economic & construction MARKET REVIEW

Barbour ABI | Building | bd

APRIL 2016

Economic Context

Major announcements and developments in the UK economy this month.

SKIP TO THIS SECTION

The Construction Sector

The main economic headlines in the construction industry this month.

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Sectors in Detail

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

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ABOUT US

SPECIALIST PROVIDER OF CONSTRUCTION INTELLIGENCE

Michael Dall

Michael is Barbour ABI's Lead Economist specialising in construction and the built environment. He leads on Barbour ABI's research and outputs on the construction sector assessing the trends and developments which impact upon it. Michael is also a regular contributor to Building magazine, sits on the current CPA Forecasting Panel as well as being frequently noted in construction trade and the national press.

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Bespoke Research and Intelligence

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

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

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

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

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Provider of the Government's Construction and Infrastructure Pipeline

HM Government

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

Office for National Statistics

construction products association

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ECONOMIC CONTEXT

DOWNWARD REVISION TO UK ECONOMIC GROWTH FORECAST

The Budget was announced last month in what was the first sole Conservative budget since 1997.

It set the course of further austerity over the course of this Parliament with the projection that the UK deficit will be eradicated by 2018/19. The majority of headline measures focussed on income tax threshold changes and a new proposed "sugar tax" on confectionery and fizzy drinks.

Within the Budget the Office for Budget Responsibility (OBR) updated its economic forecasts for the UK in the upcoming years with its estimate for growth this year now 2.0%, down from the 2.4% forecast in the Autumn Statement. The forecast for 2017 was also revised downwards with an estimate of 2.2% growth, a decrease from the 2.5% figure predicted in December. The OBR now think that growth will continue at 2.1% from 2018 until 2020 (see Fig. 1.1).

GDP	2015	2016	2017	2018	2019	2020
Budget 2016	2.2	2.0	2.2	2.1	2.1	2.1
Autumn Statement	2.4	2.4	2.5	2.4	2.3	2.3

Fig. 1.1 **GDP** Source: OBR/ONS

CPI (Inflation)	2015	2016	2017	2018	2019	2020
Budget 2016	0.0	0.7	1.6	2.0	2.1	2.0
Autumn Statement	0.1	1.0	1.8	1.9	2.0	2.0

Fig. 1.2 **CPI (Inflation)** Source: OBR

Inflation forecasts were also reduced for 2016 from 1.0% to 0.7% which is significantly below the target of 2.0%. The OBR's inflation target of 2.0% is predicted to be met in 2018, a year earlier than the Autumn Statement predicted (see Fig. 1.2).

Average earnings growth forecasts were also revised downwards with the OBR revising its forecasts to 2.6% wage growth this year, when it expected the figure to be 3.4% when the Autumn Statement was announced in December. Wages are therefore forecast to rise above the level of inflation this year and this is forecast to continue for the rest of period, with average earnings growth of 3.6% estimated in 2020 (see Fig. 1.3).

Unemployment forecasts remained positive in the Budget with downward revisions since the Autumn Statement. Unemployment in 2016 is estimated to be 5.0% this year, remaining at that level in 2017. It is then set to rise to 5.3% in 2019 and stay at that level in 2020 (see Fig. 1.4).

Average Earnings	2015	2016	2017	2018	2019	2020
Budget 2016	2.3	2.6	3.6	3.5	3.4	3.6
Autumn Statement	2.6	3.4	3.7	3.6	3.7	3.9

Fig. 1.3 **Average Earnings** Source: OBR

Unemployment Rate	2015	2016	2017	2018	2019	2020
Budget 2016	5.4	5.0	5.0	5.2	5.3	5.3
Autumn Statement	5.5	5.2	5.2	5.3	5.4	5.4

Fig. 1.4 **Unemployment Rate** Source: OBR

The many policy measures announced in the statement included:

- **Extra £700m announced for flood defences**
- **£300m for transport projects – including funds for HS3 and Crossrail 2**
- **More than £230m earmarked for road improvements in the north of England, including upgrades to M62**
- **The delivery of 13,000 affordable homes two years early by bringing forward £250 million of capital spending to 2017-18 and 2018-19**
- **Starter Homes Land Fund prospectus inviting local authorities to access £1.2bn of funding to remediate brownfield land for housing**
- **Consultation on increasing transparency in the property market**
- **HCA working with Network Rail on releasing land for housing and commercial schemes**
- **Legislation to make it easier for local authorities to work together to create garden towns**
- **East Anglia and the West of England (Bristol and Bath) to get combined authorities**
- **Osborne has opened negotiations with Edinburgh and Swansea over new City Deals**
- **New Shakespeare North theatre on the site of the first permanent theatre outside of London**
- **The carbon reduction commitment – a mandatory emissions reduction scheme for large organisations – has been scrapped**
- **Stamp duty reform for commercial properties**
- **Small businesses will be exempt from business rates up to £15k in revenue. 600,000 small businesses will pay no rates at all**
- **Corporation tax to be cut to 17% by 2020**

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THE CONSTRUCTION SECTOR

CONTRACTS AWARDED GROW BY 9% IN MARCH

The construction sector remains in fairly rude health despite monthly fluctuations.

CPA Forecasts

The Construction Products Association recently updated its forecasts for 2016 and beyond and the industry is now predicted to grow by 3.6% this year and 4.1% next year on the back of continuing strength in the new build residential sector and increasing activity in the commercial and infrastructure sectors (see Fig. 2.1).

Construction Activity

The latest figures from the ONS show that the construction sector in the UK declined by 0.3% between January and February 2016. Comparing February output levels with the same month in 2015 showed an increase of 0.3% (see Fig. 2.2). This fall was unexpected but it should be noted that the monthly figures for construction output are often volatile and the previous three months data had been significantly revised upwards.

	Output	Growth
2014	126,685	7.5%
2015 (e)	131,609	3.9%
2016 (f)	136,357	3.6%
2017 (f)	142,013	4.1%
2018 (p)	147,950	4.2%
2019 (p)	153,937	4.0%

Fig. 2.1 **Forecasts** Source: Construction Products Association

It is clear that the main reason for the fall this month was the reduction in industrial activity which declined by 9.7% compared to February 2015 and 13.8% compared to January 2016. New Private Housing increased by 10.6% from February 2015 and was up by 3.9% compared to January 2016. Public housing output declined by 18.6% compared to February 2015 and 2.1% compared to January 2016 though this is a significantly smaller sector than private housing. This highlights that the growth patterns within the industry are still reliant on private housing.

	% change	
	February 2015 – February 2016	**January 2016 – February 2016**
Total All Work	**0.3**	**-0.3**
All New Work	**0.0**	**-0.2**
Public Housing	-18.6	-2.1
Private Housing	10.6	3.9
Infrastructure	-5.3	-1.7
Public (ex Infrastructure)	-1.0	-1.8
Private Industrial	-13.8	-9.7
Private Commercial	0.4	-0.6
Repair & Maintenance	**0.8**	**-0.5**
Public Housing	-0.3	4.4
Private Housing	4.5	-3.6
Non-Housing	-1.3	0.2

Fig. 2.2 **Construction Activity by Sector** *(chained volume measure)* 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 123 for March (see Fig. 2.3). This is a slight decrease from last month but continues to support the view that overall activity in the industry remains strong.

Construction Sector

According to Barbour ABI data on all contract activity, March witnessed an increase in construction levels with the value of new contracts awarded at £6.1 billion, based on a three month rolling average (see Fig. 2.5). This is a 9% increase from February and a 1.7% decrease on the value recorded in March 2015. The number of construction projects within the UK in March decreased by 4.7% on February, and were 1.2% lower than March 2015.

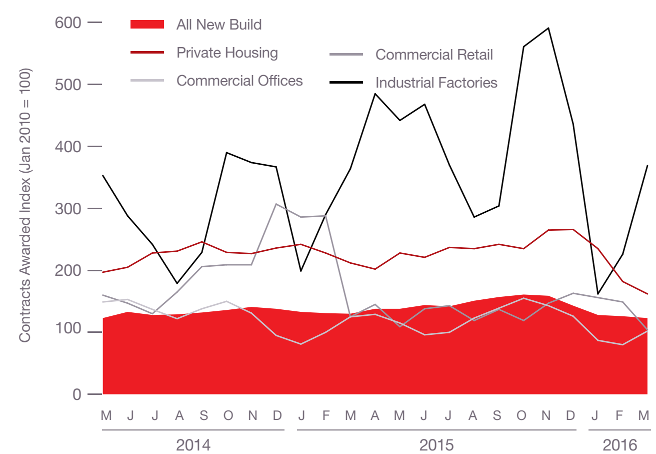

Fig. 2.3 **Contracts Awarded** Source: CPA/Barbour ABI

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CONTRACTS AWARDED GROW BY 9% IN MARCH

Projects by Region

The majority of the contracts awarded in March by value were in London, accounting for 25% of the UK total. This is followed by the South East with 11% of contract award value (see Fig. 2.4). The main reason for London's figures this month was the award of the engineering partner for the HS2 scheme valued at £350 million. In addition the contract for the construction of the much debated Thames Garden Bridge which has a value of £150 million attached to it. Awarded to Bouygues it is sure to continue to be the centre of much controversy but the construction contractor is in place for its development.

> London accounted for 25% of the UK total

Types of Project

Residential had the highest proportion of contracts awarded by value in March with 31% of the total. The infrastructure sector accounted for 24% of the contract value awarded (see Fig. 2.6). This is an indication of the continuing strength of the residential sector within construction, showing that while the top end of the residential market appears to be cooling activity in the new build market remains strong.

> March witnessed an increase in construction levels with the value of new contracts awarded at £6.1 billion

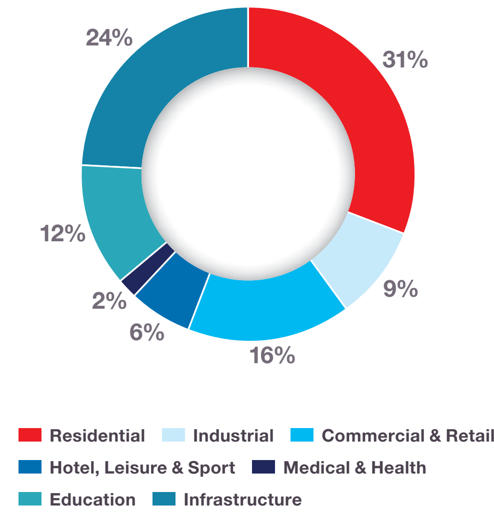
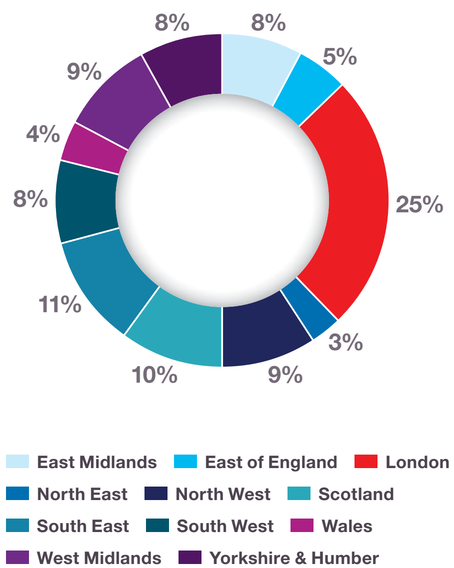


Fig. 2.6 **Type of Projects** Source: Barbour ABI



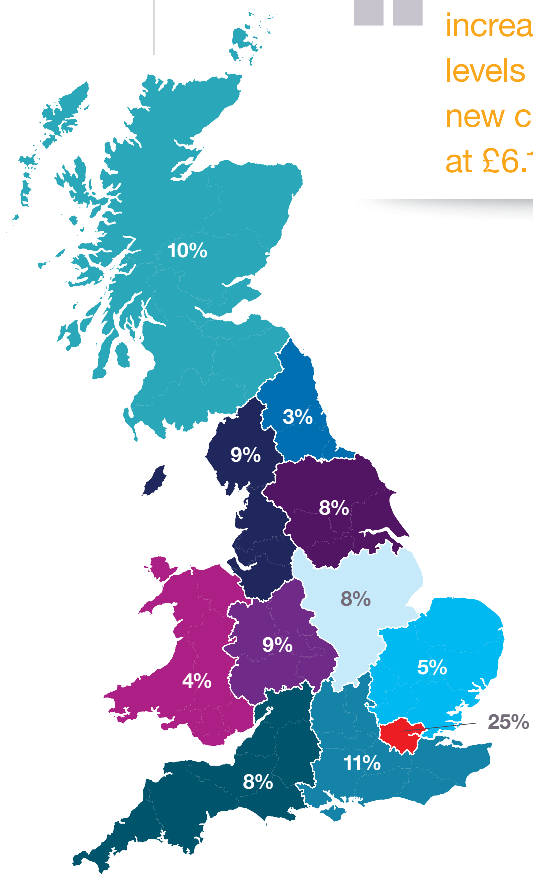


Fig. 2.4 **Locations of Contracts Awarded** Source: Barbour ABI

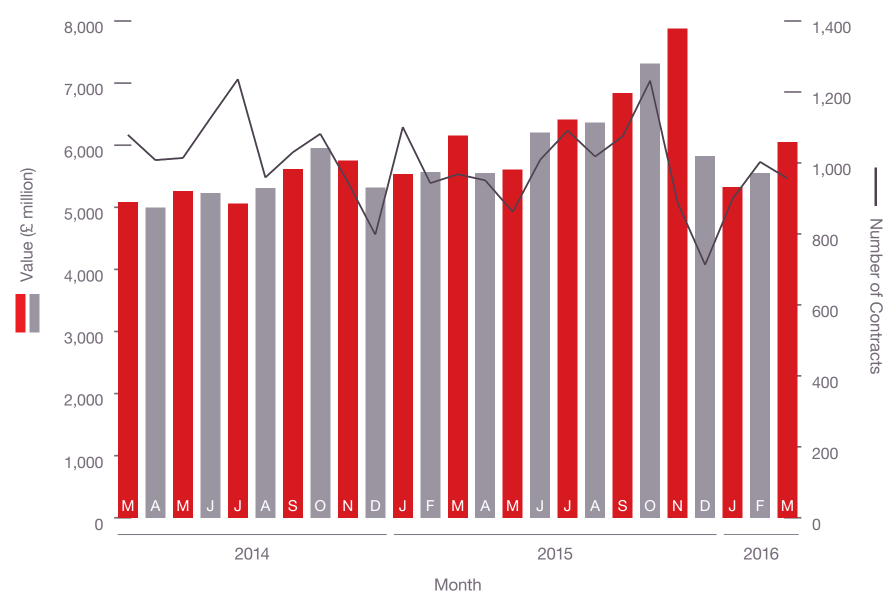


Fig. 2.5 **Construction Activity Trends** Source: Barbour ABI

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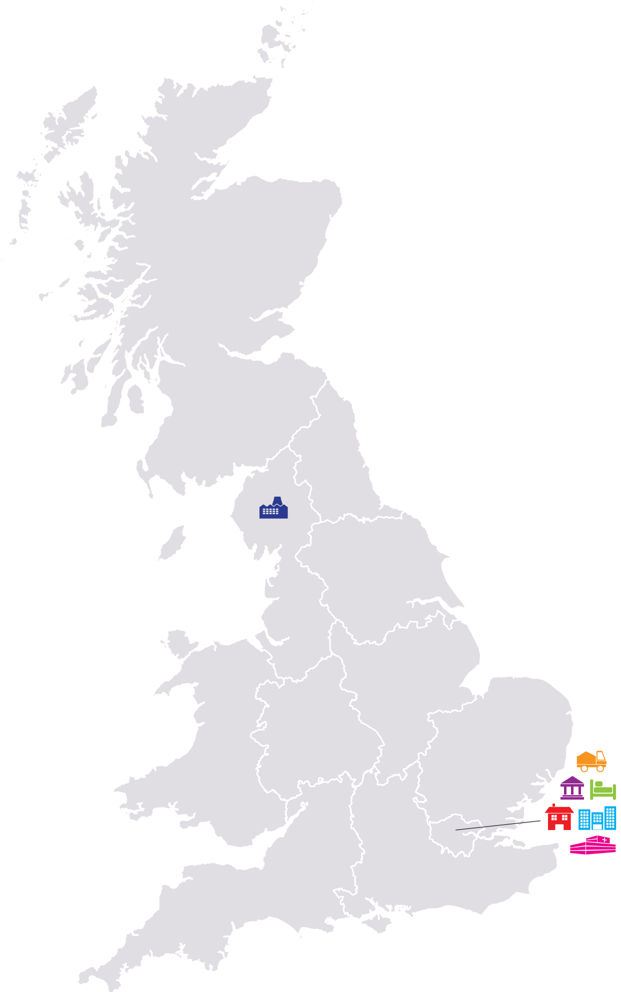
A snippet of this month's regional activity

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



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

PROJECTS IN FOCUS THIS MONTH

Take a look at these construction projects in focus this month.
Click on one of the projects below to skip to that page.

RESIDENTIAL
One Palace Street
£90,000,000

INFRASTRUCTURE
Garden Bridge – Victoria Embankment at Temple to South Bank
£150,000,000

COMMERCIAL & RETAIL
Waterloo Street – HFD Group Limited – Grade A Office
£90,000,000

HOTEL, LEISURE & SPORT
Paradise Street Hotel
£35,000,000

INDUSTRIAL
Ansty Technology Park – FANUC Research Facility
£12,000,000

MEDICAL & HEALTH
The Greenwood Centre – Greenwood Place & Highgate Day Centre
£14,000,000

EDUCATION
Copperas Hill – Liverpool – University Village
£70,000,000

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RESIDENTIAL

INCREASE IN VALUE OF RESIDENTIAL CONTRACTS

The residential sector experienced an increase in the value of residential projects reaching contract award stage in March.

Activity in the residential sector increased in March with the total value of projects valued at £1.9 billion based on a three month rolling average (see Fig. 3.1). This is a 6.4% increase compared to February and is 0.8% higher than March 2015. The number of units associated with residential contracts awarded decreased 3.5% between February and March based on a three month rolling average, and are 32.3% lower than March 2015. This demonstrates the lower amount of new contract activity in residential over recent months.

Sector Performance

The latest house price indices for March from Nationwide showed that average house prices are rising at 5.7% annually, an increase from 4.8% in February. This means that the rate of house price growth has remained between 3% and 6% since the summer of last year. The Halifax reported annual house price rises at 10.1% in March, up from 9.7% in February.

Projects by region

London is the main location of activity in the residential sector this month, accounting for 20% of the value of contracts awarded, a decrease of 9.6% from the same month last year (see Fig. 3.2 & 3.4). Contracts such as One Palace Street contribute to London's share this month. This contract is valued at £90 million and is set to provide 72 units in the area around Buckingham Palace.

> "Average house prices are rising at 5.7% annually

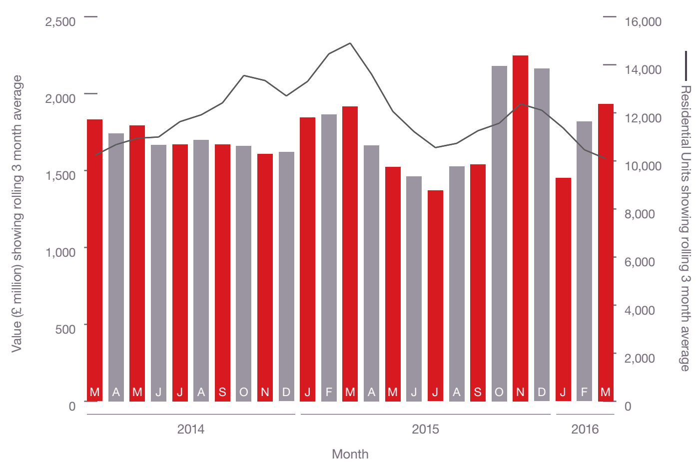

FIG. 3.1

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

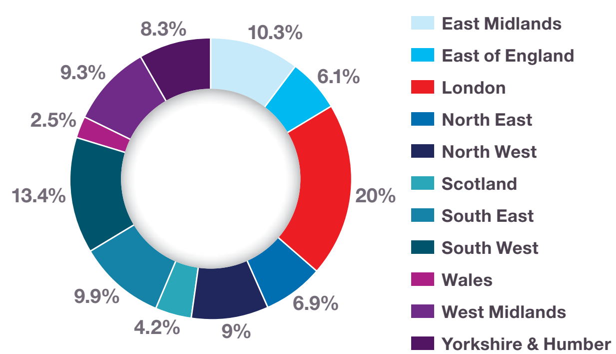

FIG. 3.2

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

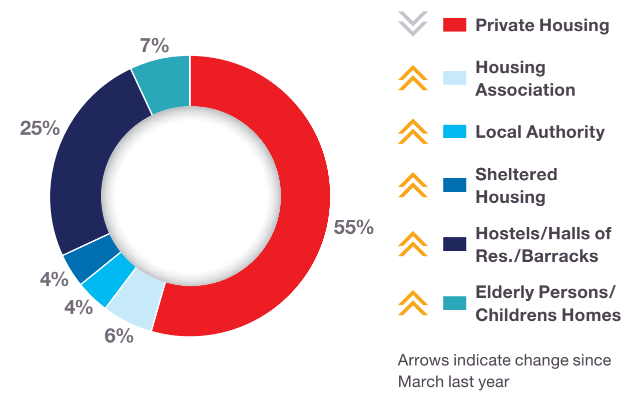

FIG. 3.3

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

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INCREASE IN VALUE OF RESIDENTIAL CONTRACTS

The map and figures show how the activity has changed since March 2015			-0.6%	Scotland	
+2.2%	East Midlands		-1.7%	South East	
-3.6%	East of England		+7.4%	South West *HOTTEST REGION*	
-9.6%	London		+0.6%	Wales	
+5.5%	North East		+3.6%	West Midlands	
-4.7%	North West		+0.9%	Yorkshire & Humber	

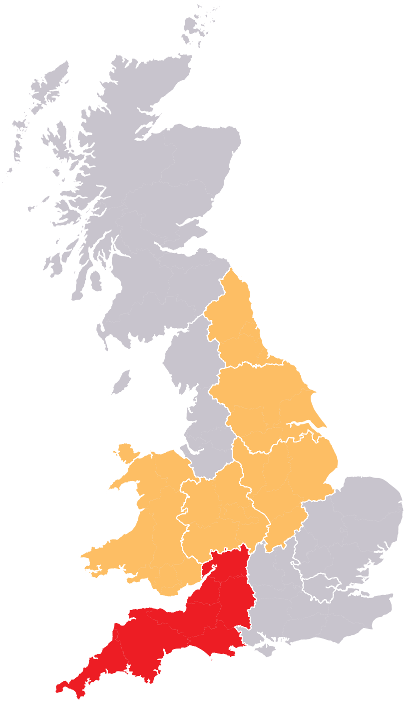

FIG. 3.4

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

Another contract awarded in London this month was a residential scheme in Harrow at College Lane which is looking to deliver 318 houses at a value of £70 million. The South West had the next highest proportion of contract award value in March with 13.4% of total value awarded, an increase of 7.4% from March 2015. Of particular note was the award of the contract to develop 398 houses in Chichester at a value of £41 million.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing this month. Private housing accounted for 55% of the value of contracts awarded this month, a decrease of 25% from the corresponding month last year. After private housing, the next largest project type were hostels which accounted for 25% of the value awarded, an increase of 6% from the corresponding month last year (see Fig. 3.3).

> London is the main location of activity in the residential sector this month, accounting for 20% of the value of contracts awarded

PROJECT IN FOCUS

One Palace Street
£90,000,000

County	London
Primary Category Sector	Residential
Government Region	London
Start Date	March 2016
End Date	March 2019
Contract Award Date	March 2016
Funding	Private
Stage	Detail Approval
Contractor	Balfour Beatty

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INCREASE IN VALUE OF RESIDENTIAL CONTRACTS

TOP TEN Key Clients
Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	206	2,349
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	155	2,266
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	149	1,671
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	93	1,149
5	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	63	783
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	65	699
7	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	46	676
8	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	57	668
9	St Modwen Developments Plc	Park Point, 17 High Street, Longbridge, Birmingham, West Midlands, B31 2UQ	0121 222 9400	15	551
10	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	29	468

TOP TEN Key Architects
Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	99	1,032
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	16	823
3	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GH	020 7880 6400	4	515
4	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	29	499
5	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555	7	489
6	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	37	428
7	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	6	421
8	Tetlow King Planning	Unit 2 Eclipse Office Park, Staple Hill, Bristol, North Somerset, BS16 5EL	0117 9561916 (CTPS)	24	388
9	Grid Architects Limited	128 Southwark Street, Westminster, London, SE1 0SW	020 7593 3260	4	380
10	Woods Hardwick Limited	17 Goldington Road, Bedford, Bedfordshire, MK40 3NH	01234 268862	27	370

TOP TEN Key Contractors
Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	214	2,434
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	159	2,362
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	147	1,647
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	101	1,250
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	84	943
6	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	65	805
7	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	73	795
8	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	62	772
9	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	49	659
10	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	55	654

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

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INFRASTRUCTURE
CONTRACT VALUES INCREASE IN MARCH

The value of infrastructure contracts increased in March with the start of engineering works for HS2 contributing to the totals.

The value of contracts awarded in the infrastructure sector in March totalled £1.8 billion based on a three month rolling average (see Fig. 4.1). This is 30.8% higher than the previous month and 11.9% higher than March 2015. In the three months to March the total value of contract awards was £4.2 billion based on a three month rolling average. This is 33.3% lower than the previous three months but 12.4% higher than the same period in 2015.

Projects by region

The main location of infrastructure projects this month was London with 33% of the value, and this was 28.7% higher than March 2015 (see Fig. 4.2 & 4.4). The main project awarded in the region was the HS2 Engineering Delivery Partner contract valued at £350 million. The other main project was the Garden Bridge development which is valued at £150 million and was awarded to Bouygues.

Type of Projects

The award of the HS2 contract in March means that rail was the dominant sector within infrastructure which accounted for 56% of the contract value awarded in March (see Fig. 4.3).

> The value of contracts awarded in the infrastructure sector in March totalled £1.8 billion

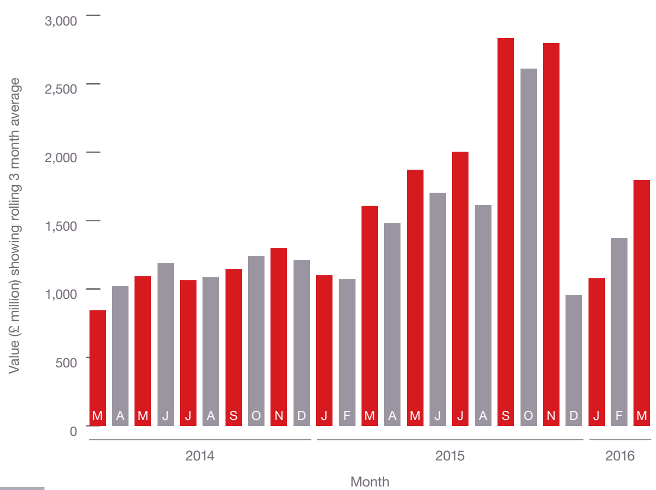

FIG. 4.1

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

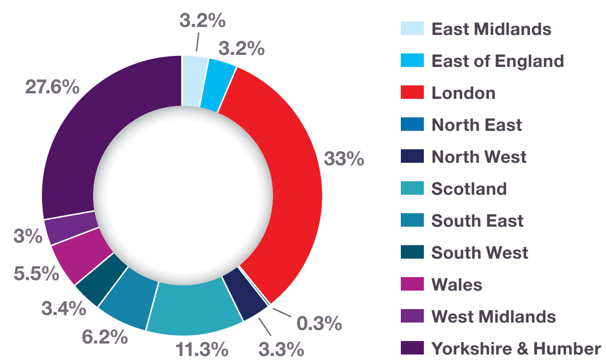

FIG. 4.2

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

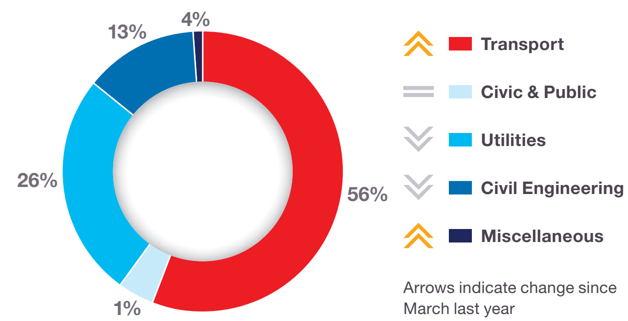

FIG. 4.3

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

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The map and figures show how the activity has changed since March 2015

		-4.2%	Scotland
+1.6%	East Midlands	+2.3%	South East
-30.5%	East of England	+2.6%	South West
+28.7%	London *HOTTEST REGION*	-23.0%	Wales
-0.6%	North East	+2.1%	West Midlands
-6.0%	North West	+27.1%	Yorkshire & Humber

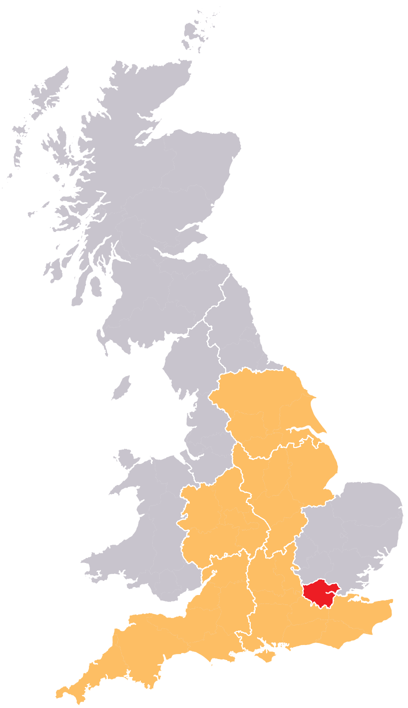

FIG. 4.4

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

"Rail was the dominant sector which accounted for 56% of the contract value awarded

PROJECT IN FOCUS

Garden Bridge – Victoria Embankment at Temple to South Bank £150,000,000

County	London
Primary Category Sector	Infrastructure
Government Region	London
Start Date	July 2016
End Date	July 2018
Contract Award Date	March 2016
Funding	Public
Stage	Detail Approval
Contractor	Bouygues UK Limited

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TOP TEN Key Clients

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	81	1,129
2	Transport for London	55 Broadway, Westminster, London, SW1 0BD	03432 220000	19	977
3	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	95	928
4	Transport Scotland	Buchanan House, 58 Port Dundas Road, Glasgow, Strathclyde, G4 0HF	0141 272 7100	7	451
5	DB Schenker Rail (UK) Limited	Lakeside Business Park, Carolina Way, Doncaster, South Yorkshire, DN4 5PN	01302 575000	1	400
6	Verdion Properties	83 Baker Street, Westminster, London, W1U 6AG	020 7193 9557	1	400
7	Segro PLC	258 Bath Road, Slough, Berkshire, SL1 4DX	01753 537 171	1	400
8	Helioslough Limited	2 Berkeley Square, Westminster, London, W1J 6EB	Not Listed	1	400
9	Aberdeen City Council	Town House, Broad Street, Aberdeen, Grampian, AB10 1AQ	01224 522000	6	398
10	High Speed Two	1 Canada Square, Poplar, London, E14 5AB	020 7944 4908	1	350

TOP TEN Key Architects

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	1	400
2	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	150
3	Acanthus LW Architects	Voysey House, Barley Mow Passage, Chiswick, London, W4 4PN	020 8994 2288	1	71
4	Pascall & Watson Architects	The Warehouses, 10 Black Friars Lane, City, London, EC4V 6ER	020 3837 2500 (CTPS)	11	43
5	WSP Parsons Brinckerhoff	WSP House, 70 Chancery Lane, Westminster, London, WC2A 1AF	020 7314 5000	1	40
6	Capita Group	71 Victoria Street, Westminster, London, SW1H 0XA	020 7799 1525	5	29
7	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	1	25
8	PLP Architecture	Ibex House, 42-47 Minories, City, London, EC3N 1DY	020 3006 3900	1	20
9	Lancashire County Council	County Hall, Preston, Lancashire, PR1 8XB	0300 123 6701	1	18
10	Staffordshire County Council	Number 1 Staffordshire Place, Riverway, Stafford, Staffordshire, ST16 3TJ	0300 111 8000	1	18

TOP TEN Key Contractors

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Thales Transportation	The Quadrant, 4 Thomas More Square, Thomas More Street, City, London, E1W 1YW	020 3300 6000	4	760
2	Costain/ Skanska JV	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444/ 01923 842444	2	600
3	Aberdeen Roads Limited	North Point, Exploration Drive, Bridge of Don, Aberdeen, Grampian, AB23 8GX	0800 058 8350	3	398
4	CH2M Hill	Elm House, 43 Brook Green, Hammersmith, London, W6 7EF	020 3479 8000	1	350
5	EWR2 Alliance	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	270
6	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	7	260
7	Costain Group Plc	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	14	203
8	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, London, E14 5HU	020 7216 6800	42	202
9	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	20	192
10	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	23	160

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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COMMERCIAL & RETAIL

SIGNIFICANT INCREASE IN CONTRACT VALUES IN MARCH

Contract values in the commercial & retail sector were markedly higher in March with the return of large scale commercial office contracts.

The value of contracts awarded in the commercial and retail sector were £904 million in March based on a three month rolling average (see Fig. 5.1). This is a 25.8% increase from February and a 7.8% increase from the March 2015 figure. In the three months to March the value of contracts were 11.1% below the previous three months but 2.4% higher than the same period in 2015, indicating a slightly more positive longer term picture.

Projects by region

London was the main location of activity in the sector this month accounting for 40.9% of the value of all contracts awarded, which was 17.2% lower than March 2015 (see Fig. 5.2 & 5.4). The largest contract awarded in London in March was the refurbishment of three former office buildings at White City valued at £87 million awarded to Wates. The West Midlands also attracted a high proportion of commercial contracts this month, with 16.3% of the value of contracts occurring in the region in March, a 14.2% increase from its share in March 2015. A major reason for the West Midlands share was the award for a 17 storey office block at the Snowhill development in Birmingham which was valued at £90 million.

Type of Projects

Offices were the dominant type of project in the sector accounting for 84% of the value of contracts awarded this month, which is 6% higher than March 2015. Shopping centres is the next largest sector with 7% of contract award value, which was a 5% increase from the March 2015 figure (see Fig. 5.3).

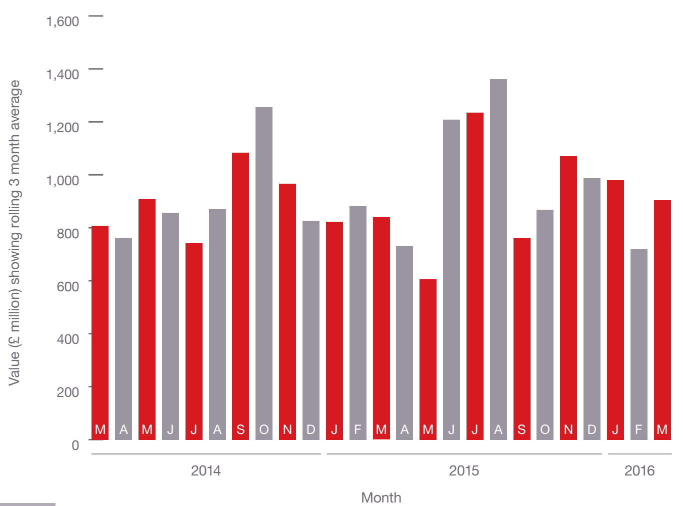

FIG. 5.1

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

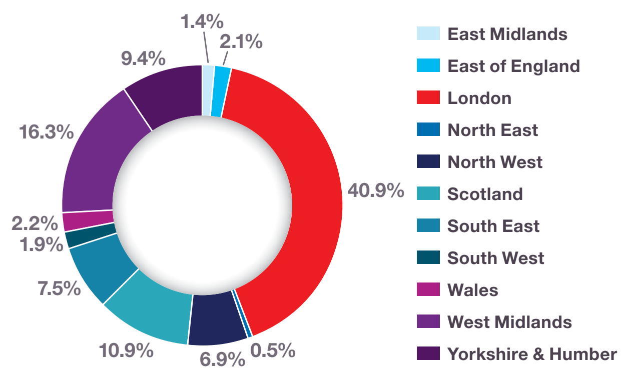

FIG. 5.2

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

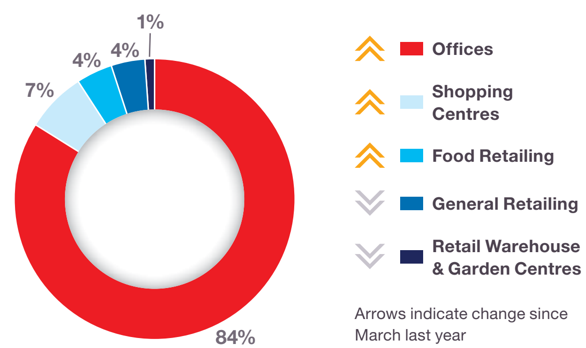

FIG. 5.3

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

economic & construction MARKET REVIEW

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SIGNIFICANT INCREASE IN CONTRACT VALUES IN MARCH

The map and figures show how the activity has changed since March 2015

		-1.9%	Scotland
-6.8%	East Midlands	+5.1%	South East
+1.7%	East of England	-4.1%	South West
-17.2%	London	+1.6%	Wales
0.0%	North East	+14.2%	West Midlands *HOTTEST REGION*
+0.9%	North West	+6.5%	Yorkshire & Humber

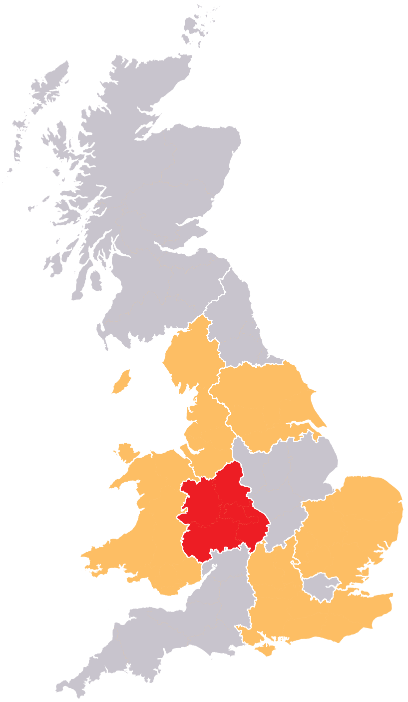

FIG. 5.4

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

PROJECT IN FOCUS

Waterloo Street – HFD Group Limited – Grade A Office
£90,000,000

County	Strathclyde
Primary Category Sector	Commercial & Retail
Government Region	Scotland
Start Date	April 2016
End Date	October 2017
Contract Award Date	March 2016
Funding	Private
Stage	Detail Approval
Contractor	McLaughlin & Harvey Construction Limited

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SIGNIFICANT INCREASE IN CONTRACT VALUES IN MARCH

TOP TEN Key Clients

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	3	527
2	Lipton Rogers Developments Llp	33 Cavendish Square, City, London, W1G 0PW	0207 3757 0575	1	500
3	British Waterways	Brindley Suite, Willow Grange, Church Road, Watford, Hertfordshire, WD17 4QA	01923 226422	1	388
4	Goldman Sachs International Limited	Peterborough Court, 133 Fleet Street, City, London, EC4A 2BB	020 7774 1000	1	350
5	Google UK Limited	Belgrave House, 76 Buckingham Palace Road, Westminster, London, SW1W 9TQ	020 7031 3000 (TPS)	1	300
6	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	216
7	Argent Group Plc	4 Stable Street, King's Cross, Camden, London, N1C 4AB	020 3664 0200 (TPS)	2	124
8	Chelsfield Partners LLP	67 Brook Street, Westminster, London, W1K 4NJ	020 7290 2388 (CTPS)	1	115
9	Derwent London	25 Saville Row, Westminster, London, W1S 2ER	020 7659 3000 (CTPS)	3	107
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	2	107

TOP TEN Key Architects

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	3	676
2	Kohn Pederson Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	2	676
3	PLP Architecture	Ibex House, 42-47 Minories, City, London, EC3N 1DY	020 3006 3900	3	513
4	Pelli Clark Pelli Architects	1056 Chapel Street, New Haven, Connecticut, CT06510	00 1203 777 2515	1	388
5	Mossessian and Partners	31-37 Hoxton Street, Islington, London, N1 6NL	020 7749 6860	2	364
6	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	2	306
7	TP Bennett LLP	One America Street, Southwark, London, SE1 0NE	020 7208 2000	11	246
8	Rogers Stirk Harbour and Partners	Thames Wharf Studios, Rainville Road, Hammersmith, London, W6 9HA	020 7385 1235	3	212
9	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555	3	211
10	Harris Partnership	2 St Johns, Wakefield, West Yorkshire, WF1 3QA	01924 291800	63	179

TOP TEN Key Contractors

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Brookfield Multiplex Construction Europe Limited	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	6	1,003
2	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	3	913
3	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	40	417
4	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	4	407
5	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	15	308
6	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	11	293
7	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	15	252
8	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	25	248
9	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	14	221
10	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	216

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

INCREASE IN CONTRACT VALUE IN MARCH

The hotel, leisure & sport sector showed monthly increases in contract values and also shows growth over the longer term.

Contract award levels in the hotel, leisure & sport sector were £392 million in March, based on a three month rolling average (see Fig. 6.1). This was 9.2% higher than February and 6.1% higher than March 2015. In the three months to March the value of contracts was £1.3 billion, which was 22.4% higher than the previous three months. This was an increase of 22.5% compared to the same period in 2015 indicating a longer term increase over the past year.

Projects by region

London was the main location for hotel, leisure & sport contracts this month accounting for 25.4% of the value awarded (see Fig. 6.2 & 6.4). There were a number of hotel contracts awarded in London in March, the highest value being a 270 bedroom hotel developed adjacent to Camden Town Hall at a construction cost of £20 million. Other hotel contracts awarded in London include a 95 bedroom hotel at Garlick Hill in the City of London with and a Premier Inn in Chiswick both valued at £10 million.

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 58% of contract value awarded in March (see Fig. 6.3). This was a 5% decrease from the corresponding month in 2015 but still shows signs of a strong hotel market in the UK.

> The hotels/motels category saw the highest proportion of activity

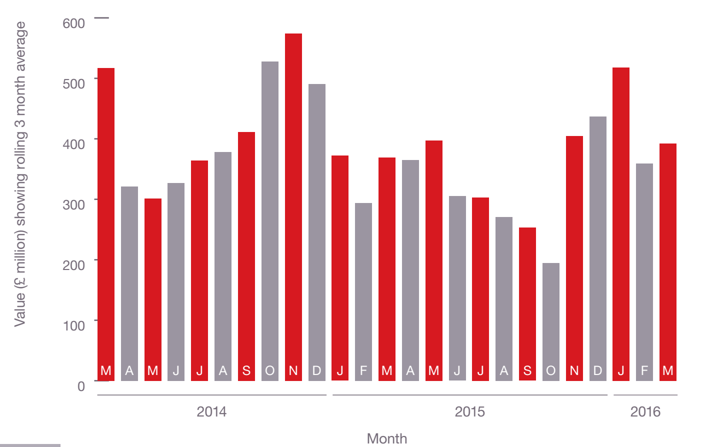

FIG. 6.1

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

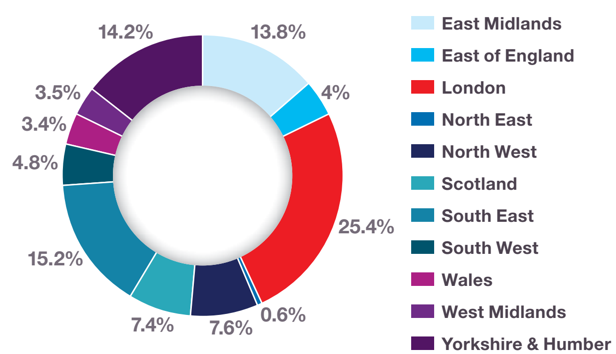

FIG. 6.2

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

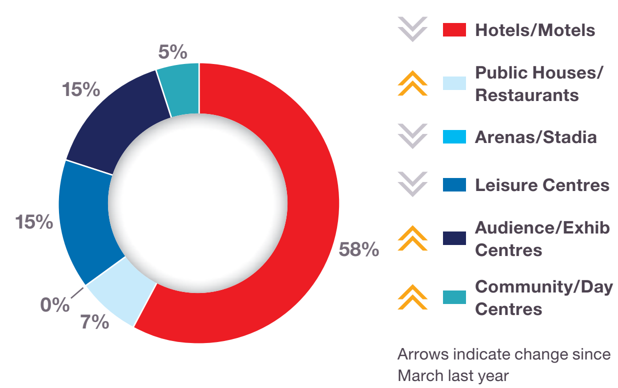

FIG. 6.3

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

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INCREASE IN CONTRACT VALUE IN MARCH

The map and figures show how the activity has changed since March 2015			-5.2%	Scotland	
+11.5%	East Midlands *HOTTEST REGION*		+2.6%	South East	
+1.4%	East of England		-1.2%	South West	
-25.4%	London		+1.4%	Wales	
-1.0%	North East		+2.1%	West Midlands	
+2.2%	North West		+11.5%	Yorkshire & Humber *HOTTEST REGION*	

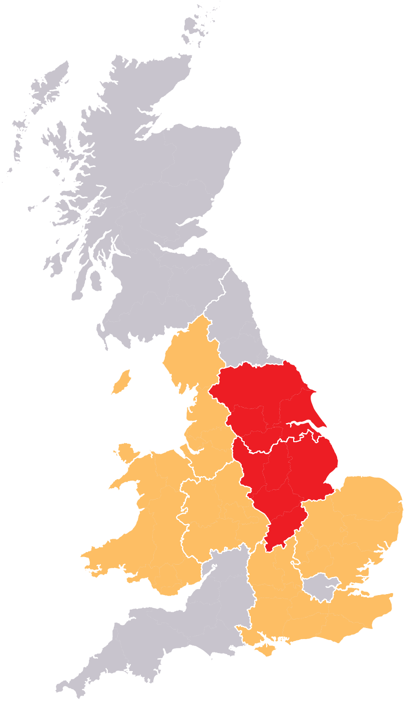

FIG. 6.4

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

> London was the main location contracts this month accounting for 25.4% of the value awarded

PROJECT IN FOCUS

Paradise Street Hotel
£35,000,000

County	Oxfordshire
Primary Category Sector	Hotel, Leisure & Sport
Government Region	South East
Start Date	April 2016
End Date	October 2017
Contract Award Date	March 2016
Funding	Private
Stage	Detail Planning
Contractor	McAleer & Rushe Limited

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INCREASE IN CONTRACT VALUE IN MARCH

TOP TEN Key Clients

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Tottenham Hotspur Plc	White Hart Lane, 748 High Road, Tottenham, London, N17 0AP	020 8365 5055	2	404
2	Heads of The Valleys Development Company Limited	The Coach House, 79 Mill Way, Grantchester, Cambridge, Cambridgeshire, CB3 9ND	01223 847 378	1	315
3	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499/ 01582 424200	49	166
4	Radisson Edwardian Hotels Limited	140 Bath Road, Hayes, Middlesex, UB3 5AW	020 8759 6311	2	150
5	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	1	100
6	The All England Lawn Tennis and Croquet Club	Church Road, Wimbledon, London, SW19 5AE	020 8944 1066	1	70
7	4C Hotels	13 Wadham Gardens, City, London, NW3 3DN	020 7419 1839	1	60
8	Premier Inn	Oakley House, Oakley Road, Luton, Bedfordshire, LU4 9QH	01582 499499	14	52
9	Manhattan Loft Corporation Limited	223 – 231 Old Marylebone Road, Edison House, City, London, NW1 5QT	020 7535 2222	1	50
10	Premier Inn Limited	Whitbread Court, Houghton Business Park, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	0871 527 8000	27	43

TOP TEN Key Architects

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Populous	14 Blades Court, Deodar Road, Putney, London, SW15 2NU	020 8874 7666	2	715
2	Tew & Smith Architects	Quoits House, 4 Harbour Road, Kingsthorpe, Northampton, Northamptonshire, NN2 7AZ	01604 791197	1	315
3	Woods Bagot	46-48 Foley Street, Westminster, London, W1W 7TY	020 7637 6880 (CTPS)	1	150
4	Dexter Moren Associates	57d Jamestown Road, Camden Town, London, NW1 7DB	020 7267 4440	6	125
5	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	10	123
6	Urban Innovations	Wellington Buildings, 2 Wellington Street, Belfast, Northern Ireland, BT1 6HT	028 9043 5060	1	100
7	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269 (TPS)	29	96
8	Nicholas Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	1	70
9	Allford Hall Monaghan Morris	4 & 5th Floors, Block C, Morelands, 5-23 Old Street, City, London, EC1V 9HL	020 7251 5261	3	56
10	ICA Architects & Designers	Merchant Exchange, 20 Bell Street, Glasgow, Strathclyde, G1 1LG	0141 552 2194	4	56

TOP TEN Key Contractors

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	McAleer & Rushe Limited	17-19 Dungannon Road, Cookstown, County Tyrone, BT80 8TL	028 8676 3741 (CTPS)	0	186
2	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	12	116
3	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	5	87
4	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	8	84
5	HOC UK Limited	Jubilee House, Townsend Lane, City, London, NW9 8TZ	020 8200 5873	3	74
6	Ogilvie Construction	Ogilvie House, Pirnhall Business Park, Stirling, Strathclyde, FK7 8ES	01786 812273	12	69
7	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	8	66
8	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	11	66
9	RG Carter Limited	9-11 Drayton High Road, Drayton, Norwich, Norfolk, NR8 6AH	01603 867355	13	57
10	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	4	55

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INDUSTRIAL

ACTIVITY DECREASES IN THE SECTOR THIS MONTH

The industrial sector experienced a slowdown in March 2016 with monthly and yearly contract values down.

Activity in the industrial sector decreased in March with the value of contracts awarded totalling £517 million, based on a three month rolling average (see Fig. 7.1). This equates to a decline of 1.7% on the value in February and is 17.6% below the figure recorded this time last year. In the three months to March the total value of contracts was £1.6 billion which was 3.5% higher than the previous three months but 8.8% lower than the same quarter last year.

Projects by region

The North West is the region with the highest value of activity this month with 16.3% of the contracts awarded, a decrease of 17.5% on March 2015 (see Fig. 7.2 & 7.4). This was principally due to the award of the contracts for a warehouse in Trafford Park with an estimated value of £25 million.

Type of Projects

The types of project awarded in the sector were predominantly in warehouse/storage which accounted for 37% of contract values, an increase of 1% from March 2015 (see Fig. 7.3). This was largely due to the award of the warehouse contract in Trafford Park but also two projects in the Thames Estuary for UPS and Ocado valued at £35 million and £30 million respectively. Heavy industrial projects had the second highest share of contracts awarded with 34% of total value, an increase of 4% from March 2015.

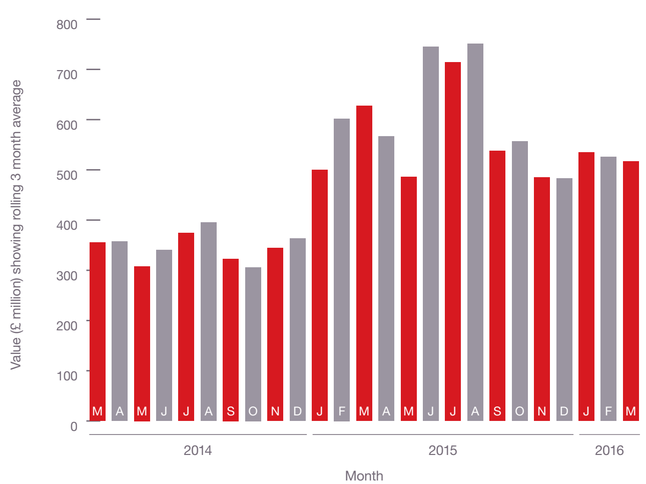

FIG. 7.1

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

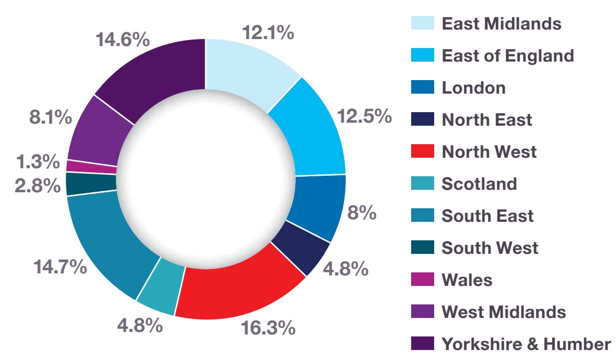

FIG. 7.2

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

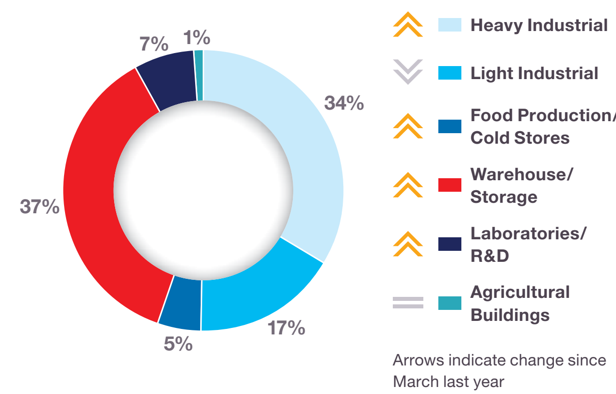

FIG. 7.3

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

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

The map and figures show how the activity has changed since March 2015		-2.2%	Scotland
+10.1%	East Midlands *HOTTEST REGION*	+3.3%	South East
+7.0%	East of England	-1.1%	South West
+2.8%	London	-0.7%	Wales
-0.9%	North East	+0.4%	West Midlands
-17.5%	North West	-1.2%	Yorkshire & Humber

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

PROJECT IN FOCUS

Ansty Technology Park – FANUC Research Facility £12,000,000

County	Warwickshire
Primary Category Sector	Industrial
Government Region	West Midlands
Start Date	March 2016
End Date	March 2017
Contract Award Date	March 2016
Funding	Private
Stage	Detail Approval
Contractor	Bowmer & Kirkland

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ACTIVITY DECREASES IN THE SECTOR THIS MONTH

TOP TEN
Key Clients
Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BP Exploration	Farburn Industrial Estate, Aberdeen, Grampian, AB21 7PB	01224 832000	1	500
2	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	3	200
3	SNF Gas and Oil Limited	Solutions House, Ripley Close, Normanton Industrial Estate, Normanton, West Yorkshire, WF6 1TB	01924 311000	2	150
4	The London Taxi Company	Holyhead Road, Coventry, West Midlands, CV5 8JJ	024 7657 2000	1	150
5	Goodman International	Nelson House, Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG	0121 506 8100	5	145
6	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	5	131
7	BAE Systems Marine Limited	Bridge Road, Barrow in Furness, Cumbria, LA14 1AF	01229 823366	1	130
8	The Peel Group	Peel Management, Peel Dome, The Trafford Centre, Manchester, Greater Manchester, M17 8PL	0161 629 8200	4	128
9	West Berkshire Council	Council Offices, Market Street, Newbury, Berkshire, RG14 5LD	01635 424000	1	125
10	Roxhill Developments Limited	Lumonics House, Valley Drive, Swift Valley, Rugby, Warwickshire, CV21 1TQ	01788 422200	3	103

TOP TEN
Key Architects
Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Michael Sparks Associates	11 Plato Place, St Dionis Road, Fulham, London, SW6 4TU	020 7736 6162	28	371
2	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	10	269
3	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	3	200
4	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	10	166
5	BHP Design LLP	Suite 2f, St Georges Court, 1 Albion Street, Birmingham, West Midlands, B1 3AH	0121 314 6618	1	150
6	Fairhursts Design Group	55 King Street, Manchester, Greater Manchester, M2 4LQ	0161 831 7300(CTPS)	4	101
7	AMEC Group PLC	76-78 Old Street, City, London, EC1V 9AZ	020 3215 1700	1	100
8	Associated Architects	1 Severn Street Place, The Mailbox, Birmingham, West Midlands, B1 1SE	0121 233 6600	2	100
9	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	100
10	Aecom	Aecom House, Victoria Street, St Albans, Hertfordshire, AL1 3ER	01727 535000	1	90

TOP TEN
Key Contractors
Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	24	651
2	Petrofac	Bridge View, 1 North Esplanade West, Aberdeen, Aberdeenshire, AB11 5QF	01224 247000 (TPS)	1	500
3	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	8	163
4	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	2	150
5	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	10	150
6	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	5	147
7	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	8	129
8	VolkerWessels UK Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	5	107
9	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	2	100
10	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	2	95

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
DECREASE IN VALUE OF CONTRACTS IN MARCH

The monthly value of medical & health contracts decreased in March but were higher than March 2015.

Levels of activity in the medical & health sector decreased by 34.8% in March 2016 compared to January, with the total value of contracts awarded £155 million based on a three month rolling average (see Fig. 8.1). This is 13.5% lower than the values in March 2015. In the three months to March the value of contracts decreased by 0.2% on the previous three months, but were 23% up on the same period in 2015 indicating a longer term increase in the value of contracts awarded in the sector but the recent trajectory is downward.

Projects by region

London was the main location of development in the sector this month capturing 33.4% of activity, a substantial 15.4% increase from March 2015 (see Fig. 8.2 & 8.4). This is primarily due to the award for the contract to build a new health and social care facility in Highgate which has a construction value of £14 million. The South East has also experienced a high proportion of value this month accounting for 20.5% of value awarded in March, an increase of 19.4% from the same month in 2015.

Type of Projects

Surgeries, health and medical centres are the dominant sub-sector this month accounting for 41% of the value of contracts in March 2015, a 33% increase from March 2015 (see Fig. 8.3).

> Levels of activity in the sector decreased by 34.8% in March 2016 compared to January

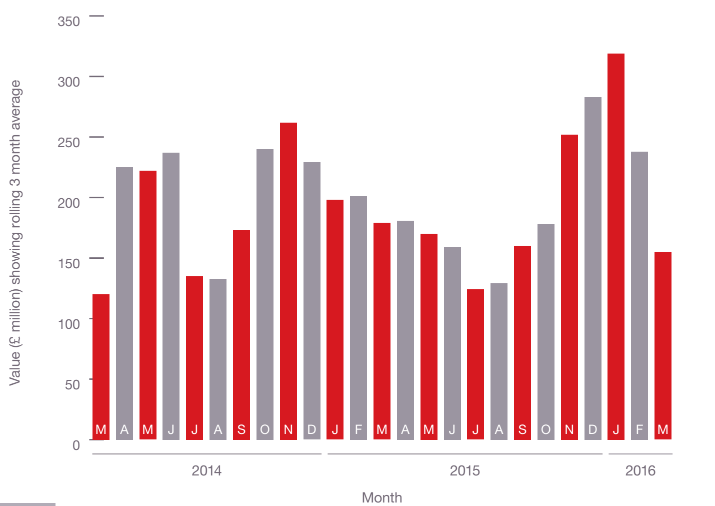

FIG. 8.1
Medical & Health: **Project Value showing 3 month moving average** Source: Barbour ABI

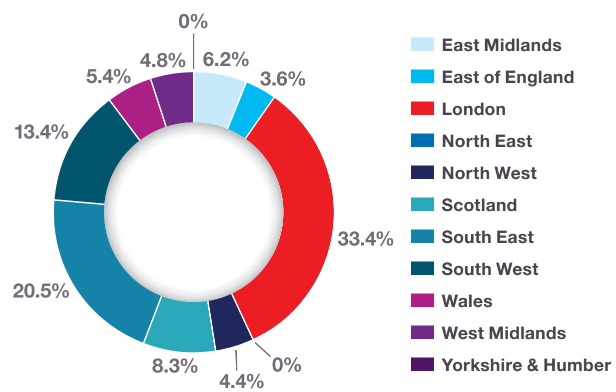

FIG. 8.2
Medical & Health: **Value of Contracts by Region** Source: Barbour ABI

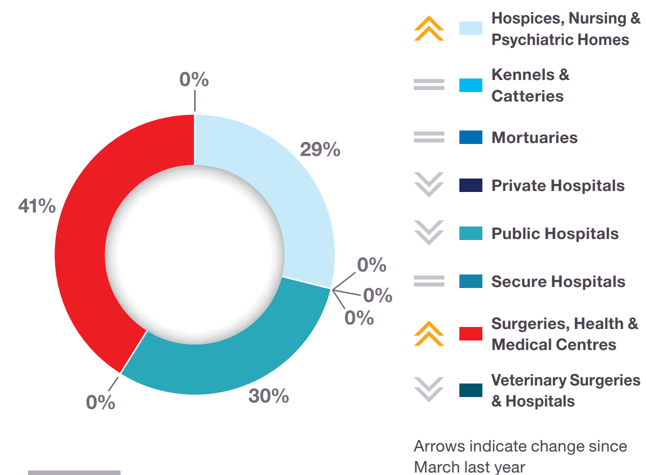

FIG. 8.3
Medical & Health: **Type of Projects Awarded** Source: Barbour ABI

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DECREASE IN VALUE OF CONTRACTS IN MARCH

The map and figures show how the activity has changed since March 2015

+4.8%	East Midlands	+3.7%	Scotland
+2.4%	East of England	+19.4%	South East *HOTTEST REGION*
+15.4%	London	+7.9%	South West
-11.1%	North East	+2.3%	Wales
-34.8%	North West	-3.8%	West Midlands
		-6.0%	Yorkshire & Humber

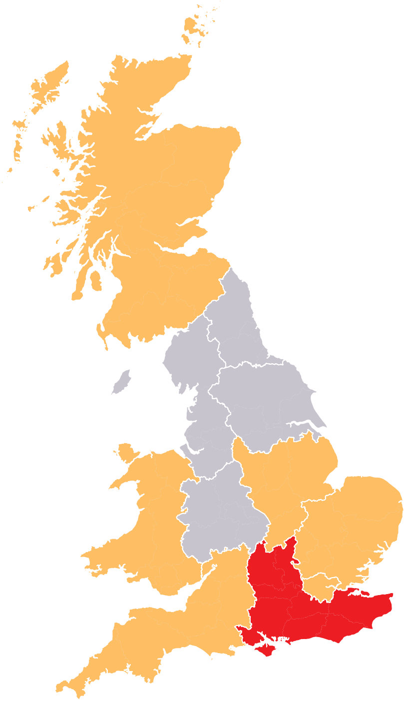

FIG. 8.4

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

Source: Barbour ABI

> Surgeries, health and medical centres are the dominant sub-sector this month accounting for 41% of the value of contracts

PROJECT IN FOCUS

The Greenwood Centre – Greenwood Place & Highgate Day Centre £14,000,000

County	London
Primary Category Sector	Medical & Health
Government Region	London
Start Date	July 2016
End Date	July 2018
Contract Award Date	March 2016
Funding	Public
Stage	Detail Approval
Contractor	Kier London Limited

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DECREASE IN VALUE OF CONTRACTS IN MARCH

TOP TEN Key Clients

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Sandwell and West Birmingham Hospital NHS Trust	City Hospital, Dudley Road, Birmingham, West Midlands, B18 7QH	0121 554 3801	1	280
2	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	2	208
3	Royal Free Hospital	Pond Street, Hampstead, London, NW3 2QG	020 7794 0500	3	155
4	Hampshire Hospitals NHS Foundation Trust	Aldermaston Road, Basingstoke, Hampshire, RG24 9NA	01256 473202	1	150
5	University College London Hospital NHS Foundation Trust	Trust Head Quarters, 2nd Floor, 250 Euston Road, City, London, NW1 2PG	020 3456 7890 (CTPS)	2	138
6	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)	3	104
7	Bartholomew & London Hospital (NHS) Trust	Capital & Facilities Directorate, 5th Floor, Queen Mary's Wing, West Smithfield, City, London, EC1A 7BE	020 7377 7000	2	101
8	Horizon Care Homes Limited	Unit 1.16, Great House, Redwall Close, Rotherham Road, Dinnington, Sheffield, South Yorkshire, S25 3QA	01909 517737	1	50
9	Lothian Health Board	Deaconess House, 148 Pleasance, Edinburgh, Lothian, EH8 9RQ	0131 536 9000	2	44
10	Luton & Dunstable Hospital NHS Trust	772 Lewsey Road, Luton, Bedfordshire, LU4 0DZ	01582 491166	6	41

TOP TEN Key Architects

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Billfinger GVA	65 Gresham Street, Westminster, London, EC2V 7NQ	020 7491 2188 (TPS)	1	280
2	John Simpson & Partners	29 Great James Street, Holborn, Westminster, London, WC1N 3EY	020 7405 1285 (TPS)	1	200
3	Steffian Bradley Architects	45 Gee Street, Fifth Floor, City, London, EC1V 3RS	020 7549 4050	1	200
4	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	3	153
5	IBI Group (UK) Limited	87-91 Newman Street, Westminster, London, W1T 3EY	020 7079 9900	2	153
6	Hassell	James William House, 9 Museum Place, Cardiff, South Glamorgan, CF10 3BD	029 2072 9071	3	153
7	Scott Tallon Walker Architects	10 Cromwell Place, South Kensington, London, SW7 2JN	020 7589 4949 (TPS)	2	138
8	Ellis Williams Architects	151 Roseberry Avenue, 3-11 Pine Street, City, London, EC1R 0JH	020 7841 7200	1	136
9	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	0207 580 0400	2	63
10	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	6	60

TOP TEN Key Contractors

Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	17	297
2	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	18	295
3	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	2	290
4	IHP	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	3	183
5	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	1	136
6	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	5	134
7	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	3	56
8	Redwall Developments Limited	Suite 2, 10 Redwall House, Waterside Business Park, Rotherham Road, Dinningham, Rotherham, South Yorkshire, S25 3QA	01909 517737	1	50
9	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	6	47
10	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	9	40

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

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EDUCATION

INCREASE IN THE VALUE OF CONTRACTS IN MARCH

The education sector increased this month but activity is still much lower than this time last year indicating poorer long term performance in this sector.

The value of contracts awarded in the education sector was £589 million in March based on a three month rolling average, a 13.5% increase from February (see Fig. 9.1). This figure was 11.2% lower than March 2015 indicating the sectors decline over the past year. The values of contract awards in the three months to March were 11.4% lower than the same period last year, showing the longer term fall in contracts awarded.

Projects by region

London experienced the highest share of the value of education contracts in March accounting for 18.6% of contract value awarded (see Fig. 9.2 & 9.4). The largest construction contract awarded in London in March was the refurbishment of a building by University College London to create a new Medical Research Building on campus. This was valued at £17 million and was awarded to John Graham Construction Limited. The North West had the next highest share of contract value accounting for 15.8% of contract value, an increase of 8.2% from March 2015. The largest contract awarded in the region was for Copperas Hill campus at Liverpool John Moore's University which is valued at £70 million.

Type of Projects

The UCL and Liverpool John Moore's University contracts mean that colleges/universities were the dominant sub sector in education in March. They accounted for 56% of the total value awarded, up from 54% in March 2015 (see Fig. 9.3).

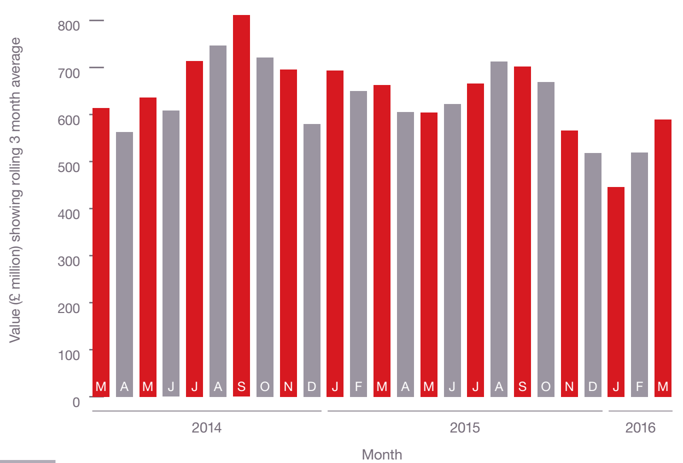

FIG. 9.1

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

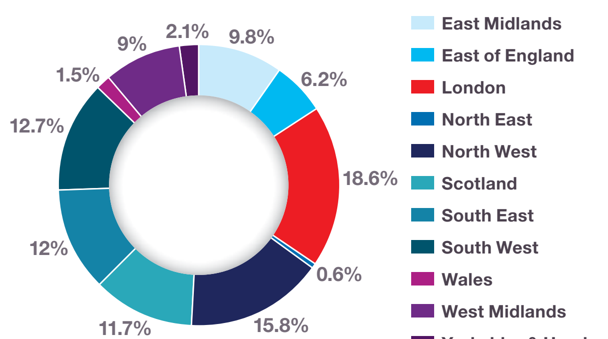

FIG. 9.2

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

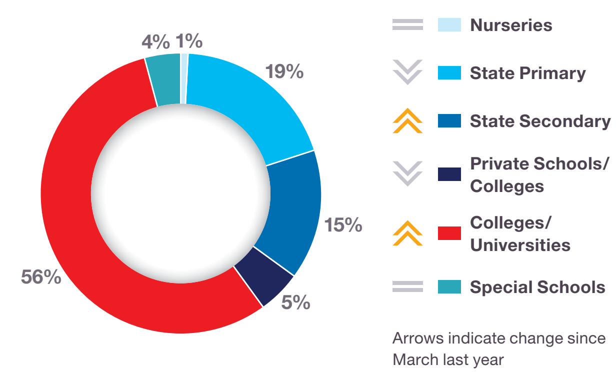

FIG. 9.3

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

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INCREASE IN THE VALUE OF CONTRACTS IN MARCH

The map and figures show how the activity has changed since March 2015

				-8.1%	Scotland
	-21.4%	East Midlands		-1.6%	South East
	-8.9%	East of England		+0.8%	South West
	+9.7%	London *HOTTEST REGION*		-3.6%	Wales
	-10.9%	North East		+5.9%	West Midlands
	+8.8%	North West		-3.5%	Yorkshire & Humber

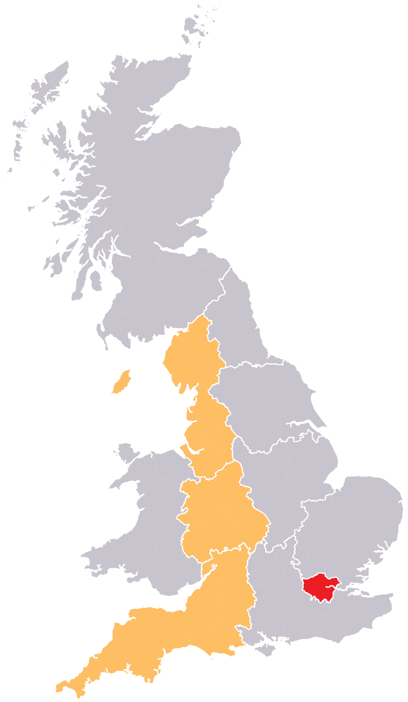

FIG. 9.4

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

Source: Barbour ABI

> London experienced the highest share of the value of contracts in March accounting for 18.6% of contract value awarded

PROJECT IN FOCUS

Copperas Hill – Liverpool – University Village £70,000,000

County	Merseyside
Primary Category Sector	Education
Government Region	North West
Start Date	February 2016
End Date	August 2018
Contract Award Date	March 2016
Funding	Mainly Private
Stage	Detail Approval
Contractor	Lendlease Limited

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INCREASE IN THE VALUE OF CONTRACTS IN MARCH

TOP TEN Key Clients
Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	The Department For Education	Castle View House, East Lane, Runcorn, Cheshire, WA7 2AA	0370 000 2288	78	855
2	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	8	273
3	University of Northampton	Boughton Green Road, Northampton, Northamptonshire, NN2 7AL	01604 735500 (CTPS)	4	128
4	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	5	127
5	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	7	123
6	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	10	89
7	North Ayrshire Council	5th Floor, Cunninghame House, Irvine, Strathclyde, KA12 8EE	01294 310 000	2	88
8	University of Leeds	Woodhouse Lane, Leeds, West Yorkshire, LS2 9JT	0113 243 1751	13	86
9	Dumfries & Galloway Council	Militia House, English Street, Dumfries, Dumfries and Galloway, DG1 2HR	0303 333 3000	7	86
10	University College London	Gower Street, Westminster, London, WC1E 6BT	020 7679 2000 (CTPS)	12	83

TOP TEN Key Architects
Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	29	352
2	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	14	243
3	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	2	232
4	Mecanoo Architecten	Oude Delft 203, 2611 HD Delft, Holland	+31 15 2798100	1	225
5	Ryder Architecture	Cooper Studios, 14-18 Westgate Road, Newcastle Upon Tyne, Tyne And Wear, NE1 3NN	0191 269 5454	14	189
6	The Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	26	180
7	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	27	176
8	Jestico Whiles & Associates	1 Cobourg Street, Camden Town, London, NW1 2HP	020 7380 0382	7	152
9	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	7	143
10	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 652 1666	6	141

TOP TEN Key Contractors
Apr 2015 – Mar 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	96	672
2	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	51	480
3	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	33	366
4	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	48	355
5	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, London, E14 5HU	020 7216 6800	11	330
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	20	315
7	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	58	261
8	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	6	257
9	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	26	242
10	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	12	203

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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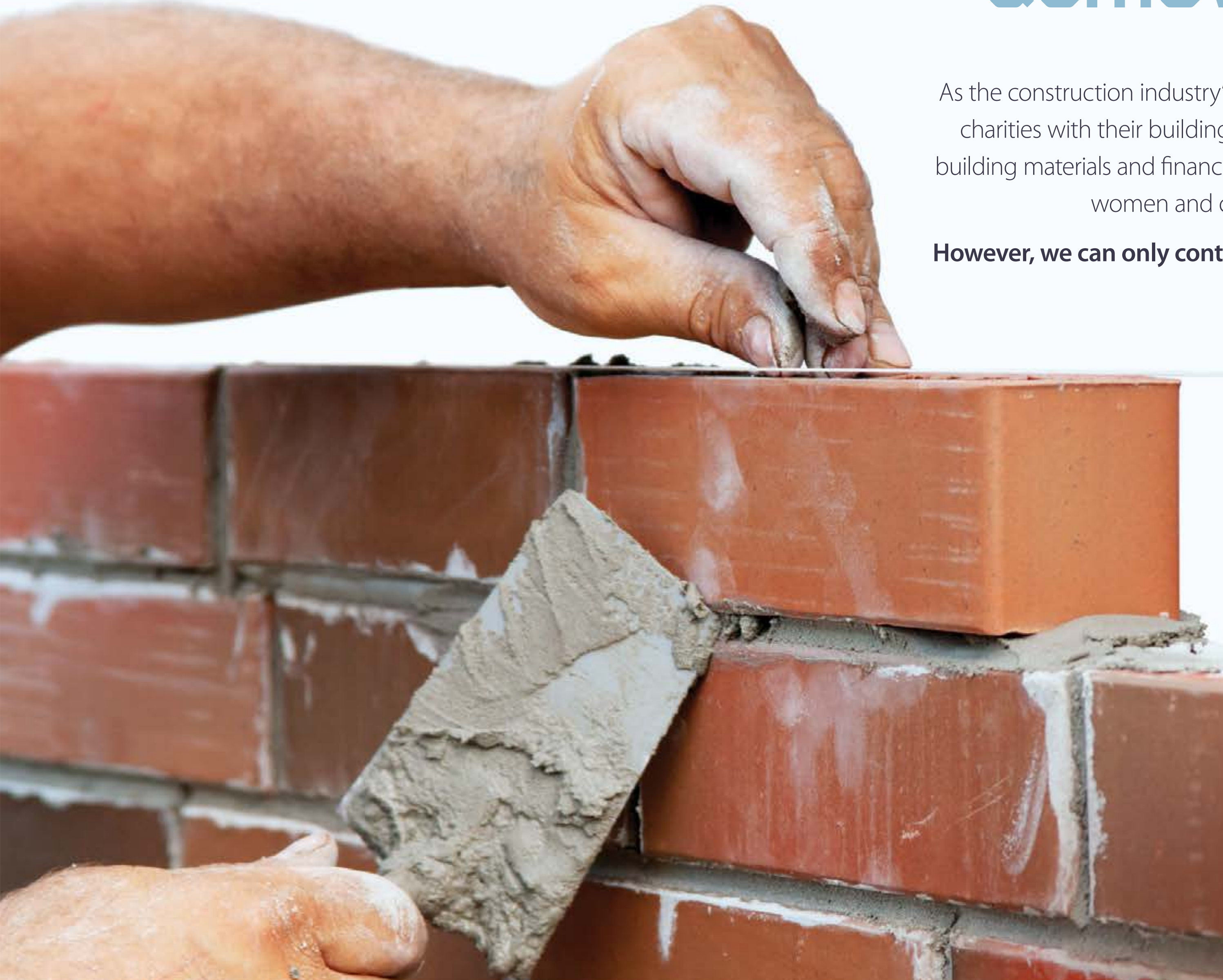
Creating Places that Care for People

Can you help us to build on the great success we've achieved together?



As the construction industry's charity, our focus is on helping homeless and hospice charities with their buildings. We do this by channelling the professional expertise, building materials and financial donations from the industry to help vulnerable men, women and children who are homeless or have life limiting illnesses.

However, we can only continue with this work with the support of companies and individuals within the construction industry.

If you would like to get involved, please contact us today.

Call Francesca Roberts CRASH Chief Executive on 0208 742 0717

www.crash.org.uk

20 YEARS OF CRASH 1996 2016

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economic & construction MARKET REVIEW

APRIL 2016

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