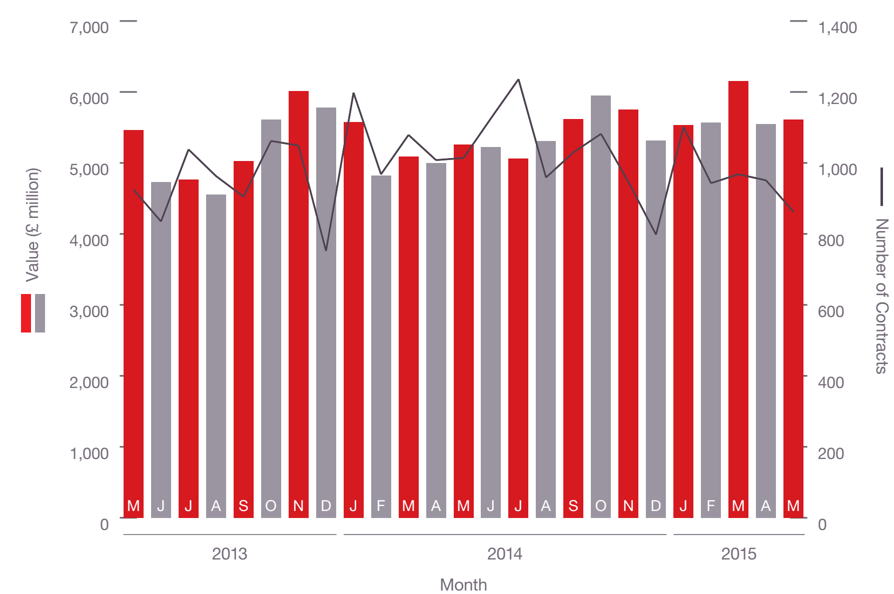


Fig. 2.5 **Construction Activity Trends** Source: Barbour ABI

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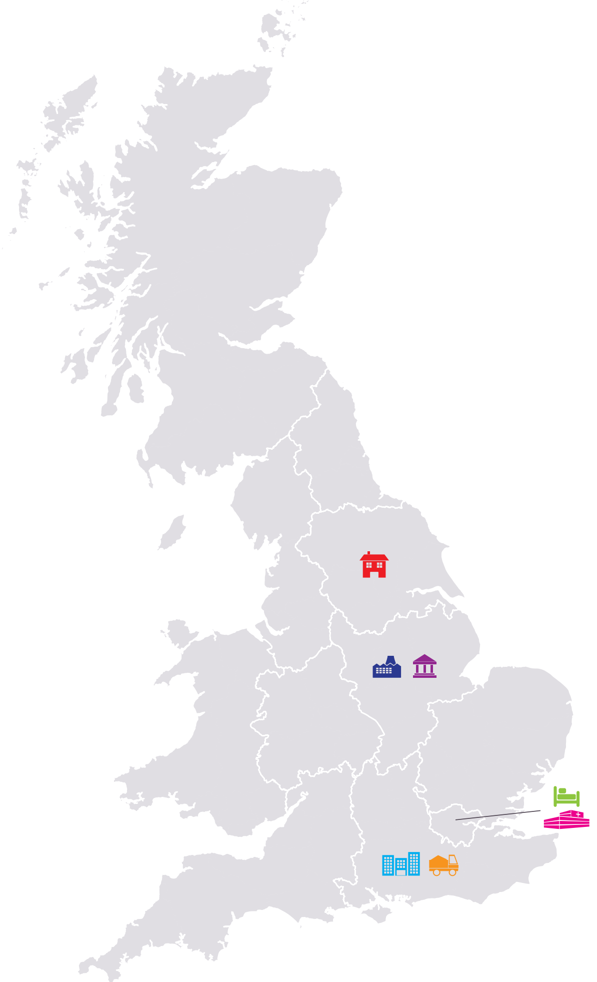
A snippet of this month's regional activity

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



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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
Plot H3 Elephant Park – 228 Houses and Retail Units
£26,300,000

INFRASTRUCTURE
Rampion 400MW Offshore Wind Farm
£1,300,000,000

COMMERCIAL & RETAIL
Sainsburys Supermarket & Hotel – Redhill
£25,000,000

HOTEL, LEISURE & SPORT
The Apex – Ibis Styles Hotel
£7,200,000

INDUSTRIAL
Uniserve Group – Distribution Centre
£100,000,000

MEDICAL & HEALTH
Newham University Hospital – Rainbow Suite
£5,000,000

EDUCATION
The Ruth Gorse Academy
£21,000,000

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Cheshire Oaks, Cheshire,
CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
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RESIDENTIAL UNITS DECLINE IN MAY

The uncertainty surrounding the General Election outcome led to a monthly decline in both residential units and values but growth is still evident over the longer term.

Activity in the residential sector decreased in May with the total number of units awarded 12,060, based on a three month rolling average (see Fig. 3.1). This is an 11.4% decrease compared to April but is 10.2% higher than May 2014, indicating that the residential is still performing strongly over the longer term. The value of projects associated with residential contracts awarded increased by 0.3% between April and May based on a three month rolling average, but is 6.9% lower than May 2014. Taken together these statistics suggest a slowdown in recent months in the sector after its strong performance recently. Given that the long term fundamentals that have been driving growth, in particular help for first time buyers, are set to continue it suggests this is a temporary blip rather than a long term change.

Sector Performance

The latest house price indices for May from Nationwide showed that average house prices are rising at 4.6% annually, a fall from 5.2% in April. This shows that annual house price growth is now running at less than half the level recorded in the middle of 2014. In contrast, the Halifax reported annual house price rises of 8.6% in May, a marginal increase from 8.5% in April. The share prices of the major house builders increased in the weeks after the General Election results gaining on average 15-20% and suggesting the prospects for the industry remain strong.

Projects by region

Yorkshire & Humber is the main location of activity in the residential sector this month, accounting for 15.7% of the value of contracts awarded, an increase of 10.3% from the same month last year

> Residential is still performing strongly over the longer term

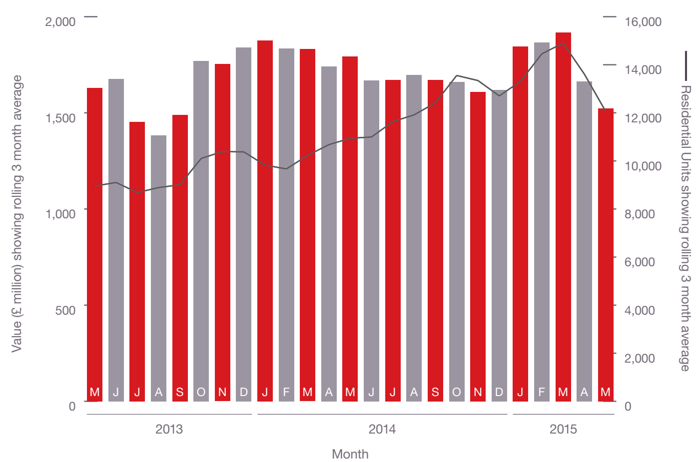

FIG. 3.1

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

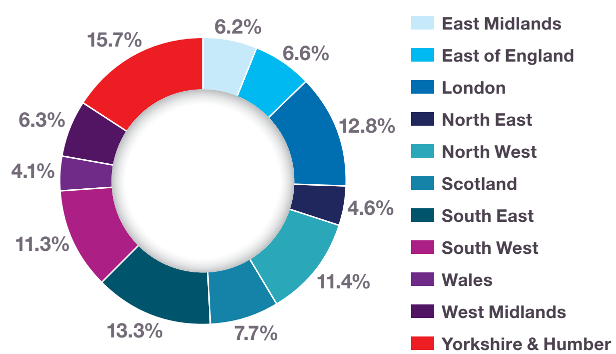

FIG. 3.2

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

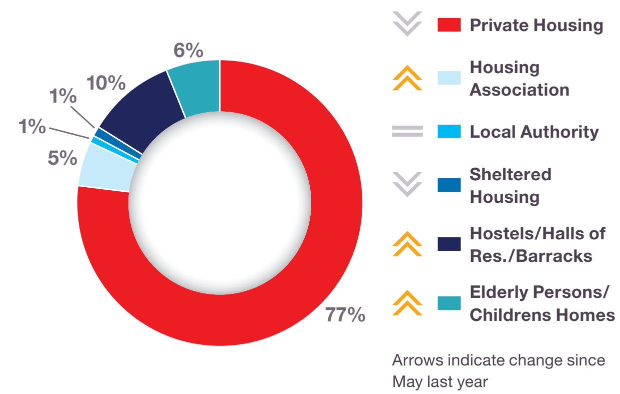

FIG. 3.3

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

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The map and figures show how the activity has changed since May 2014

-1.3%	Scotland		
+0.6%	East Midlands	+1.4%	South East
-1.7%	East of England	+5.5%	South West
-15.3%	London	-2.3%	Wales
+0.7%	North East	+1.4%	West Midlands
+0.7%	North West	+10.3%	Yorkshire & Humber *HOTTEST REGION*

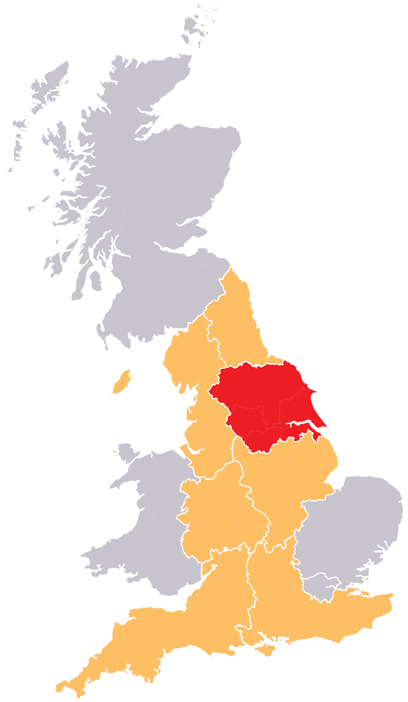

FIG. 3.4

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

(see Fig. 3.2 & 3.4). Contracts such as Fitzalan Square in South Yorkshire which proposes to provide 278 student units at a value of £21 million contribute to the regions share this month. The South East had the next highest proportion of contract award value in May with 13.3% of the total value awarded, an increase of 1.4% from May 2014. Of particular note was the award of the contract to develop 265 houses in East Hall Farm in Murston at a value of £25 million.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing in May (see Fig. 3.3). Private housing accounted for 77% of the value of contracts awarded this month, a decrease of 10% from the corresponding month last year. After private housing, the next largest project type were hostels/halls of residence projects which accounted for 10% of the value awarded, an increase of 4% from the corresponding month last year.

PROJECT IN FOCUS

Plot H3 Elephant Park – 228 Houses and Retail Units £26,300,000

County	London
Primary Category Sector	Residential
Government Region	London
Start Date	June 2015
End Date	June 2017
Contract Award Date	May 2015
Funding	Private
Stage	Detail approval/Contract
Contractor	Lendlease Limited

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T: 0151 353 3500
E: info@barbour-abi.com
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TOP TEN Key Clients

Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	177	2,798
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	222	2,756
3	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	157	2,156
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	101	1,115
5	Berkeley Group Plc/St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	020 3675 1502	32	995
6	Redrow Homes (South Midlands) Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520 044	69	854
7	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	51	789
8	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	65	702
9	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	11	614
10	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	49	541

TOP TEN Key Architects

Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	101	1,156
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	49	857
3	Barton Willmore	The Blade, Abbey Square, Reading, Berkshire, RG1 3BE	0118 943 0000 (CTPS)	30	492
4	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	22	478
5	Maccreanor Lavington Architects	19-21 Nile Street, Islington, London, N1 7LL	020 7336 7353	12	439
6	Pegasus Planning Group	Suite 4B, 113 Portland Street, Manchester, Greater Manchester, M1 6DW	0161 393 3399	22	429
7	Feilden Clegg Bradley Architects	Bath Brewery, Toll Bridge Road, Bath, North East Somerset, BA1 7DE	01225 852 545	10	362
8	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	31	362
9	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, Avon, BS8 3NE	0117 974 3271 (TPS)	15	334
10	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	4	332

TOP TEN Key Contractors

Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	223	2,757
2	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	178	2,414
3	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	163	2,306
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	104	1,150
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	100	1,036
6	Berkeley Group Plc/St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01244 520 044	31	860
7	Redrow Homes (South Midlands) Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520 044	70	831
8	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	48	775
9	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	0161 876 6000	81	735
10	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	45	631

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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www.barbour-abi.com

Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ

T: 0151 353 3500
E: info@barbour-abi.com
@BarbourABI

INFRASTRUCTURE CONTRACT VALUES INCREASE IN MAY

A surfeit of large projects in May saw the value of infrastructure contracts increase and values are significantly higher than this time in 2014.

The value of contracts awarded in the infrastructure sector increased in May with the total value awarded £1.9 billion based on a three month rolling average (see Fig. 4.1). This is a 26.3% increase from the previous month and 71.7% higher than May 2014. In the three months to May the total value of contract awards was £5 billion based on a three month rolling average. This is 46.6% higher than the previous three months and 67.9% higher than the same period in 2014. This indicates a significant improvement on last year's performance and is potentially a boost to overall growth in the construction industry should it continue.

Projects by region

The South East dominated infrastructure contracts in May, accounting for 62.4% of the value awarded, a 58.2% increase on May 2014 (see Fig. 4.2 & 4.4). The contract award for the Rampion offshore wind farm which is valued at £1.3 billion is the principal reason for the regions strong showing in May.

Type of Projects

The impact of this project also means that utilities was the single biggest sector in May accounting for 81% of the total value of contracts awarded (see Fig. 4.3). This is a 48% increase on the May 2014 figure.

> The South East dominated contracts in May, accounting for 62.4% of the value awarded

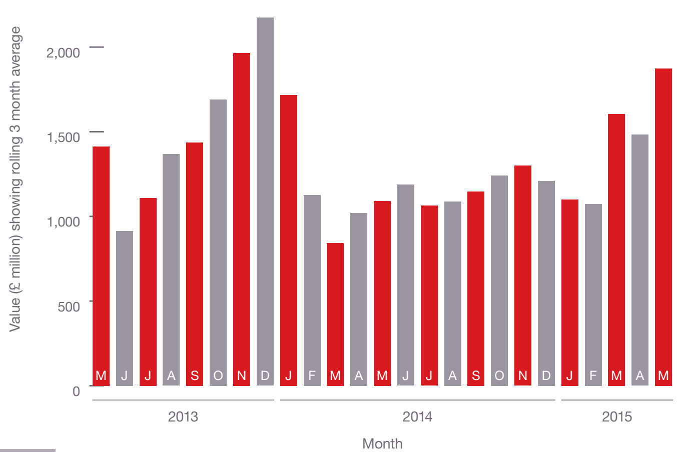

FIG. 4.1

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

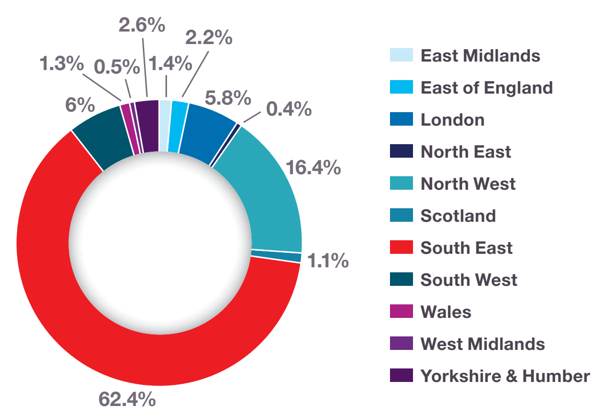

FIG. 4.2

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

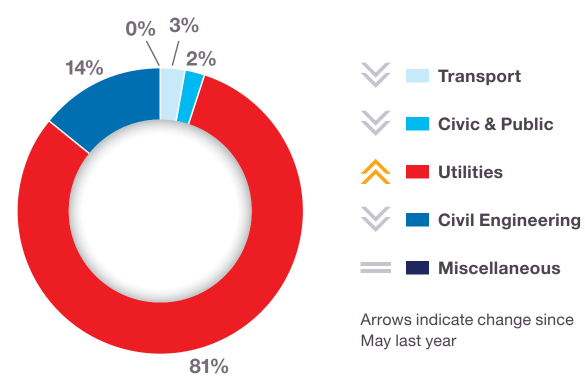

FIG. 4.3

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

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CH65 9HQ

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E: info@barbour-abi.com
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The map and figures show how the activity has changed since May 2014

		-13.6%	Scotland
-1.8%	East Midlands	+58.2%	South East *HOTTEST REGION*
-2.4%	East of England	-7.7%	South West
+3.3%	London	-2.4%	Wales
-25.5%	North East	-1.6%	West Midlands
-6.7%	North West	+0.1%	Yorkshire & Humber

FIG. 4.4

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

Outlook

The Budget 2015 announced that it will invest up to £600 million to support the delivery of super fast broadband. It also confirmed the Government support for the Swansea Bay Tidal Lagoon energy project and planned to undertake a viability assessment for government support for the scheme. The election of a Conservative majority government also means that a number of major infrastructure decisions are set to be made over the course of the next five years with Heathrow expansion, HS2 and additional rail capacity to link the northern regions all proposed.

> A significant improvement on last year's performance

PROJECT IN FOCUS

Rampion 400MW Offshore Wind Farm £1,300,000,000

County	East Sussex
Primary Category Sector	Infrastructure
Government Region	South East
Start Date	June 2015
End Date	June 2018
Contract Award Date	May 2015
Funding	Private
Stage	Confirmed/Contract
Contractor	Vestas Wind Systems

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CH65 9HQ

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E: info@barbour-abi.com
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INFRASTRUCTURE CONTRACT VALUES INCREASE IN MAY

TOP TEN Key Clients
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Transport Scotland	Buchanan House, 58 Port Dundas Road, Glasgow, Strathclyde, G4 0HF	0141 272 7100	7	2,073
2	E.ON Limited	Newstead Court, Little Oak Drive, Annesley, Nottingham, Nottinghamshire, NG15 0DR	024 7618 1684	2	1,324
3	Highways Agency	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	64	1,260
4	Aberdeen City Council	Town House, Broad Street, Aberdeen, Grampian, AB10 1AQ	01224 522000	5	1,186
5	Welsh Assembly Government	Cathays Park, Cardiff, South Glamorgan, CF10 3NQ	0300 060 3300	3	805
6	Battersea Power Station Development Company	Battersea Power Station, 188 Kirtling Street, South Lambeth, London, SW8 5BN	020 7501 0688 (CTPS)	1	600
7	Green Energy Parks Limited	Eco Innovation Centre, Peterscourt, Peterborough, Cambridgeshire, PE1 1SA	01733 348468	1	600
8	Scottish Office	St Andrews House, Regent Road, Edinburgh, Lothian, EH1 3DG	0131 556 8400	1	400
9	DONG Energy AVS	33 Grosvenor Place, Belgravia, Westminster, London, SW1X 7HY	020 7811 5200	2	342
10	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	77	328

TOP TEN Key Architects
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Dickie Associates	Manor Barn, Wilsthorpe, Stamford, Lincolnshire, PE9 4PE	01778 560811	1	600
2	Weston Williamson + Partners	12 Valentine Place, Southwark, London, SE1 8QH	020 7401 8877	1	600
3	Elevation Projects Limited	1st Floor, 16 Wright Street, Hull, Humberside, HU2 8JU	01482 221155	1	150
4	Hawkins Brown Architects	159 St John Street, City, London, EC1V 4QJ	020 7336 8030	2	130
5	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	3	107
6	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	8	91
7	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140	8	70
8	URS Limited	Scott House, Alencon Link Basing View, Basingstoke, Hampshire, RG21 7PP	01256 310200 (CTPS)	5	69
9	Race Cottam Associates Limited	3 Vincent House, Solly Street, Sheffield, South Yorkshire, S1 4BB	0114 273 7050 (TPS)	1	65
10	Stefan Zins Associates Limited	Bedford House, 69-79 Fulham High Street, Fulham, London, SW6 3JW	020 7471 8550	1	63

TOP TEN Key Contractors
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	56	1,619
2	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	18	887
3	Aberdeen Roads Limited	North Point, Exploration Drive, Bridge of Don, Aberdeen, Grampian, AB23 8GX	0800 058 8350	1	745
4	KNM Group	15 Jalan Dagang SB4/1, Taman Sungai Besi Indah, 43300 Seri Kembangan, Malaysia	+60 389 463 000	1	600
5	Ferrovial Agroman Laing O'Rourke JV	10th Floor, BSI Building, 389 Chiswick High Road, London, W4 4AL	020 8750 2100	1	600
6	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	15	340
7	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	17	294
8	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	15	290
9	Costain Group Plc	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	10	287
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	11	280

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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E: info@barbour-abi.com
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COMMERCIAL & RETAIL
DECREASE IN CONTRACT VALUES IN MAY

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

The value of contracts awarded in the commercial & retail sector was £605 million in May based on a three month rolling average (see Fig. 5.1). This is a 17.2% decrease from April and a 33.3% decrease from the May 2014 figure. In the three months to May the value of contracts were 14.1% below the previous three months and 12.3% lower than the same period in 2014, indicating a decrease in activity over the longer term.

Projects by region

The South East was the main location of activity in the sector this month accounting for 30.6% of the value of all contracts awarded, which was 28% higher than May 2014. London was the area that attracted the next highest share of contracts, accounting for 19.4% of the value awarded in May, although this was a 34% decrease from May 2014 (see Fig. 5.2 & 5.4). In the South East, a Sainsbury's supermarket and hotel in Redhill worth £25 million was the largest project in the South East which goes some way in accounting for the regions strong performance in May.

Type of Projects

Offices were the dominant type of project in the sector accounting for 62% of the value of contracts awarded this month, which is 6% higher than May 2014 (see Fig. 5.3). General retailing is the other significant sector with 15% of contract award value, which was a 21% decrease from the May 2014 figure.

> In the three months to May the value of contracts were 14.1% below the previous three months

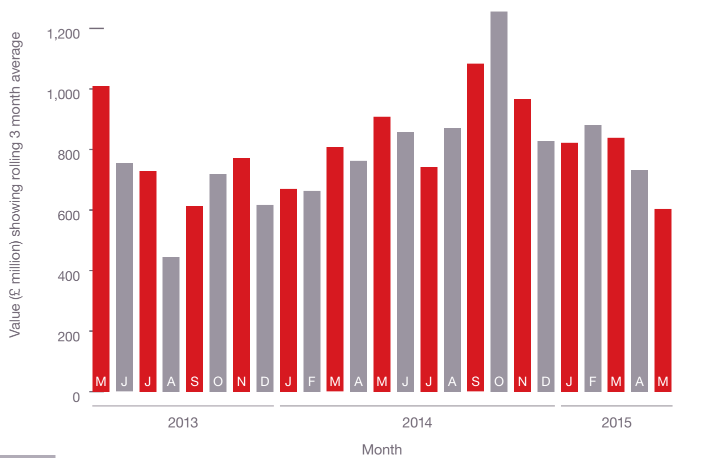

FIG. 5.1

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

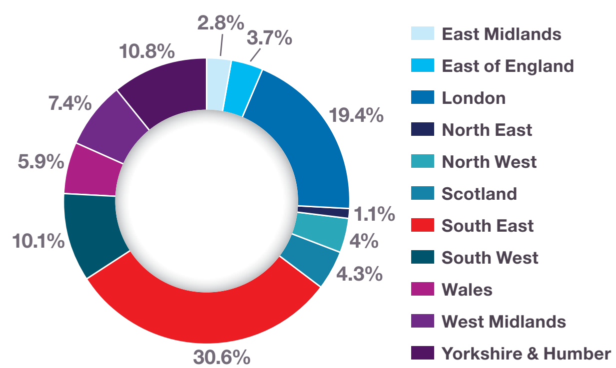

FIG. 5.2

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

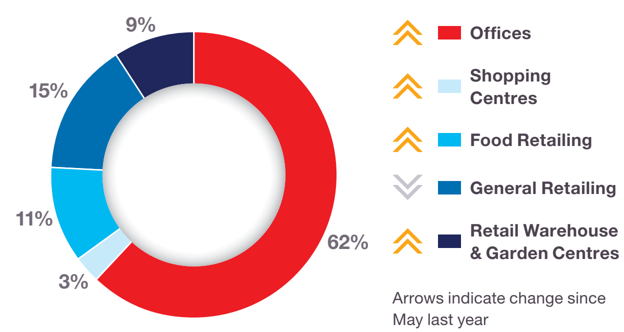

FIG. 5.3

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

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The map and figures show how the activity has changed since May 2014		-0.7%	Scotland
+1.2%	East Midlands	+28.0%	South East *HOTTEST REGION*
-0.1%	East of England	+8.0%	South West
-34.0%	London	+4.2%	Wales
-0.8%	North East	+6.5%	West Midlands
+0.1%	North West	-12.3%	Yorkshire & Humber

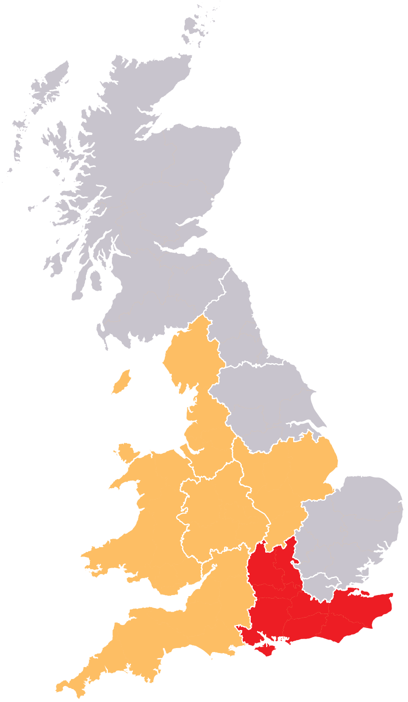

FIG. 5.4

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

"The South East was the main location of activity in the sector this month accounting for 30.6% of the value of all contracts awarded

PROJECT IN FOCUS

Sainsburys Supermarket & Hotel – Redhill £25,000,000

County	Surrey
Primary Category Sector	Commercial & Retail
Government Region	South East
Start Date	July 2015
End Date	November 2016
Contract Award Date	May 2015
Funding	Mixed
Stage	Detail approval/Contract
Contractor	Longcross Construction Limited

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DECREASE IN CONTRACT VALUES IN MAY

TOP TEN Key Clients
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Battersea Power Station Development Company	Battersea Power Station, 188 Kirtling Street, South Lambeth, London, SW8 5BN	020 7501 0688 (CTPS)	2	601
2	Argent Estates Limited	11 Brindley Place, 2 Brunswick Square, Birmingham, West Midlands, B1 2LP	0121 643 7799	2	500
3	The Crown Estate	16 New Burlington Place, Westminster, London, W1S 2HX	020 7851 5000 (CTPS)	6	444
4	Stanhope Plc	Norfolk House, 31 St James Square, Westminster, London, SW1Y 4JR	020 7170 1700	3	371
5	Land Securities Group	5 The Strand, Westminster, London, WC2N 5HR	020 7413 9000 (CTPS)	9	263
6	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	3	210
7	Henderson Global Investors	201 Bishopsgate, City, London, EC2M 3AE	020 3727 8000	11	150
8	Saxon Land BV	117 Fenchurch Street, City, London, EC3M 5DY	020 7410 7300	1	150
9	Mitsui Fudosan	7th Floor, Berger House, 38 Berkeley Square, City, London, W1J 5AE	020 7318 4370 (CTPS)	1	125
10	West London & Suburban Property Investments Limited	25 Savile Row, City, London, W1S 2ER	Not Listed	1	125

TOP TEN Key Architects
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	13	774
2	Glenn Howells Architects	321 Bradford Street, Digbeth, Birmingham, West Midlands, B5 6ET	0121 666 7640 (CTPS)	2	690
3	Wilkinson Eyre Architects	33 Bowling Green Lane, City, London, EC1R 0BJ	020 7608 7900	3	613
4	Allies & Morrison Urban Practitioners	85 Southwark Street, Southwark, London, SE1 0HX	020 7921 0100	2	490
5	Panter Hudspith Architects	4-8 Emerson Street, Southwark, London, SE1 9DU	020 7633 9425	1	440
6	Dixon Jones Limited	2-3 Hanover Yard, Noel Yard, Islington, London, N1 8YA	020 7483 8888	1	440
7	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	2	400
8	Allford Hall Monaghan Morris	2nd Floor, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	5	364
9	Make Architects	13 Fitzroy Street, Westminster, London, W1T 4BQ	020 7636 5151	7	332
10	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555 (TPS)	4	278

TOP TEN Key Contractors
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	25	921
2	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	3	606
3	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	5	528
4	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	4	526
5	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	13	364
6	Lendlease Construction (EMEA) Limited	EMEA Head Office, 20 Triton Street, Regents Place, London, NW1 3BF	0203 430 9000	3	311
7	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	38	300
8	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	20	286
9	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	11	273
10	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	10	244

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

SLIGHT INCREASE IN CONTRACT VALUES IN MAY

The hotel, leisure & sport sector showed monthly increases in contract values but there are declines over the longer term indicating a subdued start to the year.

Contract award levels in the hotel, leisure & sport sector were £397 million in May, based on a three month rolling average (see Fig. 6.1). This was 8% higher than April and 32.1% higher than May 2014. In the three months to May the value of contracts was £1.1 billion, which was 2.2% lower than the previous three months. This was a decrease of 0.6% compared to the same period in 2014 indicating a longer term decline over the past year.

Projects by region

London was the main location for hotel, leisure & sport contracts this month accounting for 51.7% of the value awarded, a 28.9% increase from May 2014 (see Fig. 6.2 & 6.4). The Leicester Square redevelopment project, which is set to provide a hotel, cinema and other leisure uses and has a contract value of £150 million is the largest project in London this month and accounts for its strong performance.

Type of Projects

Due to the activity in the hotel sector this month, the hotels/motels category saw the highest proportion of activity accounting for 75% of contract value awarded in May (see Fig. 6.3). This was a 30% increase from the corresponding month in 2014 indicating an improving hotels market in the UK.

> London was the main location for contracts this month

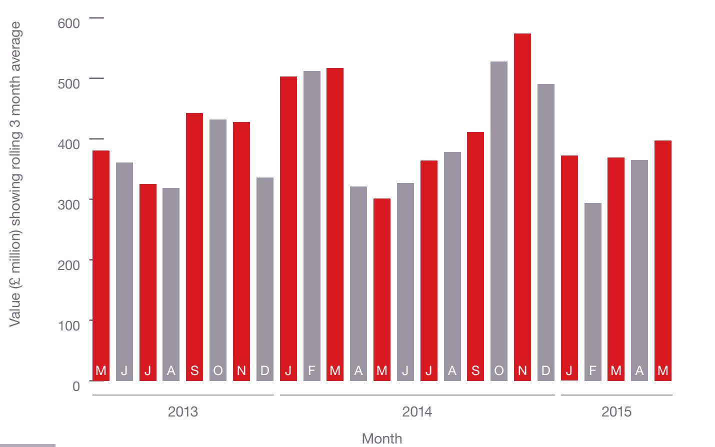

FIG. 6.1

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

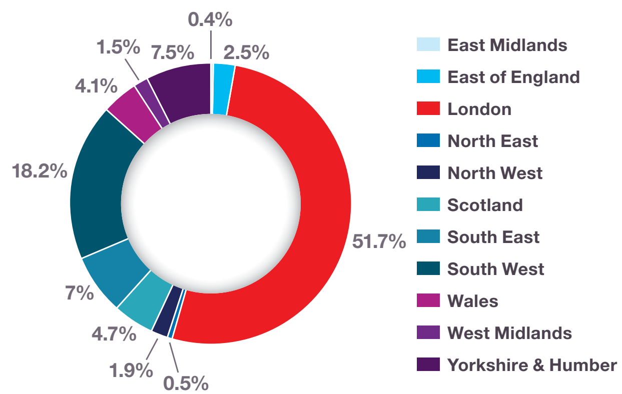

FIG. 6.2

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

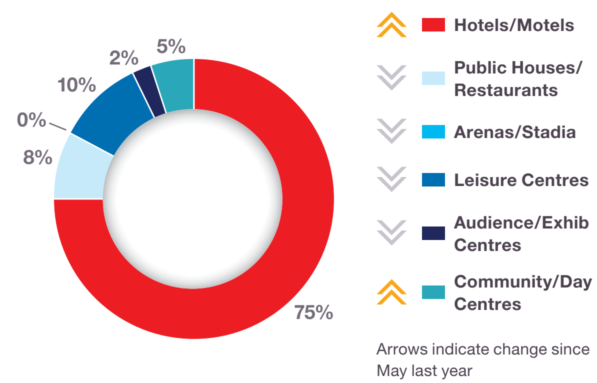

FIG. 6.3

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

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T: 0151 353 3500

E: info@barbour-abi.com

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SLIGHT INCREASE IN CONTRACT VALUES IN MAY

The map and figures show how the activity has changed since May 2014

		-17.8%	Scotland
-0.8%	East Midlands	-2.9%	South East
-11.4%	East of England	+14.8%	South West
+28.9%	London *HOTTEST REGION*	+3.1%	Wales
-0.5%	North East	+0.5%	West Midlands
-9.3%	North West	-4.6%	Yorkshire & Humber

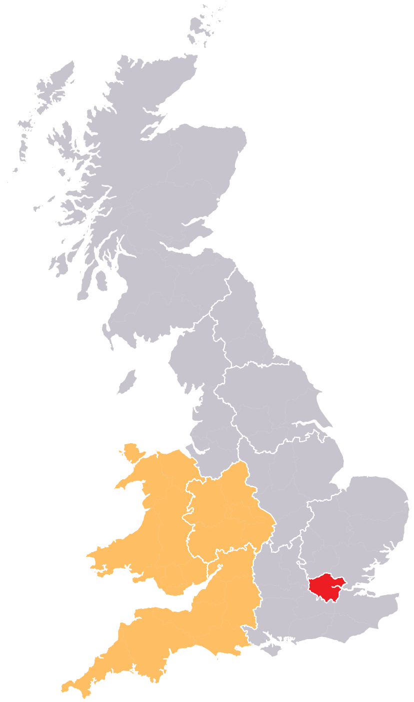
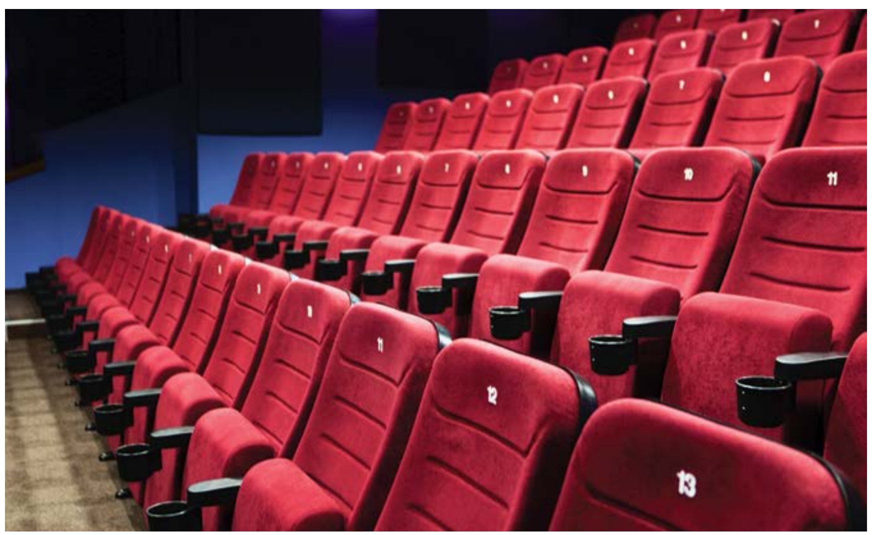


FIG. 6.4

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



> The hotels/motels category saw the highest proportion of activity accounting for 75% of contract value awarded in May

PROJECT IN FOCUS

The Apex – Ibis Styles Hotel
£7,200,000

County	London
Primary Category Sector	Hotel, Leisure & Sport
Government Region	London
Start Date	May 2015
End Date	July 2016
Contract Award Date	May 2015
Funding	Private
Stage	Detail approval/Contract
Contractor	HOC UK Limited

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CH65 9HQ

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TOP TEN Key Clients
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	All England Lawn Tennis and Croquet Club	Church Road, Wimbledon, London, SW19 5AE	020 8944 1066	2	160
2	Radisson Edwardian Hotels Limited	140 Bath Road, Hayes, Middlesex, UB3 5AW	020 8759 6311	1	150
3	Berkeley Group Plc/St James Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	020 3675 1502	1	140
4	Galliard Homes Limited	Sterling House, Langston Road, Loughton, Essex, IG10 3TS	020 8418 1000	2	104
5	Capital Construction & Development Limited	Herschel House, 58 Herschel Street, Slough, Berkshire, SL1 1PG	Not Listed	1	80
6	Soho House Limited	40 Greek Street, Westminster, London, W1D 4EB	020 7734 5188	1	80
7	Liverpool Football Club	Anfield Road, Liverpool, Merseyside, L4 0TH	0843 170 5555 / 0151 263 2361	2	76
8	Premier Inn London Putney Bridge Hotel	3 Putney Bridge Approach, Fulham, London, SW6 3JD	0871 527 8674	28	74
9	Marsh Wall Chelsea LLP	38-40 Chamberlayne Road, Kensal Rise, City, London, NW10 3JE	Not Listed	1	60
10	4C Hotels	13 Wadham Gardens, City, London, NW3 3DN	020 7419 1839	1	60

TOP TEN Key Architects
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	EPR Architects	21 Douglas Street, Barnet, London, SW1P4PE	020 7834 4411	4	213
2	Woods Bagot	46-48 Foley Street, Westminster, London, W1W 7TY	020 7637 6880 (CTPS)	2	170
3	Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	2	151
4	Simpson Architects	5-8 Roberts Place, City, London, EC1R 0BB	020 7549 4000 (CTPS)	1	140
5	Dexter Moren Associates	57d Jamestown Road, Camden Town, London, NW1 7DB	02072 674440	6	116
6	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269 (TPS)	25	109
7	Leach Rhodes & Walker LLP	West Riverside, New Bailey Street, Manchester, Greater Manchester, M3 5AA	0161 833 0211	3	101
8	KKA Architects	Highpoint, Highfield Street, Liverpool, Merseyside, L3 6AA	0151 236 3186 (CTPS)	3	80
9	KSS Group Limited	1 James Street, Westminster, London, W1U 1DR	020 7907 2222	1	75
10	Broadway Malyan	3 Weybridge Business Park, Addlestone Road, Weybridge, Surrey, KT15 2BW	01932 845599 (TPS)	5	71

TOP TEN Key Contractors
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	2	155
2	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	16	133
3	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	14	126
4	Bay Construct Limited	64 Clerkenwell Road, Islington, London, EC1M 5PX	0203 714 7390 / 0113 821 4407	3	108
5	Ardmore Construction Limited	Byrne House, Jeffreys Road, Brimsdown, Enfield, Middlesex, EN3 7UB	020 8344 0300	1	80
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	7	77
7	Carillion Plc	Construction House, 24 Birch Street, Wolverhampton, West Midlands, WV1 4HY	01902 422431	1	75
8	HOC UK Limited	Jubilee House, Townsend Lane, City, London, NW9 8TZ	020 8200 5873	3	74
9	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	10	67
10	Bouygues (UK) Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	4	66

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

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E: info@barbour-abi.com

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INDUSTRIAL

ACTIVITY DECREASES IN THE INDUSTRIAL SECTOR THIS MONTH

The industrial sector experienced a slight decline in contracts awarded in May but the value of work is still significantly higher than the same time in 2014.

Activity in the industrial sector decreased in May with the value of contracts awarded £486 million, based on a three month rolling average (see Fig. 7.1). This equates to a decline of 14.4% on the value in April but is 57.8% above the figure recorded this time last year. In the three months to May the total value of contracts was £1.7 billion which was 14.7% higher the previous three months and 64.8% higher than the same quarter last year. This indicates the strong start to the year that the sector has experienced.

Projects by region

The East Midlands recorded the highest value of activity in May with 26.4% of the contracts awarded, an increase of 3.3% on May 2014 (see Fig. 7.2 & 7.4). Both the Nailstone Colliery Country Park and Warehouse, valued at £90 million and the Grange Park warehouses development in Northamptonshire valued at £20 million are major contributors to this high share of value.

Type of Projects

The types of project awarded in the sector were predominantly in warehouse/storage which accounted for 47% of contract values, an increase of 15% from May 2014 (see Fig. 7.3). Heavy industrial had the second highest proportion of contracts by value in May accounting for 34% of contract value, an increase of 8% from May 2014.

> "The East Midlands recorded the highest value of activity in May

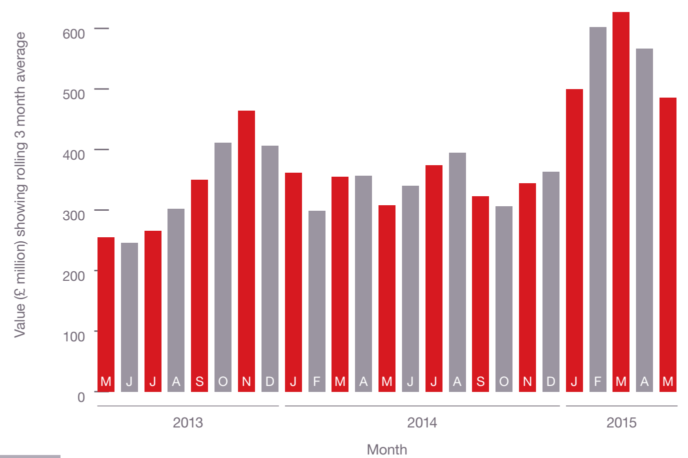

FIG. 7.1

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

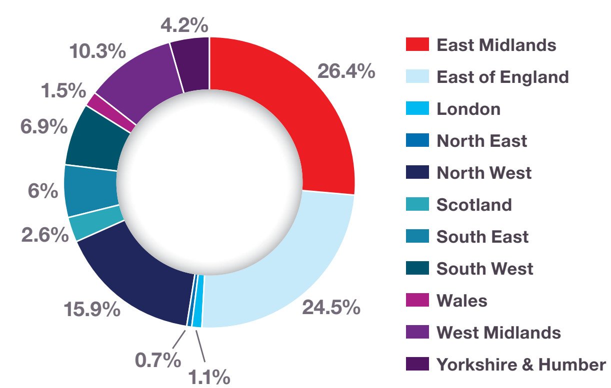

FIG. 7.2

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

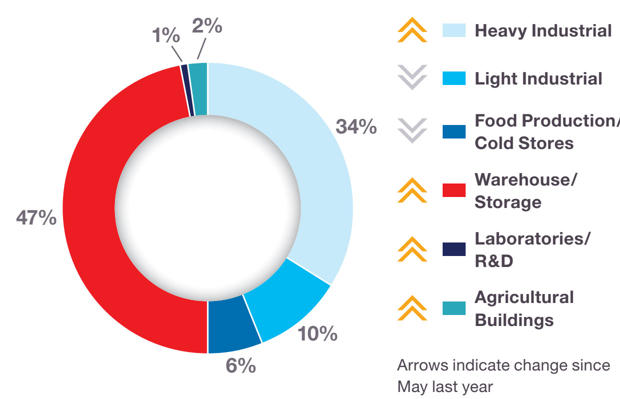

FIG. 7.3

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

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E: info@barbour-abi.com

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ACTIVITY DECREASES IN THE INDUSTRIAL SECTOR THIS MONTH

The map and figures show how the activity has changed since May 2014

-3.3%	Scotland		
+3.3%	East Midlands	-0.3%	South East
+16.0%	East of England *HOTTEST REGION*	+1.7%	South West
-8.2%	London	-0.7%	Wales
-2.9%	North East	-8.7%	West Midlands
+2.9%	North West	+0.2%	Yorkshire & Humber

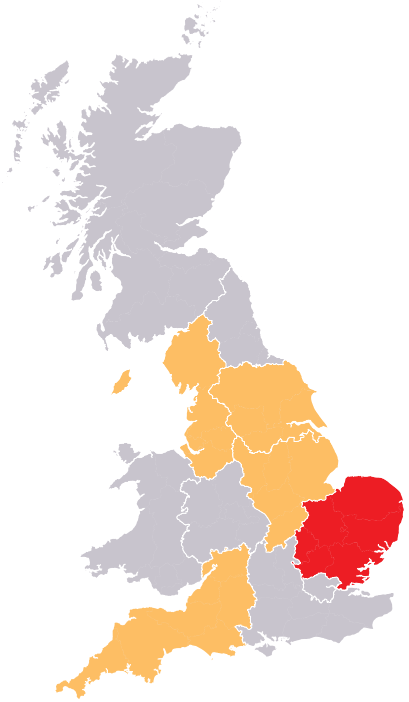

FIG. 7.4

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

> The types of project awarded in the sector were predominantly in warehouse/storage

PROJECT IN FOCUS

www.uniserve.co.uk

Uniserve Group – Distribution Centre
£100,000,000

County	Suffolk
Primary Category Sector	Industrial
Government Region	East of England
Start Date	Quarter 2 2014
End Date	Quarter 2 2017
Contract Award Date	May 2015
Funding	Private
Stage	Detail approval/Contract
Contractor	McLaren Construction

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ACTIVITY DECREASES IN THE INDUSTRIAL SECTOR THIS MONTH

TOP TEN Key Clients
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BAE Systems Marine Limited	Michaelson Road, Barrow in Furness, Cumbria, LA14 1AF	01229 823366	2	330
2	AstraZeneca	2 Kingdom Street, City, London, W2 6BD	020 7604 8000	1	300
3	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	8	234
4	Sellafield Limited	Hinton House, Birchwood Park Avenue, Warrington, Cheshire, WA3 6GR	01925 832000	1	150
5	Institute Of Animal Health	Compton, Newbury, Berkshire, RG20 7NU	01635 578888	2	140
6	Barwood Developments Limited	Grange Park Court, Roman Way, Grange Park, Northampton, Northamptonshire, NN4 5EA	0870 167 7600	3	124
7	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	7	110
8	Bericote Properties Limited	8 Hamilton Terrace, Leamington Spa, Warwickshire, CV32 4LY	01926 315615 (CTPS)	7	100
9	Uniserve Group	Upminster Court, Hall Lane, Upminster, Essex, RM14 1AL	01708 259400	1	100
10	The Macallan Distillery	The Macallan Distillery, Craigellachie, Charlestown of Aberlour, Aberlour, Grampian, AB38 9RX	01340 871471	1	100

TOP TEN Key Architects
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	14	354
2	Herzog & de Meuron UK Limited	65 Clerkenwell Road, City, London, EC1R 5BL	020 7025 2960	1	300
3	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	1	300
4	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	15	218
5	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	8	192
6	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653 027	10	191
7	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	17	143
8	PHP Architects	The Old Rectory, 31 Rectory Lane, Milton Malsor, Northampton, Northamptonshire, NN7 3AQ	01604 858916	7	140
9	Smith Carter	1600 Buffalo Place, Winnipeg MB, Canada	+1 204 477 1260	2	140
10	Chetwood Associates	12-13 Clerkenwell Green, City, London, EC1R 0QJ	020 7490 2400	5	114

TOP TEN Key Contractors
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	21	416
2	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	1	300
3	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	14	269
4	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	10	221
5	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	7	196
6	Shepherd Construction Limited	Frederick House, Fulford Road, York, North Yorkshire, YO10 4EA	01904 634431	3	170
7	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	9	158
8	M & W UK	Unit A2, Metheun South, Bath Road, Chippenham, Wiltshire, SN14 0GT	01249 455150	1	150
9	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	9	99
10	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444	3	98

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

SLIGHT DECREASE IN VALUE OF CONTRACTS IN MAY

The monthly value of medical & health contracts decreased in May and were significantly below the values for May 2014.

Levels of activity in the medical & health sector decreased by 5.7% in May 2015 compared to April, with the total value of contracts awarded £170 million based on a three month rolling average (see Fig. 8.1). This is 23.3% lower than the values in May 2014. In the three months to May the value of contracts decreased by 15.6% on the previous three months, and was 15.6% lower than the same period in 2014 indicating a longer term decrease in the value of contracts awarded in the sector.

Projects by region

London was the main location of development in the sector this month capturing 34.8% of activity, a 14.1% increase from May 2014 (see Fig. 8.2 & 8.4). The Waltham Forest Central Hub project valued at £12 million and the Northwick Park Hospital valued at £9 million were the two main projects in May. The North West also had a high share of medical and health contracts with 28.3% of the value in May, up from 25.7% in May 2014. The major project awarded in May in the North West was the Ashoworth Hospital – Medium Secure Unit which had a value of £36 million.

Type of Projects

Surgeries, health and medical centres and public hospitals accounted for 32% each of the contracts awarded in May 2014 (see Fig. 8.3). For surgeries, health and medical centres this was an increase on May 2014 of 17% while for public hospitals this was a decline of 28% on the previous year.

> Levels of activity decreased by 5.7% in May compared to April

FIG. 8.1

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

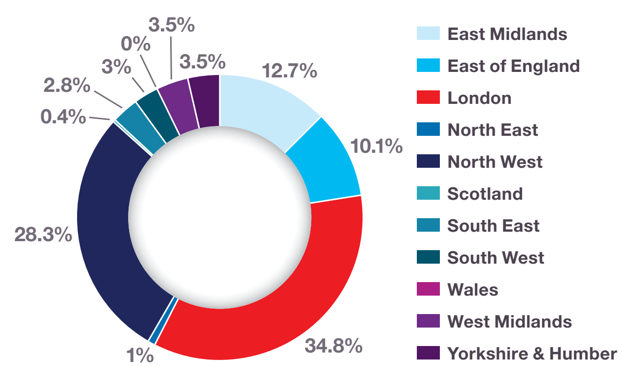
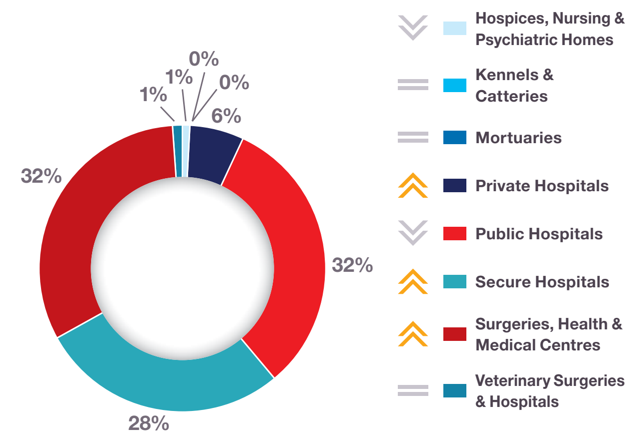


FIG. 8.2

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



Arrows indicate change since May last year

FIG. 8.3

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

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SLIGHT DECREASE IN VALUE OF CONTRACTS IN MAY

The map and figures show how the activity has changed since May 2014

		-7.4%	Scotland
+10.3%	East Midlands	-1.0%	South East
-6.8%	East of England	-2.8%	South West
+14.1%	London	0.0%	Wales
-2.7%	North East	-13.2%	West Midlands
+25.7%	North West *HOTTEST REGION*	-16.2%	Yorkshire & Humber

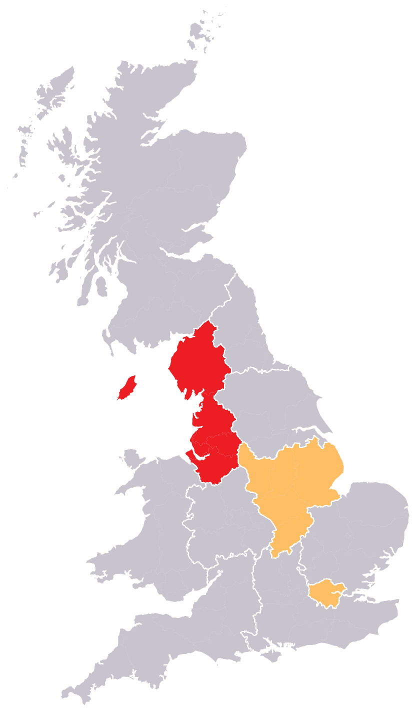

FIG. 8.4
Medical & Health: **Change of Activity by Region** *(since last year)* Source: Barbour ABI

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 Budget in March 2015 indicating this spending will occur.

> "London was the main location of development in the sector this month capturing 34.8% of activity

PROJECT IN FOCUS

Newham University Hospital – Rainbow Suite
£5,000,000

County	London
Primary Category Sector	Medical & Health
Government Region	London
Start Date	May 2015
End Date	October 2016
Contract Award Date	May 2015
Funding	Public
Stage	Detail approval/Contract
Contractor	Vinci Construction UK Limited

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TOP TEN Key Clients
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Dumfries & Galloway Health Board	Crichton Royal Hospital, Dumfries, Dumfries and Galloway, DG1 4TG	01387 244000	1	200
2	Royal Infirmary of Edinburgh NHS Trust	51 Little France Crescent, Old Dalkeith Road, Edinburgh, Lothian, EH16 4SA	0131 536 1000 (CTPS)	2	151
3	Papworth Hospital NHS Trust	Papworth Hospital, Papworth Everard, Cambridge, Cambridgeshire, CB23 3RE	01480 830541	1	140
4	Royal Liverpool and Broadgreen Hospital NHS Trust	Prescot Street, Liverpool, Merseyside, L7 8XP	0151 706 2000	5	121
5	Spire Healthcare Limited	PO Box 62647, 120 Holborn, City, London, EC1P 1JH	0800 169 1777	3	88
6	University of Glasgow	Gilbert Scott Building, University Avenue, Glasgow, Strathclyde, G12 8QQ	0141 330 2000 (TPS)	2	67
7	Birmingham Women's NHS Foundation Trust	Metchley Park Road, Edgbaston, Birmingham, West Midlands, B15 2TG	0121 472 1377	1	63
8	Department Of Health	Richmond House, 79 Whitehall, Westminster, London, SW1A 2NS	020 7210 4850	12	56
9	The Trustees of the London Clinic	20 Devonshire Place, Westminster, London, W1G 6BW	020 7935 4444	1	55
10	University Hospitals of Leicester NHS Trust	Leicester Royal Infirmary, Infirmary Square, Leicester, Leicestershire, LE1 5WW	0300 303 1573	3	54

TOP TEN Key Architects
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	5	205
2	IBI Group	Princes Manor Barn, Reading Road, Harwell, Oxford, Oxfordshire, OX11 0LU	01235 820222 (TPS)	11	194
3	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	6	180
4	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	150
5	HOK International Limited	Qube, 90 Whitfield Street, Westminster, London, W1T 4EZ	020 7636 2006	1	140
6	P & HS Architects	The Old Station, Station Road, Stokesley, Middlesbrough, Cleveland, TS9 7AB	01642 712684	17	113
7	Gilling Dod Architects	The Cruck Barn, Duxbury Park, Chorley, Lancashire, PR7 4AT	01257 260070	13	94
8	Halliday Meecham Partnership	111 Piccadilly, Manchester, Greater Manchester, M1 2HY	0161 661 5566	4	83
9	Murphy Philipps Architects Limited	140 Old Street, City, London, EC1V 9BJ	020 7490 8008	5	67
10	Boswell Mitchell & Johnston	The Hub, 70 Pacific Quay, Glasgow, Strathclyde, G51 1DZ	0141 271 3200	1	64

TOP TEN Key Contractors
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	5	286
2	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	26	243
3	Brookfield Multiplex Construction Europe Limited	99 Bishopsgate, 2nd Floor, City, London, EC2M 3XD	020 7659 3500	7	175
4	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	4	142
5	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	9	121
6	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	18	113
7	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	8	107
8	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	5	104
9	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	7	87
10	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	6	58

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

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EDUCATION
DECREASE IN THE VALUE OF CONTRACTS IN MAY

Contract values in the education sector decreased in May but activity is higher than this time last year indicating better long term performance in this sector.

The value of contracts awarded in the education sector was £604 million in May based on a three month rolling average, a 0.2% decrease from April (see Fig. 9.1). This figure was 4.9% lower than May 2014 indicating a light slowdown in the sector this month. The values of contract awards in the three months to May were 3.3% higher than the same period last year, showing the longer term growth in contracts awarded.

Projects by region

The East Midlands accounted for the largest proportion of contracts awarded in May, with 20.2% of the value of contracts awarded. This was a 14.7% increase on the equivalent month in 2014 (see Fig. 9.2 & 9.4). A £90 million project at the University of Northampton Waterside Campus was major a part of the reason for the East Midlands strong performance in May.

Type of Projects

Colleges/universities were the sub sector with the largest proportion of contracts in May 2015 accounting for 34% of total value awarded. This was a 1% decrease on the proportion in May 2014 (see Fig. 9.3).

> "The East Midlands accounted for the largest proportion of contracts awarded in May

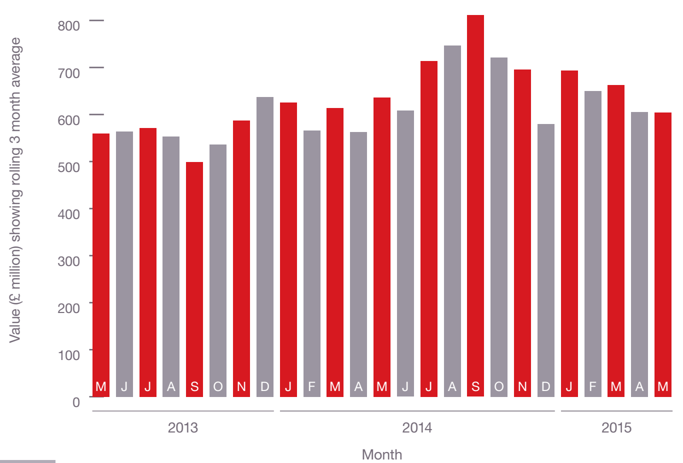

FIG. 9.1
Education: **Project Value showing 3 month moving average** Source: Barbour ABI

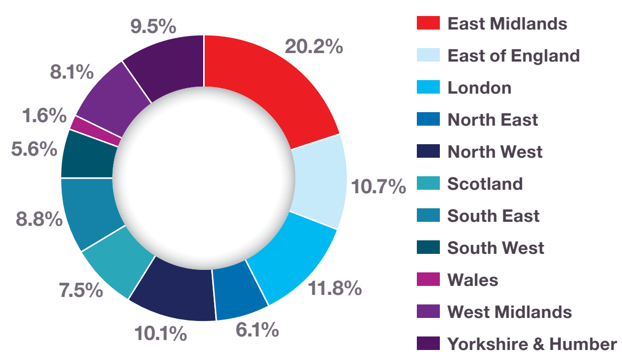

FIG. 9.2
Education: **Value of Contracts by Region** Source: Barbour ABI

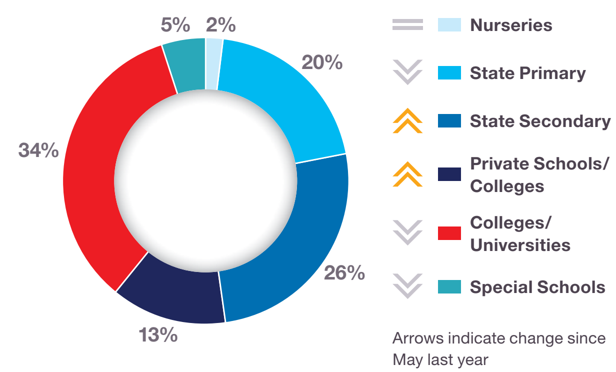

FIG. 9.3
Education: **Type of Projects Awarded** Source: Barbour ABI

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DECREASE IN THE VALUE OF CONTRACTS IN MAY

The map and figures show how the activity has changed since May 2014			
+14.7%	East Midlands *HOTTEST REGION*	-13.5%	Scotland
+7.1%	East of England	-13.5%	South East
+1.2%	London	-0.7%	South West
+2.9%	North East	-0.4%	Wales
+2.8%	North West	-2.2%	West Midlands
		+1.5%	Yorkshire & Humber

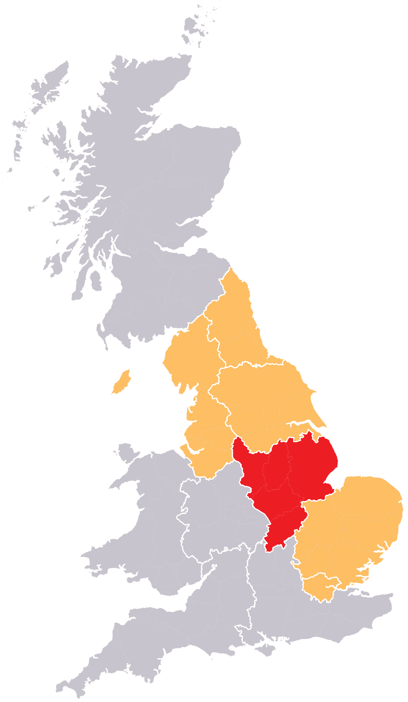

FIG. 9.4

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

Outlook

In the Budget 2015 the Government announced a series of measures that may impact the value of contracts awarded in the Education sector in the coming years. These included:

- **Introducing income-contingent loans of up to £25,000 to support PHDs and research-based masters degrees**

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

PROJECT IN FOCUS

The Ruth Gorse Academy
£21,000,000

County	West Yorkshire
Primary Category Sector	Education
Government Region	Yorkshire & Humber
Start Date	June 2015
End Date	June 2017
Contract Award Date	May 2015
Funding	Public
Stage	Detail planning/Contract
Contractor	BAM Construction

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E: info@barbour-abi.com
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DECREASE IN THE VALUE OF CONTRACTS IN MAY

TOP TEN Key Clients
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Department For Education	Castle View House, East Lane, Runcorn, Cheshire, WA7 2AA	0370 000 2288	71	666
2	University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	13	266
3	Imperial College London	Estates Division, South Kensington Campus, Exhibition Road, South Kensington, London, SW7 2DB	020 7589 5111 (CTPS)	3	152
4	Kent County Council	County Hall, County Road, Maidstone, Kent, ME14 1XQ	03000 414141	31	112
5	Dumfries & Galloway Council	Militia House, English Street, Dumfries, Dumfries and Galloway, DG1 2HR	0303 333 3000	6	103
6	Fife Council Building Services	Fife House, North Street, Glenrothes, Fife, KY7 5LT	0345 155 0000	6	94
7	University of Cambridge	74 Trumpington Street, Cambridge, Cambridgeshire, CB2 1RW	01223 337770 (CTPS)	7	93
8	University of Northampton	Boughton Green Road, Northampton, Northamptonshire, NN2 7AL	01604 735500 (CTPS)	2	92
9	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	12	81
10	Cambridgeshire County Council	Castle Court, Shire Hall, Castle Hill, Cambridge, Cambridgeshire, CB3 0AP	0345 0455 200	10	80

TOP TEN Key Architects
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, Avon, BS8 3NE	0117 974 3271 (TPS)	36	272
2	AHR	Norwich Union House, High Street, Huddersfield, West Yorkshire, HD1 2LR	01484 537411 (TPS)	42	255
3	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	2	245
4	Mecanoo Architecten	Oude Delft 203, 2611 HD Delft, Holland	+31 15 279 8100	1	225
5	Atkins	Woodcote Grove, Ashley Road, Epsom, Surrey, KT18 5BW	01372 726140	24	223
6	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	29	199
7	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	24	174
8	Building Design Partnership	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	10	158
9	Holmes Miller	89 Minerva Street, Glasgow, Strathclyde, G3 8LE	0141 204 2080	10	153
10	PLP Architecture	2 Seething Lane, City, London, EC3N 4AT	020 3006 3900	1	150

TOP TEN Key Contractors
Jun 2014 – May 2015

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	99	531
2	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	90	481
3	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	68	422
4	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	35	416
5	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	58	389
6	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	46	364
7	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	10	180
8	Balfour Beatty Group Limited	130 Wilton Road, Westminster, London, SW1V 1LQ	020 7216 6800	26	164
9	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	14	160
10	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861 000	18	153

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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Barbour ABI
www.barbour-abi.com
Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ
T: 0151 353 3500
E: info@barbour-abi.com
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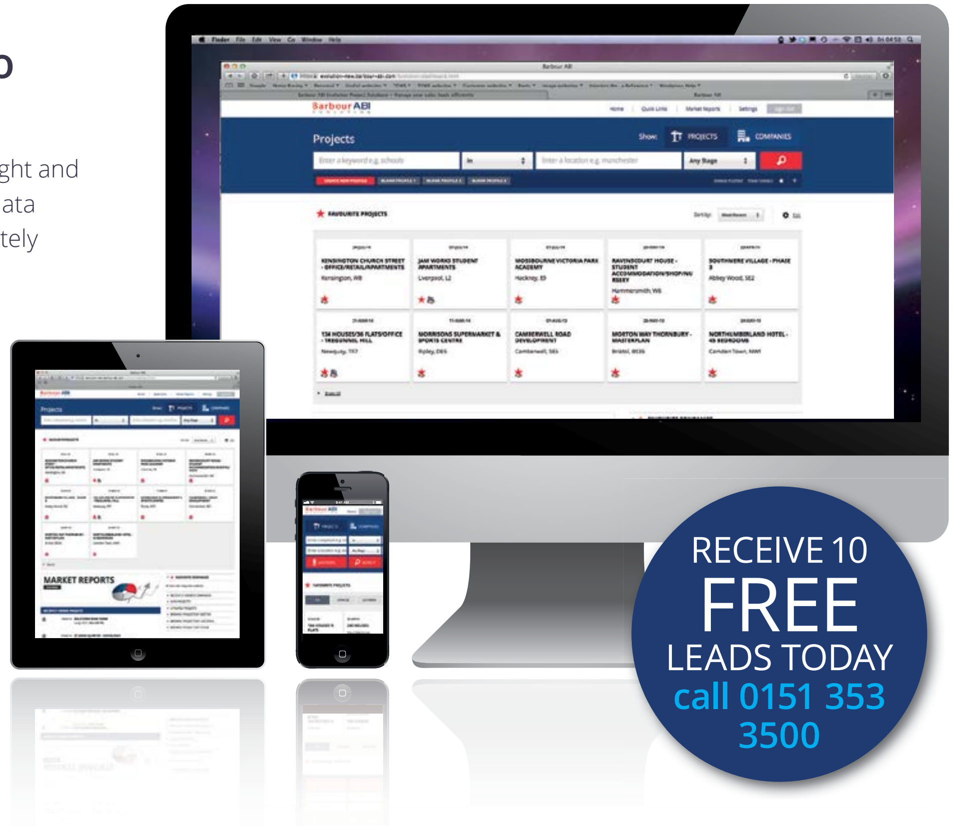

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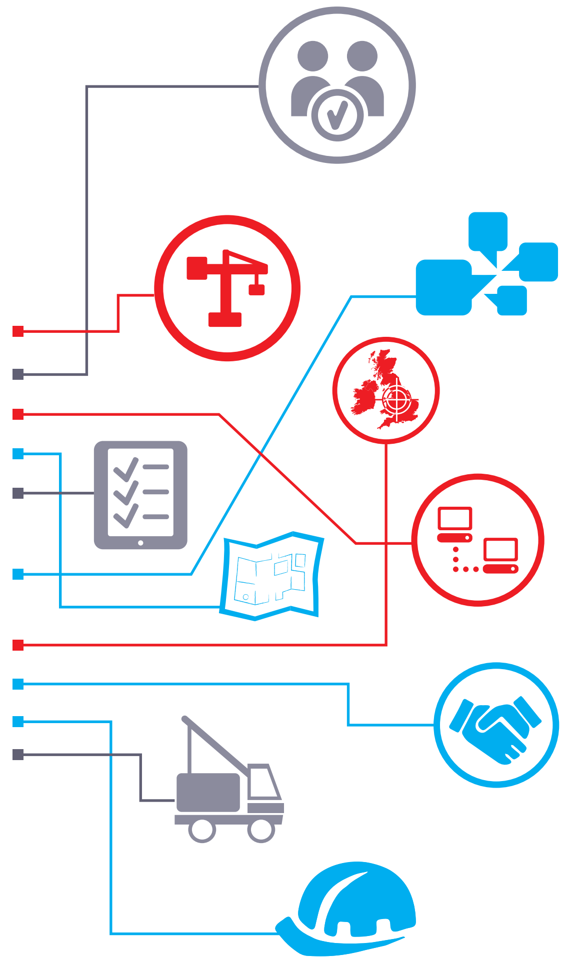

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Hinderton Point, Lloyd Drive,
Cheshire Oaks, Cheshire,
CH65 9HQ
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@BarbourABI