economic & construction MARKET REVIEW

Barbour ABI | Building | bd

DECEMBER 2016

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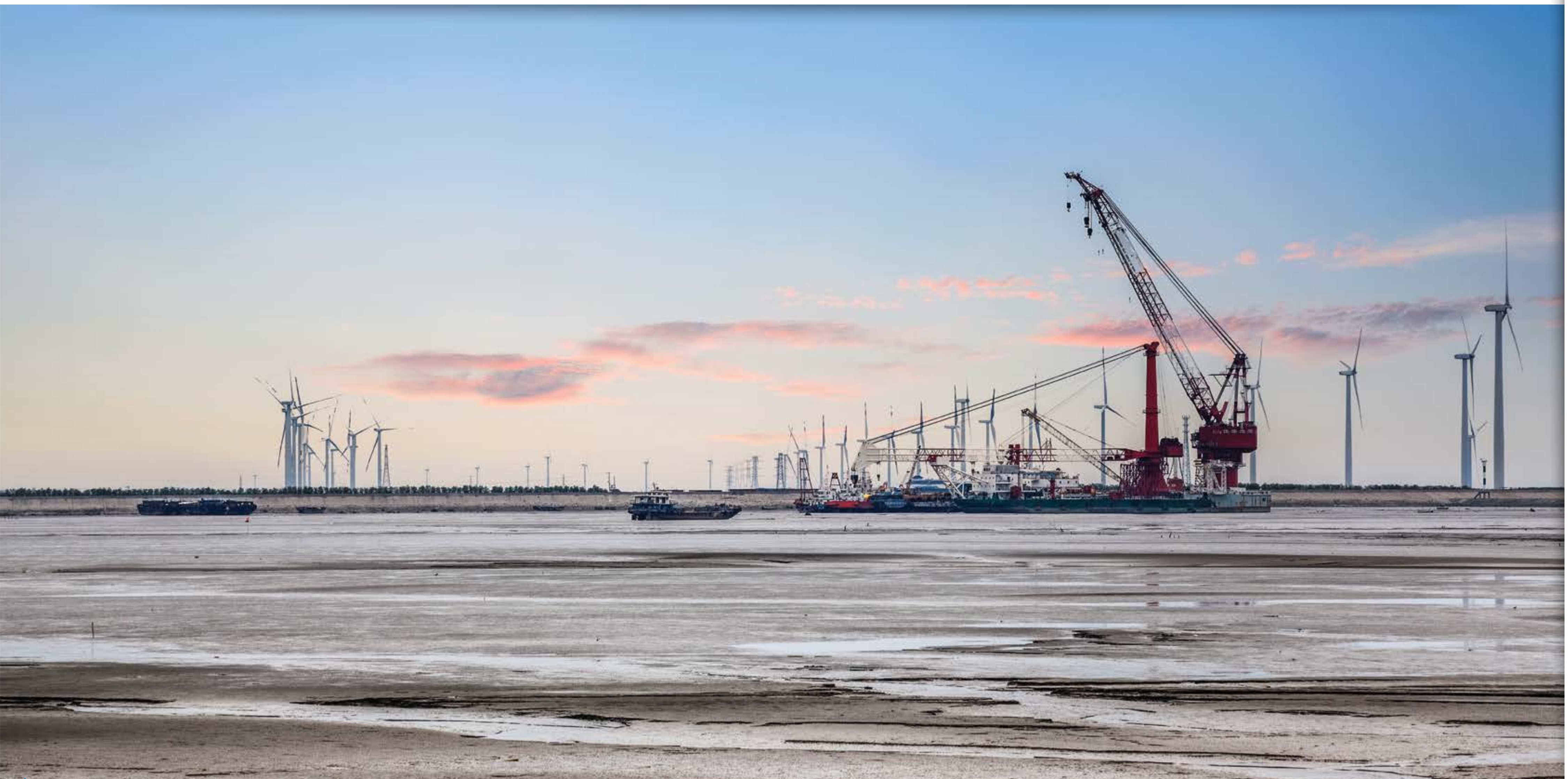

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ABOUT US

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.

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.

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Barbour ABI

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

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

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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

cpa construction products association

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ECONOMIC CONTEXT

OBR REVISES ECONOMIC FORECASTS IN THE AUTUMN STATEMENT

The Autumn Statement was announced this month in what was the first major spending announcement with new Prime Minister Theresa May.

In what was a relatively benign statement in the policy changes proposed it did give an idea of the current administration's views on the economic challenges that lie ahead for the UK economy. In that respect it was the revision the Office for Budget Responsibility's (OBR) economic forecasts that attracted the most headlines with the planned increase to the infrastructure budget the most relevant policy announcement for the construction industry.

GDP	2015	2016	2017	2018	2019	2020	2021
Budget 2016	2.2	2.0	2.2	2.1	2.1	2.1	
Autumn Statement	2.2	2.1	1.4	1.8	2.1	2.1	2.0

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

CPI (Inflation)	2015	2016	2017	2018	2019	2020	2021
Autumn Statement	0.0	0.7	1.6	2.0	2.1	2.0	
Summer Budget	0.0	0.7	2.3	2.5	2.1	2.0	2.0

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

Average Earnings	2015	2016	2017	2018	2019	2020	2021
Autumn Statement	2.3	2.6	3.6	3.5	3.4	3.6	
Summer Budget	1.8	2.2	2.4	2.8	3.3	3.6	3.7

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

Unemployment Rate	2015	2016	2017	2018	2019	2020	2021
Autumn Statement	5.4	5.0	5.0	5.2	5.3	5.3	
Summer Budget	5.4	5.0	5.2	5.5	5.4	5.4	5.4

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

The OBR's updated economic forecasts for the UK show that GDP growth is now estimated to be 2.1% in 2016, which was actually an increase from the 2.0% forecast in the Budget. However, the forecast for 2017 received a downward revision to 1.4%, down from 2.2% in March. The figure for 2018 was also downgraded to 1.8%, from 2.1% at the Budget. Growth is expected to recover to 2.1% in 2019 and 2020 although that is still below long term average growth of around 2.5% (see Fig. 1.1). It is clear that the OBR expects short term 'shocks' to the economy from the Brexit vote in 2017 and 2018.

The fall in the value of Sterling since the Brexit vote led to the Inflation forecasts to be revised for 2017 from 1.6% to 2.3% as the weaker currency leads to more expensive imported goods. The OBR's inflation target of 2.0% is predicted to be met in 2020, no change to the March budget (see Fig. 1.2).

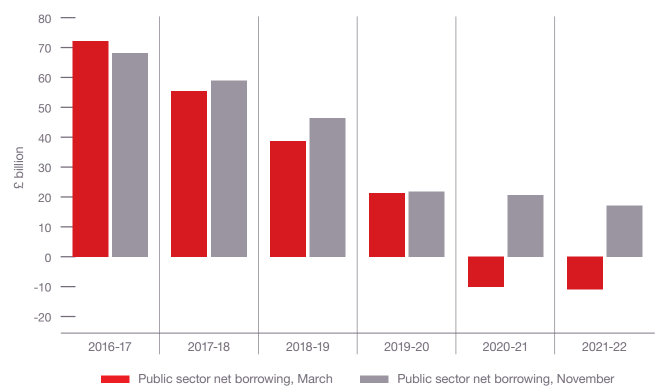

Fig. 1.5 **Public Sector Borrowing** Source: ONS

Average earnings also look set to be challenged post Brexit with the OBR revising its forecasts down to 2.2% wage growth this year, when it expected the figure to be 2.6% when the Budget was announced. In 2017 average earnings are now forecast to be 2.4% next year, down from 3.6% in March and 2.8% in 2018 down from 3.5% at its previous estimate (see Fig. 1.3).

Unemployment is now forecast to be marginally higher in 2017 at 5.2% compared to 5.0% in March. It is then forecast to be 5.5% in 2018, with the forecast 5.2% in at the Budget (see Fig. 1.4). These forecasts imply that the economy is set for some turbulent years ahead with higher inflation and lower growth but that the majority of this will have occurred by 2020.

The fiscal impact of these changes to the economic outlook was marked. While in March it was estimated that the government would begin to pay down its debt, it is now estimated to have a borrowing requirement of £37.9 billion compared to a £21.1 billion surplus in March (see Fig. 1.5).

The many policy measures for construction announced in the statement included:

- **£23bn National Productivity Investment Fund (NPIF), which will fund housing, R&D and economic infrastructure**
- **A commitment to raise the amount invested annually in economic infrastructure to up to 1.2% of GDP, from 0.8% today**

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CONSTRUCTION CONTRACT ACTIVITY DECREASES IN NOVEMBER

The latest figures from the ONS indicate the construction sector in the UK declined by 0.6% in October compared to September.

Comparing October output levels with the same period in 2015 showed an increase of 0.7%, demonstrating an industry that is larger than last year despite the slowdown in recent months.

New private housing remains strong within the industry growing by 2.4% in October compared to September and 13.9% compared to October 2015. Taking output in the last three months compared to a year earlier also showed an increase of 13.9%. The one sector that showed declines in both comparison periods was infrastructure which declined by 4.1% between September and October and 11.3% on October 2015 (see Fig. 2.1).

	% change	
	October 2015 – October 2016	September 2016 – October 2016
Total All Work	**0.7**	**-0.6**
All New Work	**2.9**	**-0.9**
Public Housing	4.4	-3.0
Private Housing	13.9	2.4
Infrastructure	-11.3	-4.1
Public (ex Infrastructure)	1.3	-3.1
Private Industrial	-6.9	1.6
Private Commercial	5.3	-1.3
Repair & Maintenance	**-3.2**	**0.0**
Public Housing	-11.6	-1.1
Private Housing	-2.4	-1.5
Non-Housing	-1.1	1.6

Fig. 2.1 **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 134 for November. This is a decrease from the previous month's figure of 144 and suggests that contract activity in the industry is still high by historical standards but it has weakened slightly. The readings for Private Housing fell slightly to register a reading of 232, down from 243 the previous month. Commercial offices also declined, recording a reading of 89 down from 93 in October. However, that compares to a reading of 155 in October 2015 (see Fig. 2.2).

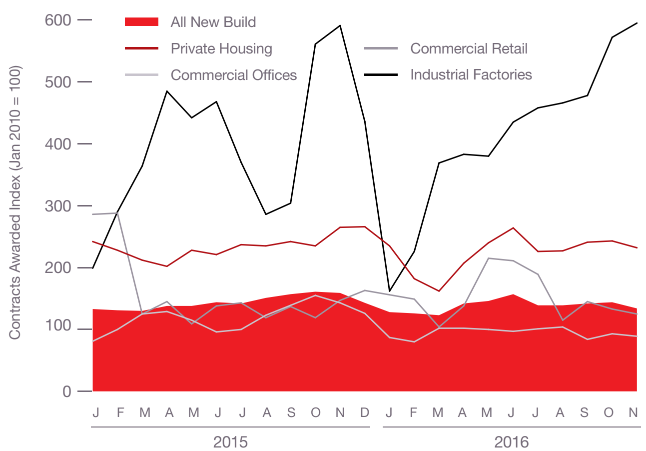

Fig. 2.2 **Contracts Awarded** Source: CPA/Barbour ABI

Construction Sector

According to Barbour ABI data on all contract activity, November witnessed a decrease in construction levels with the value of new contracts awarded at £5.5 billion, based on a three month rolling average (see Fig. 2.4). This is a 7.8% decrease from October and is 30.1% lower than the value recorded in November 2015. The number of construction projects within the UK decreased by 8.7% in November, but were 0.8% higher than November 2015.

> Contract activity in the industry is still high by historical standards but it has weakened slightly

Projects by Region

The majority of the contracts awarded in November by value were in the North East and London, accounting for 15% each of the UK total. This is followed by Scotland with 13% of contract award value in the month (see Fig. 2.3). The main reason for the North East's figures this month was the award of the construction contract for the Tees Renewable Energy plant in Cleveland. This scheme is set to deliver 295 MWE biomass fired power station, has a value of £650 million and was awarded to Tolent Construction. In London, the largest contract awarded was a

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residential scheme called Abbey Retail Park in Barking which is set to deliver 597 flats at a value of £90 million.

Types of Project

Infrastructure had the highest proportion of contracts awarded by value in November with 30% of the total. This is followed by the residential sector which accounted for 29% of the awarded value (see Fig. 2.5). The Tees Renewable Energy plant in Cleveland was the infrastructure contract with the highest value awarded in November at £650 million. Another major contract awarded in November was the Aberdeen offshore wind farm, an 11 turbine development valued at £300 million.

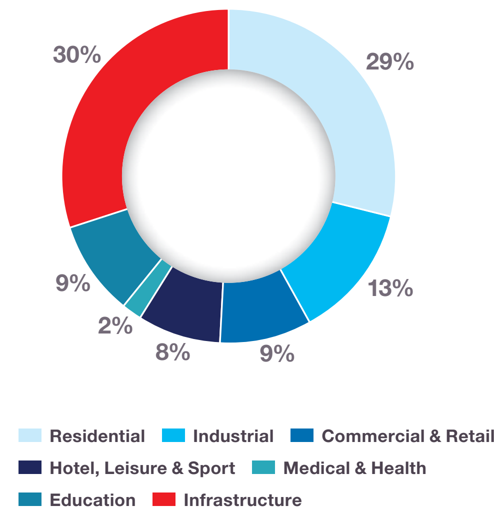

Fig. 2.5 **Type of Projects** Source: Barbour ABI

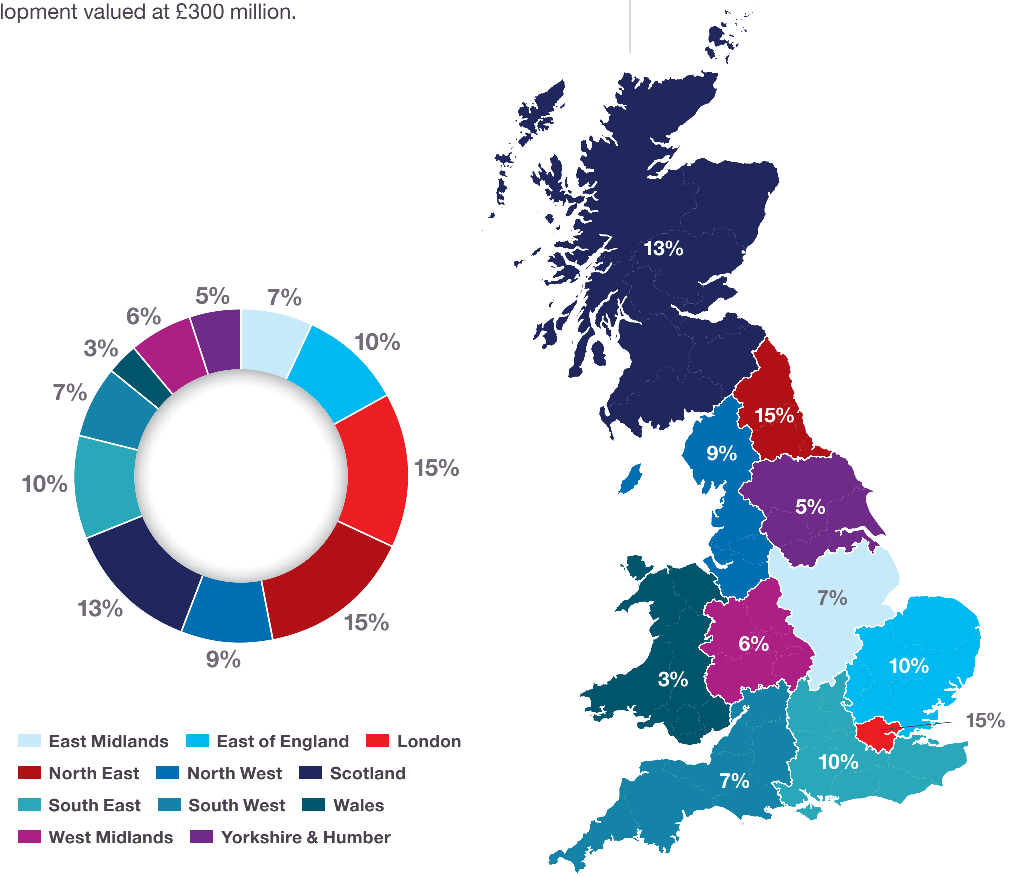

Fig. 2.3 **Locations of Contracts Awarded** Source: Barbour ABI

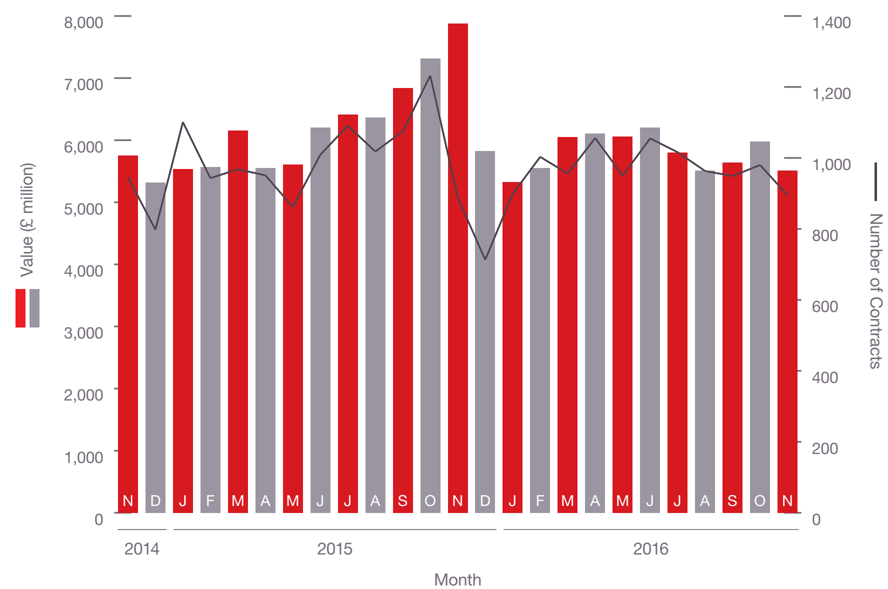

Fig. 2.4 **Construction Activity Trends** Source: Barbour ABI

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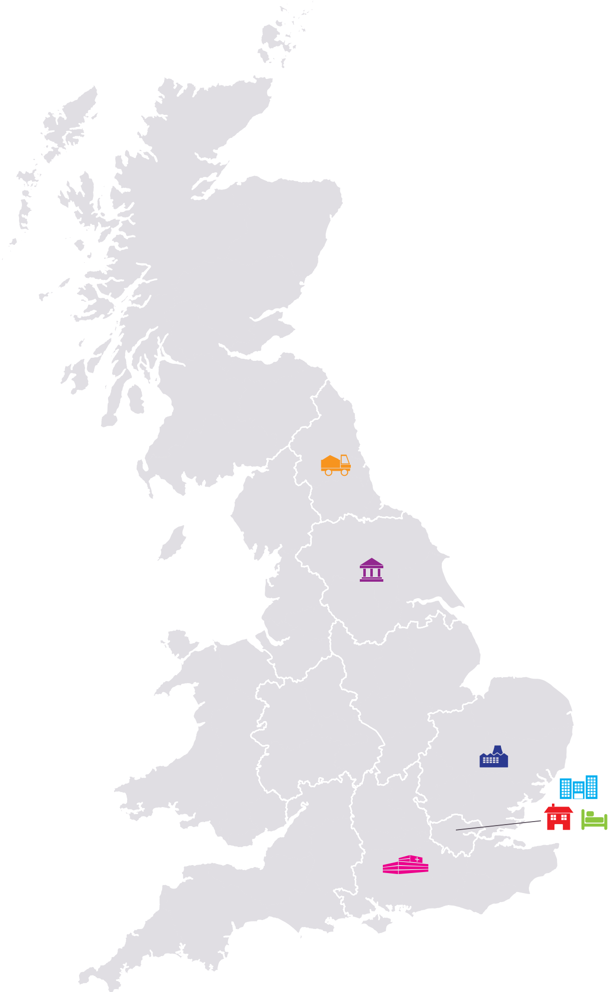
A snippet of this month's regional activity

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



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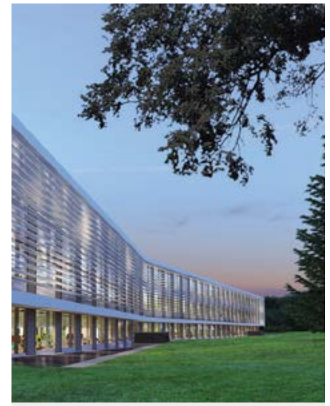
- Infrastructure
- Commercial & Retail
- Hotel, Leisure & Sport
- Industrial
- Medical & Health
- Education

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
International Bible Students Association Residences
£22,500,000

INFRASTRUCTURE
Contract 2 – Sighthill Tra Infrastructure
£36,540,000



COMMERCIAL & RETAIL
Atkins HQ – Woodcote Grove Redevelopment Project
£35,200,000

HOTEL, LEISURE & SPORT
Wembley Theatre – Olympic Way
£14,000,000

INDUSTRIAL
Marine Harvest Limited – Fish Feed Factory
£80,000,000

MEDICAL & HEALTH
Milton Keynes University Hospital – Academic Centre
£5,000,000

EDUCATION
University of Manchester – Graphene Engineering Innovation Centre
£30,000,000

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RESIDENTIAL

RESIDENTIAL PARES BACK IN NOVEMBER

The value of residential contracts awarded decreased in November after sharp increases in the month of October.

The residential sector pared back slightly in November following an exceptionally strong October. The total value of projects awarded was valued at £2.1 billion based on a three month rolling average (see Fig. 3.1). This is an 8% decrease compared to October and is 5.7% lower than November 2015. The number of units associated with residential contracts awarded increased by 1% between October and November based on a three month rolling average, but are 1.6% lower than November 2015.

Sector Performance

The latest house price indices for November from Nationwide showed that average house prices are rising at 4.4% annually, a decrease from 4.6% in October. The conditions within the market are described as “stable” and that the relative strength of the labour market should continue to underpin these levels of increases. The Halifax reported annual house price rises at 6% in November, up from 5.2% in October. In signs that the high end residential market continues to be challenged, Berkeley Homes said that the reservations for its homes had fallen by a fifth since the result of the EU referendum.

Projects by region

London is the main location of activity in the residential sector this month, accounting for 19.7% of the value of contracts awarded, an increase of 2.3% from the same month last year. The South East had the next highest proportion of contract award value in November with 14% of the total value awarded, an increase of 1.1% from November 2015 (see Fig. 3.2 & 3.4). Outside of London the largest residential contract award by value was in

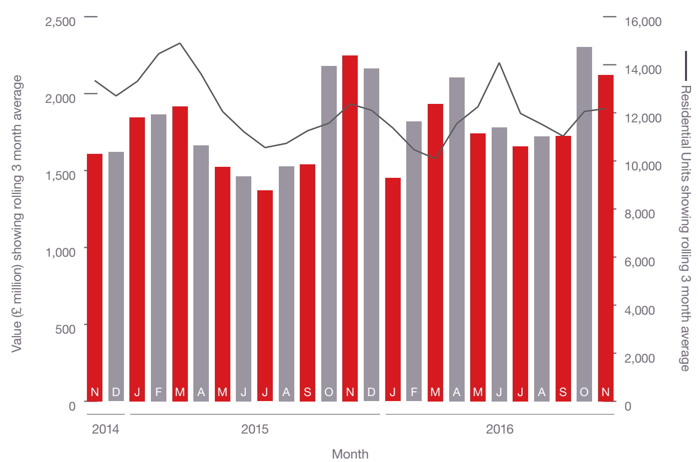

FIG. 3.1

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

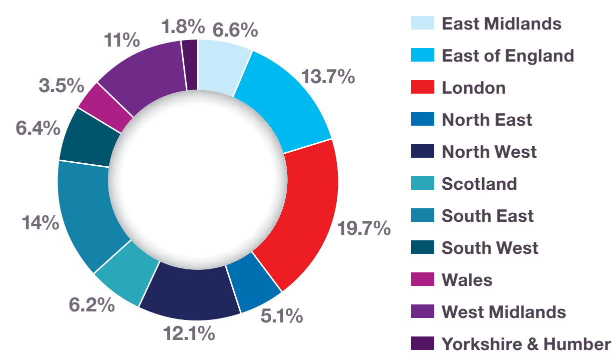

FIG. 3.2

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

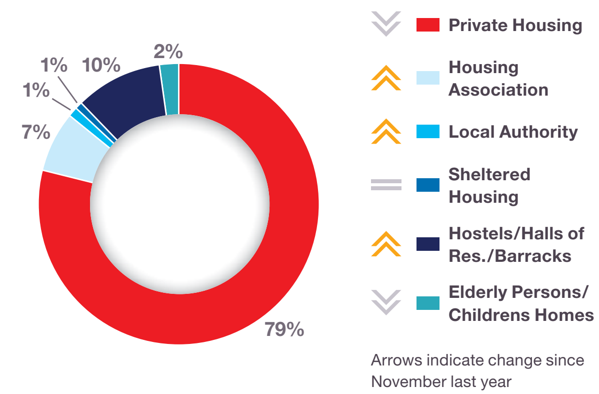

FIG. 3.3

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

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

-0.3%	East Midlands		-7.9%	Scotland
+5.0%	East of England *HOTTEST REGION*		+1.1%	South East
+2.3%	London		-1.1%	South West
+3.4%	North East		-2.9%	Wales
+1.9%	North West		+3.0%	West Midlands
			-4.6%	Yorkshire & Humber

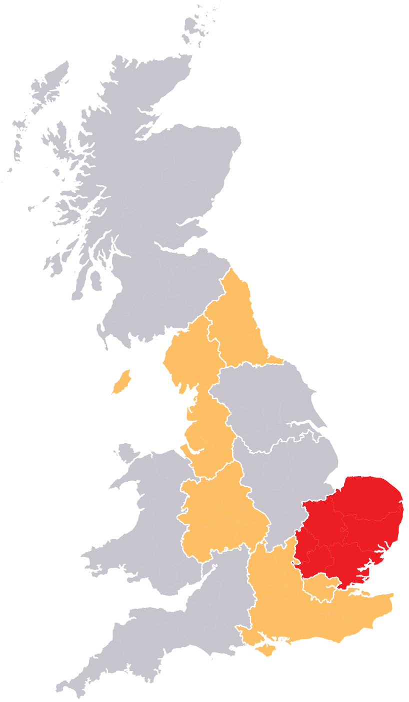

FIG. 3.4

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

Walsall at the Goscote Lane regeneration development, a scheme set to provide 426 units at a value of £44 million awarded to Keepmoat Regeneration.

Type of Projects

The type of projects awarded in the residential sector was dominated by private housing this month. Private housing accounted for 79% of the value of contracts awarded this month, a 2% decrease from the corresponding month last year. After private housing, the next largest project type were hostels/halls of residence/barracks which accounted for 10% of the value awarded, a 1% increase from the corresponding month last year (see Fig. 3.3).

PROJECT IN FOCUS

International Bible Students Association Residences
£22,500,000

County	Essex
Primary Category Sector	Residential
Government Region	East England
Start Date	January 2016
End Date	January 2019
Contract Award Date	November 2016
Funding	Private
Stage	Contract
Contractor	International Bible Students Association

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TOP TEN Key Clients

Dec 2015 – Nov 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	134	1,869
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	136	1,764
3	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	98	1,173
4	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	98	1,143
5	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	51	657
6	The Berkeley Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	24	621
7	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 876200 (CTPS)	41	511
8	Bloor Homes	Ashby Road, Measham, Swadlincote, Derbyshire, DE12 7JP	01530 270100	38	502
9	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	26	408
10	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	23	382

TOP TEN Key Architects

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	68	689
2	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	10	453
3	CZWG Architects	17 Bowling Green Lane, City, London, EC1R 0QB	020 7253 2523	4	416
4	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	4	406
5	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	27	394
6	Broadway Malyan	3 Weybridge Business Park, Addlestone Road, Weybridge, Surrey, KT15 2BW	01932 845599 (TPS)	17	381
7	Pollard Thomas & Edwards Architects	Diespeker Wharf, 38 Graham Street, Islington, London, N1 8JX	020 7336 7777	18	371
8	JTP	23-25 Great Sutton Street, City, London, EC1V 0DN	020 7017 1780	22	369
9	PRP Architects	Ferry Works, Summer Road, Thames Ditton, Surrey, KT7 0QJ	020 8339 3600	28	320
10	Tetlow King Planning	Unit 2 Eclipse Office Park, Staple Hill, Bristol, North Somerset, BS16 5EL	0117 9561916 (CTPS)	24	296

TOP TEN Key Contractors

Dec 2015 – Nov 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	137	1,911
2	Persimmon Homes Limited	Persimmon House, Fulford, York, North Yorkshire, YO19 4FE	01904 642199	141	1,822
3	Bellway Plc	Seaton Burn House, Dudley Lane, Seaton Burn, Newcastle Upon Tyne, Tyne And Wear, NE13 6BE	0191 217 0717 (CTPS)	104	1,216
4	Taylor Wimpey	Gate House, Turnpike Road, High Wycombe, Buckinghamshire, HP12 3NR	01494 558323	101	1,178
5	Keepmoat Regeneration Limited	The Waterfront, Lakeside Boulevard, Doncaster, South Yorkshire, DN4 5PL	01302 346 620	88	1,151
6	Redrow Homes Limited	Redrow House, St David's Park, Deeside, Clwyd, CH5 3RX	01244 520044	51	668
7	The Berkeley Group	Berkeley House, 19 Portsmouth Road, Cobham, Surrey, KT11 1JG	01932 868555	26	643
8	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	57	572
9	Countryside Properties (UK) Limited	Countryside House, The Drive, Great Warley, Brentwood, Essex, CM13 3AT	01277 260000	27	513
10	Bovis Homes Limited (South East Region)	The Manor House, North Ash Road, New Ash Green, Longfield, Kent, DA3 8HQ	01474 876200 (CTPS)	41	511

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 DECREASE IN NOVEMBER

Infrastructure contract values were down month-on-month and are lower than the same month in 2015.

The value of contracts awarded in the infrastructure sector in November totalled £1.3 billion based on a three month rolling average (see Fig. 4.1). This is 12.4% lower than the previous month and 52.2% lower than November 2015. In the three months to November the total value of contract awards was £4.4 billion based on a three month rolling average. This is 7.2% lower than the previous three months and 46.2% lower than the same period in 2015.

Projects by region

The main location of infrastructure projects this month was the North East with 44.1% of the value, and this was 43.8% higher than November 2015 (see Fig. 4.2 & 4.4). The main project awarded in the region was the aforementioned Tees renewable energy plant valued at £650 million. Scotland was the next most active location accounting for 26.2% of contract value, a 15.8% increase since November 2015.

Type of Projects

Utilities was the dominant sector within infrastructure, accounting for 79% of the contract value awarded. Transport was the second major sector accounting for 9% of the value of contracts (see Fig. 4.3).

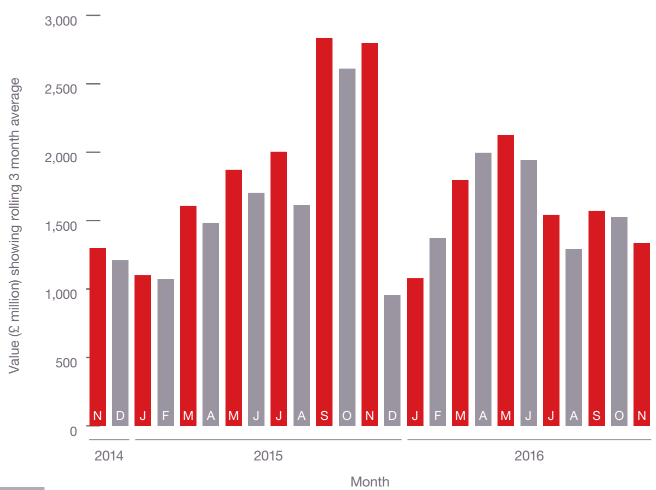

FIG. 4.1

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

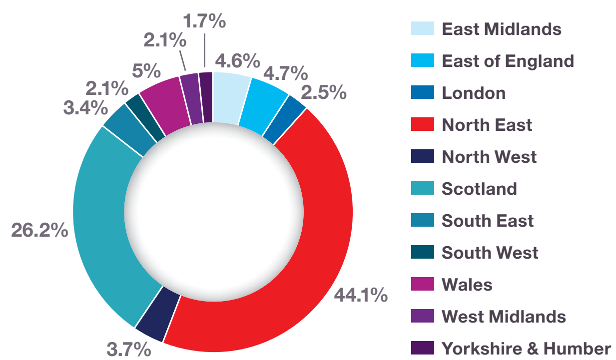

FIG. 4.2

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

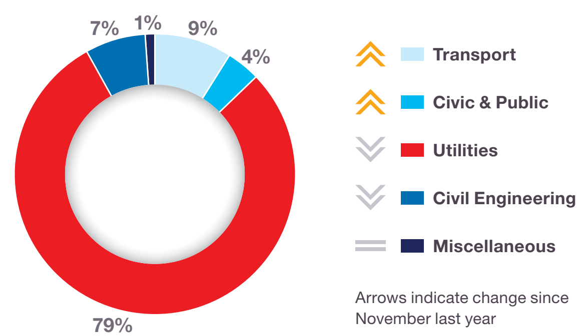

FIG. 4.3

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

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The map and figures show how the activity has changed since November 2015		+15.8%	Scotland
+4.0%	East Midlands	-0.7%	South East
+1.5%	East of England	+0.6%	South West
-50.7%	London	+3.8%	Wales
+43.8%	North East *HOTTEST REGION*	-0.2%	West Midlands
-5.4%	North West	-12.5%	Yorkshire & Humber

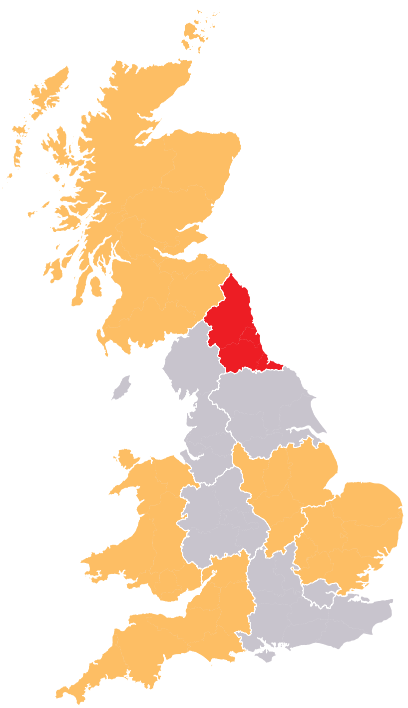

FIG. 4.4

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

"The main location of infrastructure projects this month was the North East with 44.1% of the value

PROJECT IN FOCUS

Contract 2 – Sighthill Tra Infrastructure £36,540,000

County	Strathclyde
Primary Category Sector	Infrastructure
Government Region	Scotland
Start Date	November 2016
End Date	March 2019
Contract Award Date	November 2016
Funding	Mainly Public
Stage	Contract
Contractor	Morgan Sindall (Construction) Plc

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TOP TEN Key Clients

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Highways England	123 Buckingham Palace Road, Westminster, London, SW1W 9HA	0845 955 6575	61	1,911
2	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	266	1,649
3	Wokingham Borough Council	Civic Offices, Shute End, Wokingham, Berkshire, RG40 1BN	0118 974 6000	1	673
4	HS2	1 Canada Square, Poplar, London, E14 5AB	020 7944 4908	1	350
5	Warwickshire County Council	Shire Hall, Market Square, Warwick, Warwickshire, CV34 4RL	01926 410410	2	256
6	Plymouth City Council	Civic Centre, Armada Way, Plymouth, Devon, PL1 2AA	01752 668000	3	182
7	Transport for London	Albany House, Ninth Floor, Petty France, Westminster, London, SW1H 9EA	0343 222 0000	3	172
8	The Scottish Government	9th Floor, Buchanan House, 58 Port Dundas Road, Glasgow, Strathclyde, G4 0HF	0141 272 7100	1	170
9	BAA Lynton Plc	Medici Court, 67-69 New Bond Street, Westminster, London, W1S 1DF	020 7907 9200	1	170
10	Kent County Council	County Hall, County Road, Maidstone, Kent, ME14 1XQ	0300 041 4141	7	156

TOP TEN Key Architects

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Gebler Tooth	1 World Business Centre, Newall Road, Hounslow, Middlesex, TW6 2RE	020 8283 9926 (CTPS)	1	170
2	Heatherwick Studio	356-364 Grays' Inn Road, Westminster, London, WC1X 8BH	020 7833 8800 (CTPS) (TPS)	1	150
3	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	1	50
4	CH2M Hill	Elm House, 43 Brook Green, Hammersmith, London, W6 7EF	020 3479 8000	2	40
5	Capita Group	71 Victoria Street, Westminster, London, SW1H 0XA	020 7799 1525	2	37
6	Knight Architects	Old Metalworks, 10 Queen's Road, High Wycombe, Buckinghamshire, HP13 6AQ	01494 525 500 (TPS)	1	35
7	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	1	35
8	Network Rail Infrastructure Limited	Kings Place, 90 York Way, Islington, London, N1 9AG	020 7557 8000	9	29
9	Hawkins Brown Architects	159 St John Street, City, London, EC1V 4QJ	020 7336 8030	2	26
10	HOK International Limited	Qube, 90 Whitfield Street, Westminster, London, W1T 4EZ	020 7636 2006	1	25

TOP TEN Key Contractors

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	36	1,325
2	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	21	451
3	VolkerFitzpatrick Limited	Hertford Road, Hoddesdon, Hertfordshire, EN11 9BX	01992 305000	38	411
4	BAM Nuttall	St James House, Knoll Road, Camberley, Surrey, GU15 3XW	01276 63484	21	389
5	Colas – A-one+ Area 4	10 Kings Hill Avenue, Kings Hill, West Malling, Kent, ME19 4AR	01732 446800	1	366
6	CH2M Hill	Elm House, 43 Brook Green, Hammersmith, London, W6 7EF	020 3479 8000	1	350
7	Costain/Skanska JV	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444 / 01923 842444	1	290
8	EWR2 Alliance	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	4	270
9	J Murphy Group	Hiview House, Highgate Road, Kentish Town, London, NW5 1TN	020 7267 4366 (TPS)	74	241
10	Costain Group Plc	Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire, SL6 4UB	01628 842444	16	217

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
Hotel, Leisure & Sport
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COMMERCIAL & RETAIL
DECREASE IN CONTRACT VALUES IN NOVEMBER

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

The value of contracts awarded in the commercial and retail sector were £567 million in November based on a three month rolling average (see Fig. 5.1). This is an 8.9% decrease from October and a 47% decrease from the November 2015 figure. In the three months to November the value of contracts were 27.2% below the previous three months and 32.2% lower than the same period in 2015, indicating poorer performance in the sector over the longer term.

Projects by region

London was the main region of activity in the sector this month accounting for 33.1% of the value of all contracts awarded, which was 29.3% lower than November 2015 (see Fig. 5.2 & 5.4). The largest contract awarded in London in November was The Stage project in Shoreditch to construct two office blocks with an estimated value of £48.1 million. The second largest contract in London was the Nottingdale Village in White City which is to provide a four storey commercial block valued at £25 million.

Type of Projects

Offices were the dominant type of project in the sector accounting for 64% of the value of contracts awarded this month, which is 22% lower than November 2015. General retailing is the next largest sector with 20% of contract award value, a 13% increase from the November 2015 figure (see Fig. 5.3).

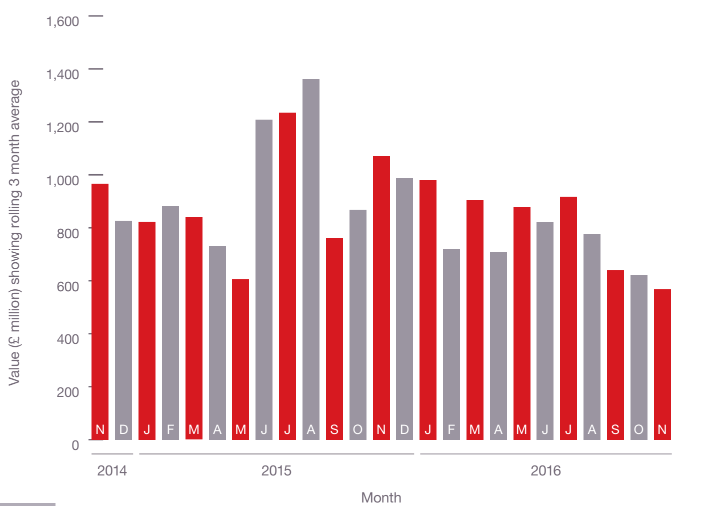

FIG. 5.1

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

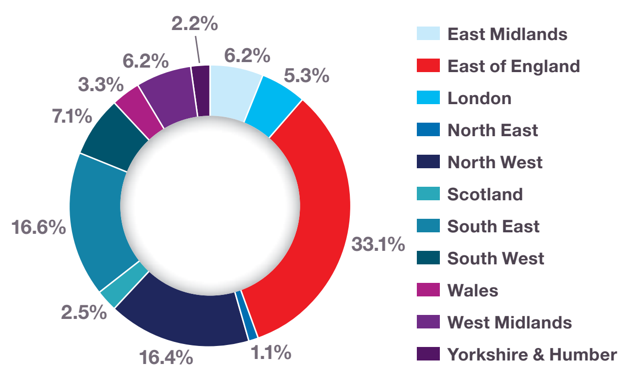

FIG. 5.2

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

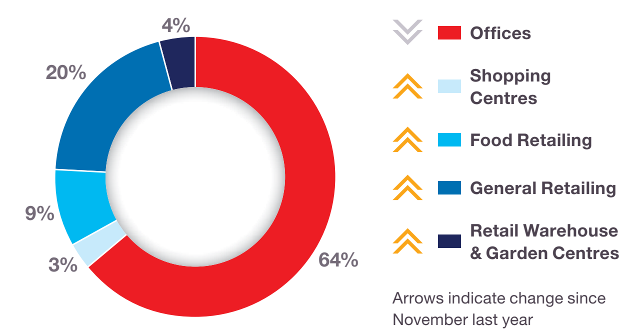

FIG. 5.3

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

economic & construction MARKET REVIEW

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DECREASE IN CONTRACT VALUES IN NOVEMBER

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

	-0.9%	Scotland			
+5.1%	East Midlands		+12.5%	South East *HOTTEST REGION*	
-3.9%	East of England		+5.1%	South West	
-29.3%	London		+0.3%	Wales	
-0.3%	North East		+0.6%	West Midlands	
+10.5%	North West		+0.4%	Yorkshire & Humber	

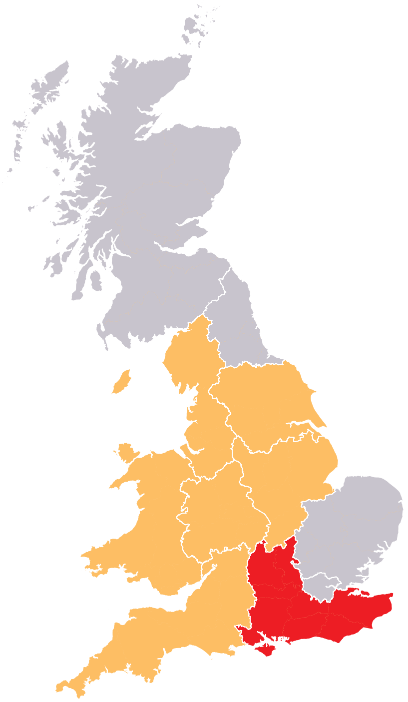

FIG. 5.4

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

PROJECT IN FOCUS

Atkins HQ – Woodcote Grove Redevelopment Project £35,200,000

County	Surrey
Primary Category Sector	Commercial & Retail
Government Region	South East
Start Date	December 2016
End Date	March 2018
Contract Award Date	November 2016
Funding	Private
Stage	Subcontract
Contractor	Speller Metcalfe

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DECREASE IN CONTRACT VALUES IN NOVEMBER

TOP TEN Key Clients
Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Lipton Rogers Developments Llp	33 Cavendish Square, City, London, W1G 0PW	0207 3757 0575	1	550
2	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	1	326
3	Legal and General Group PLC	1 Coleman Street, City, London, EC2R 5AA	020 3124 3000	4	303
4	Argent Estates Limited	11 Brindley Place, 2 Brunswick Square, Birmingham, West Midlands, B1 2LP	0121 643 7799	1	250
5	Intu Group	40 Broadway, Westminster, London, SW1H 0BU	020 7960 1200	2	202
6	Lidl UK GMBH	19 Worple Road, Wimbledon, London, SW19 4JS	0800 977 7766 / 0870 444 1234	71	171
7	Aldi Stores Limited	Holly Lane, Atherstone, Warwickshire, CV9 2SQ	01827 711800	58	129
8	Westfield Shoppingtowns Limited	Level 6, Midcity Place, 71 High Holburn, Westminster, London, WC1V 6EA	020 7061 1400	1	120
9	Helical Bar Plc	11-15 Farm Street, Westminster, London, W1J 5RG	020 7629 0113	5	102
10	BBC Club	Wood Lane, Westminster, London, W12	020 8576 8598	1	100

TOP TEN Key Architects
Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	PLP Architecture	Ibex House, 42-47 Minories, City, London, EC3N 1DY	020 3006 3900	4	640
2	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	10	557
3	Kohn Pedersen Fox (International) PA	7a Langley Street, Westminster, London, WC2H 9JA	020 3119 5300	3	341
4	Adamson Associates (International) Limited	6th Floor, One Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2068	1	326
5	Eric Parry Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7608 9600	2	253
6	Bennetts Associates Architects	1 Rawstorne Place, City, London, EC1V 7NL	020 7520 3300 (CTPS)	4	252
7	Chapman Taylor & Partners	10 Eastbourne Terrace, Paddington, London, W2 6LG	020 7371 3000	3	218
8	Leslie Jones Architects	121 Great Portland Street, Westminster, London, W1W 6QL	020 7255 1150	5	209
9	Harris Partnership	2 St Johns, Wakefield, West Yorkshire, WF1 3QA	01924 291800	64	181
10	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	9	167

TOP TEN Key Contractors
Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Multiplex	One Broadgate, 1st Floor, City, London, EC2M 2QS	020 3829 2500	6	916
2	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	5	415
3	ISG	Aldgate House, 33 Aldgate High Street, City, London, EC3N 1AG	020 7247 1717	30	363
4	Canary Wharf Group PLC	1 Canada Square, Canary Wharf, Poplar, London, E14 5AB	020 7418 2000	1	326
5	Lendlease Construction (EMEA) Limited	EMEA Head Office, 20 Triton Street, Regents Place, London, NW1 3BF	0203 430 9000	4	315
6	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	2	278
7	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	7	265
8	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	18	247
9	Sir Robert McAlpine Limited	Eaton Court, Maylands Avenue, Hemel Hempstead, Hertfordshire, HP2 7TR	01442 233444 (CTPS)	8	154
10	Mace Limited	155 Moorgate, City, London, EC2M 6XB	020 3522 3000 (TPS)	10	136

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

DECREASE IN CONTRACT VALUE IN NOVEMBER

The hotel, leisure & sport sector showed a decrease in contract value on last month but was higher than November 2015.

Contract award levels in the hotel, leisure & sport sector were £485 million in November, based on a three month rolling average (see Fig. 6.1). This was 7.7% lower than October but 19.9% higher than November 2015. In the three months to November the value of contracts was £1.5 billion, which was 36.6% higher than the previous three months. This was an increase of 77.8% compared to the same period in 2015 indicating a significant increase in activity in the sector over the past year.

Projects by region

London was the main location for hotel, leisure & sport contracts this month accounting for 43.8% of the value awarded, 23.6% lower than November 2015 (see Fig. 6.2 & 6.4). The largest individual contract was for a boutique hotel known as Number 1 Sloane Gardens. The contract was valued at £35 million and is due to start in early 2017 with McLaren Construction the contractor.

Type of Projects

The plethora of hotel contracts means that hotels/motels accounted for the highest proportion of activity at 52%, a 31% increase from November 2015. Leisure centres accounted for 24% of the value awarded, a 12% increase from the corresponding month in 2015 (see Fig. 6.3).

> Significant increase in activity in the sector over the past year

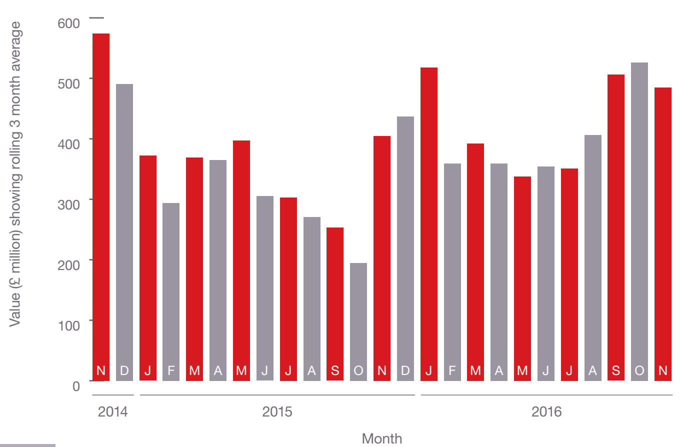

FIG. 6.1

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

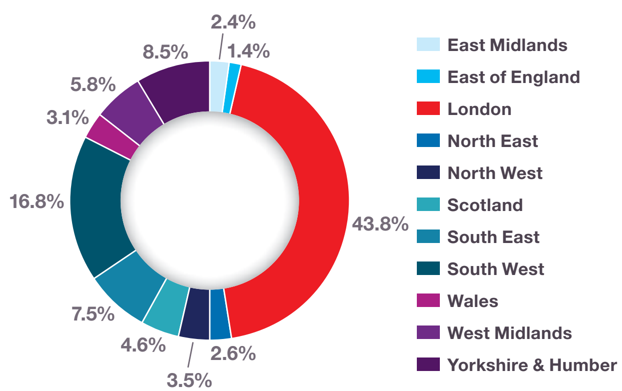

FIG. 6.2

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

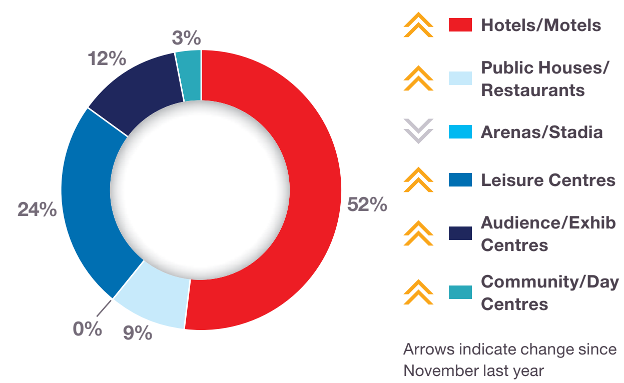

FIG. 6.3

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

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DECREASE IN CONTRACT VALUE IN NOVEMBER

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

-4.0%	Scotland		
+0.7%	East Midlands	+1.1%	South East
-0.8%	East of England	+13.3%	South West *HOTTEST REGION*
-23.6%	London	+2.5%	Wales
-2.2%	North East	+5.2%	West Midlands
0.0%	North West	+7.6%	Yorkshire & Humber

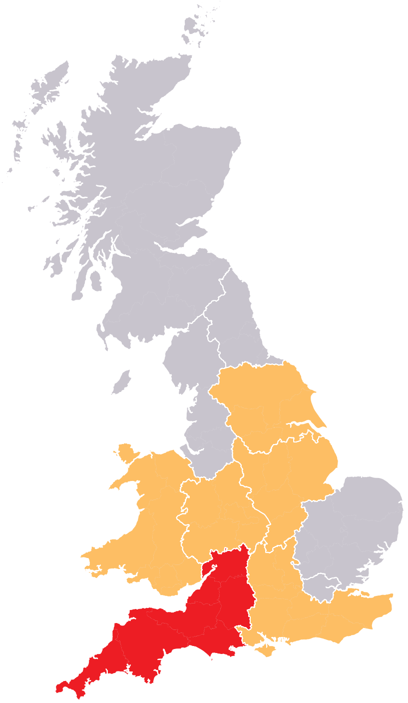

FIG. 6.4

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

> Hotels/motels accounted for the highest proportion of activity at 52%, a 31% increase from November 2015

PROJECT IN FOCUS

Wembley Theatre – Olympic Way
£14,000,000

County	Middlesex
Primary Category Sector	Hotel, Leisure & Sport
Government Region	East England
Start Date	June 2017
End Date	June 2018
Contract Award Date	November 2016
Funding	Private
Stage	Contract
Contractor	JJ Rhatigan & Company Limited

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DECREASE IN CONTRACT VALUE IN NOVEMBER

TOP TEN Key Clients

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Aberdeen City Council	Town House, Broad Street, Aberdeen, Grampian, AB10 1AQ	01224 522000	4	338
2	Whitbread PLC	Whitbread Court, Houghton Hall Business Court, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	01582 499499 / 01582 424200	36	155
3	Bristol City Council	The Exchange, Corn Street, Bristol, North East Somerset, BS1 1JQ	0117 922 2000	3	97
4	Mandarin Oriental Hotel Group	Kings Court, 2-16 Goodge Street, Westminster, London, W1T 2QA	020 7908 7888	1	60
5	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	1	60
6	4C Hotels	13 Wadham Gardens, City, London, NW3 3DN	020 7419 1839	1	60
7	Hull City Council	Guildhall, Alfred Gelder Street, Kingston Upon Hull, East Riding of Yorkshire, HU1 2AA	01482 609100	3	46
8	Arun District Council	Civic Centre, Maltravers Road, Littlehampton, West Sussex, BN17 5LF	01903 737500	2	45
9	London Borough of Ealing Council	Perceval House, 14-16 Uxbridge Road, Ealing, London, W5 2HL	020 8825 5000	6	43
10	Premier Inn Limited	Whitbread Court, Houghton Business Park, Porz Avenue, Dunstable, Bedfordshire, LU5 5XE	0871 527 8000	25	42

TOP TEN Key Architects

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	3	332
2	AFLS+P Architects Limited	The Cornerhouse, 91-93 Farringdon Road, City, London, EC1M 3LN	020 7831 8877	9	110
3	3D Reid (Architects) Limited	45 West Nile Street, Glasgow, Strathclyde, G1 2PT	0345 271 6350	10	109
4	Dexter Moren Associates	57d Jamestown Road, Camden Town, London, NW1 7DB	020 7267 4440	5	105
5	Feilden Clegg Bradley Architects	Bath Brewery, Toll Bridge Road, Bath, North East Somerset, BA1 7DE	01225 852 545	2	93
6	Jestico Whiles & Associates	1 Cobourg Street, Camden Town, London, NW1 2HP	020 7380 0382	6	91
7	Populous	14 Blades Court, Deodar Road, Putney, London, SW15 2NU	020 8874 7666	1	91
8	Axiom Architects	Brooklands Yard, Southover High Street, Lewes, East Sussex, BN7 1HU	01273 479269	18	86
9	Faulkner Browns	Dobson House, Northumbrian Way, Killingworth, Newcastle Upon Tyne, Tyne And Wear, NE12 6QW	0191 268 3007	4	66
10	Squire and Partners	77 Wicklow Street, Westminster, London, WC1X 9JY	020 7278 5555 (TPS)	2	47

TOP TEN Key Contractors

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	12	416
2	Gilbert – Ash Limited	47 Boucher Road, Belfast, County Antrim, BT12 6HR	028 90664334	8	111
3	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	3	104
4	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	12	97
5	Bouygues UK Limited	Elizabeth House, 39 York Road, Southwark, London, SE1 7NQ	020 7401 0020	1	91
6	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	3	80
7	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	10	78
8	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	13	76
9	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	8	72
10	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	2	65

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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INDUSTRIAL

ACTIVITY INCREASES IN THE SECTOR THIS MONTH

The industrial sector experienced an increase in contracts awarded in November but the value of work is lower than the same month in 2015.

Activity in the industrial sector increased in November with the value of contracts awarded at £469 million, based on a three month rolling average (see Fig. 7.1). This equates to an increase of 18.8% on the value in October and is 3.3% below the figure recorded this time last year. In the three months to November the total value of contracts was £1.4 billion which was 12.7% higher than the previous three months and 11.8% lower than the same quarter last year.

Projects by region

The East of England had the largest share of contract value in November with 21.3%, an increase of 11.3% from November 2015 (see Fig. 7.2 & 7.4). The highest value contract awarded in the region was the London Road Science Park in Harlow valued at £60 million and awarded to Vinci Construction. The East Midlands and Scotland were the next two regions with significant shares of industrial value this month with 16.9% and 16.5% of the value respectively. The largest contract awarded from the two regions in November was the Marine Harvest Limited fish feed factory in the Isle of Skye valued at £80 million.

Type of Projects

The types of project awarded in the sector were predominantly in warehouse/storage which accounted for 29% of contract values, a decrease of 29% from November 2015. The heavy industrial sub sector had a strong showing accounting for 21% of the contracts awarded, up by 7% from the same month last year (see Fig. 7.3).

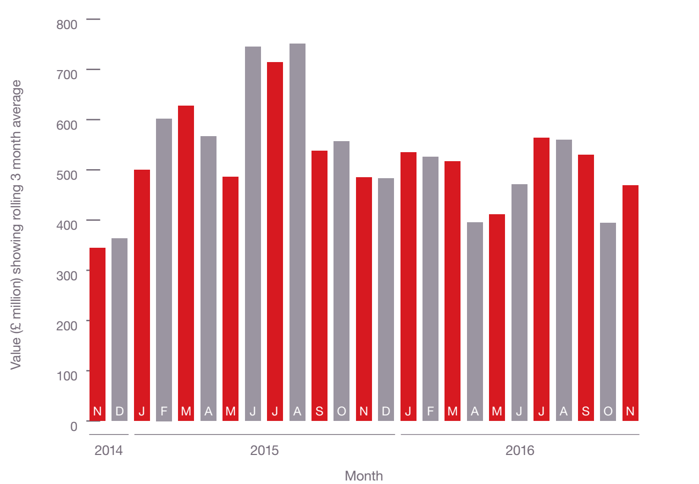

FIG. 7.1

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

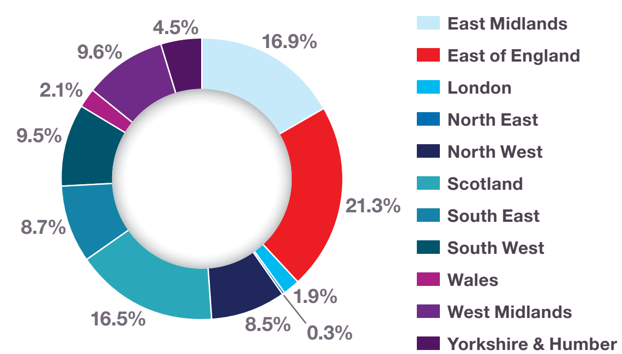

FIG. 7.2

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

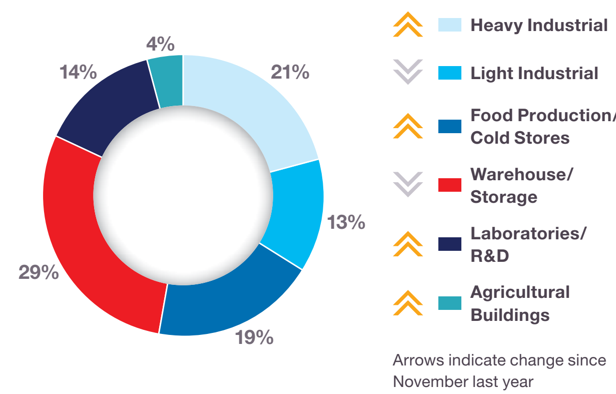

FIG. 7.3

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

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ACTIVITY INCREASES IN THE SECTOR THIS MONTH

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

		+12.5%	Scotland *HOTTEST REGION*
-9.2%	East Midlands	+5.6%	South East
+11.3%	East of England	-1.1%	South West
-3.4%	London	-3.3%	Wales
-4.7%	North East	-8.0%	West Midlands
+0.9%	North West	-0.7%	Yorkshire & Humber

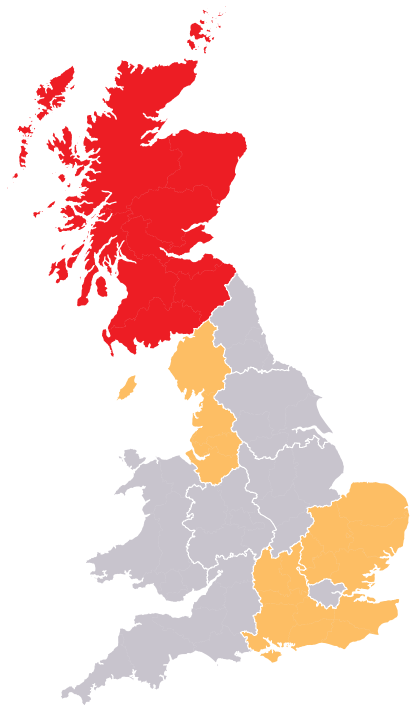

FIG. 7.4

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

> In the three months to November the total value of contracts was £1.4 billion which was 12.7% higher than the previous three months

PROJECT IN FOCUS

Marine Harvest Limited – Fish Feed Factory
£80,000,000

County	Highlands
Primary Category Sector	Industrial
Government Region	Scotland
Start Date	March 2017
End Date	September 2018
Contract Award Date	November 2016
Funding	Private
Stage	Contract
Contractor	Robertson Group Limited

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TOP TEN Key Clients

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Ministry of Defence	Whitehall, Westminster, London, SW1A 2HB	020 7218 9000	7	888
2	Marine Harvest Limited	Farms Office, Units 3-7, Blar Mhor Industrial Estate, Fort William, Highlands, PH33 7PT	01397 701550	3	173
3	SNF Gas and Oil Limited	Solutions House, Ripley Close, Normanton Industrial Estate, Normanton, West Yorkshire, WF6 1TB	01924 311000	1	140
4	Lidl UK GMBH	19 Worple Road, Wimbledon, London, SW19 4JS	0800 977 7766 / 0870 444 1234	3	114
5	Prologis Developments Limited	Prologis House, 1 Monkspath Hall Road, Solihull, West Midlands, B90 4FY	0121 224 8700	6	113
6	Port of Tyne Authority	Maritime House, Tyne Dock, South Shields, Tyne And Wear, NE34 9PT	0191 455 2671	2	110
7	Edrington Group	2500 Great Western Road, Glasgow, Strathclyde, G15 6RW	0141 940 4000	1	100
8	Reckitt Benckiser Health Care (UK) Limited	Dansom Lane, Hull, East Riding of Yorkshire, HU8 7DS	01482 326151	1	100
9	The Range	Tamar House, Thornbury Road, Estover, Plymouth, Devon, PL6 7PP	01752 725572 (CTPS)	3	96
10	Roxhill Developments Limited	Lumonics House, Valley Drive,, Rugby, Warwickshire, CV21 1TQ	01788 422 200	1	90

TOP TEN Key Architects

Dec 2015 – Nov 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	22	426
2	Stephen George & Partners	170 London Road, Leicester, Leicestershire, LE2 1ND	0116 247 0557	13	281
3	UMC Architects	Newark Beacon Office Park, Cassereta Way, Nottingham, Nottinghamshire, NG24 2TN	01636 653027	12	256
4	AJA Architects LLP	1170 Elliot Court, Herald Avenue, Coventry Business Park, Coventry, West Midlands, CV5 6UB	024 7625 3200	12	177
5	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	8	154
6	Fairhursts Design Group	55 King Street, Manchester, Greater Manchester, M2 4LQ	0161 831 7300 (CTPS)	5	149
7	Orbit Architects Limited	83 Blackfriars Road, Southwark, London, SE1 8HA	020 7593 3380	1	100
8	AMEC Group PLC	76-78 Old Street, City, London, EC1V 9AZ	020 3215 1700	1	100
9	HLM Architects	46 Loman Street, Southwark, London, SE1 0EH	020 7921 4800	1	100
10	Devereux Architects Limited	Zeeta House, 200 Upper Richmond Road, Putney, London, SW15 2SH	020 8780 1800	1	100

TOP TEN Key Contractors

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Aspire Defence Limited	Aspire House, Princes Avenue, Aldershot, Hampshire, GU11 2LF	01252 352600	2	680
2	Winvic Construction	Brampton House, 19 Tenter Road, Moulton Park, Northampton, Northamptonshire, NN3 6PZ	01604 678960 (CTPS)	21	430
3	McLaren Construction Limited	McLaren House, 100 Kings Road, Brentwood, Essex, CM14 4EA	01277 205800	9	265
4	Buckingham Group Contracting Limited	Blackpit Farm, Silverstone Road, Stowe, Buckingham, Buckinghamshire, MK18 5LJ	01280 823355	12	232
5	Robertson Group Limited	Robertson House, Castle Business Park, Stirling, Central, FK9 4TZ	01786 431600	4	205
6	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	8	157
7	Vinci Construction UK Limited	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	3	147
8	Readie Construction Limited	Unit 15 Falcon Business Centre, Ashton Road, Romford, Essex, RM3 8UR	01708 332800	8	123
9	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	6	121
10	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	6	110

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 NOVEMBER

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

Levels of activity in the medical & health sector decreased by 2.7% in November 2016 compared to October, with the total value of contracts awarded £117 million based on a three month rolling average (see Fig. 8.1). This is 53.5% lower than the values in November 2015. The value of contracts awarded was 17.6% lower than the previous three months and was 36.1% 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 with 43.2% of activity, a 34.6% increase from November 2015 (see Fig. 8.2 & 8.4). This is primarily due to the award of the Reading Cancer Care contract at the Thames Valley Science Park valued at £15 million and awarded to John Graham Construction.

Type of Projects

Surgeries, health and medical centres is the dominant sub-sector this month accounting for 47% of the value of contracts in November 2016, a 39% increase from November 2015 (see Fig. 8.3).

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

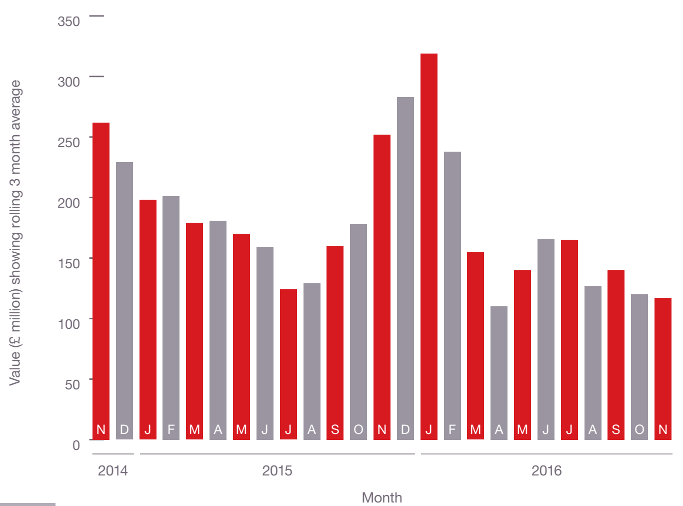


FIG. 8.1

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

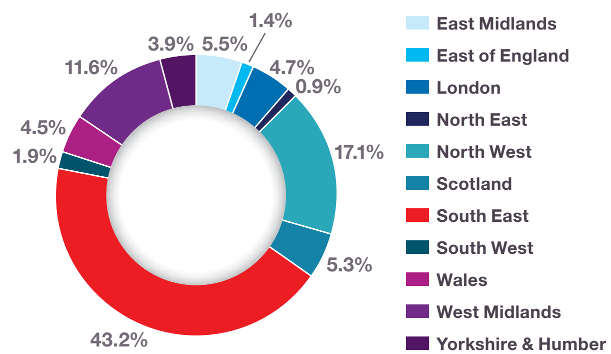
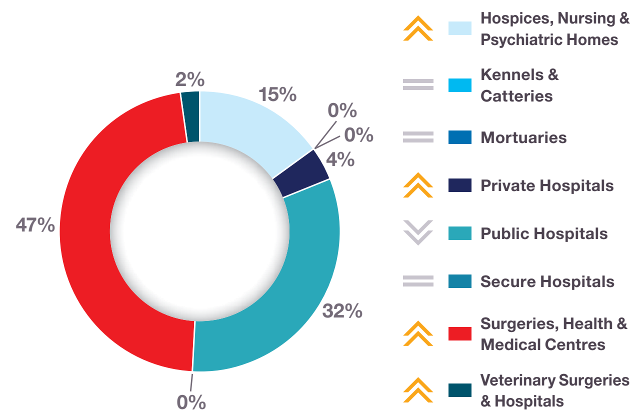


FIG. 8.2

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



Arrows indicate change since November last year

FIG. 8.3

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

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DECREASE IN VALUE OF CONTRACTS IN NOVEMBER

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

+5.2%	Scotland	+2.2%	East Midlands
+34.6%	South East *HOTTEST REGION*	+0.9%	East of England
+1.2%	South West	-65.5%	London
+1.2%	Wales	+0.9%	North East
+2.3%	West Midlands	+14.5%	North West
+2.4%	Yorkshire & Humber		

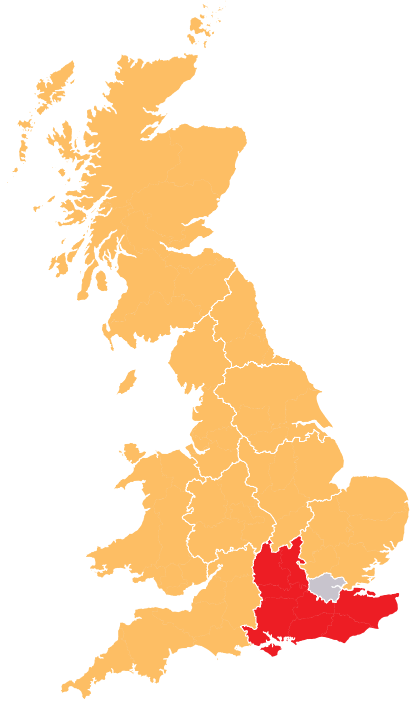

FIG. 8.4

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

> The value of contracts awarded was 17.6% lower than the previous three months and was 36.1% down on the same period in 2015

PROJECT IN FOCUS

Milton Keynes University Hospital – Academic Centre
£5,000,000

County	Buckinghamshire
Primary Category Sector	Medical & Health
Government Region	South East
Start Date	January 2017
End Date	January 2018
Contract Award Date	November 2016
Funding	Mixed
Stage	Contract
Contractor	Beard Limited

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DECREASE IN VALUE OF CONTRACTS IN NOVEMBER

TOP TEN Key Clients

Dec 2015 – Nov 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	Hampshire Hospitals NHS Foundation Trust	Aldermaston Road, Basingstoke, Hampshire, RG24 9NA	01256 473202	2	166
3	NHS Lothian	Royal Edinburgh Hospital, Morningside Place, Edinburgh, Lothian, EH10 5HF	0131 537 6000 (CTPS)	2	130
4	Frimley Health NHS Foundation Trust	Wexham Park Hospital, Wexham Street, Wexham, Slough, Berkshire, SL2 4HL	01753 633000	3	96
5	Great Ormond Street Hospital NHS Trust	Great Ormond Street, Westminster, London, WC1N 3JH	020 7405 9200 (CTPS)	1	60
6	Royal Free Hospital	Pond Street, Hampstead, London, NW3 2QG	020 7794 0500	6	55
7	Ashley House Plc	6 Cliveden Office Village, Lancaster Road, Cressex Business Park, High Wycombe, Buckinghamshire, HP12 3YZ	01628 600340	1	45
8	One Healthcare Group	Tallis House, 2 Tallis Street, City, London, EC4Y 0AB	0333 939 0007	1	40
9	Lothian Health Board	Deaconess House, 148 Pleasance, Edinburgh, Lothian, EH8 9RQ	0131 536 9000	1	35
10	Frimley Park NHS Trust	Wexham Park Hospital, Wexham Street, Wexham, Slough, Berkshire, SL2 4HL	01753 633000	2	35

TOP TEN Key Architects

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	9	181
2	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	5	162
3	Hassell	James William House, 9 Museum Place, Cardiff, South Glamorgan, CF10 3BD	029 2072 9071	3	153
4	Keppie Design	160 West Regent Street, Glasgow, Strathclyde, G2 4RL	0141 204 0066	1	70
5	Archial Group Plc	Tennyson House, 159-165 Great Portland Street, Westminster, London, W1W 5PA	020 7580 0400	2	61
6	Stanton Williams	Diespecker Wharf, 36 Graham Street, Islington, London, N1 8GJ	020 7880 6400	1	60
7	Penoyre & Prasad Architects	28-42 Banner Street, City, London, EC1Y 8QE	020 7250 3477	1	45
8	Boswell Mitchell & Johnson Architects	72-82 Roseberry Avenue, City, London, EC1R 4RW	020 7833 9974	1	42
9	Manning & Elliott	Suite 1 Manelli House, 4 Cowper Road, Penrith, Cumbria, CA11 9BN	01768 868800	1	40
10	Bowman Riley Architects	Wellington House, Otley Street, Skipton, North Yorkshire, BD23 1EL	01756 795611	4	30

TOP TEN Key Contractors

Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	16	339
2	Carillion Construction Limited	Carillion House, 84 Salop Street, Wolverhampton, West Midlands, WV3 0SR	01902 422431	1	280
3	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	5	89
4	Morrison Construction	2rd Floor Rowan House, 1 Robroyston Oval, Robroyston, Glasgow, Strathclyde, G33 1AP	0141 557 6500	1	70
5	Skanska UK	Maple Cross House, Denham Way, Maple Cross, Rickmansworth, Hertfordshire, WD3 9SW	01923 776666	2	69
6	Integrated Health Projects	Astral House, Imperial Way, Watford, Hertfordshire, WD24 4WW	01923 233433	3	51
7	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	4	49
8	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	3	45
9	EJ Taylor & Sons Limited	Mill Works, Hazeleigh, Near Purleigh, Chelmsford, Essex, CM3 6QT	01621 828661 (CTPS)	1	45
10	Conlon Construction Limited	Charnley Fold Lane, Bamber Bridge, Preston, Lancashire, PR5 6BE	01772 335268 (CTPS)	1	40

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

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EDUCATION

DECREASE IN THE VALUE OF CONTRACTS IN NOVEMBER

Contract values decreased in the education sector in November and activity is lower than this time last year indicating poorer performance in this sector.

The value of contracts awarded in the education sector was £413 million in November based on a three month rolling average, a 14.6% decrease from October (see Fig. 9.1). This figure was 26.9% lower than November 2015 indicating the sectors deteriorating performance over the past year. The value of contract awards in the three months to November were 26.4% below the same period last year, emphasising the decline in construction contracts over the longer term.

Projects by region

Yorkshire & Humber experienced the highest share of the value of education contracts in November accounting for 22.7% of contract value awarded, a 1.1% increase from November 2015 (see Fig. 9.2 & 9.4). One of the major construction contracts awarded in Yorkshire in November was the contract to build a new innovation centre at the University of Leeds. This was valued at £29 million and was awarded to Sir Galliford Try.

Type of Projects

Colleges/universities were the dominant sub sector in education in November. They accounted for 51% of the total value awarded, an 8% increase from November 2015 (see Fig. 9.3).

> Yorkshire & Humber experienced the highest share of the value of education contracts in November

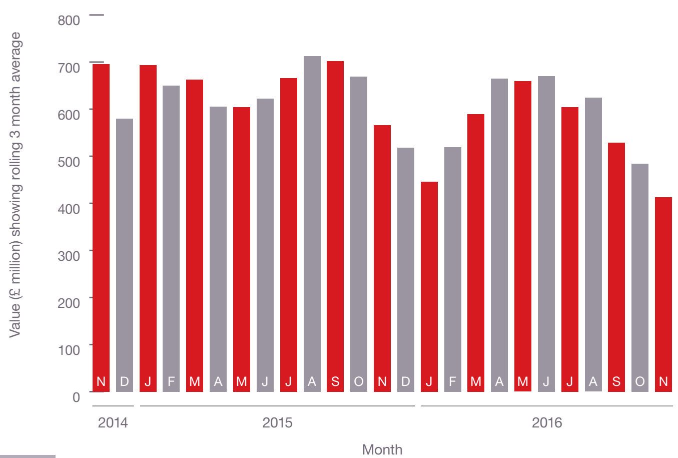

FIG. 9.1

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

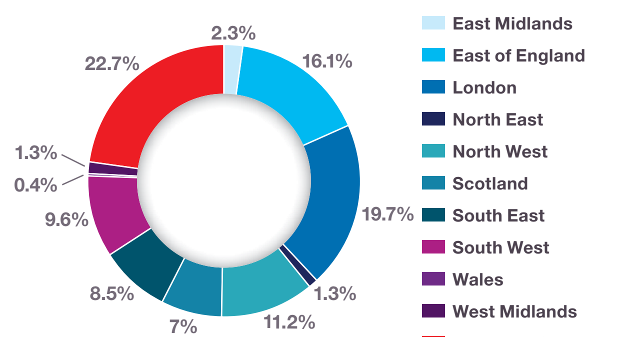

FIG. 9.2

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

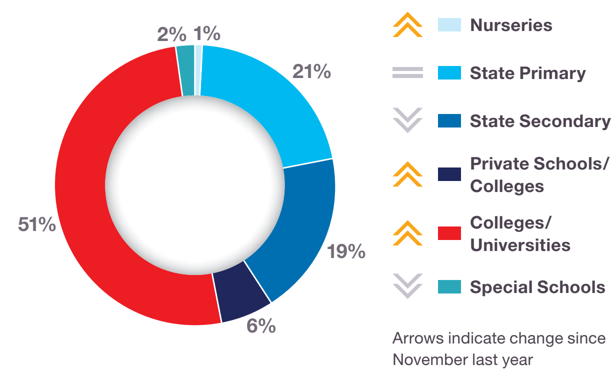

FIG. 9.3

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

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DECREASE IN THE VALUE OF CONTRACTS IN NOVEMBER

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

+4.1%	Scotland	-1.3%	East Midlands
-15.0%	South East	+9.1%	East of England *HOTTEST REGION*
+3.6%	South West	+2.5%	London
-7.4%	Wales	-1.9%	North East
-2.2%	West Midlands	+7.5%	North West
+1.1%	Yorkshire & Humber		

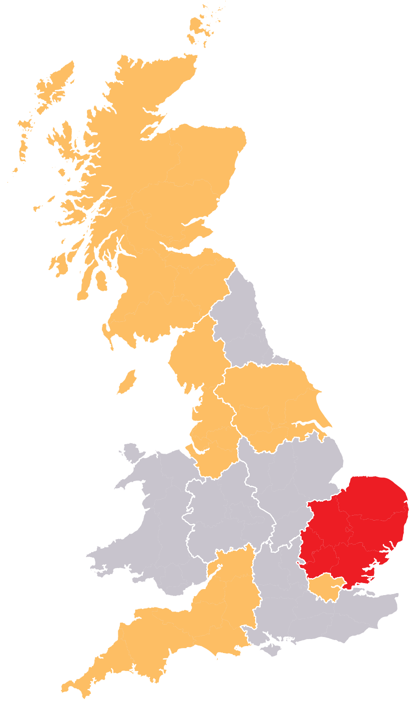

FIG. 9.4

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

> The value of contract awards in the three months to November were 26.4% below the same period last year

PROJECT IN FOCUS

University of Manchester – Graphene Engineering Innovation Centre £30,000,000

County	Greater Manchester
Primary Category Sector	Education
Government Region	North West
Start Date	September 2017
End Date	March 2019
Contract Award Date	November 2016
Funding	Private
Stage	Subcontract
Contractor	Laing O'Rourke Northern Limited

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DECREASE IN THE VALUE OF CONTRACTS IN NOVEMBER

TOP TEN Key Clients
Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Education Funding Agency	Sanctuary Buildings, 20 Great Smith Street, Westminster, London, SW1P 3BT	0370 000 2288	35	298
2	University of Edinburgh	The Old College, South Bridge, Edinburgh, Lothian, EH8 9YL	0131 650 1000	15	203
3	University of Northampton	Boughton Green Road, Northampton, Northamptonshire, NN2 7AL	01604 735500 (CTPS)	6	138
4	Birmingham City University	Franchise Street, Perry Barr, Birmingham, West Midlands, B42 2SU	0121 331 5000	3	96
5	London School of Economics and Political Science	Houghton Street, Westminster, London, WC2A 2AE	020 7405 7686	3	82
6	The University of Manchester	Oxford Road, Manchester, Greater Manchester, M13 9PL	0161 306 6000	5	77
7	London Borough of Hounslow	Civic Centre, Lampton Road, Hounslow, Middlesex, TW3 4DN	020 8583 2000	10	77
8	Powys County Council	Powys County Hall, Spa Road East, Llandrindod Wells, Powys, LD1 5LG	01597 826000 (CTPS)	1	75
9	University of Bristol	Senate House, Tyndall Avenue, Clifton, Bristol, Avon, BS8 1TH	0117 928 9000 (TPS)	6	74
10	Liverpool John Moores University	JMU Tower, 24 Norton Street, Liverpool, Merseyside, L3 8PY	0151 231 2121	2	71

TOP TEN Key Architects
Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Atkins	286 Euston Road, Camden Town, London, NW1 3AT	01372 726140 (TPS)	24	226
2	Sheppard Robson	77 Parkway, Camden Town, London, NW1 7PU	020 7504 1700	8	214
3	BDP	16 Brewhouse Yard, Clerkenwell, City, London, EC1V 4LJ	020 7812 8000	10	213
4	Pick Everard (Leicester)	Halford House, Charles Street, Leicester, Leicestershire, LE1 1HA	0116 223 4400 (TPS)	25	175
5	Moses Cameron William Architects	Oast House, Malting Lane, Cambridge, Cambridgeshire, CB3 9HF	01223 792500	6	160
6	Bond Bryan Partnership	The Congregational Church, The Church Studio, Springvale Road, Sheffield, South Yorkshire, S10 1LP	0114 266 2040 (TPS)	20	144
7	JM Architects	64 Queen Street, Edinburgh, Lothian, EH2 4NA	0131 464 6100	5	131
8	Scott Brownrigg Limited	St Catherines Court, 46-48 Portsmouth Road, Guildford, Surrey, GU2 4DU	01483 568686	16	122
9	Stride Treglown Limited	Promenade House, The Promenade, Clifton Down, Bristol, North Somerset, BS8 3NE	0117 974 3271 (TPS)	19	121
10	Holmes Miller	89 Minerva Street, Glasgow, Strathclyde, G3 8LE	0141 204 2080	6	120

TOP TEN Key Contractors
Dec 2015 – Nov 2016

Rank	Company Name	Address	Telephone	Awards	Value (£M)
1	Kier Group PLC	Tempsford Hall, Station Road, Sandy, Bedfordshire, SG19 2BD	01767 640111 (CTPS)	98	617
2	Willmott Dixon Construction Limited	Spirella 2, Icknield Way, Letchworth Garden City, Hertfordshire, SG6 4GY	01462 671852 (CTPS)	61	408
3	BAM Construction	Breakspear Park, Breakspear Way, Hemel Hempstead, Hertfordshire, HP2 4FL	01442 238300	26	405
4	Galliford Try Construction	2 Cowley Business Park, High Street, Cowley, Uxbridge, Middlesex, UB8 2AD	01895 855000	32	352
5	Morgan Sindall Plc	Kent House, 14-17 Market Place, Westminster, London, W1W 8AJ	020 7307 9200	55	313
6	Bowmer & Kirkland Limited	High Edge Court, Heage, Belper, Derbyshire, DE56 2BW	01773 853131	10	196
7	Balfour Beatty Group Limited	5 Churchill Place, Canary Wharf, Poplar, London, E14 5HU	020 7216 6800	14	191
8	Wates Construction Limited	Wates House, Station Approach, Leatherhead, Surrey, KT22 7SW	01372 861 000	8	136
9	Interserve Plc	Interserve House, Ruscombe Park, Twyford, Reading, Berkshire, RG10 9JU	0118 932 0123 (CTPS)	22	132
10	Laing O'Rourke	Bridge Place, Anchor Boulevard, Crossways, Dartford, Kent, DA2 6SN	01322 296200	8	131

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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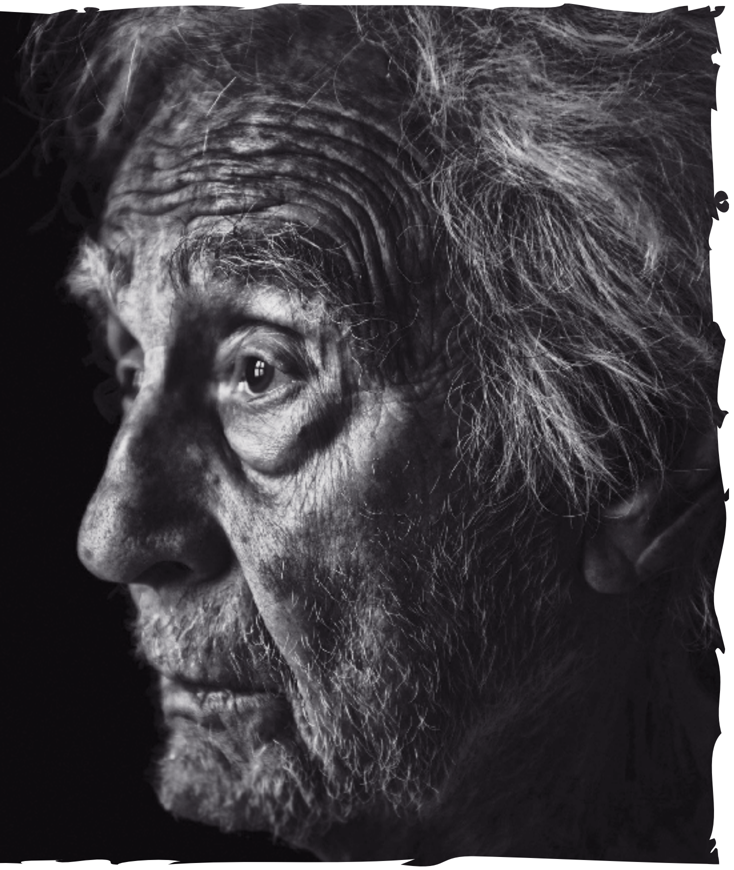
NO CHRISTMAS CARD APPEAL

In times of need you shouldn't be alone



Support the CRASH Charity 'No Christmas Card Appeal 2016'

Ideally Christmas is a time for joy, family and excitement, but for someone who is homeless, or facing their last Christmas in a hospice, it can be a lonely and scary time.

CRASH creates places that care for people when they are at their most vulnerable – this is why we need you to support this appeal. Please help us put a roof over people's heads when they are homeless and help hospices improve their buildings to provide care for adults and children with life limiting illnesses.

It's easy to help. Donate your company's Christmas Card budget to CRASH and in return your company will receive:

- **A personalised e-Christmas card**
- **For donations over £500** – your company name will appear in our 'Thank You' advertisements, which will run in the industry media in the New Year
- **For donations over £2000** – your company logo will also be included in the 'Thank You' advertisements

The Gatehouse, 2 Devonhurst Place, London W4 4JD 020 8742 0717 www.crash.org.uk CRASH is a UK registered charity (no. 1054107) and operates throughout the UK.

You can make a real difference to people who are homeless or in a hospice this Christmas and throughout the year.

To donate:

Complete our online form at **www.crash.org.uk**

Thank you for helping CRASH create places that care for people who are homeless or in a hospice. If you would like further information please call Jenny on **020 8742 0717.**

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