



Glenigan

A Hubexo Product

Construction Review

Reflecting activity to the end of March 2026

April 2026

- ❌ **29% decline in detailed planning approvals** against the preceding three months
- ✅ **30% rise in main contract awards** against the preceding three months
- ❌ **6% decline in project starts** against the preceding three months



Expert insights

to drive your construction strategy forward

Glenigan's bespoke research service delivers actionable, data-driven insights tailored to expand construction industry business pipelines.

Led by Allan Wilen, a construction industry expert with over 30 years of market analysis experience, our team provides extensive expertise on the UK construction and built environment markets. Allan, previously Economics Director at the Construction Products Association for 20 years, offers valuable insights and in-depth analysis. He is supported by seasoned economists Yuliana Ivanykovych and Drilon Baca, who enable businesses to make informed strategic decisions through rigorous research and analysis.

Glenigan's trusted analysis is widely respected across thousands of construction businesses, from large infrastructure organisations to smaller enterprises. Featured in leading media, our team delivers custom research for commercial clients, government agencies, and trade organisations. From strategic forecasting to tailored reports, we provide the intelligence needed to plan confidently.

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Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

Industrial

Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

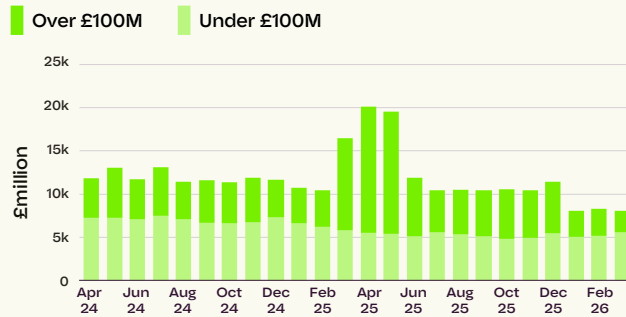
Executive Summary

- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

- ▼ **51% decline** in detailed planning approvals against the previous year
- ▲ **3% rise** in main contract awards against the previous year
- ▼ **20% decrease** in project starts against the previous year

The latest data suggest a cooling UK construction sector, with activity becoming increasingly uneven across the project pipeline. While main contract awards rose against the preceding quarter and previous year, fewer new projects are progressing through planning and into starts, pointing to a more cautious stance from clients and developers. The escalation of conflict involving the US, Israel and Iran has pushed oil prices higher, feeding renewed inflationary pressure into energy, transport and construction input costs. Combined with still-tight financial conditions, geopolitical uncertainty is dampening investor confidence and delaying decision-making. At the same time, fragile global growth and ongoing supply-chain sensitivities add to risk aversion.

Detailed Planning Approvals

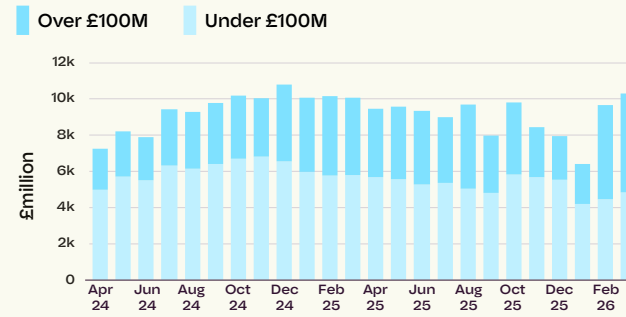


Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£million	16,781	7,367	24,149
YoY	-4%	-77%	-51%
Prev. 3 months	3%	-59%	-29%
Prev. 3 months (SA)	12%		

Source: Glenigan. Three month average

Main Contract Awards

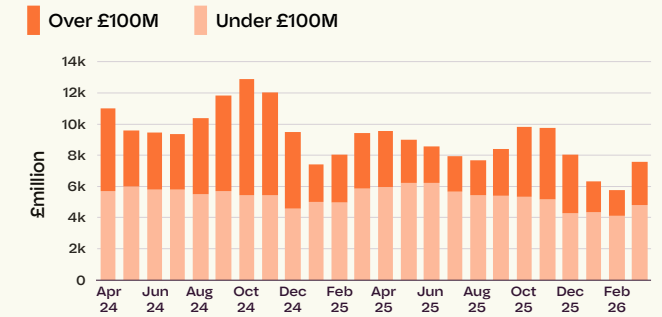


Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	14,511	16,441	30,952
YoY	-16%	28%	3%
Prev. 3 months	-12%	127%	30%
Prev. 3 months (SA)	-8%		

Source: Glenigan. Three month average

Starts



Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	14,468	8,261	22,730
YoY	-18%	-23%	-20%
Prev. 3 months	13%	-27%	-6%
Prev. 3 months (SA)	-17%		

Source: Glenigan. Three month average

Economic Outlook

War's lengthening shadow

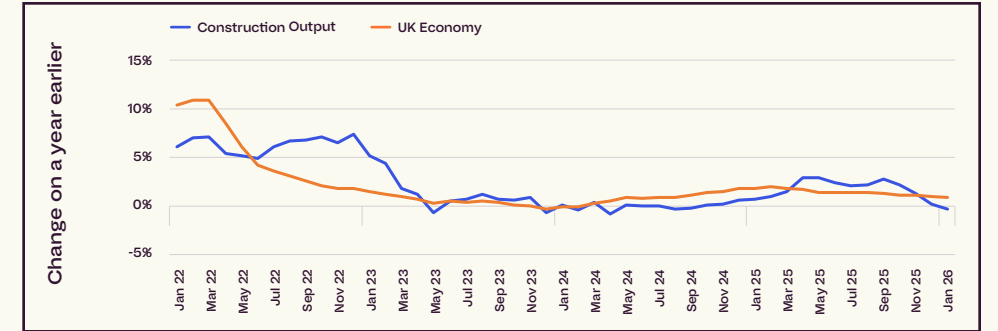
- ❑ Iran war blow to industry and consumer confidence
- ❑ Higher energy costs to drive up inflation
- ❑ Housing market activity stalls as mortgage costs rise

The escalation of conflict involving Iran is reshaping the global economic backdrop and weighing on UK sentiment. Ahead of official data, industry surveys point to a sharp deterioration in business confidence, driven by concerns over higher energy costs, supply-chain disruption, renewed interest-rate pressure and weaker growth prospects.

The CIPS manufacturing survey recorded a contraction in output in March, alongside rising purchasing costs and ongoing supply-chain disruption, while the services index also weakened. Separately, Deloitte's CFO survey shows a marked fall in confidence among UK finance leaders, with geopolitics, elevated energy prices and the risk of higher interest rates cited as key external threats. Confidence fell to a net balance of -57% in March, from -13% in the previous quarter.

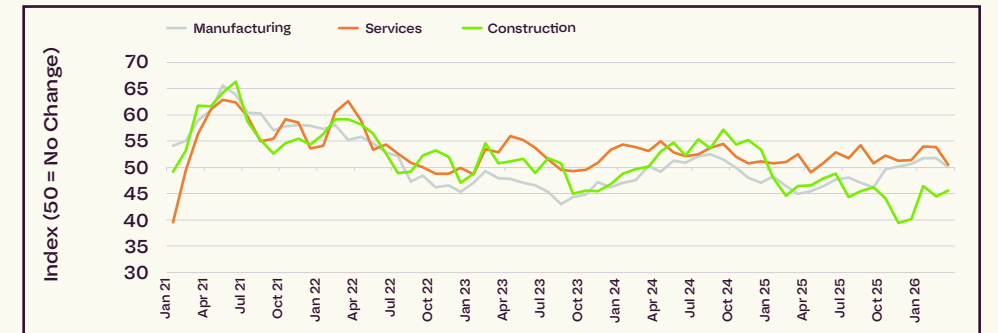
Softer sentiment is also emerging in the housing market, following the withdrawal of many fixed-rate mortgage products by lenders. The RICS residential survey reports a sharp fall in new buyer inquiries in March, accompanied by easing house prices and expectations of further near-term declines. However, the picture remains mixed, with Nationwide recording a modest monthly rise in prices, while Halifax reported a 0.5% fall.

Construction Activity & the Economy



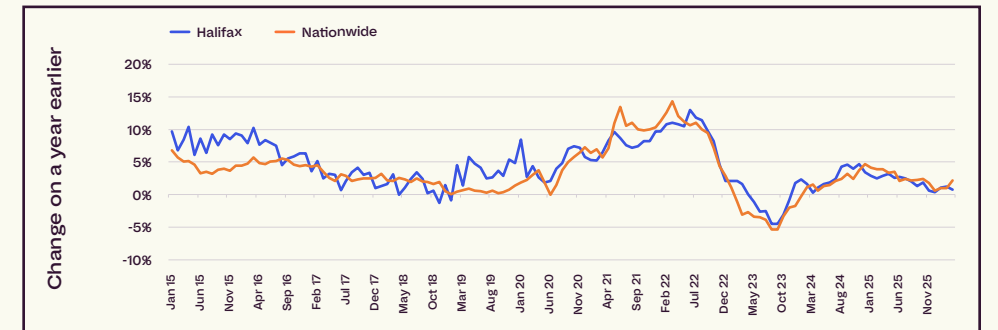
3 months against a year earlier. Source: ONS.

CIPS Activity Surveys



Sources: IHS Markit/CIPS

House Prices



Sources: Halifax, Nationwide

Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

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Hotel & Leisure

Health

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Community & Amenity

Civil Engineering

Top 50 Contractors

Last 12 month totals: **1038 projects**
£35,496m

Last month totals: **116 projects**
£3,436m

April 2025 to March 2026

Contractors	#	£m	★	Contractors	#	£m	★
1 Morgan Sindall	216	2,686	1	26 Robertson	26	499	4
2 STRABAG	7	2,636	-1	27 JRL Group	4	493	-2
3 Bowmer & Kirkland	33	1,784	1	28 TSL Projects	8	405	13
4 Bovis	12	1,459	1	29 ACCIONA	1	400	0
5 Mace	9	1,292	-2	30 McLaughlin & Harvey	13	399	13
6 Laing O'Rourke	9	1,274	1	31 Hill Group	15	380	0
7 McLaren	17	1,207	7	32 VINCI	23	375	12
8 Willmott Dixon	65	1,174	5	33 Bouygues	17	360	-1
9 Balfour Beatty	14	1,156	1	34 Structure Tone	4	344	0
10 Kier	93	1,131	-1	35 UI Social Infrastructure	3	343	NEW
11 Galliford Try	124	1,068	0	36 McAleer & Rushe	7	333	-10
12 Costain	7	1,053	-4	37 Equitix	1	332	-1
13 Wates	53	972	6	38 Corrighenda	4	324	0
14 Graham Construction	25	916	-8	39 Tilbury Douglas	37	321	-6
15 Corinthia	1	800	0	40 VolkerWessels	16	314	9
16 GE Vernova	1	800	0	41 Glencar Construction	15	313	-4
17 Technip Energies	1	800	0	42 Tusker Construction Group	1	300	NEW
18 Winvic	21	788	2	43 CCG (Sco.)/Queens Cross HA	17	289	NEW
19 Mears Group	4	787	-1	44 GMI Construction	19	276	-2
20 Sisk	7	619	1	45 Skanska UK	2	274	-6
21 Sir Robert McAlpine	8	607	2	46 Benniman Limited	10	266	2
22 Royal BAM	34	604	0	47 Bennett Construction	4	253	-2
23 Jones Bros	2	532	1	48 Flynn	1	250	-2
24 Caddick Group	20	514	3	49 RG Group Ltd	3	248	NEW
25 Worley Europe	1	500	NEW	50 Fortem Solutions	3	246	NEW

★ Change in ranking since the previous period

March 2026

Contractors	#	£m	★	Contractors	#	£m	★
1 Morgan Sindall	20	267	14	26 Bowmer & Kirkland	2	43	-17
2 JSSH	2	204	NEW	27 Tilbury Douglas	3	43	6
3 UI Social Infrastructure	1	203	NEW	28 Cambrianway Plant Hire	1	42	NEW
4 Fortem Solutions	1	203	NEW	29 CCG (Sco.)/Queens Cross HA	2	41	-4
5 Axis Group UK	1	203	NEW	30 Graham Construction	1	39	-29
6 Wates	3	158	NEW	31 Starship Group	3	36	NEW
7 McLaren	2	150	NEW	32 E H Allingham Construction	1	33	NEW
8 Kier	19	138	-1	33 Winvic	1	32	NEW
9 VINCI	2	125	NEW	34 Higgins	1	31	NEW
10 Caddick Group	2	107	-6	35 Thakeham Group	1	29	NEW
11 Kingscote Construction	1	100	NEW	36 M J Church Plant	1	27	NEW
12 AtkinsRealis	1	99	NEW	37 Barnes Construction	2	26	NEW
13 RG Group Ltd	1	75	NEW	38 Woodhart Carpentry	2	25	NEW
14 VolkerWessels	1	74	-3	39 Neilcott Construction	4	23	NEW
15 Galliford Try	4	74	-7	40 Benniman Limited	1	23	NEW
16 JRL Group	1	68	2	41 MCS Group	1	21	NEW
17 RE: GEN Group	3	65	NEW	42 Shepherd Building Group	1	20	NEW
18 Sisk	1	65	NEW	43 Keepmoat	1	20	NEW
19 McLaughlin & Harvey	3	64	8	44 Vistry	1	19	NEW
20 Formation Architect. Design	1	57	NEW	45 Rooms Group	1	19	NEW
21 Mace	1	54	NEW	46 Dandara Group	1	18	NEW
22 Lowry Construction	1	54	8	47 Willmott Dixon	5	18	-26
23 Gobion Construction	1	52	NEW	48 E G Carter & Co	1	18	NEW
24 Milestone Group	1	52	NEW	49 George Cox & Sons	1	17	NEW
25 Costain	1	45	24	50 Svella Connect	2	16	NEW

- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

Top 50 Clients

April 2025 to March 2026

Clients	#	£m	★
1 United Utilities Group	11	3474	0
2 Net Zero Teesside Power	1	2000	1
3 OGCI Climate Invest. Holdings	1	2000	-1
4 Ministry of Justice	35	1137	1
5 Department of Health	187	1011	-1
6 Dep. for Env., Food etc.	10	950	0
7 Department for Education	69	935	0
8 Mitsui Fudosan	1	700	3
9 Ministry of Defence	37	699	0
10 Sunderland City Council	8	601	2
11 Kemble Water	15	591	2
12 Milton Keynes City Council	6	540	NEW
13 Community Wind Power	1	500	1
14 Cadent Gas	1	500	NEW
15 Dover District Council	3	371	2
16 Prologis UK	7	350	3
17 Hampshire County Council	11	342	1
18 SSEN Transmission	10	301	5
19 Manby BGE	1	300	NEW
20 R&F Properties QS	1	300	1
21 Department for Transport	29	279	8
22 Hertfordshire CC.	6	263	3
23 Lidl UK	24	262	1
24 Tribus Clean Energy	1	250	2
25 Telehouse International	1	250	2

Clients	#	£m	★
26 Herefordshire Council	6	234	2
27 Westminster City Council	2	230	3
28 Sanctuary Housing	2	228	3
29 Greater London Authority	11	227	14
30 Unite Group	2	216	2
31 Aldi	51	204	9
32 Network Rail	18	204	NEW
33 Natural History Museum	2	204	2
34 Legal & General Group	7	203	NEW
35 Great Portland Estates	5	202	1
36 Immersa	1	200	1
37 Orion Capital Managers	2	188	4
38 Aberdeen City Council	22	187	NEW
39 British Land	6	187	-29
40 Cole Waterhouse	1	185	2
41 Barclays Bank	3	178	NEW
42 University of London	7	177	2
43 Environment Agency	24	175	NEW
44 Obayashi	1	165	2
45 Sellar Property Group	1	165	2
46 Leeds City Council	23	164	NEW
47 Sadel Group	1	161	NEW
48 The Crown Estate	4	160	0
49 Vita Meadows	1	158	1
50 Glasgow City Council	12	153	NEW

★ Change in ranking since the previous period

March 2026

Clients	#	£m	★
1 Network Rail	3	114	NEW
2 Aston Villa Football Club	1	100	NEW
3 AXA IM Alts	1	75	NEW
4 Oxfordshire County Council	1	74	NEW
5 Caddick Group	2	70	NEW
6 London Borough of Haringey	3	60	NEW
7 Apex Housing Association	2	58	23
8 Midlothian Council	1	55	NEW
9 Severn Trent Water	1	45	NEW
10 Department for Transport	3	45	NEW
11 Wirral Council	1	42	NEW
12 Feldberg Capital	1	40	NEW
13 London Borough of Camden	2	39	NEW
14 Kingston Upon Hull CC.	3	36	NEW
15 Department for Education	4	35	-4
16 Welsh Government	2	33	NEW
17 Leeds City Council	1	33	NEW
18 Leeds United Football Club	1	33	NEW
19 GLP UK	1	32	NEW
20 Tribe Grove Street	1	30	NEW
21 Sovereign Housing Group	1	29	NEW
22 Wiltshire Council	2	28	NEW
23 Greater London Authority	1	27	NEW
24 Platinum Southwark	1	27	NEW
25 Infinity Park Derby	1	26	NEW

Clients	#	£m	★
26 DP World	1	26	NEW
27 London Gateway Port	1	26	NEW
28 Brighton and Hove City	2	26	NEW
29 Wellcome Trust	1	25	NEW
30 Wosc 1/Wosc 2 Nominee	1	25	NEW
31 Aithrie Net Zero Solar	1	25	NEW
32 British Land	1	25	-25
33 Norges Bank Inv.	1	25	NEW
34 Urban&Civic	1	25	NEW
35 Ampyr Solar Europe	1	25	NEW
36 R.Bor. of Kens. & Chelsea	1	23	NEW
37 Prosper	2	23	NEW
38 Gentoo Group	1	23	NEW
39 City Of Edinburgh Coun.	1	23	NEW
40 Clarion Housing Group	1	23	-17
41 Argenta Hse. (Stonebridge Prk)	1	23	-8
42 Cervidae	1	23	-8
43 Prologis UK	1	23	NEW
44 Fold Housing Association	3	22	NEW
45 Consi Investments	1	21	NEW
46 BAE Systems Marine	1	20	NEW
47 Walsall Met. BC.	1	20	NEW
48 Department of Health	12	20	-46
49 University of Liverpool	2	19	NEW
50 Rainier Developments	1	18	NEW

Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

Industrial

Offices

Retail

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Health

Education

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Civil Engineering

Housing

Overview

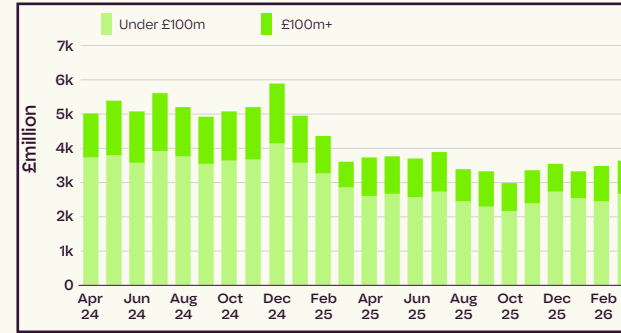
- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

- ▼ **11% decrease** in project starts year-on-year.
- ▲ **41% increase** in main contract awards from last year.
- ▲ **1% increase** in detailed planning approvals compared to 2025.

Residential starts weakened on an annual basis, driven by a decline in underlying projects (under £100 million). Quarter-on-quarter comparisons were more positive thanks to a strong jump in major projects starting on-site (£100 million or more). The pipeline also strengthened, with increases both year-on-year and quarter-on-quarter supported by rises in major projects.

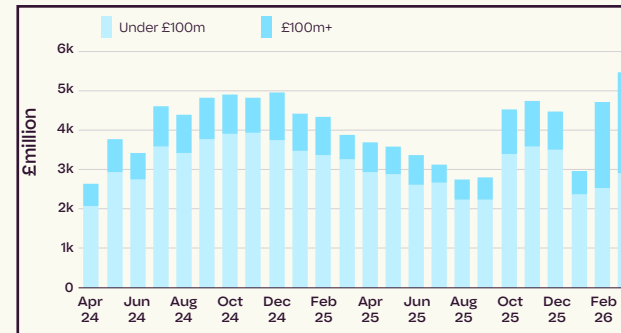
Despite the latest uplift in approvals and main contract awards, this recovery is likely to be short-lived amidst global geo-political instability. The signs have already started showing, with Halifax reporting a decline in house prices.

Detailed Planning Approvals



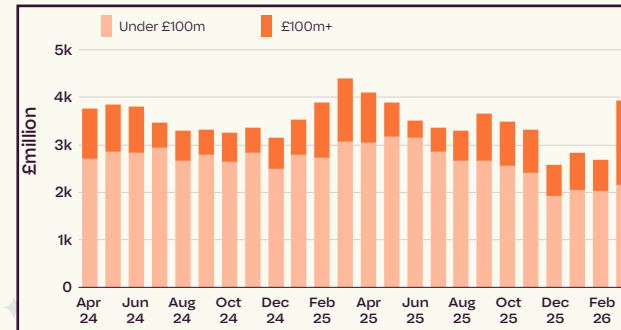
Source: Glenigan

Main Contract Awards



Source: Glenigan

Housing Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	8,022	2,917	10,939
YoY	-6%	29%	1%
Prev. 3 months	-2%	18%	2%
Prev. 3 months (SA)	17%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	8,734	7,667	16,402
YoY	-11%	314%	41%
Prev. 3 months	-17%	162%	22%
Prev. 3 months (SA)	-9%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	6,436	5,338	11,774
YoY	-30%	32%	-11%
Prev. 3 months	12%	170%	52%
Prev. 3 months (SA)	-13%		

Housing

Types of projects started

Sub-sector performance was mixed, with social sector housing dominating overall activity.

- Social Sector Housing accounted for the largest share (41%), having risen 230% year-on-year to total £4,770 million.
- Private Housing fell 44% against the previous year, totalling £3,653 million.
- Private Apartments decreased 50% year-on-year to total £1,915 million.

Types of Housing Projects Started

Three months to March 2026

	£ million	Percentage
Private Apartments	1,915	16%
Elderly Persons Homes	8	0%
Private Housing	3,653	31%
Private Sheltered Housing	246	2%
Social Sector Sheltered Housing	42	0%
Social Sector Apartments	395	3%
Social Sector Housing	4,770	41%
Homes, Hostels Etc.	54	0%
Student Accommodation	693	6%
Total	11,774	100%

Project Spotlight

Mercia Student Village

Detailed plans have been approved on the £183 million Mercia Student Village development in Coventry, West Midlands. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q2 2030.

PROJECT ID: 25205289

IMAGE SOURCE: CORSTORPHINE AND WRIGHT

£183m



Housing League Tables

April 2025 to March 2026

Contractors	Projects	£m
Bloor Homes	58	2,085
Barratt Redrow	56	1,826
Taylor Wimpey	40	1,379
Persimmon Group	51	1,234
Graham Cons.	7	904
Vistry Group	26	880
Bellway	35	809
Mears Group	4	787
Morgan Sindall	25	720
Hill Group	24	718

Clients	Projects	£m
Bloor Homes	62	2,212
Barratt Redrow	59	1,709
Taylor Wimpey	53	1,649
Persimmon Group	58	1,241
Vistry Group	49	1,226
The Guinness Prtns.	7	1,087
Bellway	38	941
Milton Keynes CC	4	733
The Berkeley Group	11	470
Apollo Mngt. Int.	25	469

Housing

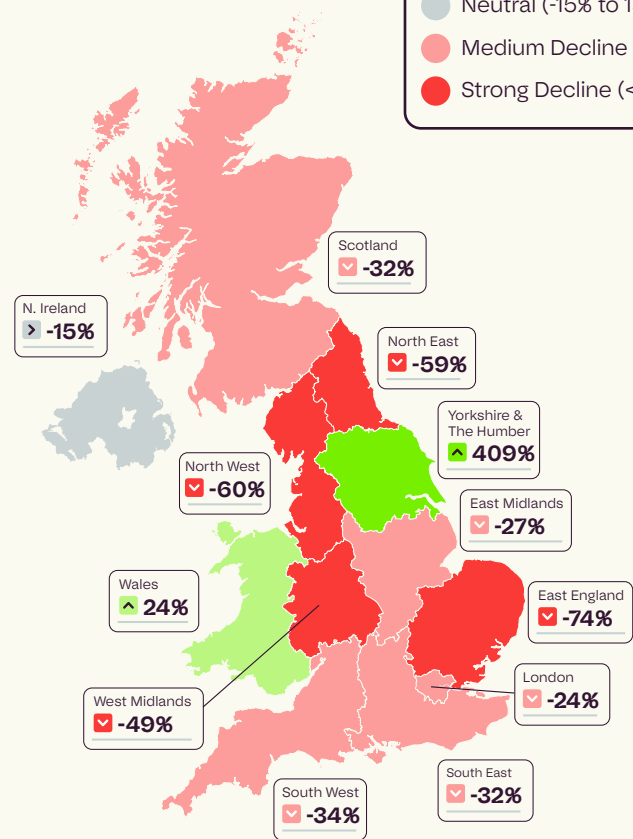
Regional

- Most regions experienced annual declines in residential starts.
- Detailed planning approvals grew in most regions.
- Yorkshire & the Humber saw exceptionally strong growth in project starts.

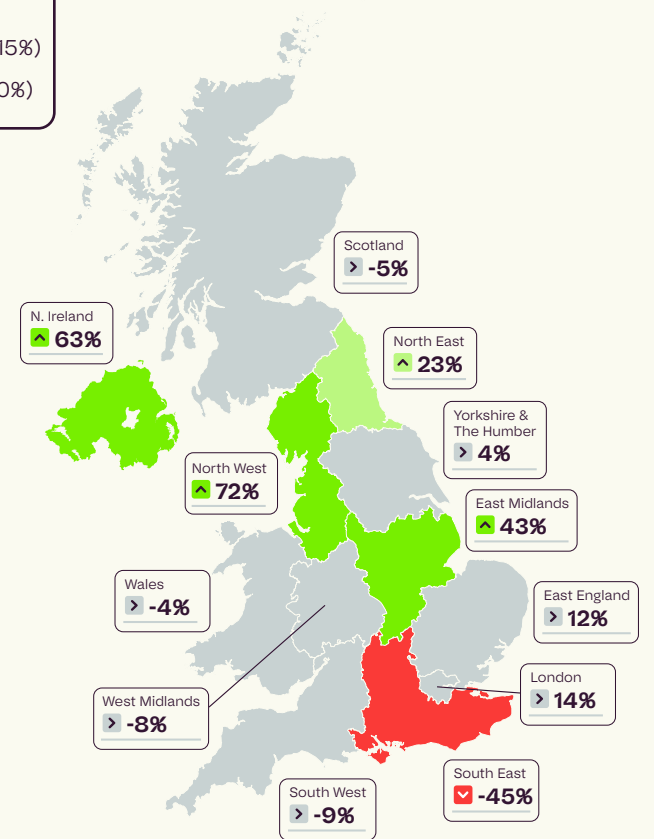
Yorkshire & the Humber was the most active region at £4,594 million, following substantial year-on-year growth driven by social housing heating works worth £4,086 million in Leeds. London was the second most active region at £1,787 million despite a moderate decline. Most other regions including the East of England and North West experienced steep drops in activity. In contrast, most regions experienced an increase in planning approvals.



Changes in Housing Starts
on a Year Earlier



Changes in Housing Planning Approvals
on a Year Earlier



- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

Industrial Overview

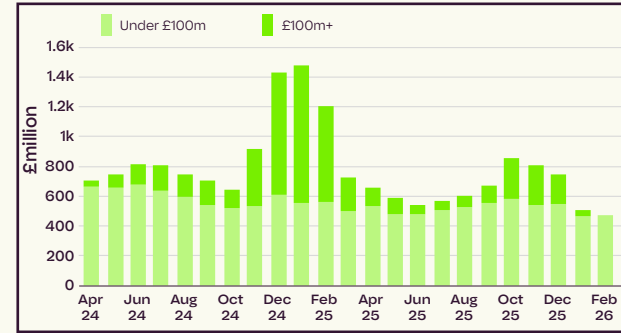
- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

- ▼ **44% decrease** in project starts year-on-year.
- ▼ **75% decrease** in main contract awards from last year.
- ▼ **35% decrease** in detailed planning approvals compared to 2025.

The industrial sector remained weak across the pipeline, with starts, awards and approvals all declining substantially both on an annual and quarterly basis. No major projects (£100 million or more) were approved or awarded, further exacerbating the slowdown in activity.

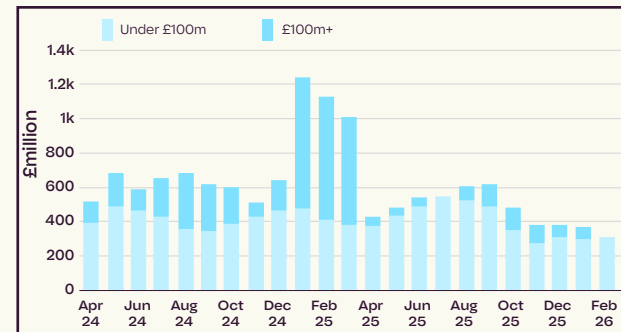
The UK Manufacturing PMI was down in March, with S&P reporting a decline in output for the first time in six months. The closure of the Strait of Hormuz has increased uncertainty in the sector due to supply chain disruptions and increasing energy costs.

Detailed Planning Approvals



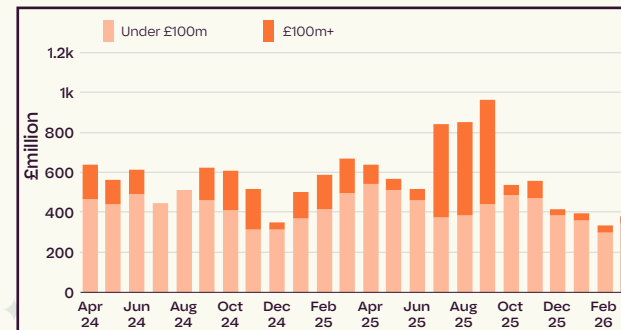
Source: Glenigan

Main Contract Awards



Source: Glenigan

Industrial Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,416	-	1,416
YoY	-5%	-100%	-35%
Prev. 3 months	-14%	-100%	-37%
Prev. 3 months (SA)	6%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	749	-	749
YoY	-34%	-100%	-75%
Prev. 3 months	-20%	-100%	-34%
Prev. 3 months (SA)	-18%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,029	104	1,133
YoY	-31%	-80%	-44%
Prev. 3 months	-10%	4%	-9%
Prev. 3 months (SA)	-36%		

Industrial

Types of projects started

In line with overall sector weakness, project starts fell across all categories.

- Warehousing & logistics accounted for the largest share (54%), having decreased 38% year-on-year to total £613 million.
- Manufacturing fell 44% against the previous year, totalling £487 million.
- Other industrial starts decreased 78% year-on-year to total £33 million.

Types of Industrial Projects Started

Three months to March 2026

	£ million	Percentage
Manufacturing	487	43%
Other Industrial	33	3%
Warehousing & Logistics	613	54%
Total	1,133	100%

Project Spotlight

Hawthorne Corner Industrial Units

Detailed plans have been approved for the £57 million Hawthorne Corner Industrial Units development in Herne Bay, Kent. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 22250229

IMAGE SOURCE: CLAGUE ARCHITECTS

£57m



Industrial League Tables

April 2025 to March 2026

Contractors	Projects	£m
Winvic Group	14	593
TSL Projects	7	374
Glencar Cons.	14	297
Benniman	11	283
Caddick Group	9	254
GMI Construction	6	146
J W Muir	7	128
MCS	5	115
Murphy	2	106
A & H Con. & Dev.	4	99

Clients	Projects	£m
Prologis UK	8	365
Sadel Group	1	161
Lidl UK	1	150
DP World	3	119
Panattoni UK	6	111
Amazon UK	3	110
Howden Joinery	1	100
Whyte & MacKay	1	85
Aldi	1	84
Avonmouth Ind. Est.	2	83

Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

Industrial
Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Industrial

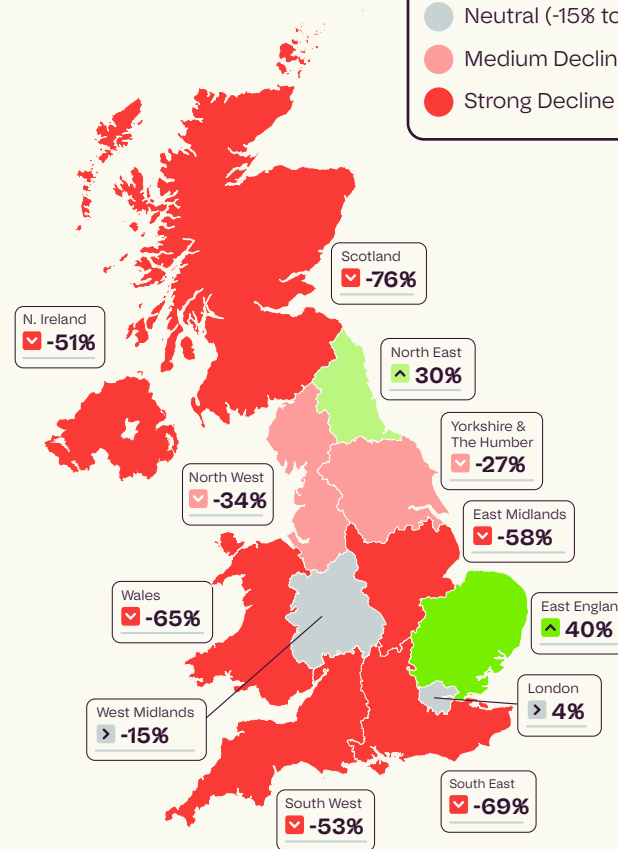
Regional

- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

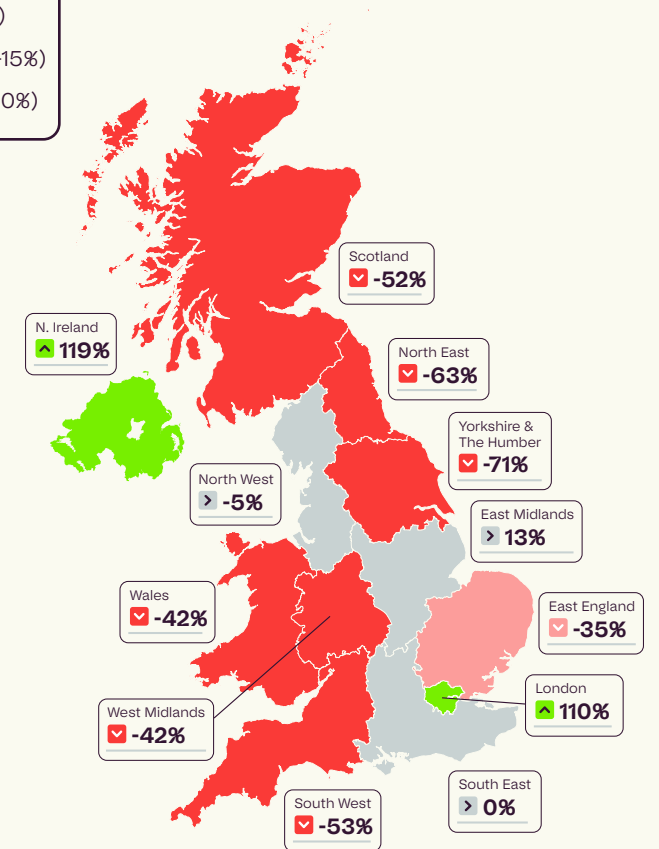
- Regional performance in industrial starts and approvals was weak.
- The East Midlands led by value despite a sharp decline.
- London and Northern Ireland recorded strong growth in approvals.

The East Midlands remained the most active region for starts at £253 million despite falling 58% year-on-year. The East of England grew strongly to £175 million, while London rose 4% to £93 million. Approvals were strongest in the North West at £265 million, though London and Northern Ireland recorded the most notable year-on-year increases.

Changes in Industrial Starts
on a Year Earlier



Changes in Industrial Planning Approvals
on a Year Earlier



Offices

Overview

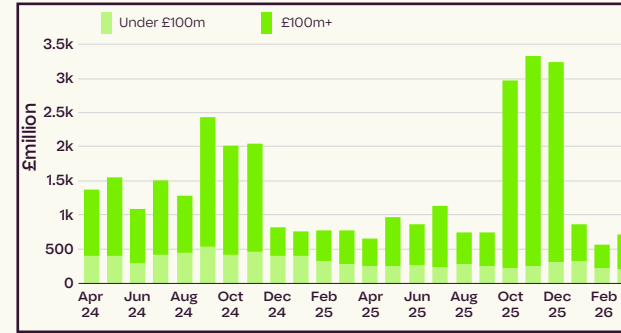
- ▲ **75% increase** in project starts year-on-year.
- ▼ **33% decrease** in main contract awards from last year.
- ▼ **9% decrease** in detailed planning approvals compared to a year ago.

Office starts strengthened sharply due to substantial growth in both major and underlying schemes, supported by increases across all value bands. However, both awards and approvals weakened year-on-year, indicating softer forward momentum even as near-term activity accelerates.

While data centre development has been gaining momentum within the office sector, it now faces mounting pressure as soaring industrial electricity costs and grid connection delays undermine project viability.

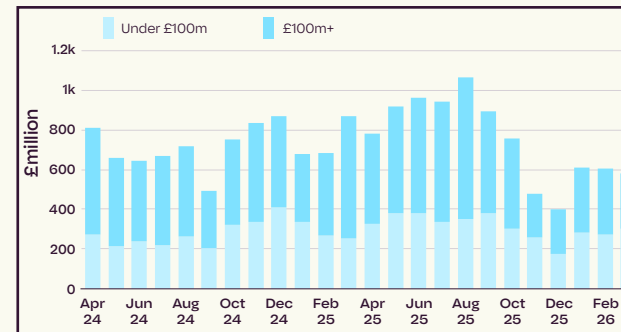
OpenAI has paused its Stargate UK scheme, stating it will only proceed once energy and regulatory conditions allow long term investment, leaving the planned North Tyneside facility indefinitely on hold.

Detailed Planning Approvals



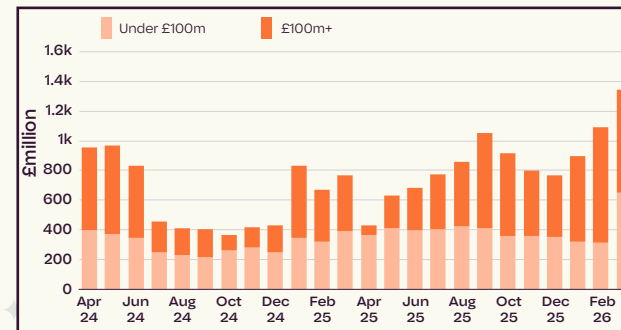
Source: Glenigan

Main Contract Awards



Source: Glenigan

Office Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	613	1,512	2,125
YoY	-28%	2%	-9%
Prev. 3 months	-34%	-83%	-78%
Prev. 3 months (SA)	-16%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	907	843	1,750
YoY	20%	-54%	-33%
Prev. 3 months	74%	23%	45%
Prev. 3 months (SA)	83%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,944	2,083	4,027
YoY	67%	84%	75%
Prev. 3 months	85%	67%	75%
Prev. 3 months (SA)	37%		

- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

Offices

Types of projects started

In line with the overall growth in the sector, all value bands experienced increases.

- Project starts in the over £100 million value band totalled £2,083 million, having increased 84% year-on-year.
- The £50 million to £100 million value band grew 87% year-on-year, totalling £617 million.
- The £20 million to £50 million value band was 31% up year-on-year, totalling £534 million.

Types of Office Projects Started

Three months to March 2026

	£ million	Percentage
Up to £5 million	237	6%
£5 million up to £10 million	232	6%
£10 million up to £20 million	323	8%
£20 million up to £50 million	534	13%
£50 million up to £100 million	617	15%
Over £100 million	2,083	52%
Total	4027	100%

Project Spotlight

33 Cavendish Square

Detailed plans have been approved for the £260 million 33 Cavendish Square office and retail development on Oxford Street, London. Works are due to complete in Q2 2033, with a main contractor yet to be appointed on the scheme.

PROJECT ID: 25210081

IMAGE SOURCE: BUILDING

£260m



Office League Tables

April 2025 to March 2026

Contractors	Projects	£m
Morgan Sindall	114	1,083
Mace Group	6	1,036
Bowmer & Kirkland	5	722
McLaren Construc.	6	544
Bovis	3	540
Multiplex Cons. Eur.	2	358
Structure Tone	4	344
Skanska UK	1	273
Newarthill	2	270
Flynn	1	250

Clients	Projects	£m
Mitsui Fudosan UK	1	700
Sunderland CC.	1	450
Endurance Land	1	300
Telehouse Int.	1	250
Great Portland Est.	5	202
Barclays Bank	3	178
British Land	3	170
Obayashi	1	165
Sellar Property	1	165
The Crown Estate	3	159

Offices

Regional

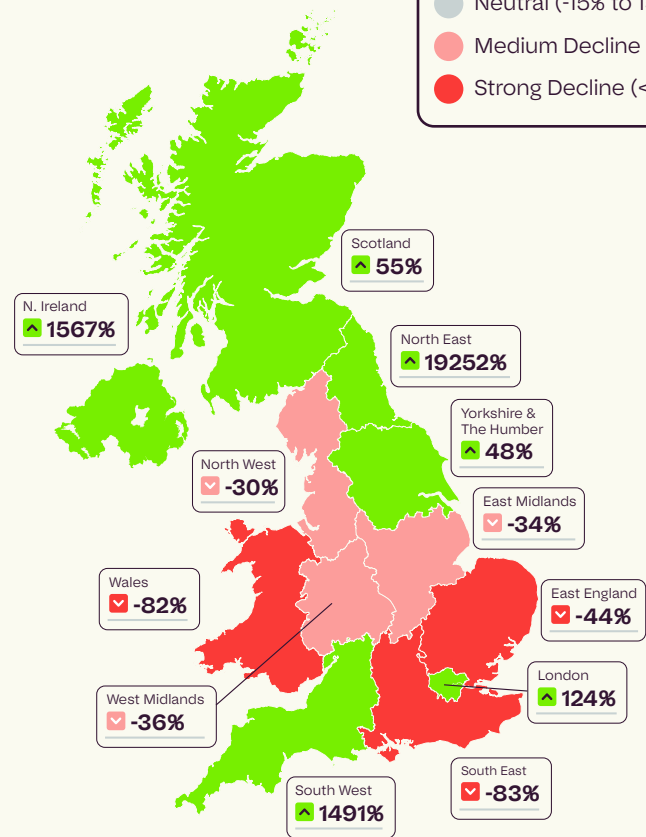
- Most regions saw strong growth in office starts, led by London.
- The South West experienced a significant increase.
- Planning approvals declined in most regions.

London dominated with £2,882 million of starts, rising 124% year-on-year, boosted by the £500 million G Park Docklands Data Centre development in Newham. The South West also surged 15 times to £414 million. In approvals, London led at £1,016 million having jumped 90%, while the South East and North East recorded strong gains despite declines elsewhere.

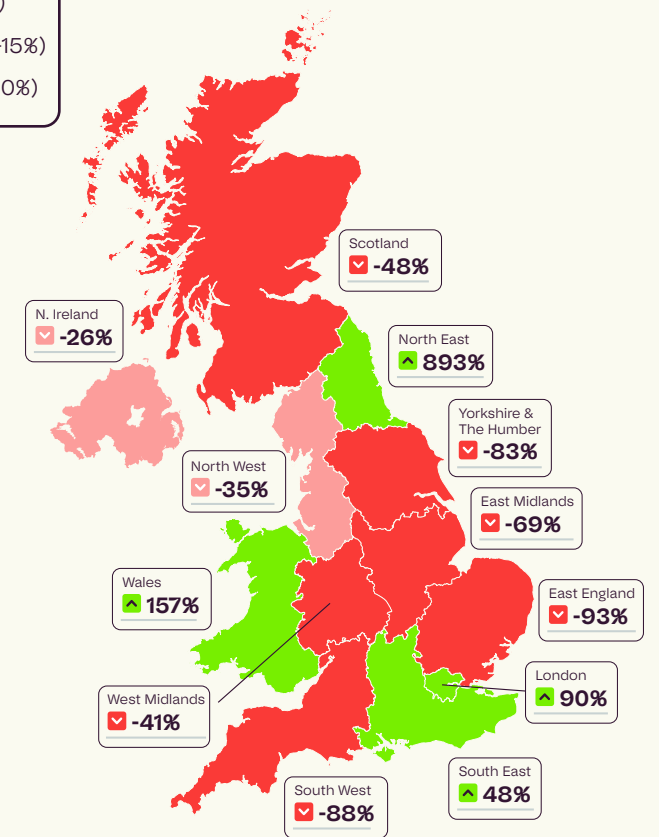


- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

Changes in Office Starts
on a Year Earlier



Changes in Office Planning Approvals
on a Year Earlier



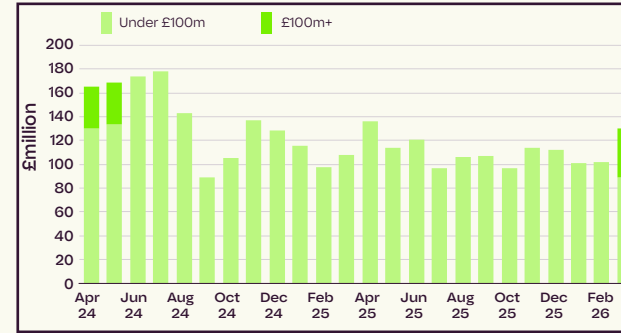
Retail

Overview

- ▼ **17% decrease** in project starts year-on-year.
- ▼ **34% decrease** in main contract awards from last year.
- ▲ **21% increase** in detailed planning approvals compared to 2025.

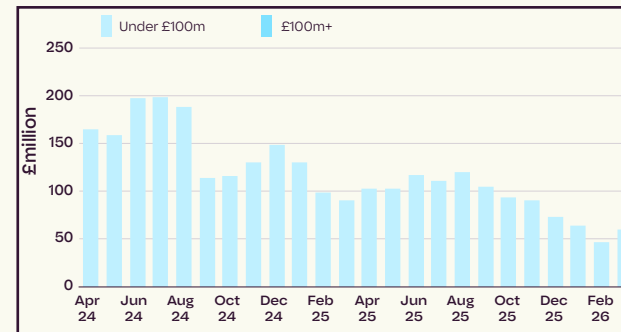
Retail activity remained subdued, with starts and awards both declining sharply on an annual basis. Quarter-on-quarter data showed some improvement in starts, driven by underlying projects (under £100 million), while approvals strengthened significantly, particularly in major schemes (£100 million or more). Supply chain disruptions and cost pressures caused by global geopolitical instability will add to the challenges faced by the retail sector.

Detailed Planning Approvals



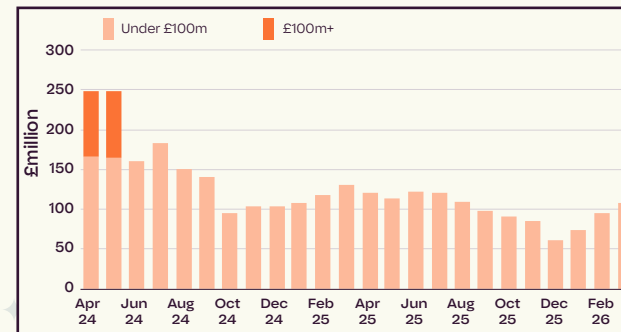
Source: Glenigan

Main Contract Awards



Source: Glenigan

Retail Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	267	124	391
YoY	-18%		21%
Prev. 3 months	-21%		16%
Prev. 3 months (SA)	-18%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	180	-	180
YoY	-34%		-34%
Prev. 3 months	-18%		-18%
Prev. 3 months (SA)	-9%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	322	-	322
YoY	-17%		-17%
Prev. 3 months	74%		74%
Prev. 3 months (SA)	12%		

- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

Retail

Types of projects started

Performance across the sector was weak, with supermarkets providing the majority of activity.

- Supermarkets accounted for the largest share (75%), having grown 17% year-on-year to total £241 million.
- Shops fell 50% year-on-year, totalling £71 million.
- Petrol filling stations decreased 4% year-on-year to £9 million.

Types of Retail Projects Started

Three months to March 2026

	£ million	Percentage
Other Retail	-	0%
Petrol Filling Stations	9	3%
Retail Warehousing	1	0%
Shopping Centres	1	0%
Shops	71	22%
Supermarkets	241	75%
Total	322	100%

Project Spotlight

Service Station

Detailed plans have been approved for a £10 million service station and shop in Gravesend, Kent. A main contractor is yet to be appointed on the scheme with works due to complete in Q2 2027.

PROJECT ID: 13373510

IMAGE SOURCE: BP PULSE

£10m



Retail League Tables

April 2025 to March 2026

Contractors	Projects	£m
Kier Group	1	41
DSP Cons. Mngmt.	11	41
Adston UK	1	40
McPhillips Wellington	1	37
Mildren Constr.	2	25
The Barnfield Group	1	20
VINCI Construction	1	20
Audas Project Mngt.	1	17
Red Construction	1	17
Neilcott Cons.	1	14

Clients	Projects	£m
Aldi	49	116
Lidl UK	21	111
Marks & Spencer	19	49
Walsall Met. BC.	1	41
McPhillips Wellington	1	37
T J Morris	13	36
J Sainsbury	15	34
Tesco	42	26
Blackburn Darwen BC.	1	20
Watford Health	1	17

Retail

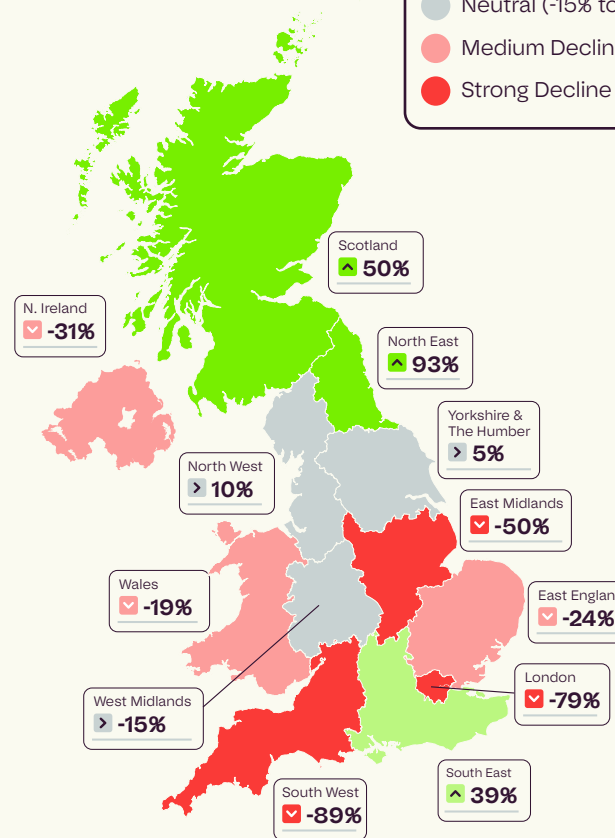
Regional

- Project starts and detailed planning approvals experienced declines in most regions.
- Strongest project start growth in the North East and Scotland.
- The South East was the most active region in both starts and approvals.

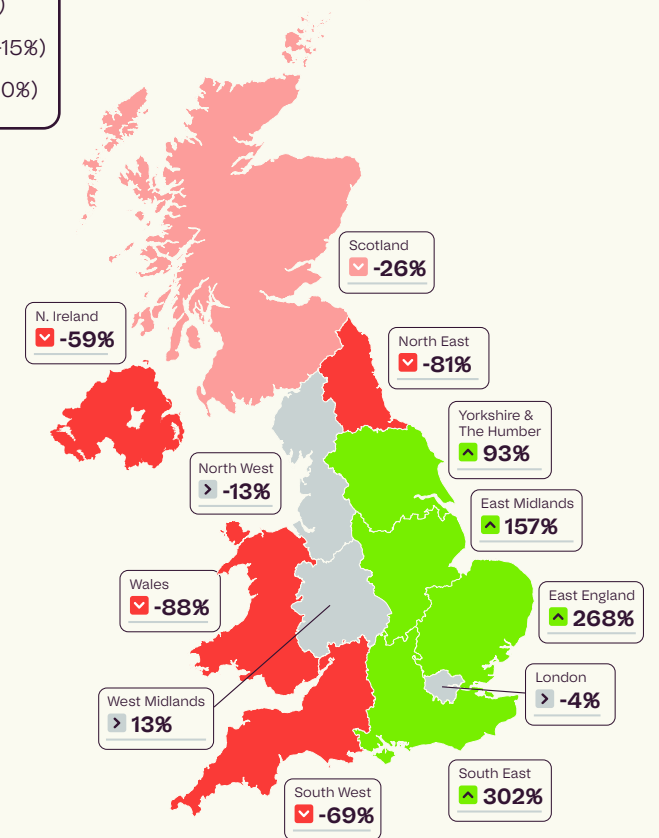
The South East led retail starts at £71 million, increasing 39% year-on-year. The North West followed at £69 million, having grown 10% on a year ago. The North East also performed well at £29 million, with the value of project starts having jumped 93% against last year. In contrast, London and Northern Ireland experienced notable declines.



Changes in Retail Starts
on a Year Earlier



Changes in Retail Planning Approvals
on a Year Earlier



- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

Hotel & Leisure

Overview

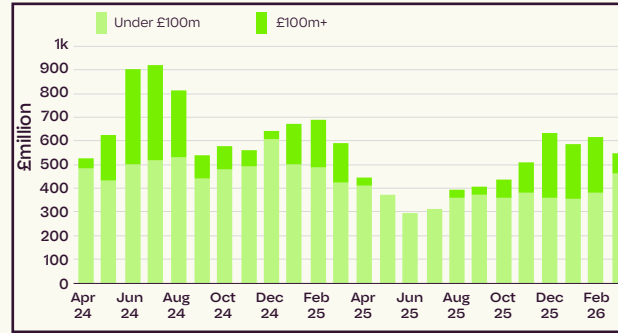
- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

- ▲ **31% increase** in project starts year-on-year.
- ▼ **22% decrease** in main contract awards from last year.
- ▼ **7% decrease** in detailed planning approvals compared to 2025.

Hotel & leisure starts strengthened year-on-year, driven by increases in both major and underlying projects. Quarter-on-quarter comparisons were mixed, with a decline in underlying project starts offset by a strengthening in major schemes, leading to an overall quarterly increase in starts. Pipeline metrics softened, on the other hand, with main contract awards down on a year ago, while detailed planning approvals fell both year-on-year and quarter-on-quarter.

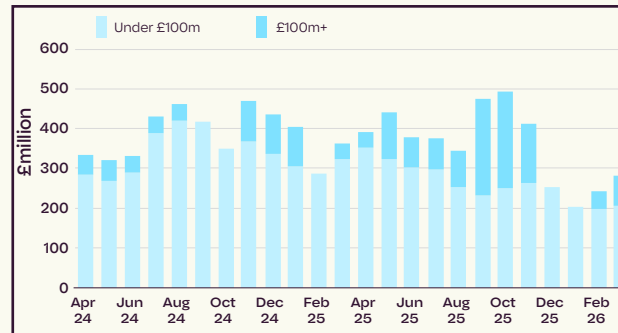
Heightened uncertainty around international travel linked to the Iran conflict, including fuel shortages and flight disruption, may redirect demand towards domestic staycations, providing pockets of resilience within the tourism sector.

Detailed Planning Approvals



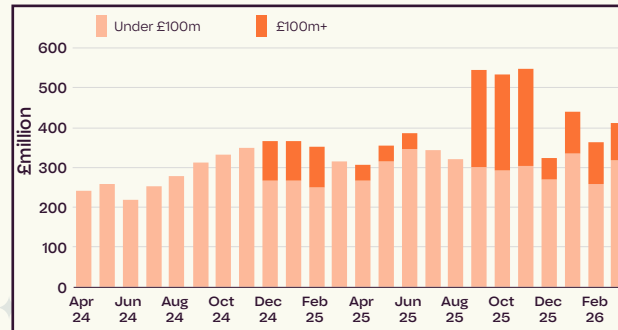
Source: Glenigan

Main Contract Awards



Source: Glenigan

Hotel & Leisure Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,388	260	1,648
YoY	9%	-48%	-7%
Prev. 3 months	29%	-69%	-13%
Prev. 3 months (SA)	46%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	616	231	847
YoY	-37%	93%	-22%
Prev. 3 months	-19%		11%
Prev. 3 months (SA)	-17%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	952	286	1,238
YoY	1%		31%
Prev. 3 months	17%	77%	27%
Prev. 3 months (SA)	-25%		

Hotel & Leisure

Types of projects started

Sub-sector performance was varied, with the strongest contributions from cinemas & theatres and indoor leisure facilities.

- Indoor leisure facilities accounted for the largest share (35%), having increased 133% year-on-year to total £438 million.
- Cinemas & theatres rose 186% year-on-year to total £216 million.
- Hotels & guest houses decreased 30% against the previous year, totalling £159 million.

Types of Hotel & Leisure Projects Started

Three months to March 2026

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	21	2%
Cinemas & Theatres	216	17%
Hotels, Guest Houses	159	13%
Indoor Leisure Facilities	438	35%
Other Hotel & Leisure	215	17%
Sport Facilities	188	15%
Total	1,238	100%

Project Spotlight

Surf London

Plans have been approved for Surf London, a new inland, multi-activity surfing destination in Enfield, North London. A main contractor is yet to be appointed on the £50 million scheme, with works expected to be completed in Q1 2028.

PROJECT ID: 22234641

IMAGE SOURCE: APG ARCHITECTURE

£50m



Hotel & Leisure League Tables

April 2025 to March 2026

Contractors	Projects	£m
Newarthill	5	317
Morgan Sindall	5	216
McLaren Cons.	2	153
Robertson Group	2	139
John Sisk & Son	2	111
Kingscote Cons.	1	100
Bovis	1	100
Walter Lilly & Co	1	90
Willmott Dixon	9	88
Limak	1	84

Clients	Projects	£m
Greater London Auth.	2	135
Alvarez & Marsal	1	131
Aston Villa FC	1	100
Crystal Palace FC.	1	100
Whitbread	20	97
Rayners Penn	1	90
Peel Holdings	2	86
London B. of Hackney	4	76
British Museum	1	51
Warwickshire CCC.	1	46

Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

Industrial

Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Hotel & Leisure

Regional

- Expert Insights

- Executive Summary

- Economic Outlook

- Top 50 Contractors

- Top 50 Clients

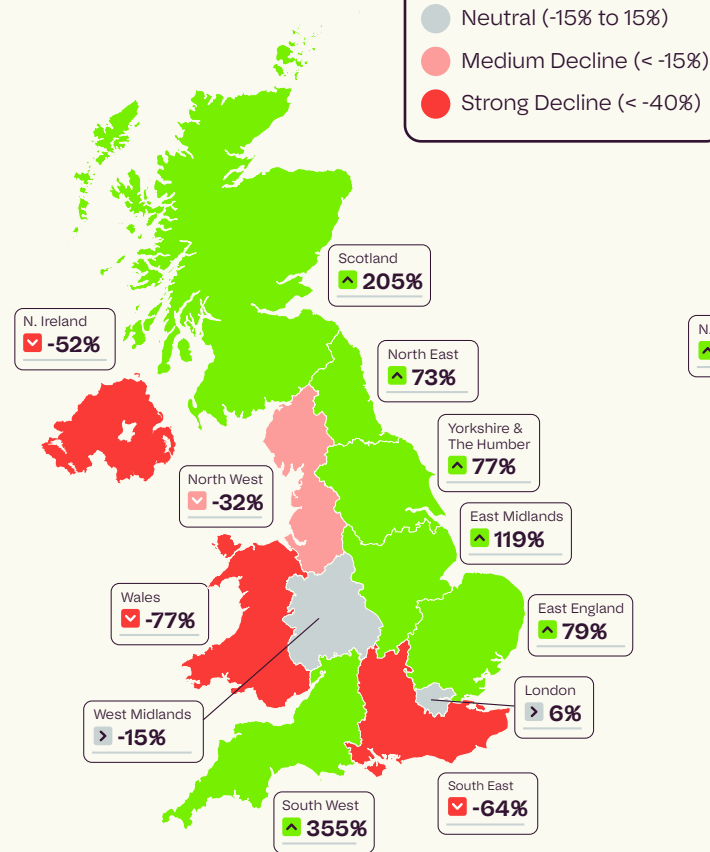
- Sector Analysis

 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

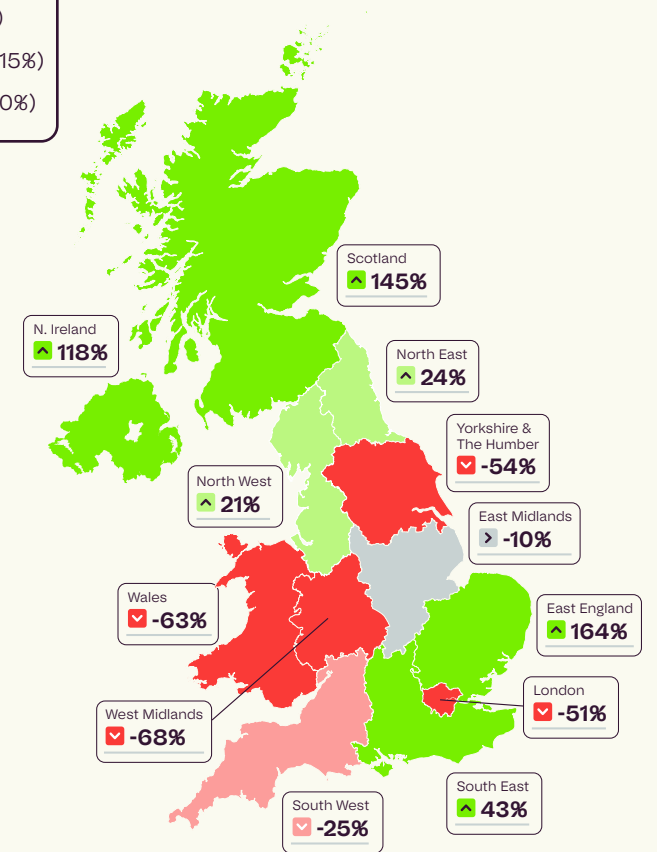
- Project starts had a strong quarter, with growth in most regions.
- Mixed performance in detailed planning approvals.
- The East of England and Scotland experienced strong growth in both starts and approvals.

Scotland was the most active region for project starts at £273 million, achieving strong 205% growth year-on-year. London also performed well at £270 million, having climbed 6% on a year ago. The South West followed closely at £212 million, having quadrupled year-on-year. Northern Ireland, Wales and several English regions, however, saw marked declines compared with last year.

Changes in Hotel & Leisure Starts
on a Year Earlier



Changes in Hotel & Leisure Planning Approvals
on a Year Earlier



Health

Overview

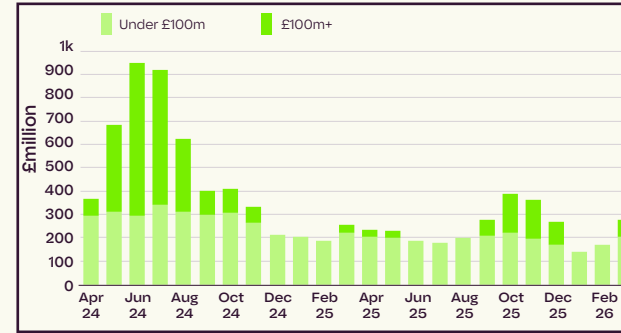
- ▼ **54% decline** in the value of project starts against the previous year.
- ▼ **60% fall** in main contract awards compared to the previous year.
- ▲ **8% rise** in detailed planning approvals against the previous year.

Despite a weak start to the year, with both project starts and main contract awards falling year on year and quarter on quarter, the rise in detailed planning approvals offers a more encouraging signal for future workloads. The uplift suggests the development pipeline is beginning to strengthen, even if this has yet to be reflected in activity on site.

Prospects for the sector are further supported by a number of high-profile schemes, most notably the New Hospital Programme, alongside proposed investment in NHS technology and increased funding commitments for routine spending announced in the Budget. Together, these factors point towards a gradual recovery in healthcare construction workloads over the coming quarters, despite near-term activity remaining subdued.

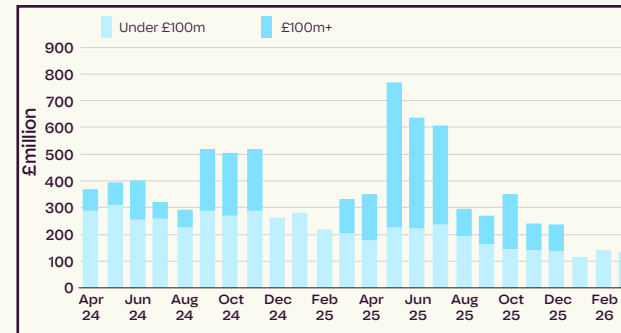
- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

Detailed Planning Approvals



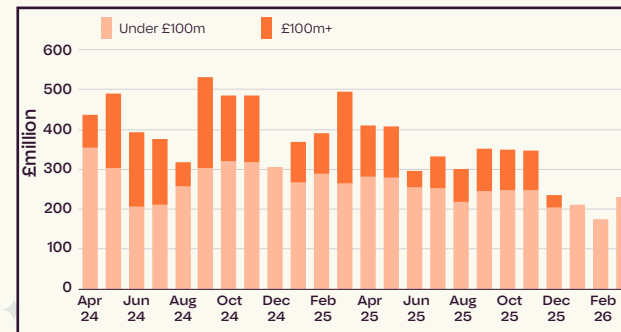
Source: Glenigan

Main Contract Awards



Source: Glenigan

Health Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	609	225	834
YoY	-9%	125%	8%
Prev. 3 months	20%	-25%	3%
Prev. 3 months (SA)	19%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	403	-	403
YoY	-34%	-100%	-60%
Prev. 3 months	-2%	-100%	-43%
Prev. 3 months (SA)	-14%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	689	-	689
YoY	-13%	-100%	-54%
Prev. 3 months	13%	-100%	-3%
Prev. 3 months (SA)	-16%		

Health

Types of projects started

- Hospitals accounted for the largest share of activity, although values were substantially lower than a year earlier.
- Dental, health and veterinary centres provided some support, recording solid growth from smaller-scale schemes.
- Day centres recorded strong percentage growth, albeit from a relatively low base.

Types of Health Projects Started

Three months to March 2026

	£ million	Percentage
Day Centres	34	5%
Dental, Health & Veterinary Centres/ Surgeries	158	23%
Hospitals	274	40%
Nursing Homes & Hospices	76	11%
Other Health	146	21%
Total	689	100%

Project Spotlight

Life Sciences Hub

Detailed plans have been approved for the refurbishment of the former Debenhams into a life sciences hub in Oxford. A main contractor is yet to be appointed on the £125 million scheme, with works expected to be completed in Q1 2029.

PROJECT ID: 24153028

IMAGE SOURCE: PERKINS AND WILL

£125m



Health League Tables

April 2025 to March 2026

Contractors	Projects	£m
Laing O'Rourke	3	942
Bouygues UK	1	215
Mace Group	1	201
McLaughlin & Harvey	3	166
VINCI Construction	4	159
Morgan Sindall	9	131
MTX Contracts	4	109
Kori Construction	5	76
W W Martin (Thanet)	2	72
Tilbury Douglas	4	67

Clients	Projects	£m
Dep. for Env. Food etc.	4	936
Dep. of Health	167	918
Nat. History Museum	1	201
Kadans Science	1	100
Univ. of Cambridge	1	72
LNT Group	7	56
Welbeck Health Prtns	2	44
Hallmark Care Homes	2	43
Elysian Residences	1	43
Wellcome Trust	1	42

Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

Industrial

Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Health

Regional

- Expert Insights

- Executive Summary

- Economic Outlook

- Top 50 Contractors

- Top 50 Clients

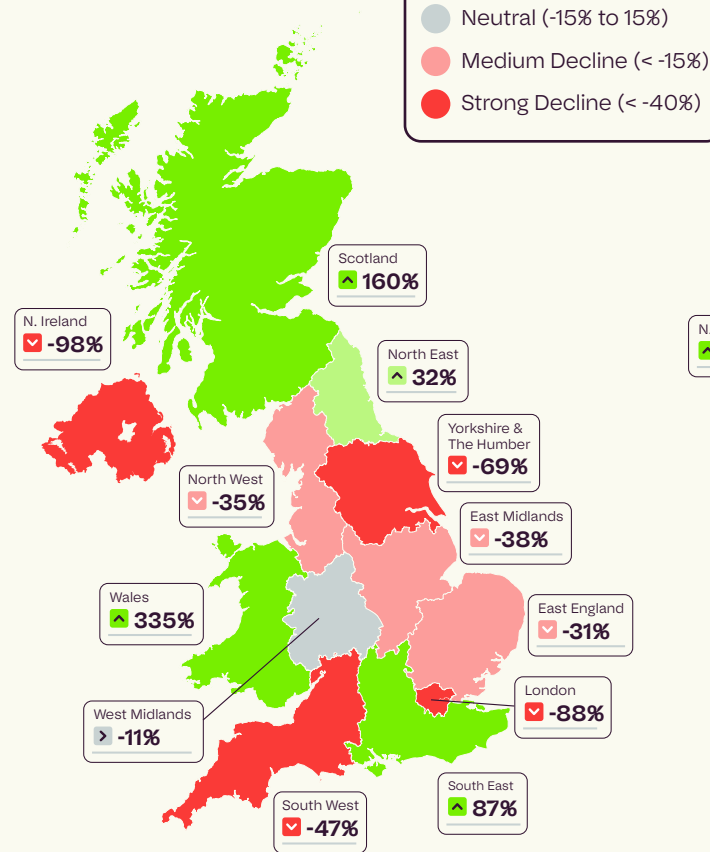
- Sector Analysis

 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

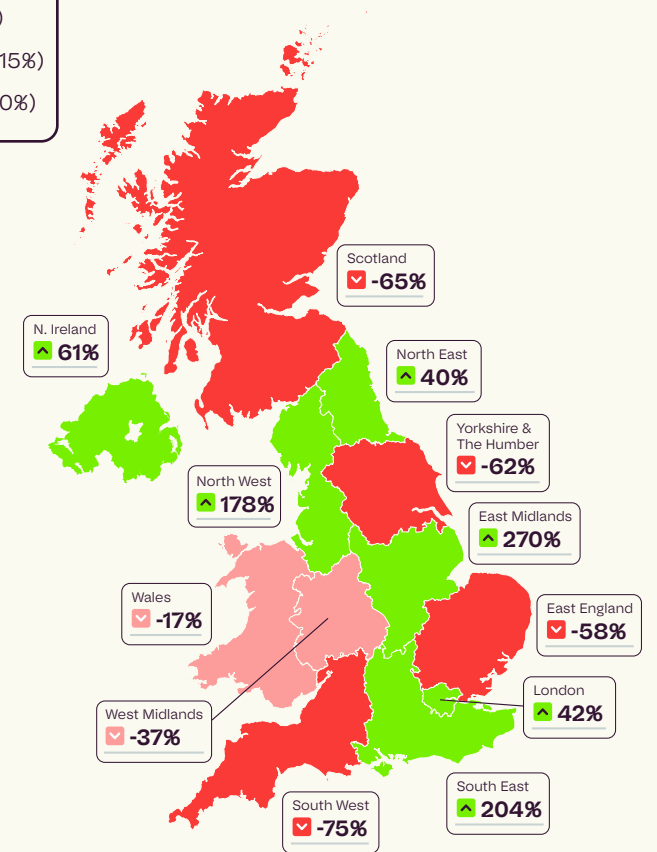
- The South East emerged as the most active region for health project starts.
- Wales and Scotland both recorded notable year-on-year growth in activity.

The South East led sector activity accounting for the largest share of project starts (26%). The £75 million New Wycombe Hospital Facility helped support overall sector activity. Wales also performed strongly, supported by several medium-sized developments, while Scotland benefitted from continued public-sector investment in healthcare infrastructure. Elsewhere, project-start activity across much of England remained subdued, reflecting ongoing funding pressures and a cautious approach to scheme progression.

Changes in Health Starts
on a Year Earlier



Changes in Health Planning Approvals
on a Year Earlier



Education

Overview

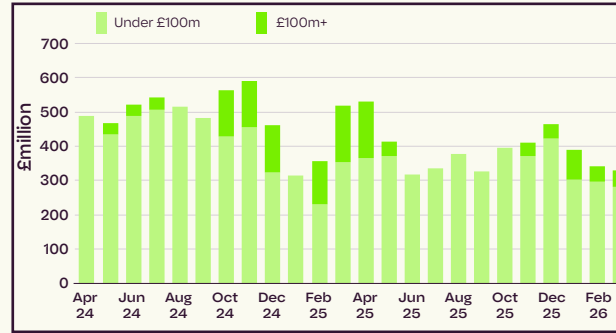
- ▲ **31% rise** in project starts against the previous year.
- ▲ **12% increase** in main contract awards year-on-year.
- ▼ **36% decline** in detailed planning approvals compared to the previous year.

The education sector delivered a strong performance during Q1 2026, with the value of project starts and main contract awards rising against both the preceding quarter and the previous year. In contrast, detailed planning approvals declined on both measures, indicating some softening in the near-term development pipeline.

Looking ahead, the outlook for the sector remains positive. Policy commitments to improving the condition of the existing school estate, alongside major programmes such as the Schools Rebuilding Programme, are expected to underpin activity levels and support workload growth across the education sector over the medium term.

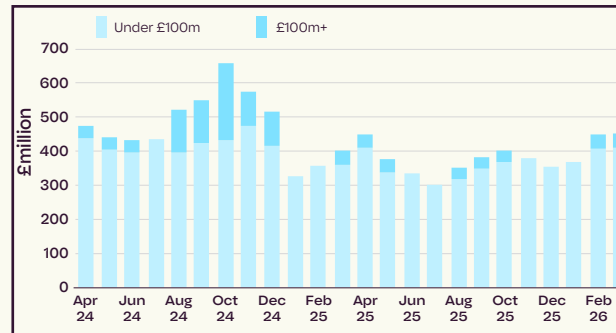
- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

Detailed Planning Approvals



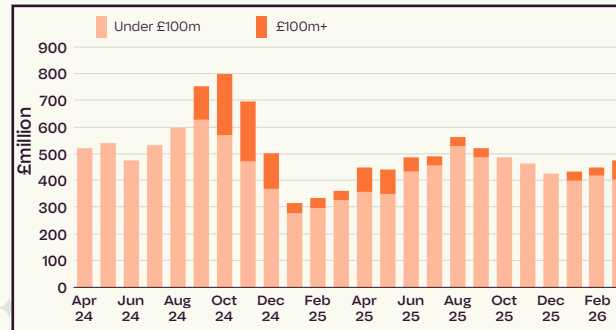
Source: Glenigan

Main Contract Awards



Source: Glenigan

Education Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	848	142	990
YoY	-20%	-71%	-36%
Prev. 3 months	-33%	18%	-29%
Prev. 3 months (SA)	-31%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	1,233	120	1,353
YoY	14%	0%	12%
Prev. 3 months	16%		27%
Prev. 3 months (SA)	12%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,205	220	1,425
YoY	23%	100%	31%
Prev. 3 months	-5%		12%
Prev. 3 months (SA)	-24%		

Education

Types of projects started

Project-start performance was strong across the board.

- Schools accounted for the largest share of starts at £955 million (67%), rising 38% year-on-year.
- Universities totalled £283 million (20% of starts), rising 46% on the previous year.
- Colleges rose 65% against the previous year to total £174 million.

Types of Education Projects Started

Three months to March 2026

	£ million	Percentage
Colleges	174	12%
Other Education	13	1%
Schools	955	67%
Universities	283	20%
Total	1,425	100%

Project Spotlight

New College – University of St Andrews

Plans have been approved for the redevelopment of the former Madras College building to form a new academic college at the University of St Andrews. A main contractor is yet to be appointed on the £142 million scheme, with works due to be completed in Q2 2027.

PROJECT ID: 21572505

IMAGE SOURCE: UNIVERSITY OF ST ANDREWS

£142m



Education League Tables

April 2025 to March 2026

Contractors	Projects	£m
Morgan Sindall	36	431
Royal BAM Group	12	421
Willmott Dixon	23	396
Bowmer & Kirkland	15	356
Robertson Group	8	210
Kier Group Plc	11	205
Tilbury Douglas	16	195
Galliford Try	19	172
Graham Constr.	6	171
McLaren Constr.	1	100

Clients	Projects	£m
Dep. for Education	71	987
Aberdeen CC.	4	127
University of London	5	108
Midlothian Council	4	101
Univ. of Portsmouth	3	101
Swansea CC.	4	82
Education Auth. NI	12	71
WEPco Ltd	2	58
Kent County Council	5	56
Bowmer & Kirkland	2	53

Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

Industrial

Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

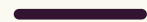
Education

Regional

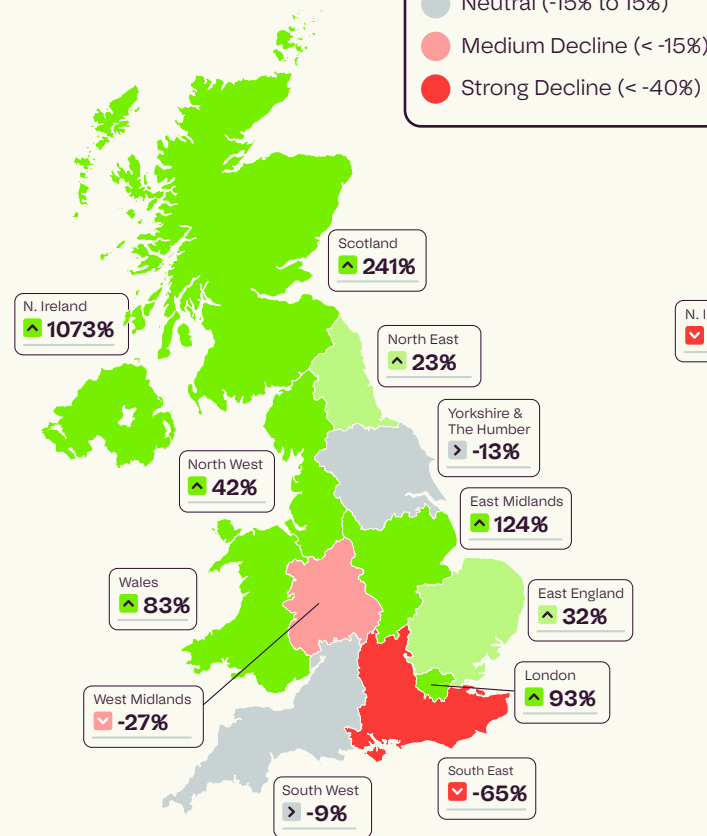
- London accounted for the largest share of sector starts, with the Capital recording a sharp rise on the previous year.
- Scotland held the largest share of sector approvals, declining against the previous year.
- Several UK regions recorded triple-digit growth in both project starts and approvals.

London was the most active region for project starts, reaching £267 million and accounting for 19% of total activity after a 93% year-on-year rise. Scotland followed with £241 million, representing 17% of starts and recording strong growth of 241% compared with the previous year.

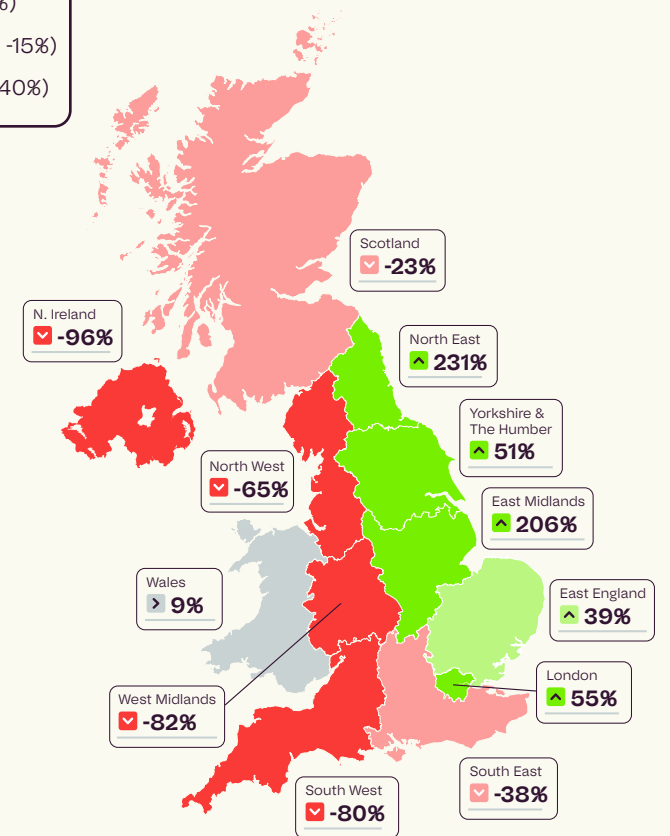
In planning approvals, Scotland held the largest share at 27%, declining 23% year-on-year to total £263 million.



Changes in Education Starts
on a Year Earlier



Changes in Education Planning Approvals
on a Year Earlier



Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

Industrial

Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Community & Amenity

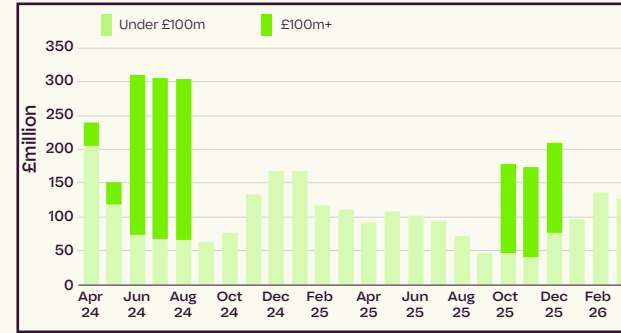
Overview

- ▼ **51% decrease** in project starts year-on-year.
- ▼ **60% decrease** in main contract awards from last year.
- ▲ **14% increase** in detailed planning approvals compared to 2025.

The sector endured a weak period, with substantial declines in starts and awards compared to last year and the previous quarter as a result of decreases in both underlying (under £100 million) and major (£100 million or more) schemes. However, approvals grew year-on-year, driven by an increase in underlying projects. Despite the fall in activity, the uptick in consents signals early signs of improvements.

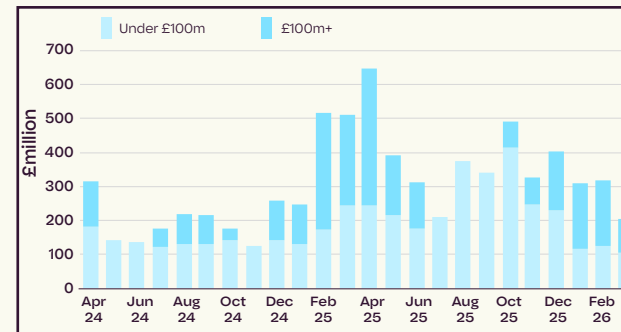
- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

Detailed Planning Approvals



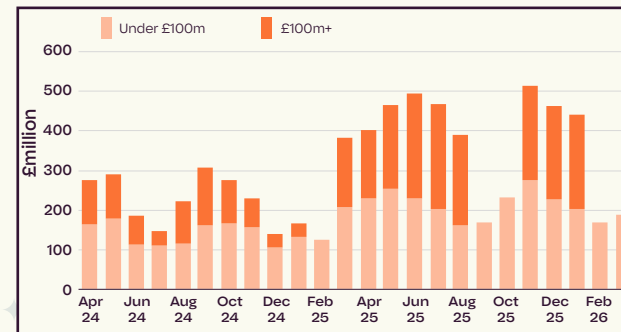
Source: Glenigan

Main Contract Awards



Source: Glenigan

Community & Amenity Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	380	-	380
YoY	14%		14%
Prev. 3 months	66%	-100%	-40%
Prev. 3 months (SA)	86%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	312	300	612
YoY	-57%	-63%	-60%
Prev. 3 months	-55%	-42%	-49%
Prev. 3 months (SA)	-63%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	562	-	562
YoY	-10%	-100%	-51%
Prev. 3 months	-17%	-100%	-60%
Prev. 3 months (SA)	-37%		

Community & Amenity

Types of projects started

Despite overall weakness, government buildings recorded significant growth.

- Government buildings accounted for the largest share (60%), having risen 532% year-on-year to total £336 million.
- Blue light projects increased 31% on a year ago, totalling £55 million.
- Local facilities fell 30% year-on-year, totalling £156 million.

Types of Community & Amenity Projects Started

Three months to March 2026

	£ million	Percentage
Blue Light	55	10%
Government Buildings	336	60%
Law Courts	-	0%
Local Facilities	156	28%
Military	3	0%
Places of Worship	12	2%
Prisons	-	0%
Total	562	100%

Project Spotlight

Student Accommodation

Detailed plans have been approved for a new Purpose-Built Student Accommodation development in Bristol. A main contractor is yet to be appointed on the £30 million development, with works due to be completed in Q4 2028.

PROJECT ID: 25088454

IMAGE SOURCE: ALEC FRENCH ARCHITECTS

£30m



Community & Amenity League Tables

April 2025 to March 2026

Contractors	Projects	£m
Laing O'Rourke	3	329
Corrigenda	4	324
Wates	14	291
Bowmer & Kirkland	8	262
Galliford Try	7	192
Morgan Sindall	11	104
Willmott Dixon	9	101
Kier	8	84
Goldbeck Bower	1	78
Reds10 (UK)	3	58

Clients	Projects	£m
Ministry of Justice	28	980
Ministry of Defence	25	654
Hampshire CC	2	302
UK Parliament	1	111
Home Office	31	84
Cardiff CC	1	78
Liverpool City Region	2	65
Sizewell C	1	50
Church Of Jesus Christ Of LDS	1	48
Min. of Housing, Communities and LG	10	46

Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

Industrial

Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Community & Amenity

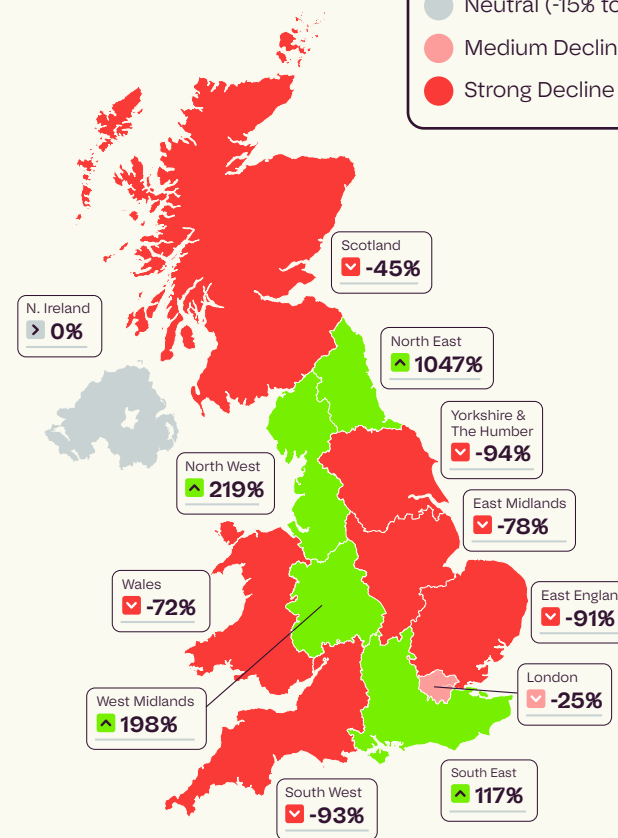
Regional

- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

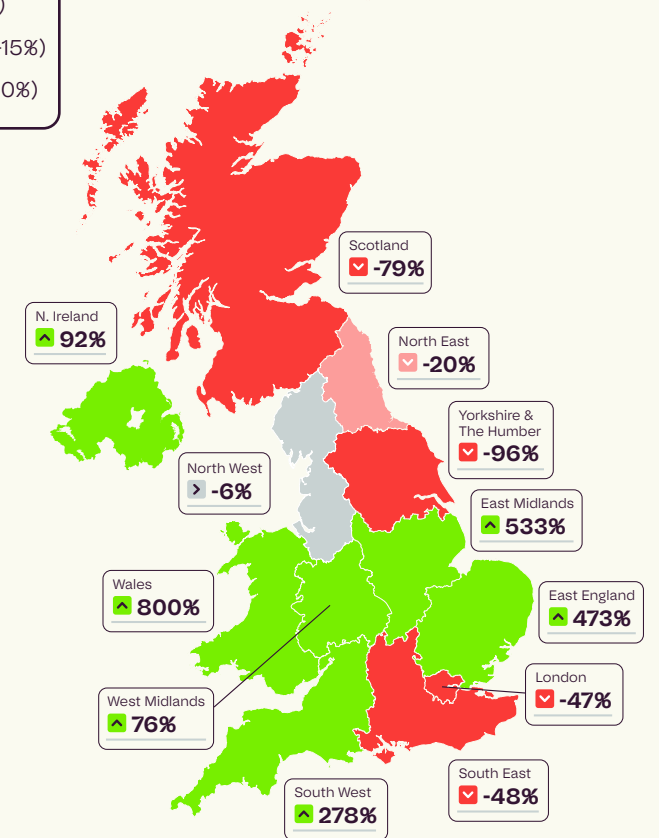
- Project starts experienced a weak period.
- Detailed planning approvals grew in most regions.
- The West Midlands recorded strong growth in both starts and approvals.

The North West was the most active region for project starts at £166 million, achieving 219% annual growth. The North East followed at £114 million, having jumped more than 10 times on a year ago. The South East also showed strong gains, having doubled on a year ago to total £70 million. London, Scotland and the East of England recorded notable declines.

Changes in Community & Amenity Starts
on a Year Earlier



Changes in Community & Amenity Planning Approvals
on a Year Earlier



Civil Engineering Overview

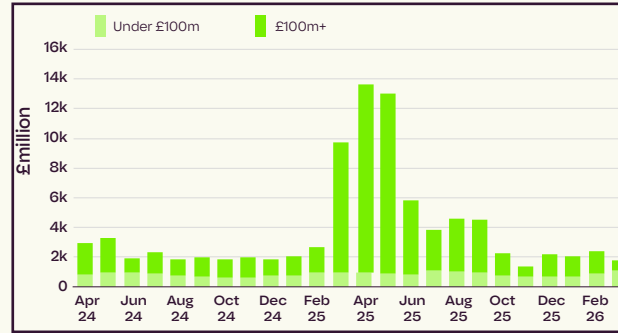
- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

- ▼ **73% decline** in project starts against the previous year.
- ▲ **11% rise** in main contract awards year-on-year.
- ▼ **81% fall** in detailed planning approvals compared to the previous year.

Despite a subdued start to the year, with both project starts and detailed planning approvals falling against the previous year and on a quarter-on-quarter basis, growth in main contract awards on both measures provides a more encouraging signal for future workloads.

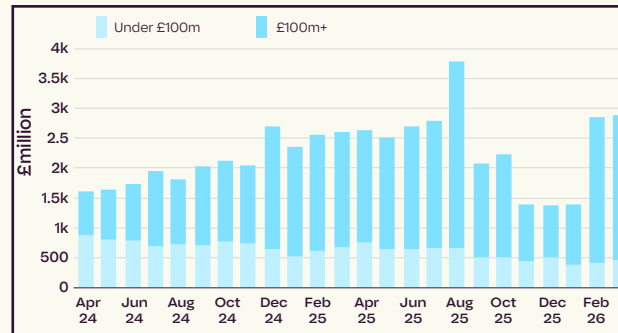
The broader outlook for the sector nonetheless carries reasons for confidence. The latest Spending Review is set to unlock further investment in road and rail infrastructure from 2026/27, providing a firmer foundation for workloads going forward. Meanwhile, utilities output is expected to strengthen in the near term, supported by increased spending on electricity generation and grid reinforcement linked to the UK's net zero commitments, alongside expanding capital programmes across the water industry.

Detailed Planning Approvals



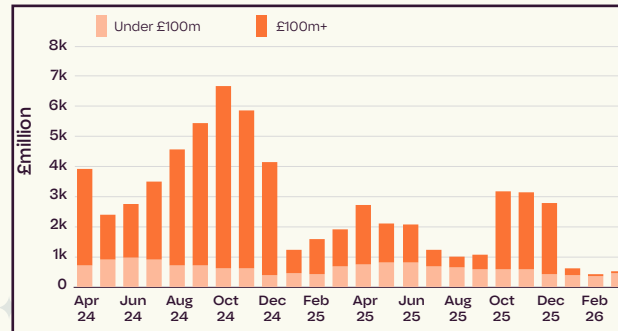
Source: Glenigan

Main Contract Awards



Source: Glenigan

Civil Engineering Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	3,238	2,188	5,426
YoY	10%	-92%	-81%
Prev. 3 months	51%	-50%	-17%
Prev. 3 months (SA)	22%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	1,377	7,279	8,657
YoY	-32%	26%	11%
Prev. 3 months	-8%	179%	110%
Prev. 3 months (SA)	-7%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,329	230	1,559
YoY	-34%	-94%	-73%
Prev. 3 months	3%	-97%	-81%
Prev. 3 months (SA)	-37%		

Civil Engineering

Types of projects started

- Roads projects accounted for a 25% share of starts, despite a year-on-year decline.
- Energy schemes also represented a significant component of activity but remained well below last year's levels.
- Airport-related infrastructure recorded growth, albeit from a low base.

Types of Civil Engineering Projects Started

Three months to March 2026

	£ million	Percentage
Airports	202	13%
Other Civils	546	35%
Rail	1	0%
Roads	391	25%
Harbours/Ports	26	2%
Energy	308	20%
Water Industry	83	5%
Waste	1	0%
Total	1,559	100%

Project Spotlight

Humber H₂ub® (Green) project

Detailed plans have been approved for the £120 million Humber H₂ub® (Green) project in Immingham, Humberside. A main contractor is yet to be appointed on the scheme, with works expected to complete in Q4 2029.

PROJECT ID: 25485593

IMAGE SOURCE: UNIPER

£120m



Civil Engineering League Tables

April 2025 to March 2026

Contractors	Projects	£m
STRABAG	6	2,598
Balfour Beatty	13	1,132
Costain Group	7	1,053
GE Vernova	1	800
Corinthia		
Technip Energies	1	800
Jones Bros	2	532
Worley Europe		
Kier Group	52	427
ACCIONA	1	400

Clients	Projects	£m
United Utilities	11	3,474
OGCI Climate Inv.	1	2,000
Net Zero Teesside	1	2,000
Kemble Water	15	591
Cadent Gas	1	500
Com. Wind Power	1	500
SSEN Transmission	10	301
Manby BGE	1	300
Dep. for Transport	26	261
Tribus Clean Energy	1	250

Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

Industrial

Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Civil Engineering

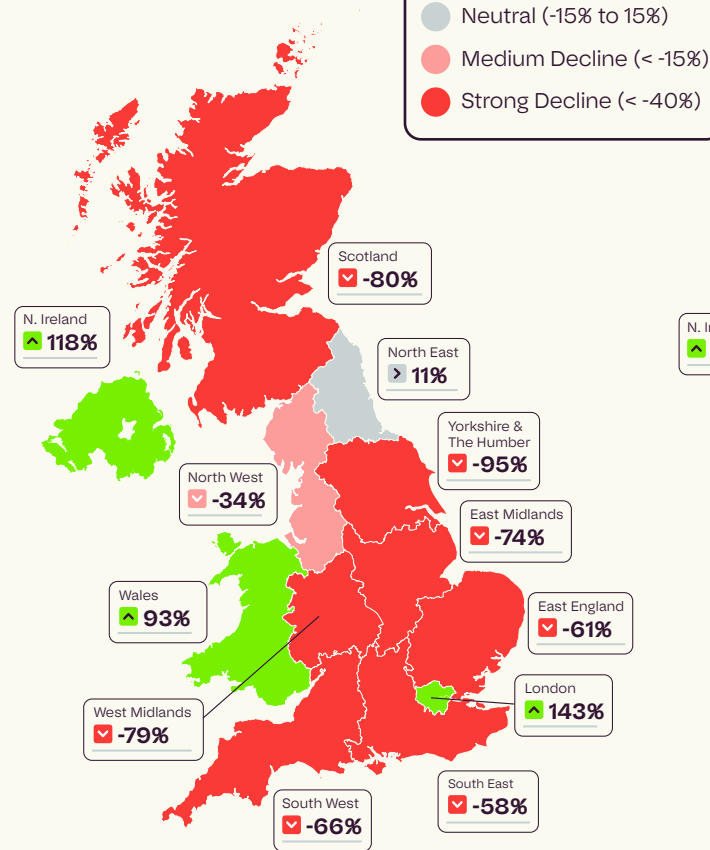
Regional

- Expert Insights
- Executive Summary
- Economic Outlook
- Top 50 Contractors
- Top 50 Clients
- Sector Analysis
 - Housing
 - Industrial
 - Offices
 - Retail
 - Hotel & Leisure
 - Health
 - Education
 - Community & Amenity
 - Civil Engineering

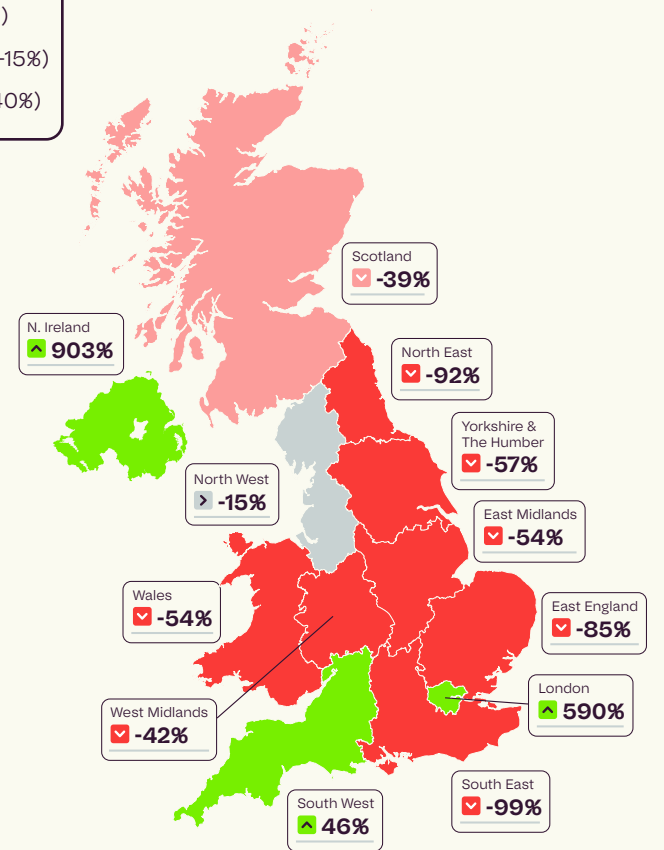
- London was the most active region for civil engineering project starts.
- Scotland accounted for the largest share of approvals.

London emerged as the strongest performing region, rising 143% to total £220 million. Scotland accounted for the largest share of approvals (20%), but the area experienced a 39% decline against the previous year to total £1,073 million. Northern Ireland (+903%) and London (+590%) both experienced sharp growth in approvals but accounted for a 5% and 4% share of the total value respectively.

Changes in Civil Engineering Starts on a Year Earlier



Changes in Civil Engineering Planning Approvals on a Year Earlier





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