economic & construction MARKET REVIEW

Barbour ABI | Building | bd

MAY 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.

SKIP TO THIS SECTION

Sectors in Detail

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

SKIP TO THIS SECTION

FULL VERSION – AVAILABLE TO BARBOUR ABI CUSTOMERS, BUILDING & BD SUBSCRIBERS ONLY

economic & construction MARKET REVIEW

MAY 2016

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

Barbour ABI
www.barbour-abi.com

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

T: 0151 353 3500

E: info@barbour-abi.com

@BarbourABI

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.

To contact Michael either:

T: 020 7560 4141

E: michael.dall@ubm.com

@MichaelGDall

DOWNLOAD METHODOLOGY CLICK HERE ▶

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.

Market Insight

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.

To learn more about Market Insight and to download your copy, click on the button below. Additionally, to register your interest in our bespoke construction intelligence and tailored analysis please register your interest by selecting the tick box in the enquiry form.

DOWNLOAD MARKET INSIGHT CLICK HERE ▶

Barbour ABI

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

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

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

T: 0151 353 3500

E: info@barbour-abi.com

W: www.barbour-abi.com

@BarbourABI

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

economic & construction MARKET REVIEW

MAY 2016

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

Barbour ABI
www.barbour-abi.com

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

ECONOMIC CONTEXT

UK ECONOMY GROWS BY 0.4% IN THE FIRST QUARTER OF 2016

The latest GDP figures for the UK economy were released in the last month and they showed that the UK economy had grown by 0.4% in the first quarter of 2016.

This was below the 0.6% rate of growth experienced in the final quarter of 2015 but the figure was largely expected since sentiment surveys had detected a cooling of economic activity at the start of the year (see Fig. 1.1).

While the total level of output is now comfortably above its pre-recession peak the pattern of growth within the economy is still very much focussed towards the dominant service sector. The latest figures show that the service sector is now 12.4% higher than its pre-recession peak while construction is currently 4.3% below its pre-recession peak (see Fig. 1.2). This indicates the scale of the challenge of rebalancing the economy towards manufacturing and construction given the success of the service sector.

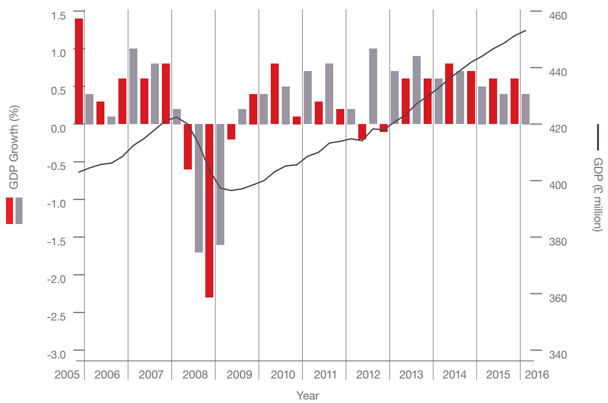


Fig. 1.1 **UK GDP** Source: ONS

The labour market continues to perform particularly strongly in the UK with unemployment remaining at 5.1% for the fourth month in a row. This is down from a recent high of 8.4% in 2011 and indicates the scale of the drop in the last two years (see Fig. 1.3).

The rate of inflation increased to 0.5% in April with the lessening impact of oil price falls and food price decreases the main reasons for the increase (see Fig. 1.4). It is worth noting that the rate of 0.5% is still well below the 2% target rate set by the Bank of England.

Other news this month on the UK economy includes:

- **The trade deficit climbed to an eight year high**
- **Repossessions in the UK fell to the lowest level on record**

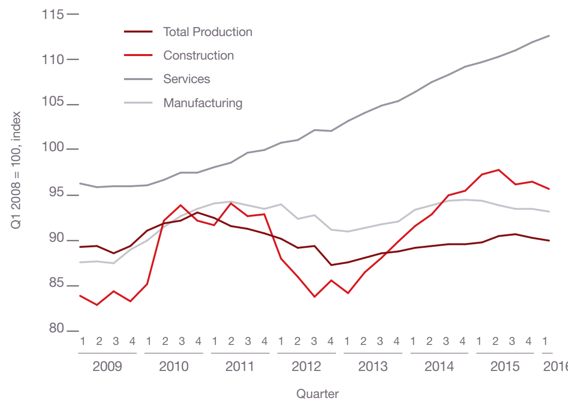


Fig. 1.2 **UK GDP** Source: ONS

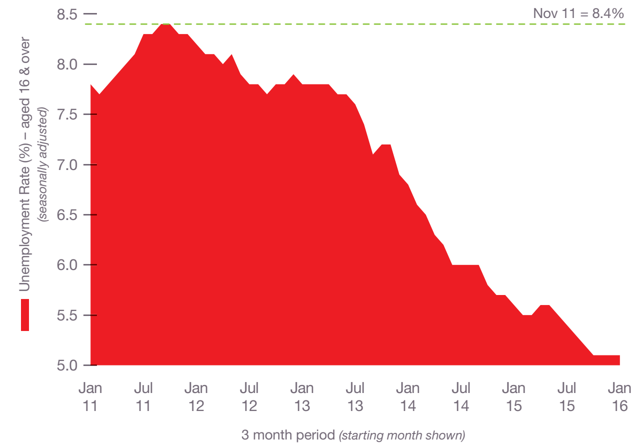


Fig. 1.3 **Unemployment Rate** Source: ONS

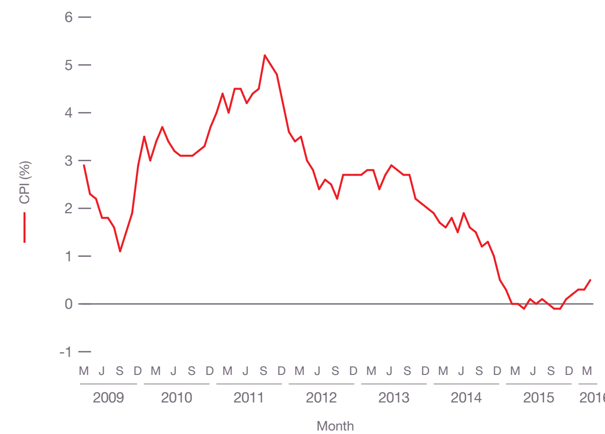


Fig. 1.4 **CPI Inflation** Source: ONS

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

Barbour ABI
www.barbour-abi.com

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

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

THE CONSTRUCTION SECTOR

CONSTRUCTION CONTRACT ACTIVITY RISES IN APRIL

The latest figures from the ONS indicate the construction sector in the UK declined by 1.1% between Q1 2016 and Q4 2015.

Comparing Q1 output levels with the same period in 2015 showed a decrease of 1.9%. This fall was expected as other surveys such as the Markit/CIPS PMI had indicated a subdued start to the year.

The main reason for the quarterly fall in output are declines in the infrastructure and private industrial sectors, as well as falls in the public sector more generally. Over the longer term however the private housing sector appears to be holding strong as output is 4.9% higher in Q1 2016 compared to the corresponding quarter in 2015. However, the infrastructure sector declined by 5.6% over the quarter and by 8.1% compared to the first quarter of 2015 which has proved a drag on overall growth (see Fig. 2.1).

The CPA/Barbour ABI Index which measures the level of contracts awarded using January 2010 as its base month recorded a reading of 142 for April (see Fig. 2.2). This is an increase from the previous month and continues to support the view that overall activity in the industry remains strong. The readings for Private Housing were up significantly in the month, but Commercial Offices remained at last month's level of 102. Commercial Retail increased considerably this month and the reading for Industrial Factories was significantly higher in April. This indicates that the pipeline of work in the private sector remains strong.

	% change	
	Quarter 1 2015 – Quarter 1 2016	Quarter 4 2015 – Quarter 1 2016
Total All Work	**-1.9**	**-1.1**
All New Work	**-1.3**	**-0.6**
Public Housing	-14.3	4.3
Private Housing	7.5	4.9
Infrastructure	-8.1	-5.6
Public (ex Infrastructure)	-2.6	-3.0
Private Industrial	-13.9	-14.6
Private Commercial	0.7	0.0
Repair & Maintenance	**-3.0**	**-1.9**
Public Housing	-4.9	0.4
Private Housing	1.2	-1.8
Non-Housing	-5.3	-2.7

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

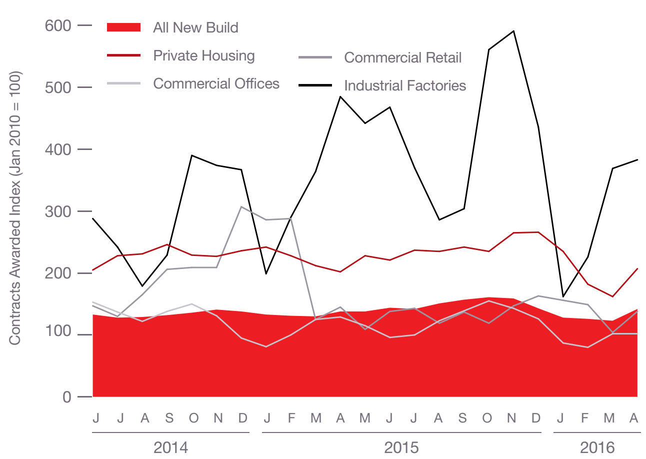


Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

Construction Sector

According to Barbour ABI data on all contract activity, April witnessed an increase in construction levels with the value of new contracts awarded £6.1 billion, based on a three month rolling average (see Fig. 2.4). This is a 0.9% increase from March and a 10% increase on the value recorded in April 2015. The number of construction projects within the UK in April increased by 10.5% on March, and were 11% lower than April 2015.

> "The main reason for the quarterly fall in output are declines in infrastructure and private industrial

Projects by Region

The majority of contracts awarded in April by value were in Scotland, accounting for 18% of the UK total. This is followed by the North West with 16% of contract award value (see Fig. 2.3). The main reason for Scotland's figures this month was the award to develop the Stronelairg Wind Farm in the Highlands valued at £300 million. It is yet more evidence of the burgeoning renewables sector in Scotland and this is further shown with the award of the

Barbour ABI
www.barbour-abi.com

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

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

contract to construct the Harburnhead wind farm in West Lothian valued at £99 million awarded in April. Further construction work awarded for the decommissioning of the Sellafield nuclear plant in Cumbria valued at £400 million was the largest contract in North West in April, explaining its strong performance in the month.

Types of Project

Infrastructure had the highest proportion of contracts awarded by value in April with 33% of the total (see Fig. 2.5). Contracts at Sellafield and for wind farms in Scotland are the main reason for the strong performance in April. The residential sector accounted for 32% of the contract value awarded. 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.

> "Infrastructure had the highest proportion of contracts awarded by value in April with 33% of the total

> "Scotland accounted for 18% of the UK total

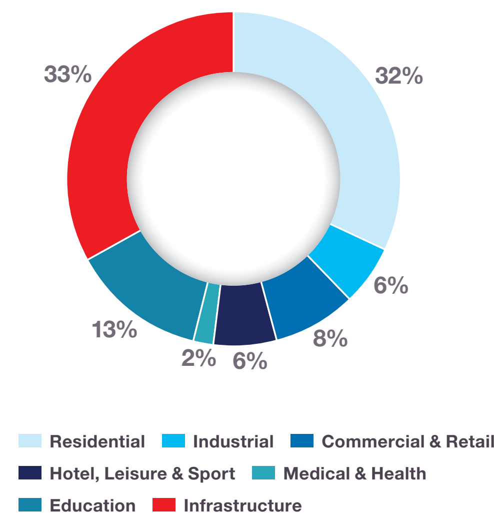


Fig. 2.5 **Type of Projects** Source: Barbour ABI

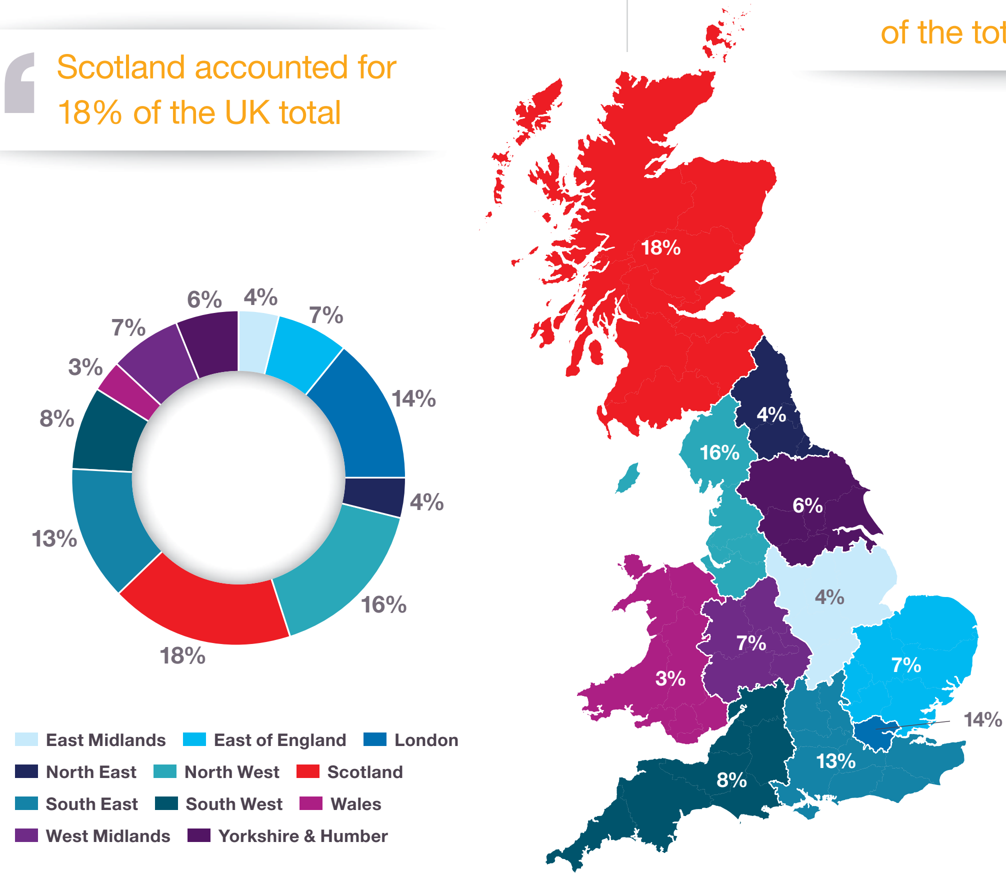


Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

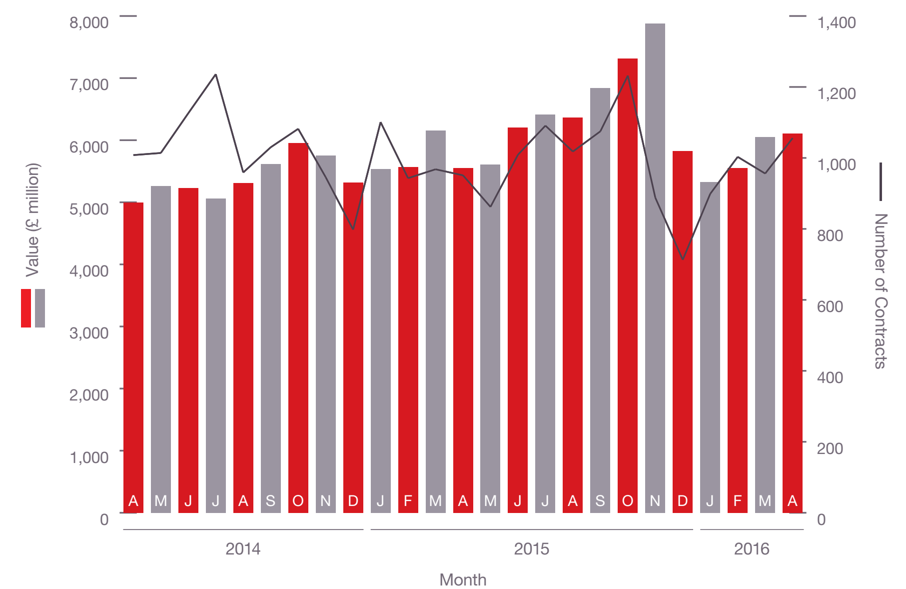


Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

economic & construction MARKET REVIEW

MAY 2016

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

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

Barbour ABI
www.barbour-abi.com

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

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
University of Northampton – Waterside Student Residences
£52,400,000

INFRASTRUCTURE
RAF Marham – Lightning II Engineering and Training Facilities
£82,500,000

COMMERCIAL & RETAIL
Dover Town Centre Regeneration – St James Site
£50,000,000

HOTEL, LEISURE & SPORT
Falmouth Beach Resort Hotel – Rebuild
£35,000,000

INDUSTRIAL
Project Wellesley Worthy Down – Phase 2 & Phase 3
£100,000,000

MEDICAL & HEALTH
Hampshire Hospital – Treatment Centre
£16,000,000

EDUCATION
University of East Anglia, Norwich Research Park – Centre for Food and Health
£60,000,000

economic & construction
MARKET REVIEW

MAY 2016

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

Barbour ABI
www.barbour-abi.com

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

RESIDENTIAL UNITS INCREASE IN APRIL

A number of large housing projects contributed to a monthly increase in both residential units and values in April.

Activity in the residential sector increased in April with the total value of projects valued at £2.1 billion based on a three month rolling average (see Fig. 3.1). This is an 8.8% increase compared to March and is 26.4% higher than April 2015. The number of units associated with residential contracts awarded increased by 14.4% between March and April based on a three month rolling average, but are 15.1% lower than April 2015. This demonstrates the continued strength of the residential market despite wider economic softening.

Sector Performance

The latest house price indices for April from Nationwide showed that average house prices are rising at 4.9% annually, a decrease from 5.7% in March. This was below the rate expected by analysts and was attributed to a surge in activity in March because of looming stamp duty changes which tailed off in April. The Halifax reported annual house price rises at 9.2% in April, down from 10.1% in March. However, the major house builders still report strong trading conditions with Barratt's forward sales up 9.7% on a year earlier, according to a recent trade update.

> "The South East is the main location of activity in the sector this month

Projects by region

The South East is the main location of activity in the residential sector this month, accounting for 17.8% of the value of contracts awarded, an increase of 2.9% from the same month last year (see Fig. 3.2 & 3.4). The Rochester Riverside development made a

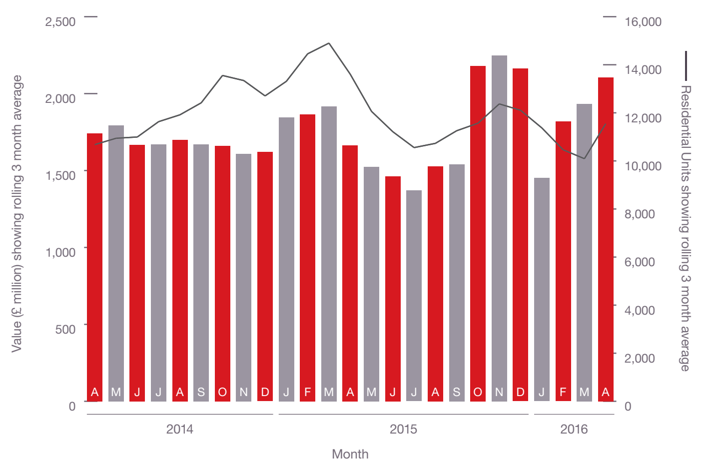


FIG. 3.1
Residential: **Project Value showing 3 month moving average** Source: Barbour ABI

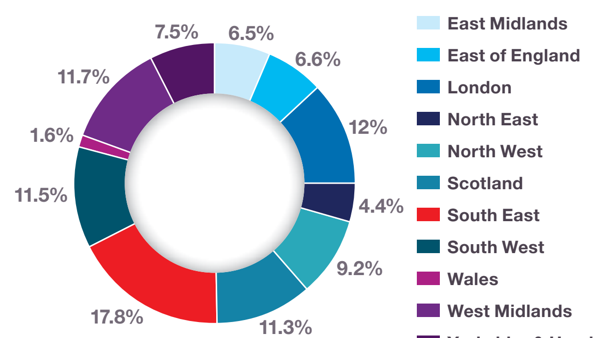


FIG. 3.2
Residential: **Value of Contracts by Region** Source: Barbour ABI

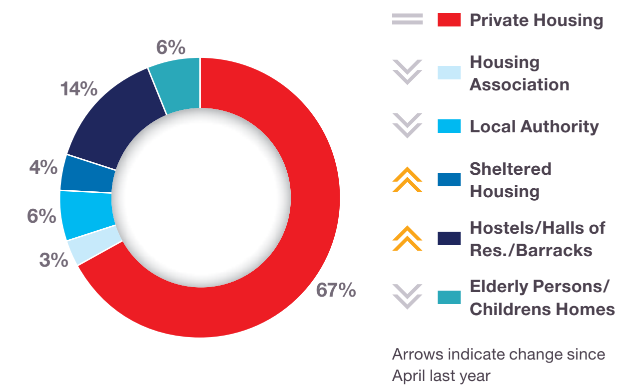


FIG. 3.3
Residential: **Type of Projects Awarded** Source: Barbour ABI

economic & construction **MARKET REVIEW**

MAY 2016

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

Barbour ABI
www.barbour-abi.com

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

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

The map and figures show how the activity has changed since April 2015			+4.7%	Scotland *HOTTEST REGION*
+0.2%	East Midlands		+2.9%	South East
-3.5%	East of England		-1.1%	South West
-6.0%	London		+0.7%	Wales
+0.4%	North East		+3.4%	West Midlands
-1.7%	North West		-0.1%	Yorkshire & Humber

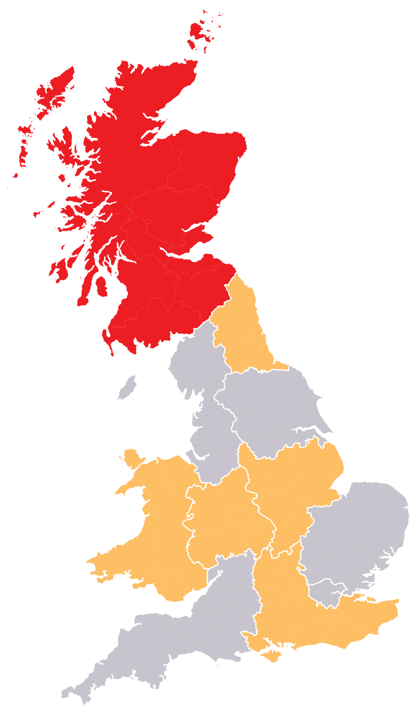


FIG. 3.4

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

significant contribution to the region's share of contracts in April. This contract is valued at £90 million and is set to provide 1400 units in the area and is due to commence in the third quarter of this year. London had the next highest proportion of contract award value in April with 12% of total value awarded, a decrease of 6% from April 2015.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing this month. Private housing accounted for 67% of the value of contracts, with no change from the corresponding month last year. After private housing, the next largest project type were hostels/halls of residence projects which accounted for 14% of the value awarded, an increase of 4% from the corresponding month last year (see Fig. 3.3).

PROJECT IN FOCUS

www.stridetreglown.co.uk

University of Northampton – Waterside Student Residences
£52,400,000

County	Northamptonshire
Primary Category Sector	Residential
Government Region	East Midlands
Start Date	July 2016
End Date	July 2018
Contract Award Date	April 2016
Funding	Private
Stage	Contract
Contractor	Kier Construction

Barbour ABI
www.barbour-abi.com

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

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

RESIDENTIAL UNITS INCREASE IN APRIL

TOP TEN
Key Clients
May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	160	2,298
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	203	2,274
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	137	1,594
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	108	1,394
5	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	67	841
6	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	67	722
7	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	61	697
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	46	679
9	St Modwen Developments Plc	Park Point, 17 High Street, Longbridge, Birmingham, West Midlands, B31 2UQ	0121 222 9400	20	646
10	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	29	438

TOP TEN
Key Architects
May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	101	1,079
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	20	839
3	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	29	534
4	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555	7	489
5	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GH	020 7880 6400	3	460
6	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	6	421
7	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	34	401
8	Grid Architects Limited	128 Southwark Street, Westminster, London, SE1 0SW	020 7593 3260	4	380
9	Woods Hardwick Limited	17 Goldington Road, Bedford, Bedfordshire, MK40 3NH	01234 268862	26	366
10	Patel Taylor Architects	48 Rawstorne Street, City, London, EC1V 7ND	020 7278 2323	3	348

TOP TEN
Key Contractors
May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	210	2,359
2	Barratt Homes	Barratt House, Cartwright Way, Forest Business Park, Coalville, Leicestershire, LE67 1UF	01530 278278	162	2,284
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	134	1,554
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	116	1,496
5	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	84	886
6	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 872427 (CTPS)	68	836
7	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	65	832
8	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	66	720
9	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	59	683
10	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	49	662

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

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

Barbour ABI
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 APRIL

A number of large projects in April saw the value of infrastructure contracts awarded increase and values are higher than this time in 2015.

The value of contracts awarded in the infrastructure sector in April totalled £2 billion based on a three month rolling average (see Fig. 4.1). This is 11.2% higher than the previous month and 34.7% higher than April 2015. In the three months to April the total value of contracts awarded was £5.2 billion based on a three month rolling average. This is 7% higher than the previous three months and 24.1% higher than the same period in 2015.

Projects by region

The main location of infrastructure projects this month was the North West with 31.8% of the value, and this was 26.5% higher than April 2015 (see Fig. 4.2 & 4.4). The main project awarded in the region was the Sellafield decommissioning contract valued at £500 million. Scotland was the next most active location accounting for 29.8%, an 18.2% change since April 2015. Two large wind farm contracts account for this share this month.

Type of Projects

The award of these contracts in April means that utilities was the dominant sector within infrastructure which accounted for 65% of the contract value awarded in April (see Fig. 4.3).

> The value of contracts awarded in in April totalled £2 billion based on a three month rolling average

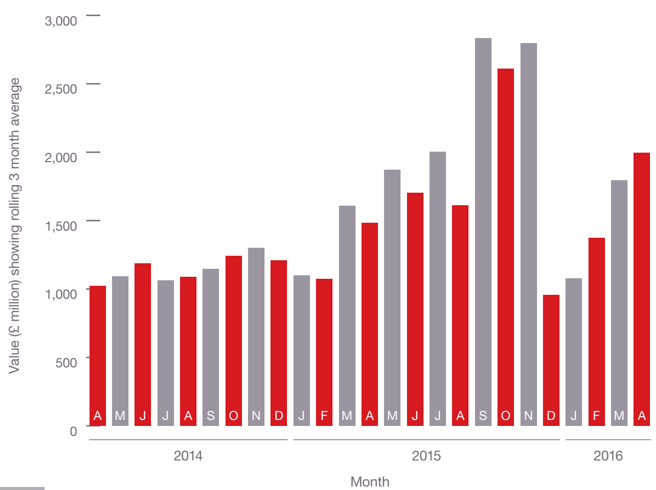


FIG. 4.1

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

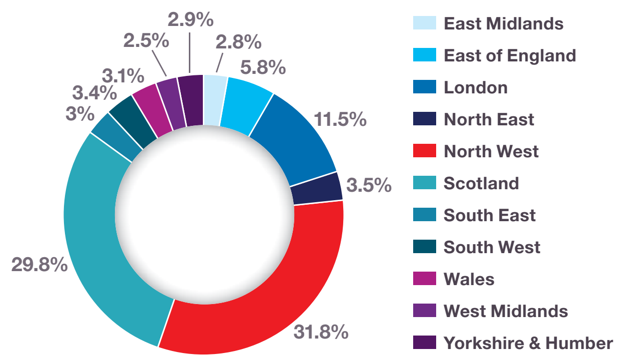


FIG. 4.2

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

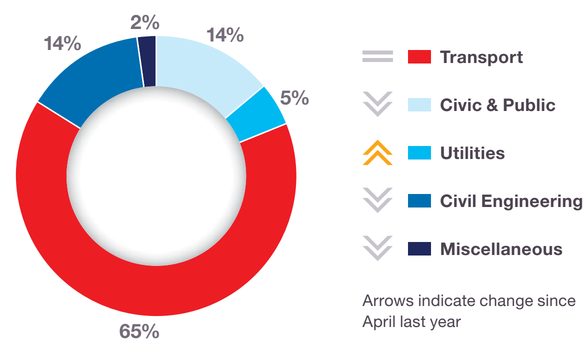


FIG. 4.3

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

Barbour ABI
www.barbour-abi.com

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

T: 0151 353 3500

E: info@barbour-abi.com

@BarbourABI

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

		+18.2%	Scotland
-8.6%	East Midlands	-11.0%	South East
+2.5%	East of England	-4.8%	South West
-4.6%	London	-2.4%	Wales
+1.7%	North East	-9.9%	West Midlands
+26.5%	North West *HOTTEST REGION*	-7.4%	Yorkshire & Humber

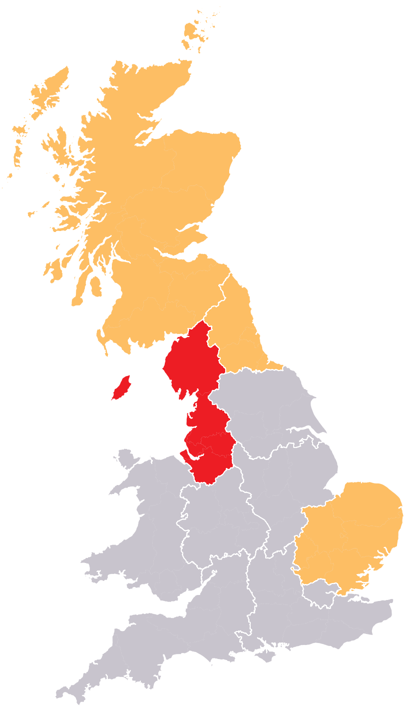


FIG. 4.4

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

> The main location of infrastructure projects this month was the North West with 31.8% of the value

PROJECT IN FOCUS

RAF Marham – Lightning II Engineering and Training Facilities £82,500,000

County	Norfolk
Primary Category Sector	Infrastructure
Government Region	East of England
Start Date	April 2016
End Date	July 2018
Contract Award Date	April 2016
Funding	Private
Stage	Contract
Contractor	Balfour Beatty Group

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

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

Barbour ABI
www.barbour-abi.com

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

TOP TEN Key Clients

May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Scottish Power	Cathcart Business Park, Spean Street, Glasgow, Strathclyde, G44 4GP	0141 568 2000	7	2,186
2	Thames Water Utilities Limited	Clearwater Court, Vastern Road, Reading, Berkshire, RG1 8DB	0800 316 9800	6	1,972
3	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	83	1,335
4	E.ON Limited	Newstead Court, Little Oak Drive, Annesley, Nottingham, Nottinghamshire, NG15 0DR	024 7618 1684	2	1,302
5	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	132	1,185
6	Transport for London	55 Broadway, Westminster, London, SW1 0BD	03432 220000	24	1,000
7	Dong Energy Power (UK) Limited	5 Howick Palce, Westminster, London, SW1P 1WG	020 7811 5200	4	641
8	DONG Energy AVS	5 Howick Place, Westminster, London, SW1P 1WG	020 7811 5200	3	581
9	Sellafield Limited (AMEC)	Sellafield Sites, Seascale, Cumbria, CA20 1PG	01946 728333 (CTPS)	1	500
10	Transport Scotland	Buchanan House, 58 Port Dundas Road, Glasgow, Strathclyde, G4 0HF	0141 272 7100	9	461

TOP TEN Key Architects

May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	16	619
2	Garry Stewart Design Associates	Highland House, Office 101 165 The Broadway, Wimbledon, London, SW19 1NE	020 8544 8085	1	191
3	WA Fairhurst & Partners	225 Bath Street, Glasgow, Strathclyde, G2 4GZ	0141 204 8800	2	154
4	RPS Group Plc	20 Western Avenue, Milton Park, Abingdon, Oxfordshire, OX14 4SH	01235 821888	3	152
5	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	2	151
6	Elevation Projects Limited	1st Floor, 16 Wright Street, Hull, East Riding of Yorkshire, HU2 8JU	01482 221155	1	150
7	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	150
8	Fletcher Rae UK Limited	Hill Quays, 5 Jordan Street, Manchester, Greater Manchester, M15 4PY	0161 242 1140	2	130
9	Pascall & Watson Architects	The Warehouses, 10 Black Friars Lane, City, London, EC4V 6ER	020 3837 2500 (CTPS)	13	102
10	WSP Parsons Brinckerhoff	WSP House, 70 Chancery Lane, Westminster, London, WC2A 1AF	020 7314 5000	1	97

TOP TEN Key Contractors

May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Costain Group Plc	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	18	1,053
2	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	28	964
3	Bachy Soletanche Limited	Henderson House, Langley Place, Higgins Lane, Burscough, Ormskirk, Lancashire, L40 8JS	01704 895686 (CTPS)	1	800
4	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	6	795
5	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, London, E14 5HU	020 7216 6800	51	770
6	Thales Transportation	The Quadrant, 4 Thomas More Square, Thomas More Street, City, London, E1W 1YW	020 3300 6000	4	760
7	Ferrovial Agroman, S. A.	Calle Ribera del Loira 42 Campo de las Naciones, Madrid, Spain, 28042	0034 91 300 85 43	1	746
8	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	25	623
9	Costain/Skanska JV	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444 / 01923 842444	2	600
10	Areva	33 rue La Fayette, 75 422 - Paris cedex 09, France	0033 (0)1 34 96 00 00	2	524

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

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

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

Barbour ABI
www.barbour-abi.com

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

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

COMMERCIAL & RETAIL

DECREASE IN CONTRACT VALUES IN APRIL

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

The value of contracts awarded in the commercial and retail sector were £708 million in April based on a three month rolling average (see Fig. 5.1). This is a 21.7% decrease from March and a 3.1% decrease from the April 2015 figure. In the three months to April the value of contracts were 23.3% below the previous three months and 4.9% higher than the same period in 2015, indicating a subdued environment in the sector.

Projects by region

London was the main location of activity in the sector this month accounting for 29.7% of the value of all contracts awarded, which was 6.2% lower than April 2015 (see Fig. 5.2 & 5.4). The largest contract awarded in London in April was the redevelopment of St Giles Circus in Westminster valued at an estimated £30 million awarded to Skanska. The South East also attracted a high proportion of commercial contracts this month, with 25.5% of the value of contracts occurring in the region in April, a 23.3% increase from its share in April 2015. A major reason for the South East share was the award of the commercially led regeneration of Dover Town Centre valued at £50 million.

Type of Projects

Offices were the dominant type of project in the sector accounting for 46% of the value of contracts awarded this month, which is 25% lower than April 2015. General retailing is the next largest sector with 26% of contract award value, which is a 4% increase from the April 2015 figure (see Fig. 5.3).

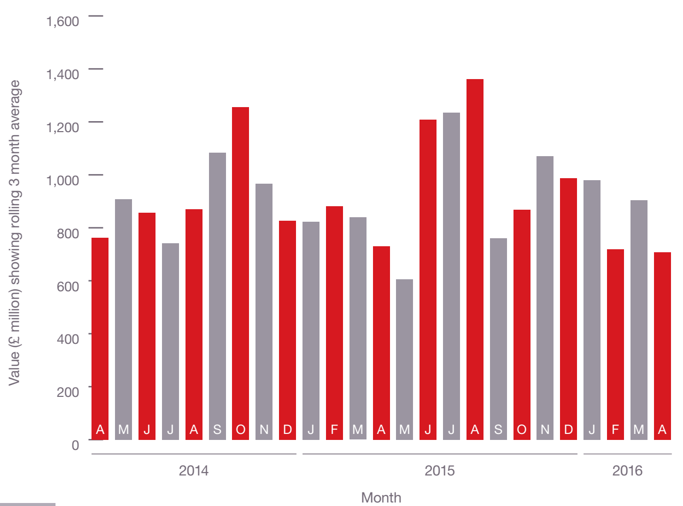


FIG. 5.1

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

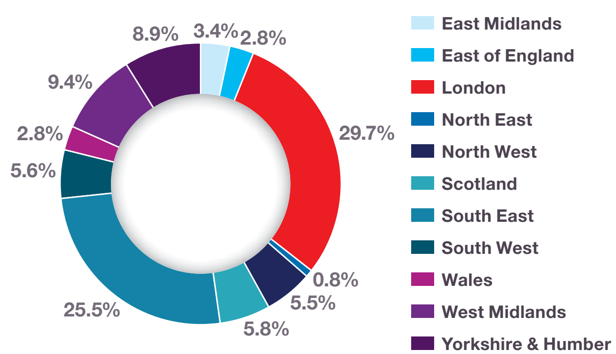


FIG. 5.2

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

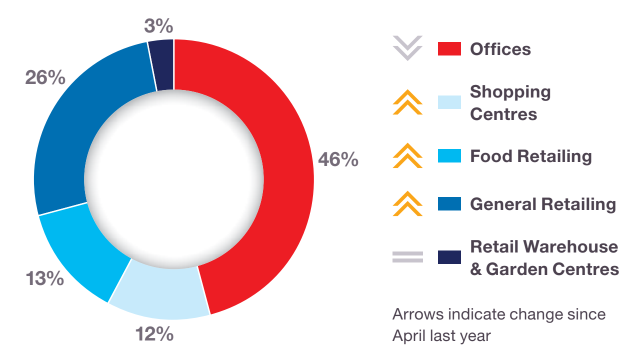


FIG. 5.3

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

economic & construction MARKET REVIEW

MAY 2016

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

Barbour ABI
www.barbour-abi.com

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

T: 0151 353 3500

E: info@barbour-abi.com

@BarbourABI

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

			↓	-12.3%	Scotland
↑	+0.8%	East Midlands	↑	+23.3%	South East *HOTTEST REGION*
↓	-3.6%	East of England	↑	+1.5%	South West
↓	-6.2%	London	↑	+0.1%	Wales
↓	-3.3%	North East	↑	+6.9%	West Midlands
↓	-9.3%	North West	↑	+2.1%	Yorkshire & Humber

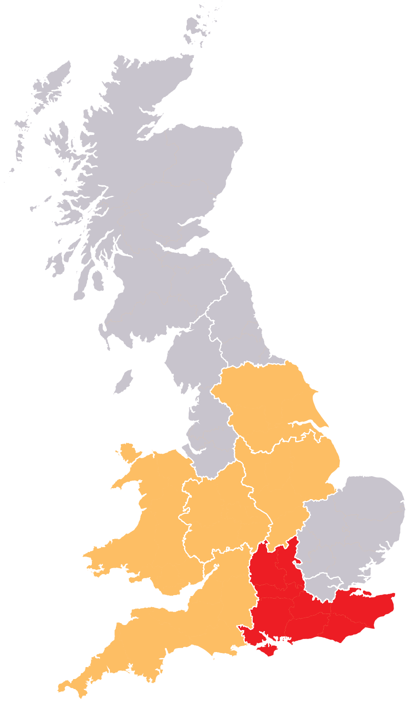


FIG. 5.4

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

PROJECT IN FOCUS

www.stjamesdover.co.uk

Dover Town Centre Regeneration – St James Site

£50,000,000

County	Kent
Primary Category Sector	Commercial & Retail
Government Region	South East
Start Date	March 2016
End Date	September 2017
Contract Award Date	April 2016
Funding	Private
Stage	Subcontract
Contractor	Kier South East

economic & construction MARKET REVIEW

MAY 2016

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

Barbour ABI
www.barbour-abi.com

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

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

DECREASE IN CONTRACT VALUES IN APRIL

TOP TEN Key Clients May 2015 – Apr 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	Lidl UK GMBH	19 Worple Road, Wimbledon, London, SW19 4JS	0800 977 7766	53	116
9	Derwent London	25 Saville Row, Westminster, London, W1S 2ER	020 7659 3000 (CTPS)	3	107
10	Performance Retail Limited Partnership	One Coleman Street, City, London, EC2R 5AA	Not Listed	3	105

TOP TEN Key Architects May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kohn Pederson Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	3	681
2	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	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	60	173

TOP TEN Key Contractors May 2015 – Apr 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	39	422
4	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	4	407
5	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	17	305
6	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	11	304
7	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	13	223
8	Lendlease Limited	20 Triton Street, Regent's Place, Camden Town, London, NW1 3BF	020 7182 9000	4	216
9	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	7	159
10	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	25	147

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

economic & construction MARKET REVIEW

MAY 2016

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

Barbour ABI
www.barbour-abi.com

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

T: 0151 353 3500

E: info@barbour-abi.com

@BarbourABI

HOTEL, LEISURE & SPORT

SLIGHT DECREASE IN CONTRACT VALUE IN APRIL

The hotel, leisure & sport sector showed monthly decreases in contract values but also shows increases over the longer term indicating a solid start to the year.

Contract award levels in the hotel, leisure & sport sector were £359 million in April, based on a three month rolling average (see Fig. 6.1). This was 8.2% lower than March and 1.6% lower than April 2015. In the three months to April the value of contracts was £1.1 billion, which was 18.4% lower than the previous three months. This was an increase of 7.8% compared to the same period in 2015 indicating a slight increase over the past year.

Projects by region

London was the main location for hotel, leisure & sport contracts this month accounting for 29.4% of the value awarded (see Fig. 6.2 & 6.4). The largest contract awarded in London during April was the Gurnell Leisure Centre development in Ealing awarded to Wilmott Dixon with a value of £33 million. This is set to provide a range of leisure facilities with the possibility of including residential at a later stage.

Type of Projects

As is often the case the hotels/motels category saw the highest proportion of activity accounting for 40% of contract value awarded in April. This was a 15% decrease from the corresponding month in 2015 but still shows signs of a strong hotel market in the UK. Leisure centres accounted for 29% of the value awarded in April, which is a 5% increase from April 2015 (see Fig. 6.3).

> London was the main location for contracts this month

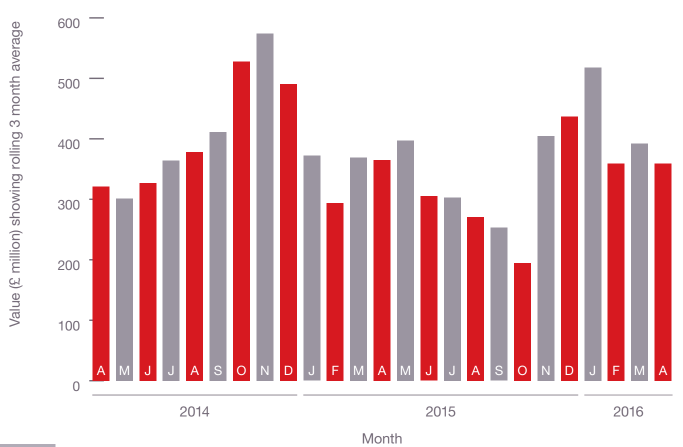


FIG. 6.1

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

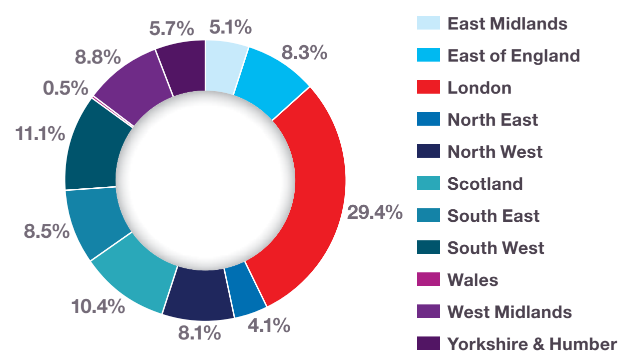


FIG. 6.2

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

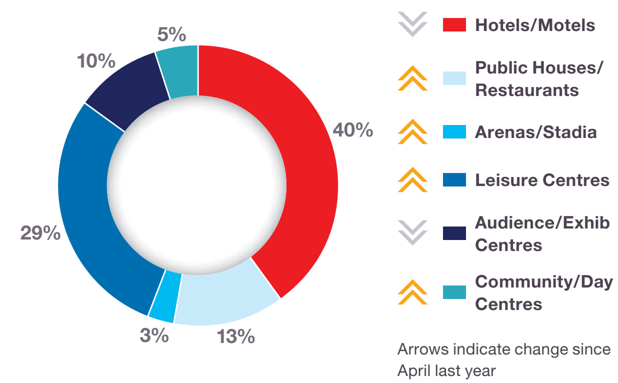


FIG. 6.3

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

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

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

Barbour ABI
www.barbour-abi.com

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

T: 0151 353 3500

E: info@barbour-abi.com

@BarbourABI

SLIGHT DECREASE IN CONTRACT VALUE IN APRIL

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

		-7.0%	Scotland
+4.2%	East Midlands	+1.1%	South East
-4.6%	East of England	+4.9%	South West
-12.8%	London	-0.8%	Wales
+0.6%	North East	+8.1%	West Midlands *HOTTEST REGION*
+1.9%	North West	+4.4%	Yorkshire & Humber

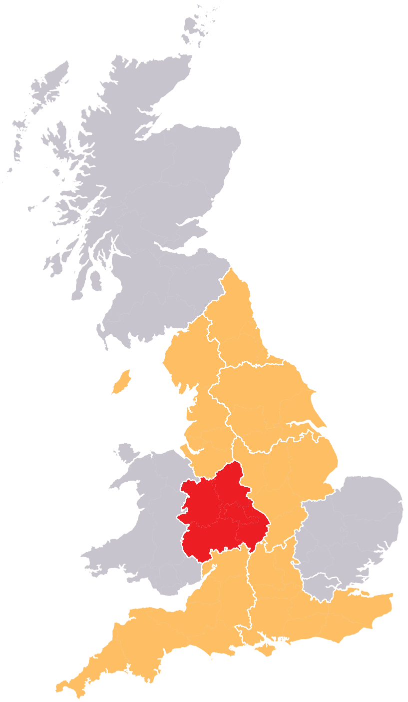
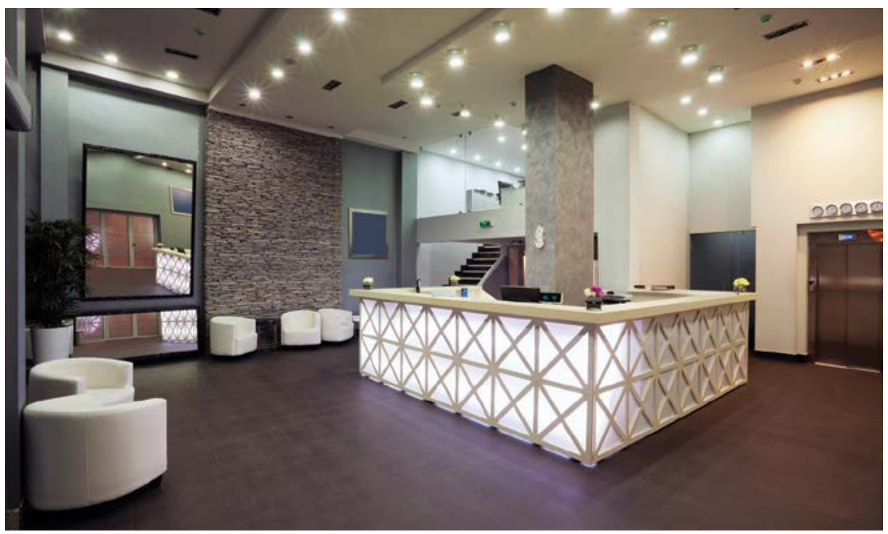


FIG. 6.4

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 40% of contract value awarded

PROJECT IN FOCUS

www.jllproperty.com

Falmouth Beach Resort Hotel – Rebuild
£35,000,000

County	Cornwall
Primary Category Sector	Hotel, Leisure & Sport
Government Region	South West
Start Date	January 2016
End Date	January 2018
Contract Award Date	April 2016
Funding	Private
Stage	Subcontract
Contractor	P Chapman Construction

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

Barbour ABI
www.barbour-abi.com

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

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

TOP TEN Key Clients

May 2015 – Apr 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	Radisson Edwardian Hotels Limited	140 Bath Road, Hayes, Middlesex, UB3 5AW	020 8759 6311	2	150
4	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499 / 01582 424200	47	138
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	Manhattan Loft Corporation Limited	223 - 231 Old Marylebone Road, Edison House, City, London, NW1 5QT	020 7535 2222	1	50
8	Premier Inn Limited	Whitbread Court, Houghton Business Park, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	0871 527 8000	28	45
9	Stanley Dock Properties Limited	New Street Square, Westminster, London, EC4A 3LX	Not Listed	1	43
10	Co-Operative Group	1 Angel Square, Manchester, Greater Manchester, M60 0AG	0161 834 1212	2	41

TOP TEN Key Architects

May 2015 – Apr 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	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	10	123
5	Urban Innovations	Wellington Buildings, 2 Wellington Street, Belfast, Northern Ireland, BT1 6HT	028 9043 5060	1	100
6	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269 (TPS)	30	86
7	Nicholas Grimshaw & Partners Limited	57 Clerkenwell Road, Westminster, London, EC1M 5NG	020 7291 4141	1	70
8	Allison Pike Partnership	7 Buxton Road West, Disley, Stockport, Cheshire, SK12 2AE	01663 763000	27	60
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

May 2015 – Apr 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)	4	166
2	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	14	123
3	McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	5	77
4	Tolent Construction Limited	Ravensworth House, 5th Avenue Business Park, Team Valley, Gateshead, Tyne and Wear, NE11 0HF	0191 487 0505	5	77
5	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	7	71
6	Ogilvie Construction	Ogilvie House, Pirnhall Business Park, Stirling, Strathclyde, FK7 8ES	01786 812273	10	67
7	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	11	65
8	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	4	55
9	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	6	52
10	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	1	50

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.

Barbour ABI
www.barbour-abi.com

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

INDUSTRIAL

ACTIVITY DECREASES IN THE SECTOR THIS MONTH

The industrial sector experienced a slight decline in contracts awarded in April and the value of work is significantly lower than the same time in 2015.

Activity in the industrial sector decreased in April with the value of contracts awarded £395 million, based on a three month rolling average (see Fig. 7.1). This equates to a decline of 23.5% on the value in March and is 30.3% below the figure recorded this time last year. In the three months to April the total value of contracts was £1.4 billion which was 4.3% lower than the previous three months but 20% lower than the same quarter last year.

Projects by region

The South East is the region with the highest value of activity this month with 34% of the contracts awarded, an increase of 14% on April 2015 (see Fig. 7.2). This was principally due to the award of the Ministry of Defence contract for Project Wellesley Worthy Down in Winchester valued at £100 million.

Type of Projects

The types of project awarded in the sector were predominantly in warehouse/storage which accounted for 67% of contract values, no change from April 2015 (see Fig. 7.3). This was largely due to the award of several warehouse contracts, the largest of which was the Dunelm Distribution Centre in Stoke valued at £49 million.

> In the three months to April the total value of contracts was £1.4 billion

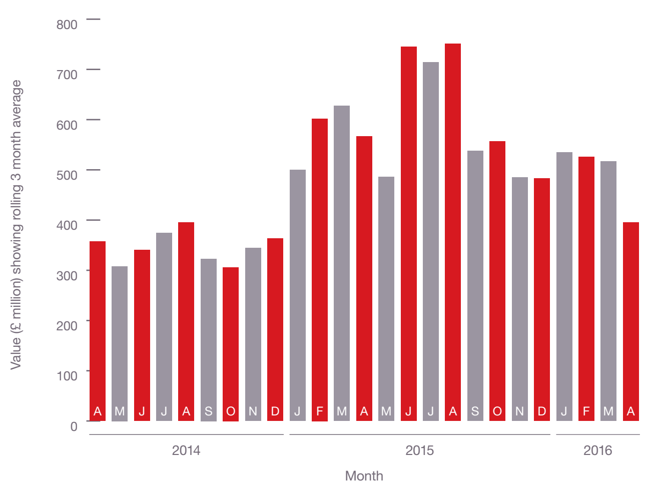


FIG. 7.1
Industrial: **Project Value showing 3 month moving average** Source: Barbour ABI

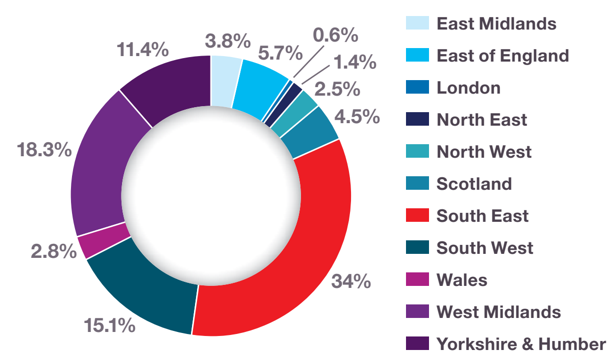


FIG. 7.2
Industrial: **Value of Contracts by Region** Source: Barbour ABI

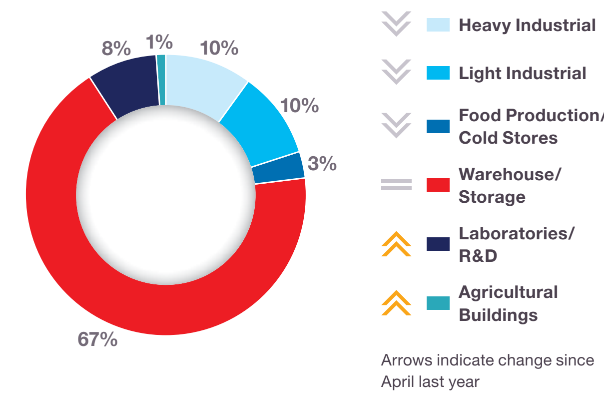


FIG. 7.3
Industrial: **Type of Projects Awarded** Source: Barbour ABI

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

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

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

ACTIVITY DECREASES IN THE SECTOR THIS MONTH

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

-17.2%	East Midlands	+1.1%	Scotland
+2.6%	East of England	+14.0%	South East
-5.5%	London	+8.9%	South West
-1.2%	North East	-1.1%	Wales
-23.5%	North West	+14.5%	West Midlands *HOTTEST REGION*
		+7.4%	Yorkshire & Humber

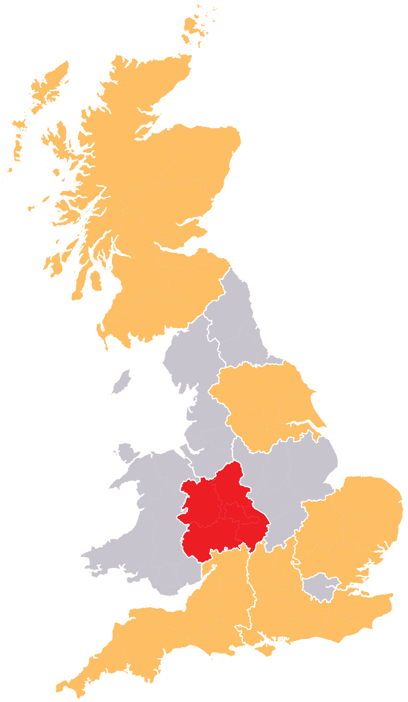


FIG. 7.4

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

Source: Barbour ABI

PROJECT IN FOCUS

Project Wellesley Worthy Down – Phase 2 & Phase 3 £100,000,000

County	Hampshire
Primary Category Sector	Industrial
Government Region	South East
Start Date	Quarter 3 2016
End Date	Quarter 3 2018
Contract Award Date	April 2016
Funding	Public
Stage	Contract
Contractor	Skanska UK

Barbour ABI
www.barbour-abi.com

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

T: 0151 353 3500

E: info@barbour-abi.com

@BarbourABI

ACTIVITY DECREASES IN THE SECTOR THIS MONTH

TOP TEN Key Clients
May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BP Exploration	Farburn Industrial Estate, Aberdeen, Grampian, AB21 7PB	01224 832000	1	500
2	BAE Systems Marine Limited	Bridge Road, Barrow in Furness, Cumbria, LA14 1AF	01229 823366	2	215
3	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	6	157
4	SNF Gas and Oil Limited	Solutions House, Ripley Close, Normanton Industrial Estate, Normanton, West Yorkshire, WF6 1TB	01924 311000	2	150
5	The London Taxi Company	Holyhead Road, Coventry, West Midlands, CV5 8JJ	024 7657 2000	1	150
6	Goodman International	Nelson House, Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG	0121 506 8100	5	145
7	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	5	129
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	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	2	110

TOP TEN Key Architects
May 2015 – Apr 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	25	343
2	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	8	165
3	BHP Design LLP	Suite 2f, St Georges Court, 1 Albion Street, Birmingham, West Midlands, B1 3AH	0121 314 6618	1	150
4	Fairhursts Design Group	55 King Street, Manchester, Greater Manchester, M2 4LQ	0161 831 7300 (CTPS)	5	126
5	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	9	122
6	STOAS Architects	216 Fort Dunlop, Fort Parkway, Birmingham, West Midlands, B24 9FD	0121 747 1943	2	110
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	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	2	97

TOP TEN Key Contractors
May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Winvic Construction	19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	22	621
2	Petrofac	Bridge View, 1 North Esplanade West, Aberdeen, Aberdeenshire, AB11 5QF	01224 247000 (TPS)	1	500
3	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	6	232
4	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	8	163
5	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	9	139
6	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	8	133
7	VolkerWessels UK Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	6	126
8	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	2	100
9	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	1	90
10	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	7	84

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.

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

MEDICAL & HEALTH

DECREASE IN VALUE OF CONTRACTS IN APRIL

The monthly value of medical & health contracts decreased in April and were significantly below the values for April 2015.

Levels of activity in the medical & health sector decreased by 28.9% in April 2016 compared to March, with the total value of contracts awarded £110 million based on a three month rolling average (see Fig. 8.1). This is 39.1% lower than the values in April 2015. In the three months to April the value of contracts decreased by 41.1% compared to the three months to March and was 10.4% down on the same period in 2015 indicating a longer term decrease in the value of contracts awarded in the sector.

Projects by region

The South East was the main location of development in the sector this month capturing 44.2% of activity, a substantial 40.5% increase from April 2015 (see Fig. 8.2 & 8.4). This is primarily due to the award for the contract to build a new Accident & Emergency department at Wexham Hospital in Slough. With a construction value of £25 million it is due to commence in January 2017 and was awarded to the Kier Group.

Type of Projects

Public hospitals are the dominant sub-sector this month accounting for 81% of the value of contracts in April 2015, a 38% increase from April 2015 (see Fig. 8.3).

> The South East was the main location of development in the sector this month

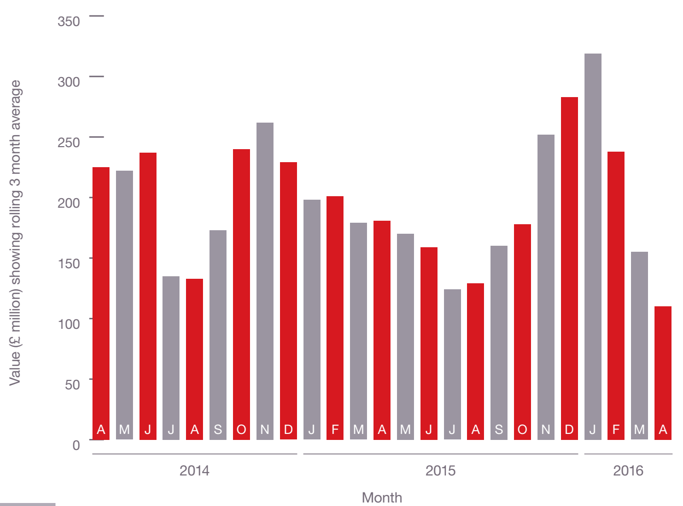


FIG. 8.1

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

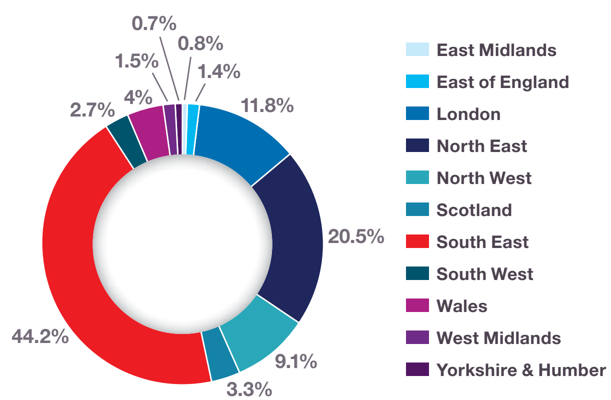
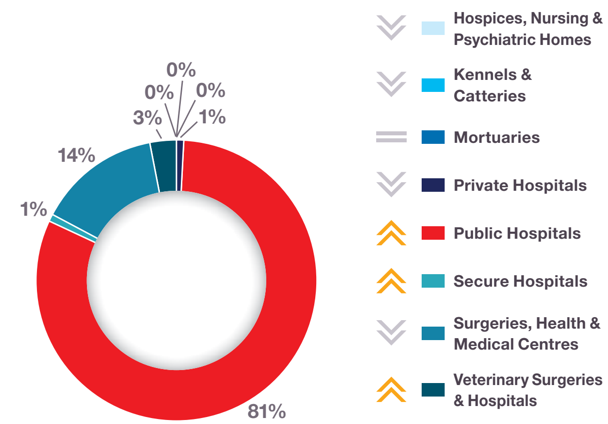


FIG. 8.2

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



Arrows indicate change since April last year

FIG. 8.3

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

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

Barbour ABI
www.barbour-abi.com

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

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

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

		-12.4%	Scotland
-15.4%	East Midlands	+40.5%	South East *HOTTEST REGION*
+1.4%	East of England	-1.3%	South West
-11.4%	London	+4.0%	Wales
+17.0%	North East	-6.2%	West Midlands
-2.2%	North West	-14.0%	Yorkshire & Humber

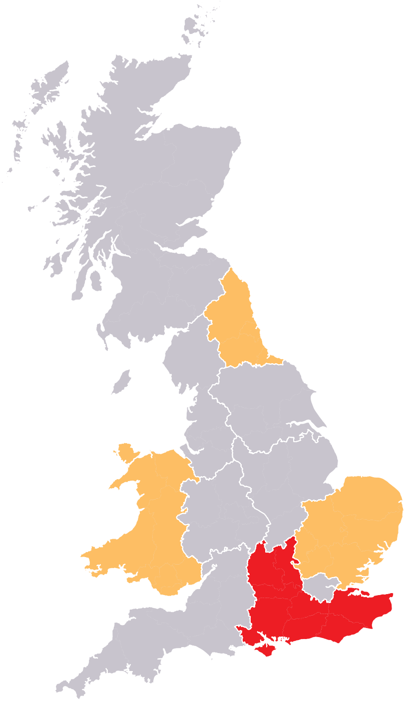
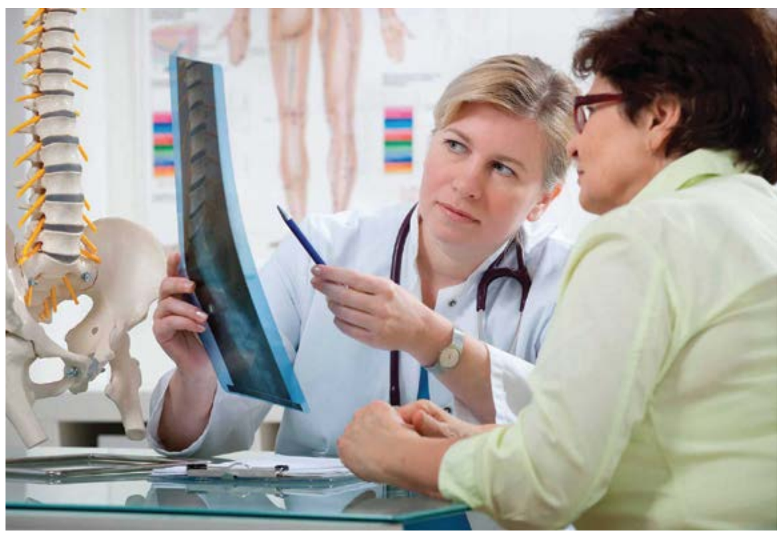


FIG. 8.4

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



> “Public hospitals are the dominant sub-sector this month accounting for 81% of the value of contracts

PROJECT IN FOCUS

Hampshire Hospital – Treatment Centre
£16,000,000

County	Hampshire
Primary Category Sector	Medical & Health
Government Region	South East
Start Date	July 2016
End Date	July 2018
Contract Award Date	April 2016
Funding	Mainly Public
Stage	Contract
Contractor	Kier Building Services

economic & construction MARKET REVIEW

MAY 2016

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

Barbour ABI
www.barbour-abi.com

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

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

DECREASE IN VALUE OF CONTRACTS IN APRIL

TOP TEN Key Clients
May 2015 – Apr 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	209
3	Hampshire Hospitals NHS Foundation Trust	Aldermaston Road, Basingstoke, Hampshire, RG24 9NA	01256 473202	2	166
4	Royal Free Hospital	Pond Street, Hampstead, London, NW3 2QG	020 7794 0500	4	157
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	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
7	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)	1	60
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	Darlington Memorial Hospital NHS Foundation	Darlington Memorial Hospital, Hollyhurst Road, Darlington, County Durham, DL3 6HX	01325 380100	2	46
10	Lothian Health Board	Deaconess House, 148 Pleasance, Edinburgh, Lothian, EH8 9RQ	0131 536 9000	2	44

TOP TEN Key Architects
May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Billfinger GVA	65 Gresham Street, Westminster, London, EC2V 7NQ	020 7491 2188 (TPS)	2	283
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	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	9	110
10	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	0207 580 0400	2	63

TOP TEN Key Contractors
May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	18	338
2	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	2	290
3	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	16	287
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	Vinci Construction	17 Navigation Court, Calder Park, Wakefield, West Yorkshire, WF2 7BJ	01924 640600	4	55
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	John Graham Construction Limited	Ballygowan Road, Hillsborough, County Down, Northern Ireland, BT26 6HX	02892 689 500	2	44
10	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	9	38

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

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

Barbour ABI
www.barbour-abi.com

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

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

EDUCATION
INCREASE IN THE VALUE OF CONTRACTS IN APRIL

Contract values in the education sector increased in April and 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 £665 million in April based on a three month rolling average, a 12.9% increase from March (see Fig. 9.1). The values of contract awards in the three months to April were 15.9% higher than the same period last year, showing an improving picture within the sector.

Projects by region

Scotland experienced the highest share of the value of education contracts in April accounting for 23.5% of contract value awarded (see Fig. 9.2 & 9.4). The largest construction contract awarded in Scotland in April was the refurbishment of the Darwin Building by the University of Edinburgh to include a new library on campus. This was valued at £80 million and was awarded Robertson Group.

A major school building contract was also awarded in Scotland with construction of Our Lady and St Patrick's High School in Dumbarton valued at £28 million.

Type of Projects

The Edinburgh University contract means that colleges/universities were the dominant sub sector in education in April. They accounted for 46% of the total value awarded, up 16% from April 2015 (see Fig. 9.3).

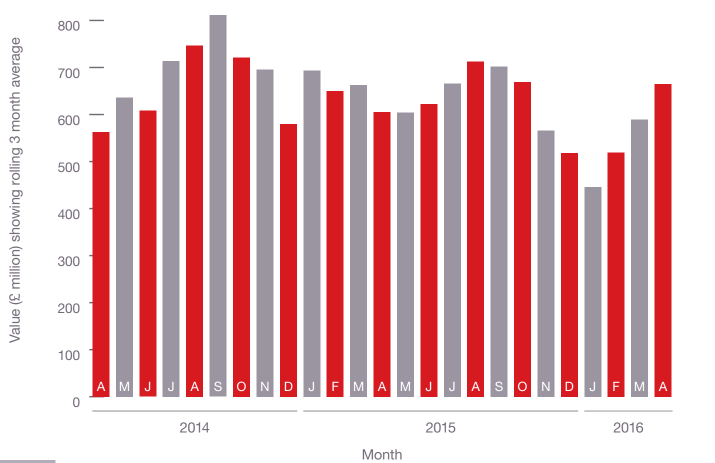


FIG. 9.1
Education: **Project Value showing 3 month moving average** Source: Barbour ABI

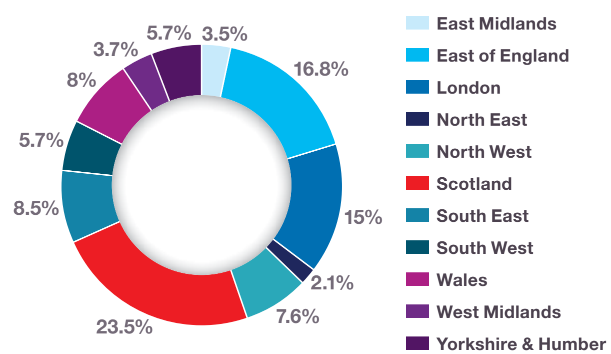


FIG. 9.2
Education: **Value of Contracts by Region** Source: Barbour ABI

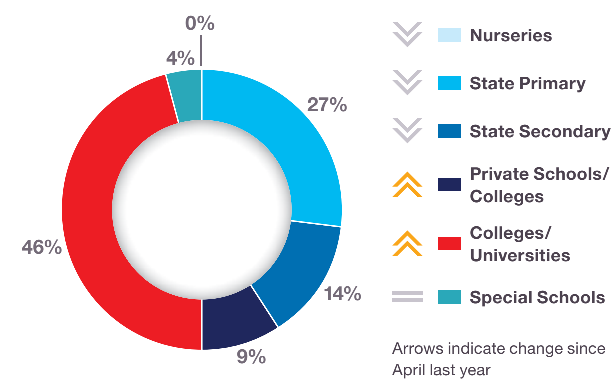


FIG. 9.3
Education: **Type of Projects Awarded** Source: Barbour ABI

Barbour ABI
www.barbour-abi.com

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

INCREASE IN THE VALUE OF CONTRACTS IN APRIL

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

-1.0%	East Midlands	-1.4%	Scotland
+12.2%	East of England *HOTTEST REGION*	-6.0%	South East
-5.8%	London	-4.8%	South West
+1.6%	North East	+8.0%	Wales
+5.2%	North West	-2.6%	West Midlands
		-5.4%	Yorkshire & Humber

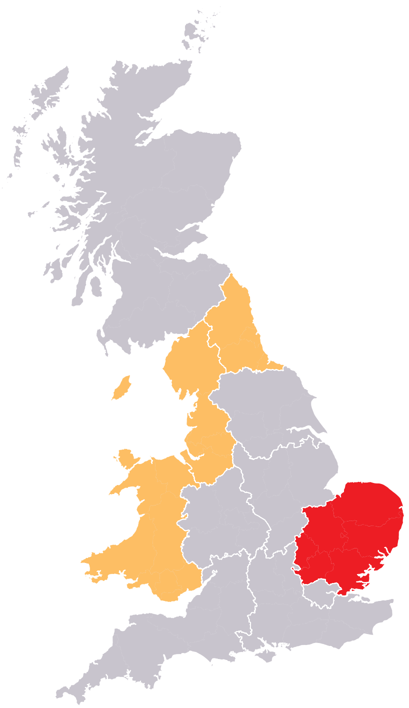


FIG. 9.4

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

> Scotland experienced the highest share of the value of contracts in April accounting for 23.5% of contract value awarded

PROJECT IN FOCUS

University of East Anglia, Norwich Research Park – Centre for Food and Health £60,000,000

County	Norfolk
Primary Category Sector	Education
Government Region	East of England
Start Date	May 2016
End Date	May 2018
Contract Award Date	April 2016
Funding	Mainly Private
Stage	Subcontract
Contractor	Wates Construction Limited

Barbour ABI
www.barbour-abi.com

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

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

INCREASE IN THE VALUE OF CONTRACTS IN APRIL

TOP TEN Key Clients
May 2015 – Apr 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	73	813
2	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	9	274
3	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	10	161
4	University of Northampton	Boughton Green Road, Northampton, Northamptonshire, NN2 7AL	01604 735500 (CTPS)	6	138
5	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	6	128
6	University of Oxford	The Malthouse, Tidmarsh Lane, Oxford, Oxfordshire, OX1 1NQ	01865 270000 (CTPS)	5	118
7	University of Leeds	Woodhouse Lane, Leeds, West Yorkshire, LS2 9JT	0113 243 1751	14	93
8	North Ayrshire Council	5th Floor, Cunninghame House, Irvine, Strathclyde, KA12 8EE	01294 310 000	2	88
9	University College London	Gower Street, Westminster, London, WC1E 6BT	020 7679 2000 (CTPS)	11	81
10	Lambeth College	45 Clapham Common Southside, Clapham, London, SW4 9BL	020 7501 5010	2	80

TOP TEN Key Architects
May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	27	343
2	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	15	258
3	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	3	234
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	203
6	The Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	24	174
7	Pick Everard (Leicester)	Halford House, Charles Street, Leicester, Leicestershire, LE1 1HA	0116 223 4400 (TPS)	23	141
8	Moses Cameron William Architects	Oast House, Malting Lane, Cambridge, Cambridgeshire, CB3 9HF	01223 792500	5	137
9	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	24	134
10	Jestico Whiles & Associates	1 Cobourg Street, Camden Town, London, NW1 2HP	020 7380 0382	6	126

TOP TEN Key Contractors
May 2015 – Apr 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	93	616
2	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	46	450
3	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	59	407
4	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	33	393
5	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	65	338
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	22	335
7	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, London, E14 5HU	020 7216 6800	10	328
8	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	5	243
9	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	25	241
10	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861 000	14	197

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

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

ABI About Us
Economic Context
The Construction Sector
Residential
Infrastructure
Commercial & Retail
Hotel, Leisure & Sport
Industrial
Medical & Health
Education

Barbour ABI
www.barbour-abi.com

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

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

Barbour ABI

www.barbour-abi.com

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

T: 0151 353 3500

E: info@barbour-abi.com

@BarbourABI

economic & construction
MARKET REVIEW

MAY 2016

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

Barbour ABI
www.barbour-abi.com

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