Glenigan

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Construction Review

Reflecting activity to the end of July 2025

August 2025

- **55% decrease in detailed planning approvals** compared to the previous three months
- **26% decrease in main contract awards** compared to the previous three months
- **20% decrease in project starts** compared to the previous three months

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to drive your construction strategy forward

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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.

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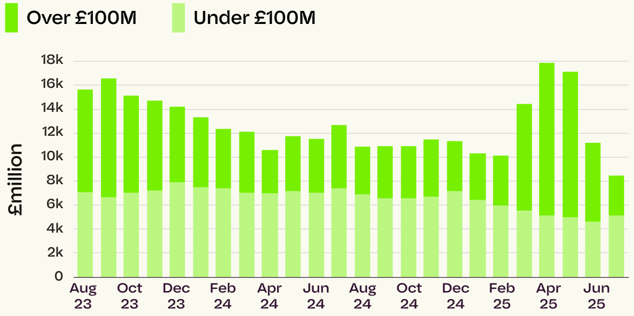
Executive Summary

- **36% decline** in detailed planning approvals compared to the previous year
- **39% decrease** in main contract awards compared to the previous year
- **17% decrease** in project starts compared to the previous year

Project starts declined on both the quarter and year, as growth in underlying projects (under £100 million) failed to offset a sharp fall in major projects. The pipeline also softened, with fewer contract awards and planning approvals amid economic volatility, geopolitical uncertainty, and rising costs delaying investment. Still, the Spending Review's £165 billion for new builds, regeneration, and infrastructure, backed by a 10-year growth strategy, plus interest rate cuts, signals a brighter outlook.

Detailed Planning Approvals

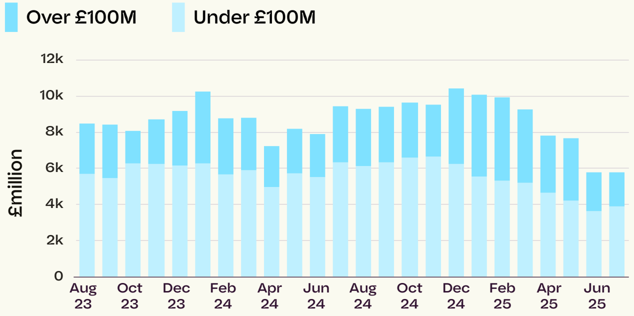


Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£million	15,341	8,991	**24,332**
YoY	-31%	-44%	**-36%**
Prev. 3 months	0%	-76%	**-55%**
Prev. 3 months (SA)	-2%		

Source: Glenigan. Three month average

Main Contract Awards

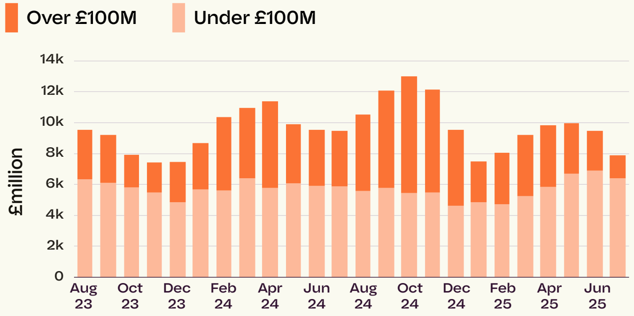


Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	11,650	5,658	**17,308**
YoY	-39%	-40%	**-39%**
Prev. 3 months	-17%	-40%	**-26%**
Prev. 3 months (SA)	-15%		

Source: Glenigan. Three month average

Starts



Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	19,203	4,437	**23,640**
YoY	9%	-59%	**-17%**
Prev. 3 months	10%	-63%	**-20%**
Prev. 3 months (SA)	9%		

Source: Glenigan. Three month average

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Economic Outlook

Weak economic growth puts pressure on government finances

- Sluggish economic growth
- Higher than planned government borrowing risks tax rises
- Bank base rate cut to 4%

A sluggish UK economy, combined with unexpected public spending, is putting increasing pressure on government finances. This raises the possibility of new tax measures in the upcoming Budget, which could further limit the UK's growth prospects.

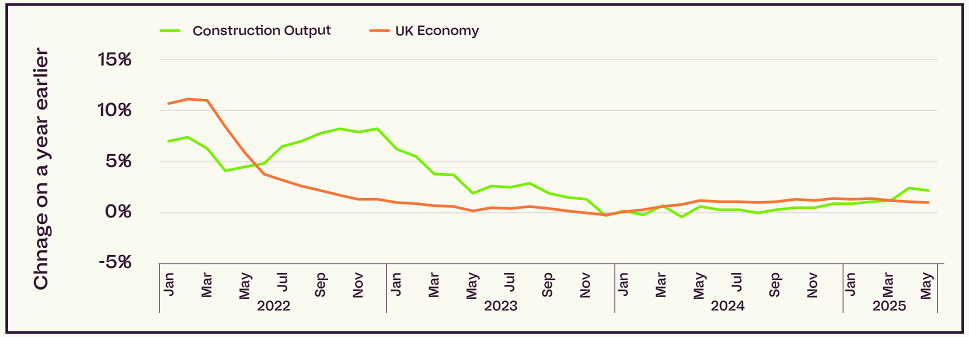
The UK economy slipped back 0.1% during May, according to the ONS. The decline followed a drop in April and trimmed growth during the three months to May to 0.5%.

Amid heightened geopolitical uncertainty, manufacturing output growth was weak during the three months to May. Encouragingly, the June and July CIPS manufacturing surveys suggest the downturn may be easing, with the July index rising to 48.0, just below the no-change threshold.

UK services output has been the principal engine for growth, rising by 0.4% during the three months to May. Consumer-facing services were strong despite weak retail sales in May. However, CIPS report that UK services growth has lost momentum in recent months, reflecting sluggish demand at home and abroad. The latest bank base rate cut may help rekindle confidence and growth over the coming months.

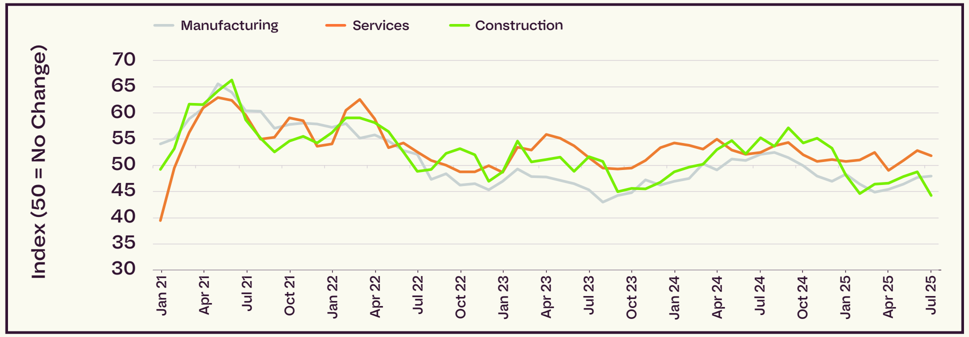
Weak economic growth has increased pressure on government finances. The public sector current budget deficit during the first quarter of this fiscal year totalled £44.4 billion, a 17% rise on a year ago. The OBR is forecasting a sharp drop in the deficit this year. Without an early improvement in the deficit taxes rises may be needed to keep the government's finances on track.

Construction & The Economy



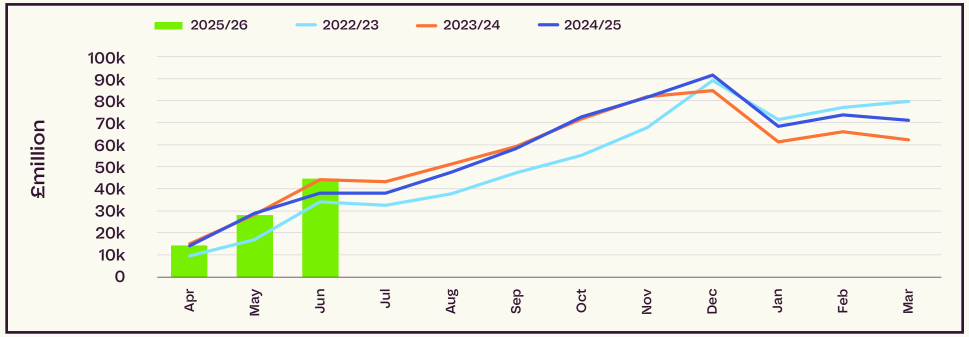
Source: ONS

CIPS Activity Surveys



Source: S&P Global PMI

Public Sector Current Deficit



Source: ONS

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Top 50 Contractors

Last 12 month totals:	968 projects	£37,034m
Last month totals:	108 projects	£2,364m

August 2024 to July 2025

	Contractors	#	£m	★
1	Kier	111	2492	0
2	Laing O'Rourke	8	2296	0
3	Royal BAM	36	2130	1
4	Morgan Sindall	206	2129	-1
5	Mace	15	2015	0
6	Ferrovial	3	1617	1
7	Sir Robert McAlpine	4	1569	-1
8	Graham Construction	25	1356	3
9	Winvic	18	1317	7
10	Bowmer & Kirkland	30	1250	-2
11	Ringway Group	3	1159	-1
12	Galliford Try	105	1014	0
13	M Group Services	14	951	2
14	Mears Group	6	827	3
15	Wates	42	818	-2
16	Bouygues	20	777	2
17	Balfour Beatty	42	711	-3
18	McLaren	18	707	-9
19	Costain	4	669	0
20	Bovis	3	650	19
21	McLaughlin & Harvey	9	611	NEW
22	Willmott Dixon	32	611	0
23	JRL Group	3	604	-2
24	McAleer & Rushe UK	10	603	1
25	Multiplex	3	555	-2
26	Hochtief Group	2	463	0
27	Kanadevia Inova UK	2	450	0
28	TSL Projects	4	443	-8
29	John Sisk & Son	6	414	-5
30	G W Highways	1	400	-2
31	ACCIONA	1	400	-2
32	Tilbury Douglas	34	386	3
33	VINCI	31	373	0
34	Caddick Group	9	365	2
35	Siemens	6	353	NEW
36	Enka	1	350	-6
37	Gilbert Ash	7	287	NEW
38	Skanska UK	3	270	-6
39	Aecon	1	250	1
40	Cfield Construction	3	229	2
41	Andrew Scott	25	224	NEW
42	Vistry	8	223	NEW
43	PMC Cons. & Development	3	222	0
44	Robertson	25	220	-3
45	Zenobe Energy	1	220	-1
46	Mwh Treatment	2	218	-1
47	G2 Design	1	216	-1
48	Hill Group	16	210	-11
49	Lowry Building & Civil Engin.	3	209	0
50	RG Group Ltd	3	201	NEW

July 2025

	Contractors	#	£m	★
1	Mace	2	400	NEW
2	Bovis	1	220	NEW
3	Graham Construction	2	161	31
4	Morgan Sindall	17	112	13
5	John Sisk & Son	1	110	1
6	Castle Building Services	1	95	NEW
7	Goldbeck Bower	2	91	NEW
8	Gilbert Ash	1	90	41
9	Bowmer & Kirkland	4	73	-7
10	Pellikaan Construction	1	68	19
11	HG Construction	2	56	NEW
12	Regal Four London Cons.	1	48	NEW
13	Tilbury Douglas	4	47	5
14	Royal BAM	1	45	9
15	VINCI	2	40	17
16	Fortem Solutions	1	37	NEW
17	VolkerWessels	2	36	NEW
18	Andrew Scott	3	35	NEW
19	Wates	1	34	-15
20	McCarthy & Associates	1	31	NEW
21	Yorkshire Choice Homes	1	28	NEW
22	Torsion Group	1	28	NEW
23	Neilcott Construction	1	26	NEW
24	Vistry	2	26	NEW
25	Henry Group	1	25	-5
26	Magrock	1	24	22
27	MPH Construction	1	21	NEW
28	Imtech	1	21	NEW
29	Mildren Construction	1	20	NEW
30	McLaughlin & Harvey	1	20	8
31	Jones Brothers (Henllan)	1	20	NEW
32	Lindum Group	2	20	NEW
33	Kier	21	19	-30
34	Ian Williams	1	19	NEW
35	CPC Civils	1	18	NEW
36	Sunnerg	1	18	NEW
37	Beard	4	17	NEW
38	Amiri Group	1	16	NEW
39	Linear Projects	1	15	NEW
40	SJ Roberts Construction	2	14	NEW
41	DC Construction	1	14	3
42	CCG (Scot.)/Queens Cross	1	13	NEW
43	Noviniti	1	13	NEW
44	Compass Build. & Cons.	1	13	NEW
45	MYC Group	1	12	NEW
46	Higgins	1	11	NEW
47	Lawrence Land	1	11	NEW
48	McKelvey Construction	2	11	NEW
49	Magna Projects	2	11	NEW
50	Thakeham Homes	1	10	NEW

★ Change in ranking since the previous period

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Top 50 Clients

August 2024 to July 2025

	Clients	#	£m	★
1	Department for Transport	53	4826	0
2	Department of Health	161	1525	0
3	Tata Steel Group	2	1254	0
4	Hertfordshire County Council	3	1159	0
5	Oxfordshire County Council	10	1041	1
6	Dep. for Environ., Food & Rural	3	934	-1
7	Department for Education	70	785	1
8	National Grid	7	720	1
9	Scottish Prison Service	4	685	1
10	Ministry of Justice	33	658	1
11	British Land	4	655	1
12	Ministry of Defence	35	645	-5
13	Amazon	6	574	0
14	North Lanarkshire Council	13	539	0
15	Tritax Group	5	507	0
16	Kingsway Solar Farm	1	500	0
17	GE Hitachi Nuclear Energy	1	500	0
18	Milton Keynes Bor. Council	5	488	0
19	Kemble Water	6	436	1
20	Kent County Council	7	435	1
21	Anglian Water Group	5	404	2
22	Cons. and Procurement Del.	7	395	2
23	Ciner Glass	1	390	2
24	Dover District Council	3	387	-2
25	Peabody Trust	3	341	2
26	University of Glasgow	2	301	3
27	MVV Environ. Devonport	1	300	3
28	Mitsubishi Estate London	1	300	3
29	Marriott International	1	300	3
30	Network Rail	29	258	4
31	Greater London Authority	8	256	-12
32	MEC London Property 3	1	250	NEW
33	Co-re	1	250	NEW
34	Vivid Housing	5	244	1
35	Anchor Housing	3	233	4
36	C1 Capital	1	225	5
37	Frogmore Real Estate	1	225	3
38	Home Office	22	221	6
39	University of London	11	218	NEW
40	Elements Green	1	216	2
41	The City of Cardiff Council	11	215	NEW
42	London Bor. of Havering	3	209	-16
43	Natural History Museum	2	204	0
44	Aviva Staff Pens. Trustees	1	200	NEW
45	Havisham C/O JP Morgan AP	1	200	3
46	JTRE London	1	200	1
47	Southwark Charities	1	200	-1
48	Urenco UK	1	196	2
49	Ass. British Ports Holdings	3	196	NEW
50	Clarion Housing Group	5	187	NEW

July 2025

	Clients	#	£m	★
1	LabTech Inverstments	1	110	NEW
2	Lab Selkirk House	1	110	NEW
3	Mfe London 1 Gp	1	100	NEW
4	Greater London Authority	1	100	NEW
5	Edge	1	100	NEW
6	Places for London	1	100	NEW
7	Tyne Coast College	1	95	NEW
8	Magdalen College	1	90	NEW
9	The City of Cardiff Council	2	80	4
10	Department for Education	4	67	10
11	Chesh. West & Chester Counc.	1	60	NEW
12	Clarion Housing Group	1	55	NEW
13	Reuben Brothers	1	55	NEW
14	Kirkglade	1	55	NEW
15	Fusion Students	1	54	NEW
16	Csg Queensferry	1	50	NEW
17	Greene King	1	40	NEW
18	Capital City College Group	1	40	NEW
19	John Innes Centre	1	40	NEW
20	Department of Health	8	37	-13
21	McLaren Living	1	36	NEW
22	Calderdale Borough Council	1	35	NEW
23	Rushmoor Borough Council	1	34	NEW
24	Alliance Leisure Services	1	34	-3
25	Tarras Park Properties	1	34	NEW
26	Capital & Centric	1	28	NEW
27	Friars Close Regeneration	1	27	NEW
28	Swansea City Council	2	27	NEW
29	Lon. Bor. of Bromley	1	26	NEW
30	Notts. Univ. Hosp. NHS Trust	1	25	NEW
31	LanzaTech UK	1	25	NEW
32	Regal London	1	24	NEW
33	4C Hotels (2)	1	24	NEW
34	Dentons Global Services UK	1	24	NEW
35	Renfrewshire Council	2	23	NEW
36	Hub West Scotland	1	23	NEW
37	Infection Innov. Cons.)	1	21	NEW
38	Canmoor Developments	1	20	NEW
39	Caddick Group	1	20	-31
40	Castell Howell Foods	1	20	NEW
41	East Ayrshire Council	1	20	NEW
42	Grand Union Hous. Group	1	19	NEW
43	Publica Group	1	19	NEW
44	Cheltenham Bor. Council	1	19	NEW
45	London Borough of Ealing	1	18	NEW
46	Novus Renewable Services	1	18	NEW
47	Home Office	2	17	NEW
48	Univ. of Southampton Science	1	16	NEW
49	North Lanarkshire Council	1	15	NEW
50	Askem Prop. Trading Part.	1	14	NEW

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Glenigan Index

Construction starts on projects under £100 million grew moderately in the three months to July, with residential strength boosting overall growth.

- The value of underlying work (under £100 million) starting on-site **increased 9%** both year-on-year and quarter-on-quarter.
- Residential construction starts **increased 10%** on the preceding three months and **rose 25% against 2024 figures.**
- Non-residential project-starts **increased 7%** against the preceding three months to stand 1% down on a year ago.
- Civils work starting on-site **increased 15%** against the preceding three months **but decreased 21%** against the previous year.

Sector Analysis

	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
Residential	11,160	14%	10%	25%
Industrial	1,243	-6%	7%	-7%
Offices	1,237	25%	39%	64%
Retail	292	-29%	-27%	-48%
Hotel & Leisure	827	-2%	2%	9%
Education	1,035	10%	6%	-36%
Health	768	-2%	11%	20%
Community & Amenity	511	-26%	-16%	48%
Civil Engineering	2,131	23%	15%	-21%
Total	**19,203**	**10%**	**9%**	**9%**

Regional Analysis

	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
East of England	1,997	23%	16%	47%
East Midlands	1,284	-24%	-18%	-6%
London	2,024	13%	13%	-10%
North East	934	11%	2%	42%
North West	2,257	34%	27%	18%
Northern Ireland	495	47%	3%	-26%
Scotland	1,375	-19%	-14%	-12%
South East	2,992	30%	22%	9%
South West	1,644	-16%	-12%	-8%
Wales	661	2%	-4%	-2%
West Midlands	1,657	26%	40%	79%
Yorkshire & the Humber	1,884	15%	10%	12%

N.B. Index 2006 =100

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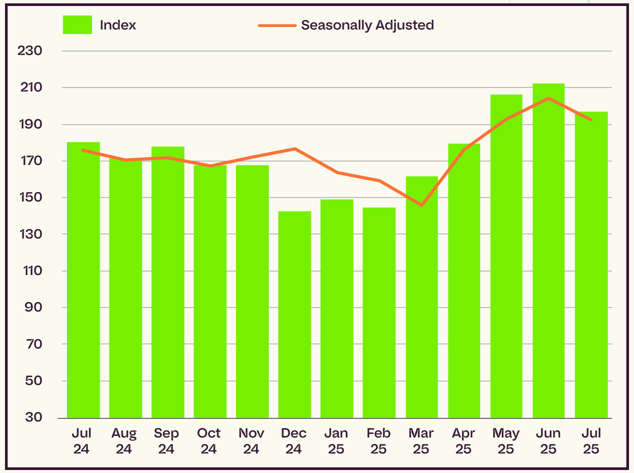
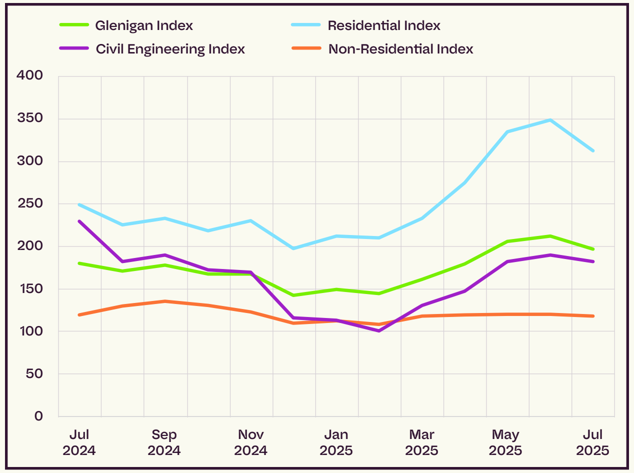


Source: Glenigan

Indices Growth



Source: Glenigan

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Housing

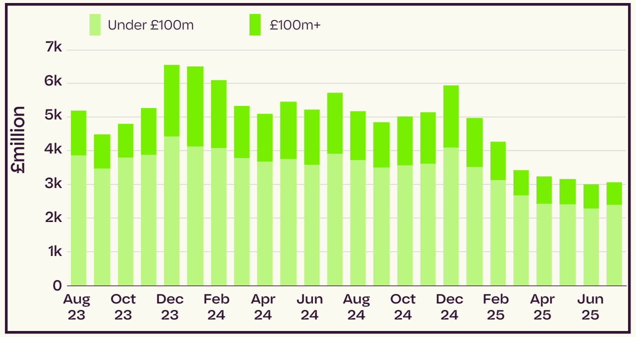
Overview

- **24% increase** in project starts year-on-year.
- **38% decrease** in main contract awards from last year.
- **47% decrease** in detailed planning approvals compared to 2024.

Although residential project starts slipped back 1% against the previous three months, they were still 24% up year-on-year. Underlying projects (under £100 million) performed especially well, having grown 10% against the preceding quarter to stand 25% higher than a year ago, Main contract awards and detailed planning approvals weakened against both periods.

We expect the sector to recover after a slump caused by the stamp duty increase, with the Glenigan forecast predicting a moderate rise in both Private Housing and Social Housing by the end of the year. Both Nationwide and Halifax reported a rise in house prices in July, and new mortgage affordability rules boosted activity in the market. The Spending Review also promised a £39 million investment in Social Housing to help meet the 1.5 million target, which will provide a boost to the sector.

Detailed Planning Approvals

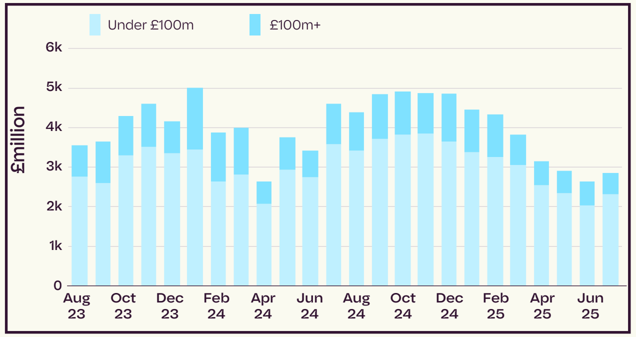


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	7,180	2,008	9,188
YoY	-39%	-63%	-47%
Prev. 3 months	-1%	-18%	-5%
Prev. 3 months (SA)	-11%		

Main Contract Awards

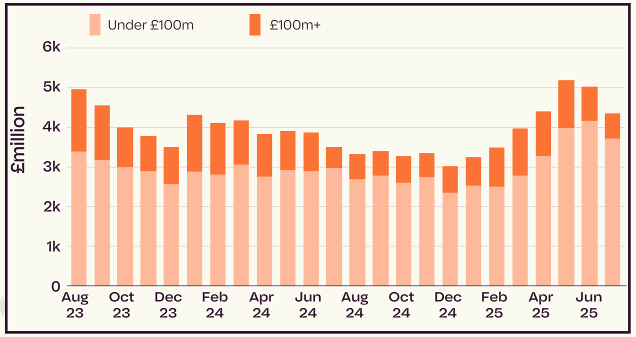


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	6,952	1,595	8,547
YoY	-35%	-48%	-38%
Prev. 3 months	-9%	-12%	-10%
Prev. 3 months (SA)	-13%		

Housing Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	11,160	1,878	13,038
YoY	25%	17%	24%
Prev. 3 months	14%	-45%	-1%
Prev. 3 months (SA)	10%		

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Housing

Types of projects started

Despite the overall growth of the sector, most categories experienced a decline in project starts.

- Private housing accounted for the largest share (64%), having grown 72% year-on-year to total £8,335 million.
- Student accommodation doubled against the previous year, totalling £849 million.
- Totalling £2,557 million, private apartments starting on site fell 12% on a year ago.

Project Spotlight

Waitrose West Ealing

Detailed plans have been approved on the £240 million 429-unit development in Ealing, London. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q1 2030.

PROJECT ID: 22218268

IMAGE SOURCE: LIFSCHUTZ DAVIDSON SANDILANDS

£240m

Types of Housing Projects Started

Three months to July 2025

	£ million	Percentage
Private Apartments	2,557	**20%**
Elderly Persons Homes	-	**0%**
Private Housing	8,335	**64%**
Private Sheltered Housing	301	**2%**
Social Sector Sheltered Housing	128	**1%**
Social Sector Apartments	204	**2%**
Social Sector Housing	663	**5%**
Homes, Hostels Etc.	2	**0%**
Student Accommodation	849	**7%**
Total	13,038	**100%**

Housing League Tables

August 2024 to July 2025

Contractors	Projects	£m
Barratt Redrow	78	2,385
Persimmon	94	2,146
Bloor Homes	47	1,883
Hill	29	1,481
Bellway	45	1,262
Taylor Wimpey	47	1,250
Vistry	29	1,095
Mears	9	874
Bouygues UK	12	839
McAleer & Rush	7	547

Clients	Projects	£m
Barratt Redrow	89	2,228
Persimmon	103	2,161
Taylor Wimpey	69	1,913
Bloor Homes	47	1,615
Vistry	64	1,588
Bellway	49	1,187
Hill Group	15	743
Milton Keynes B.C.	5	733
Berkeley DeVeer	22	558
Apollo Management	32	511

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Housing

Regional

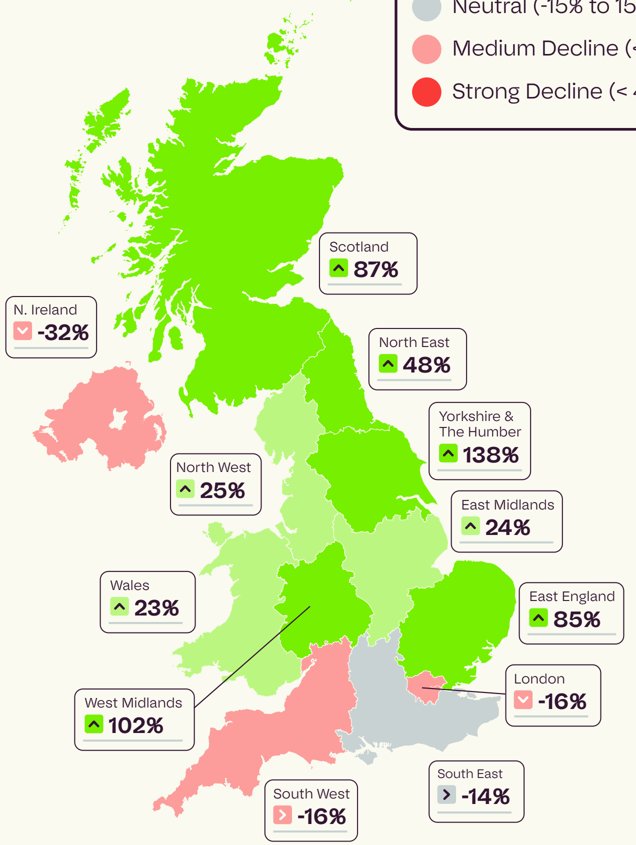
- Most regions experienced growth in project starts
- Regional performance was very weak for detailed planning approvals, with all regions slipping back year-on-year
- Yorkshire & the Humber and the West Midlands experienced the sharpest growth in project starts

The South East led residential project starts with a total of £1,865 million, despite a 14% decline year-on-year. London accounted for 11% of starts but fell 16% compared to last year. In contrast, Yorkshire & the Humber saw a sharp increase of 138%, reaching £1,731 million. Scotland also experienced strong growth, rising 149% year-on-year to £1,646 million.

The capital was the most active region for detailed planning approvals, accounting for a 20% share, despite a 55% decline year-on-year. The South East accounted for 18%, having slipped back 21%. Totalling £1,046 million, the South West fell 39%.

Changes in Housing Starts

on a Year Earlier

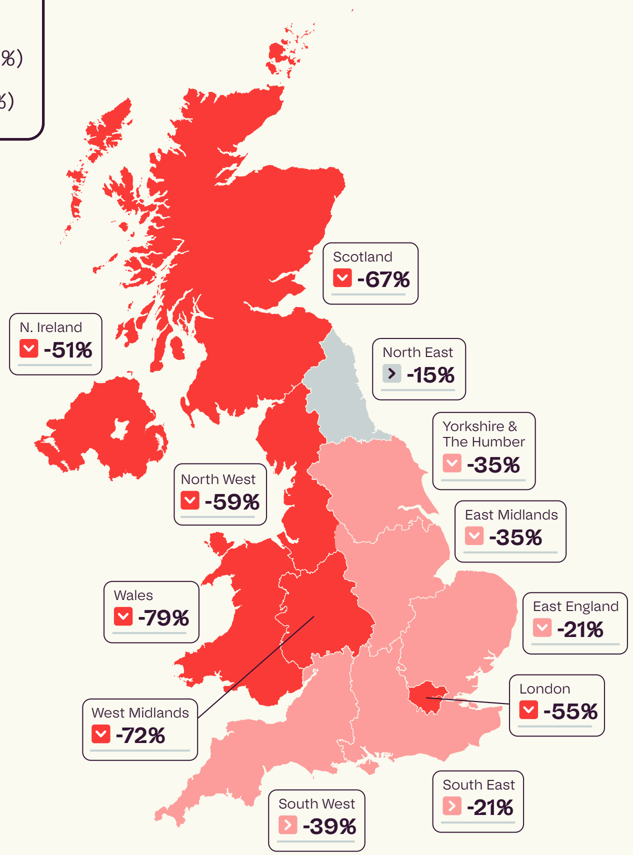


Growth or Decline

- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)

Changes in Housing Planning Approvals

on a Year Earlier



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Industrial

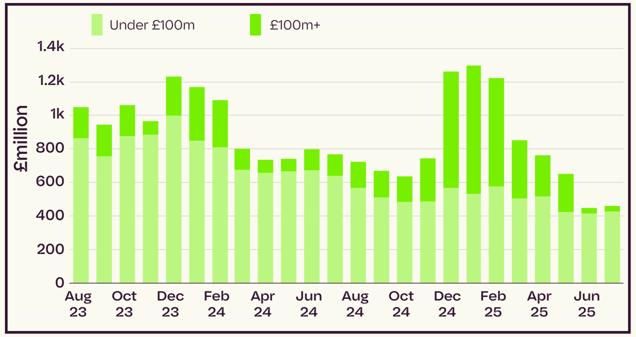
Overview

- **12% increase** in project starts year-on-year.
- **39% decrease** in main contract awards from last year.
- **40% decrease** in detailed planning approvals compared to 2024.

Performance in the industrial sector was mixed during the three months to July. Starts were 12% up on a year ago but 20% lower than the preceding three month, dragged down by major projects (£100 million or more). Main contract awards were 21% higher than the preceding quarter, to stand 39% down year-on-year. Detailed planning approvals fell 40% against both periods.

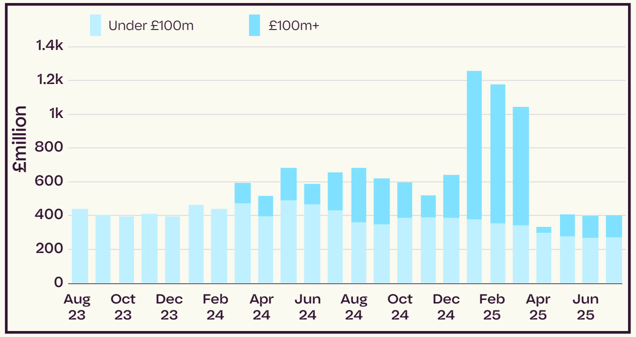
Declining UK manufacturing output and a contraction in manufacturers' confidence are reflected in a decline in project starts and a softening of the pipeline. Although the short-term outlook is subdued, we expect the activity to pick up later this year, with the sector receiving help from the new National Planning Policy Framework.

Detailed Planning Approvals



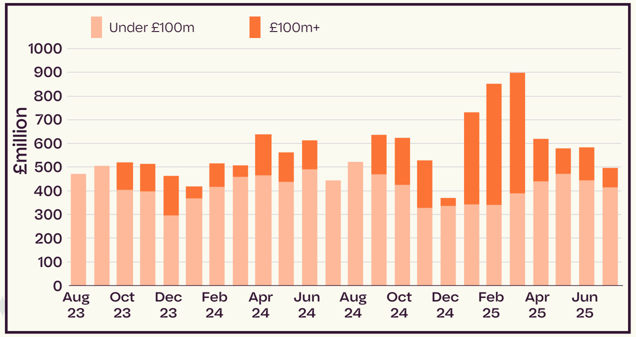
Source: Glenigan

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	1,281	100	**1,381**
YoY	-33%	-74%	**-40%**
Prev. 3 months	-18%	-86%	**-40%**
Prev. 3 months (SA)	-23%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	817	390	**1,207**
YoY	-37%	-42%	**-39%**
Prev. 3 months	-9%	290%	**21%**
Prev. 3 months (SA)	-2%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,243	250	**1,493**
YoY	-7%		**12%**
Prev. 3 months	-6%	-53%	**-20%**
Prev. 3 months (SA)	7%		

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Industrial

Types of projects started

Starts in the industrial sector had a weak performance, with two out of three categories down year-on-year.

- Warehousing & logistics accounted for 53% of industrial project starts, 53% up on a year ago, with a value of £797 million.
- Manufacturing fell 7% year-on-year, totalling £581 million, a 39% share of the sector.
- At £115 million, other industrial projects accounted for the remaining 8%, a 38% decrease.

Project Spotlight

Capitol Industrial Park

Detailed plans have been approved for the £100 million Capitol Industrial Park development in Brent, London. A main contractor is yet to be appointed on the scheme with works due to be competed in Q3 2027.

PROJECT ID: 17133454

IMAGE SOURCE: NEAT

£100m

Types of Industrial Projects Started

Three months to July 2025

	£ million	Percentage
Manufacturing	581	**39%**
Other Industrial	115	**8%**
Warehousing & Logistics	797	**53%**
Total	1,493	**100%**

Industrial League Tables

August 2024 to July 2025

Contractors	Projects	£m
Newarthill	1	1,250
Winvic	10	966
TSL Projects	3	412
McLaughlin & Harvey	1	390
McLaren	10	386
Enka	1	350
Bowmer & Kirkland	3	236
Marshall Holdings	3	193
Caddick	6	149
Benniman	7	135

Clients	Projects	£m
Tata Steel	1	1,250
Tritax	6	597
Amazon UK	2	506
Ciner Glass	1	390
BMW (GB)	1	130
Watts Solar	1	126
CP Logistics UK	2	120
Marshall	2	95
Progressive Energy	1	88
Vertex Hydrogen	1	88

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Industrial

Regional

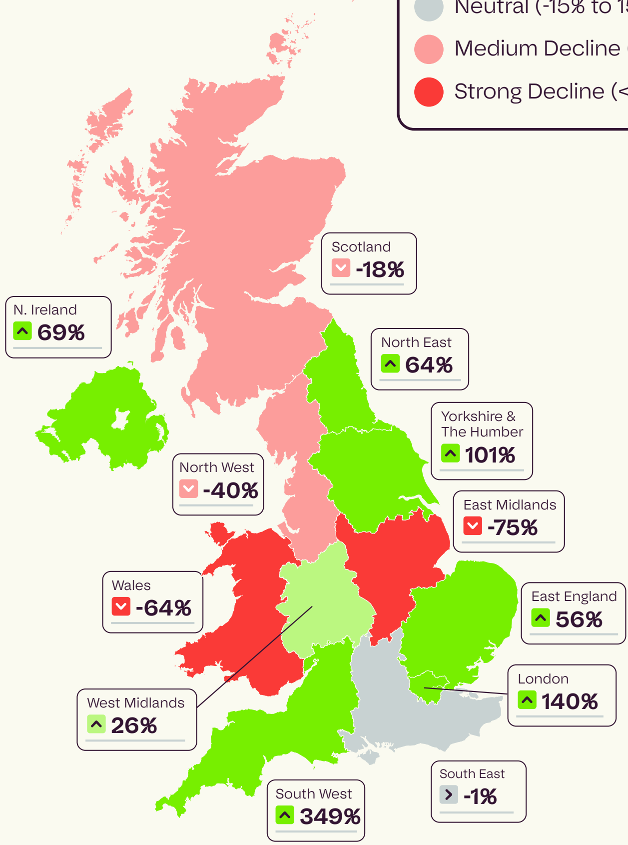
- Regional performance in project starts was strong
- Only two regions grew in detailed planning approvals
- London had a strong performance in both project starts and approvals

Yorkshire & the Humber led project starts in the industrial sector, thanks to a 101% rise on a year ago, totalling £275 million. Activity in the region was boosted by the £100 million Shipley Train Care Depot. The South West also jumped more than four times, totalling £196 million.

The East of England and the West Midlands each accounted for 17% of detailed planning approvals, both totalling £229 million. However, the regions fell 20% and 23% on a year ago, respectively. Accounting for 14%, approvals in the North West slipped back 4%, totalling £189 million. In contrast, London grew 122% to total £182 million.

Changes in Industrial Starts

on a Year Earlier

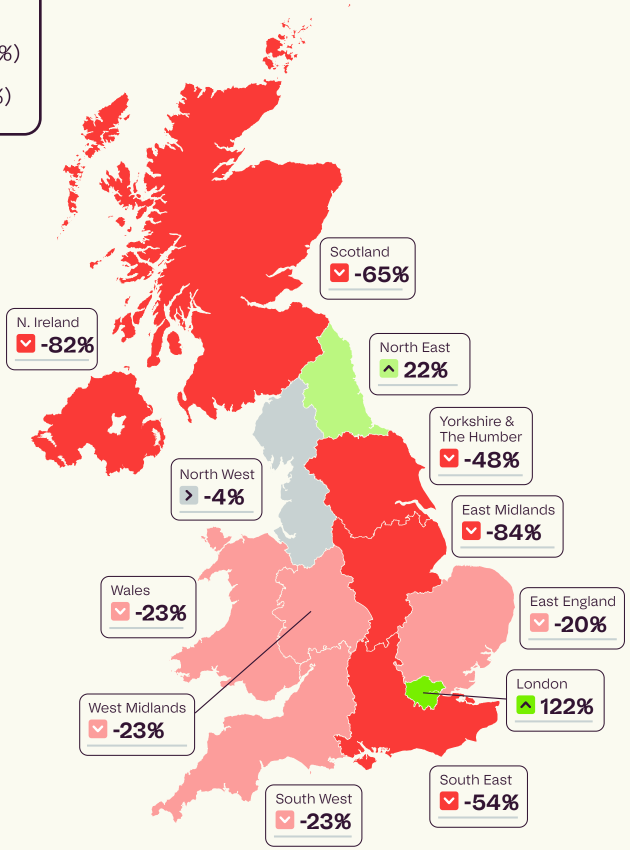


Growth or Decline

- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)

Changes in Industrial Planning Approvals

on a Year Earlier



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Offices

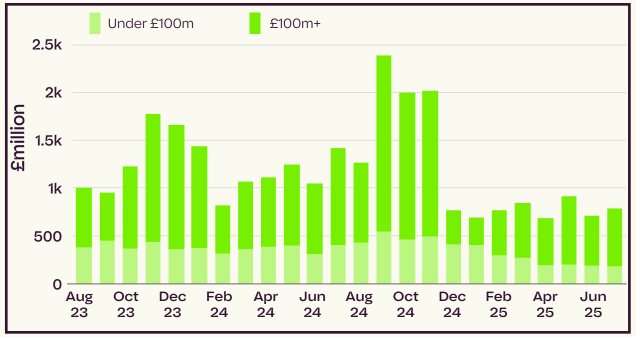
Overview

- **34% increase** in project starts year-on-year.
- **16% increase** in main contract awards from last year.
- **45% decrease** in detailed planning approvals compared to 2024.

The office sector performed strongly during the three months to July, with growth in project starts and main contract awards against both the previous three months and a year ago. Detailed planning approvals also grew against the preceding quarter but were below last year's levels.

Data centres are a relatively small but fast expanding segment of the office sector. The surge of investment in AI development, alongside rising demand from more established uses of processing capacity is spurring investment in new data centres. This is expected to help drive sector growth over the next two years.

Detailed Planning Approvals

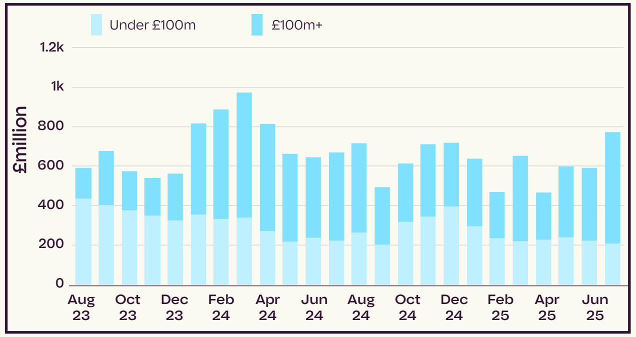


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	527	1,834	**2,361**
YoY	-56%	-40%	**-45%**
Prev. 3 months	-8%	24%	**15%**
Prev. 3 months (SA)	-11%		

Main Contract Awards

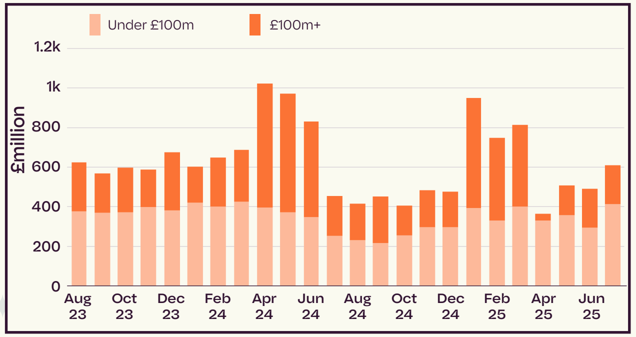


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	621	1,694	**2,315**
YoY	-6%	26%	**16%**
Prev. 3 months	-9%	135%	**65%**
Prev. 3 months (SA)	0%		

Office Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,237	596	**1,832**
YoY	64%	-2%	**34%**
Prev. 3 months	25%	457%	**67%**
Prev. 3 months (SA)	39%		

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Offices

Types of projects started

In line with the overall growth in the sector, most value bands experienced growth in project starts.

- Project starts in the over £100 million value band totalled £596 million, having slipped back 2% on a year ago.
- The £20 million to £50 million value band jumped 116% year-on-year, totalling £500 million.
- The £50 million to £100 million value band grew 93% year-on-year, totalling £271 million.

Project Spotlight

Frasers Campus

£1.08b

Detailed plans have been approved for the £1.08 billion Frasers Campus development in Coventry. Works are due to completed in Q1 2028. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 22329855

IMAGE SOURCE: FRASERS GROUP

Types of Office Projects Started

Three months to July 2025

	£ million	Percentage
Up to £5 million	141	**8%**
£5 million up to £10 million	199	**11%**
£10 million up to £20 million	127	**7%**
£20 million up to £50 million	500	**27%**
£50 million up to £100 million	271	**15%**
Over £100 million	596	**33%**
Total	1832	**100%**

Office League Tables

August 2024 to July 2025

Contractors	Projects	£m
Mace	8	1,690
Morgan Sindall	116	1,008
Multiplex Cons.	2	550
JRL	1	400
Bovis	1	330
McLaren	3	265
Bowmer & Kirkland	3	225
Wates	13	221
Kier	8	149
Royal BAM	3	140

Clients	Projects	£m
British Land	3	655
Endurance Land	1	300
Mitsubishi Estate	1	300
Co-re	1	250
MEC London Prop.	1	250
Southwark Charities	1	200
JTRE London	1	200
Havisham/JP Morgan	1	200
HSBC	4	169
Obayashi	1	165

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Offices

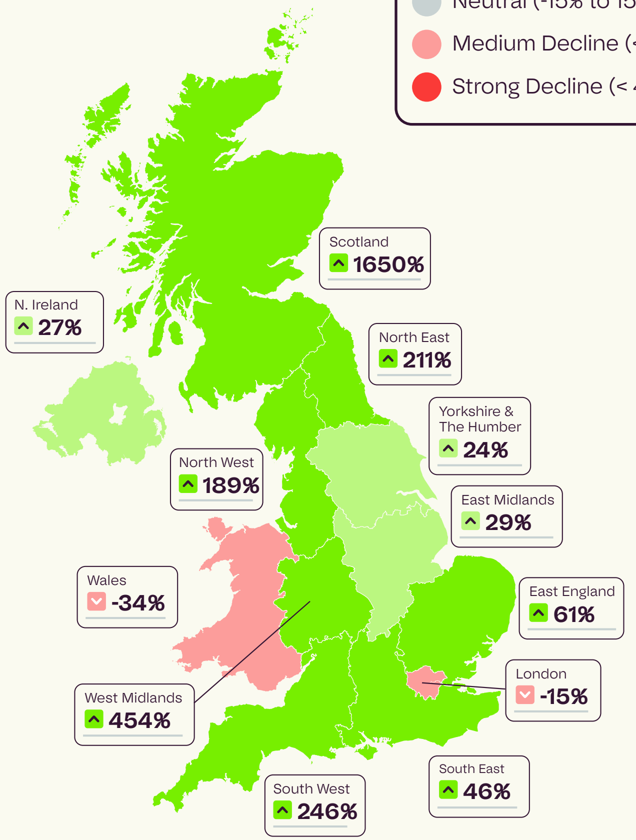
Regional

- Strong performance in project starts, with all regions except two up against last year
- Only two regions saw growth in detailed planning approvals
- The West Midlands experienced strong growth in both project starts and planning approvals

London had the highest share (38%) of project starts during the period, despite a 15% decrease. Further decline was prevented by the £250 million Panorama St Paul's fit-out in the City. In contrast, totalling £341 million, starts in the East of England grew 61% on a year ago, boosted by the £242 million Botanic Place development in Cambridge.

The West Midlands led detailed planning approvals in the office sector, having jumped 122 times year-on-year to total £1,094 million. Activity in the region was mainly driven by the £1,078 million Frasers Campus development in Coventry. In contrast, London declined 67% against 2024 to total £332 million.

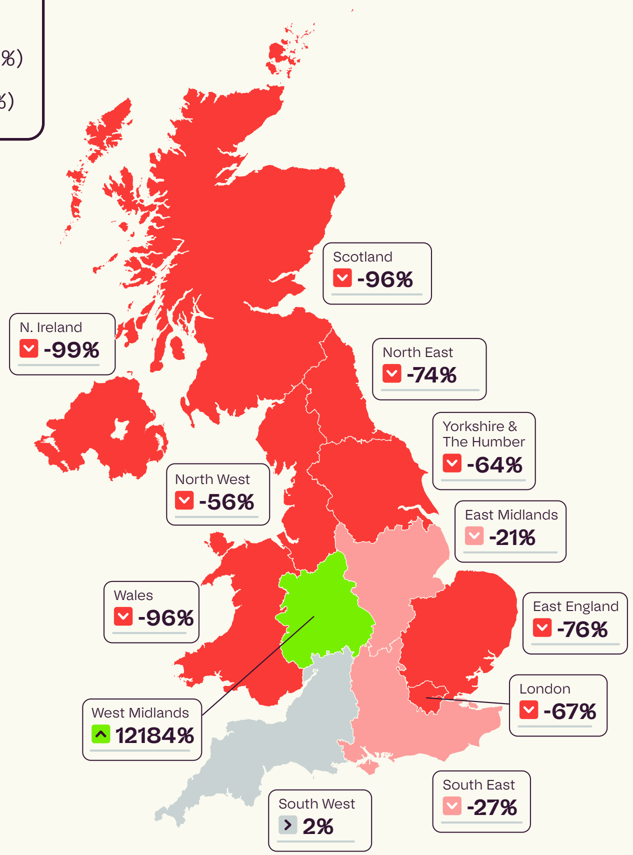
Changes in Office Starts
on a Year Earlier



Growth or Decline

- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)

Changes in Office Planning Approvals
on a Year Earlier



Retail

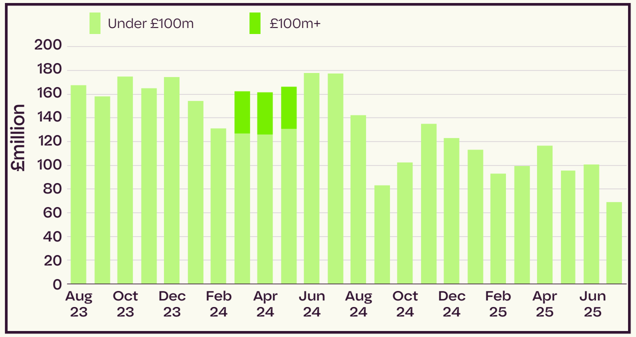
Overview

- **48% decrease** in project starts year-on-year.
- **76% decrease** in main contract awards from last year.
- **61% decrease** in detailed planning approvals compared to the previous year.

Performance in the Retail sector continued a downward trajectory in the three months to July, with project starts, main contract awards and detailed planning approvals all down year-on-year. No major projects (over £100 million) reached any of the three stages in the development pipeline, with underlying projects (£100 million) all down both year-on-year and quarter-on-quarter.

The retail industry is facing increased cost pressures including higher labour costs and an overhang of vacant retail premises which is deterring investment in retail construction. These tough trading conditions and a weak development pipeline are set to constrain sector activity in the near term.

Detailed Planning Approvals

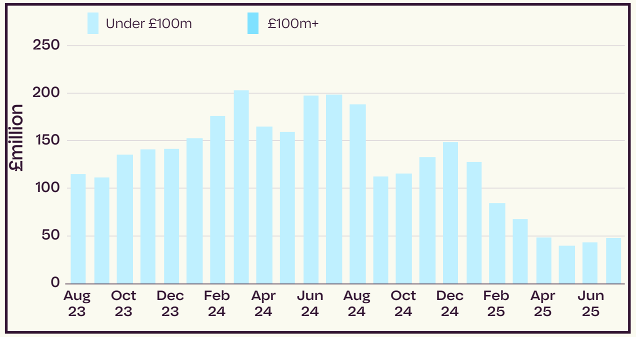


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	207	-	207
YoY	-61%		-61%
Prev. 3 months	-41%		-41%
Prev. 3 months (SA)	-51%		

Main Contract Awards

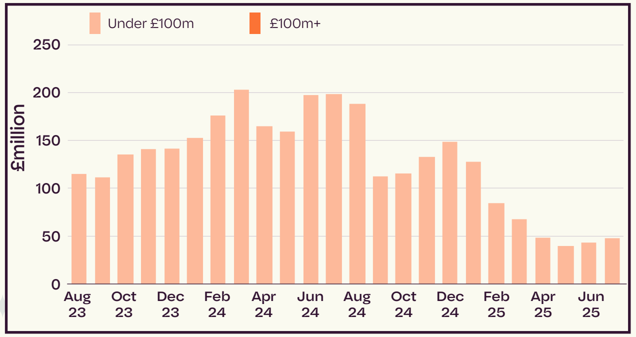


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	143	-	143
YoY	-76%		-76%
Prev. 3 months	-1%		-1%
Prev. 3 months (SA)	-32%		

Retail Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	292	-	292
YoY	-48%		-48%
Prev. 3 months	-29%		-29%
Prev. 3 months (SA)	-27%		

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Retail

Types of projects started

Performance in the retail sector was very weak, with only one category growing compared to last year.

- Supermarkets accounted for the largest share (69%), having decreased 5% year-on-year to total £202 million.
- Totalling £50 million, shop projects starting on site decreased 82% on a year ago.
- Totalling £23 million, shopping centres were 56% higher year-on-year.

Project Spotlight

Louth Retail Park

Detailed plans have been approved for the £20 million Louth Retail Park development. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q4 2026.

PROJECT ID: 23150091

IMAGE SOURCE: S+SA ARCHITECTS

Types of Retail Projects Started

Three months to July 2025

	£ million	Percentage
Other Retail	-	**0%**
Petrol Filling Stations	7	**2%**
Retail Warehousing	9	**3%**
Shopping Centres	23	**8%**
Shops	50	**17%**
Supermarkets	202	**69%**
Total	292	**100%**

Retail League Tables

August 2024 to July 2025

Contractors	Projects	£m
Kier	1	41
Mildren	3	32
DSP	8	25
Andrew Scott	3	24
G F Tomlinson	1	23
B Team	7	22
Clark Contracts	5	21
One Group	1	20
Speller Metcalfe	2	17
Adston	4	15

Clients	Projects	£m
Lidl UK	39	117
Aldi	47	82
Walsall Met. B.C.	2	52
T J Morris	11	48
Tesco	57	44
Marks & Spencer	20	28
J Sainsbury	20	16
MEPC Milton Park	1	14
Asda	14	14
Scotsman	3	14

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Retail

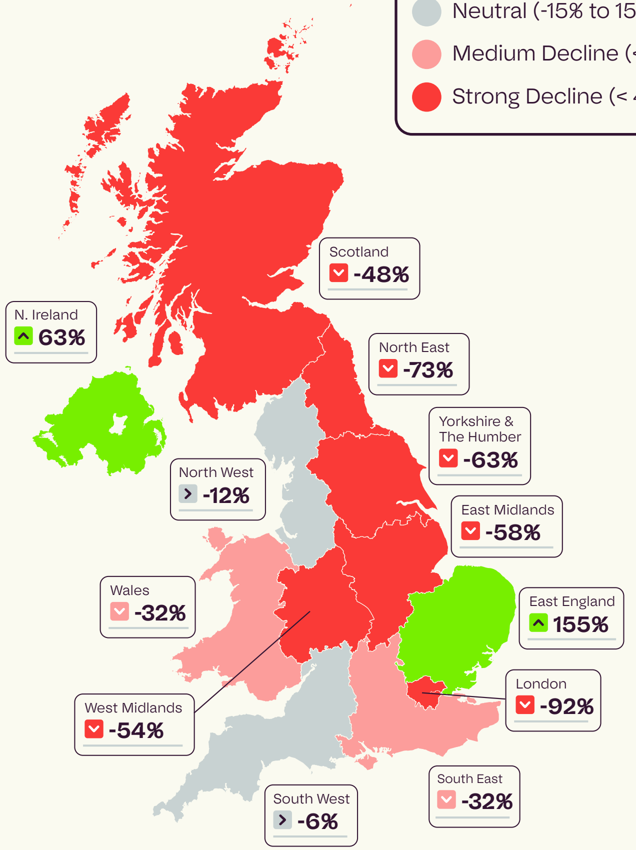
Regional

- Project starts and detailed planning approvals were down in most regions
- The East of England and Northern Ireland saw strong growth in project starts
- Detailed planning approvals grew strongly in Yorkshire & the Humber and Wales

The North West dominated retail project starts, despite a 12% decline on a year ago. The region accounted for 16% of the sector with a value of £48 million. The South West also fell 6%, totalling £43 million. In contrast, totalling £32 million, the East of England jumped 155% year-on-year.

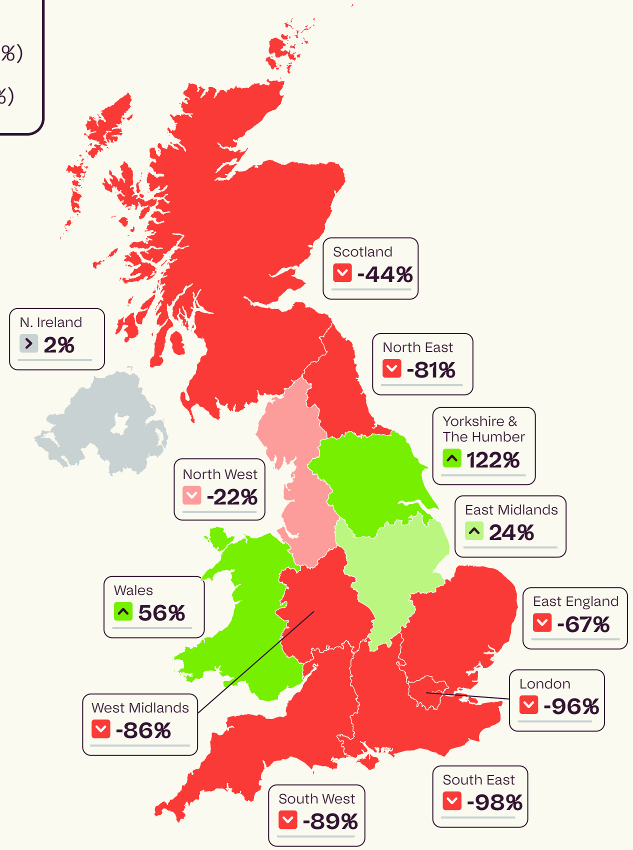
Yorkshire & the Humber led detailed planning approvals, having doubled on a year ago to total £40 million, accounting for 19% of the sector. Wales also increased 56% year-on-year to total £32 million. In contrast, totalling £30 million, the North West fell 22% against last year.

Changes in Retail Starts
on a Year Earlier



Growth or Decline
- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)

Changes in Retail Planning Approvals
on a Year Earlier



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Hotel & Leisure

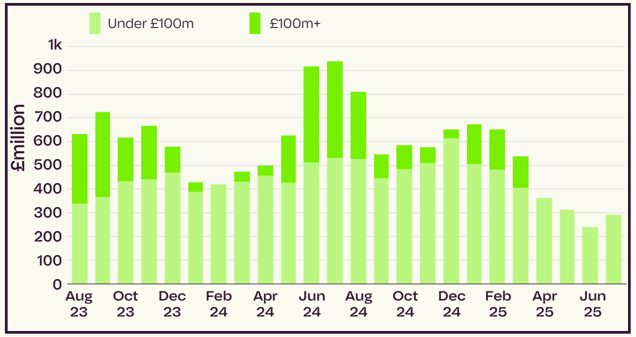
Overview

- **9% increase** in project starts year-on-year.
- **32% decrease** in main contract awards from last year.
- **69% decrease** in detailed planning approvals compared to a year ago.

Project starts grew year-on-year, driven mainly by underlying projects (valued under £100 million). However, no major projects began on site during the period, which weighed on the sector's quarterly performance. Main contract awards increased compared with the previous three months.

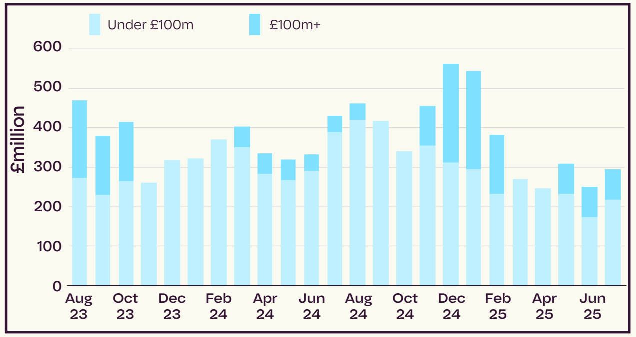
Although 2024 saw a surge in hotel investment, hospitality faces renewed cost pressures including higher labour costs. Challenging economic conditions have led to a decline in the development pipeline, with contract awards and planning approvals down on the previous year. This is likely to constrain sector activity in the near term ahead of a sustained improvement in household incomes and discretionary spending.

Detailed Planning Approvals



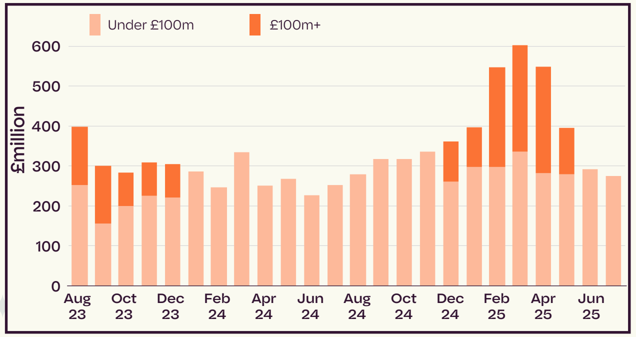
Source: Glenigan

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	872	-	872
YoY	-45%	-100%	-69%
Prev. 3 months	-20%		-20%
Prev. 3 months (SA)	-17%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	654	230	884
YoY	-44%	84%	-32%
Prev. 3 months	-12%		19%
Prev. 3 months (SA)	-31%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	827	-	827
YoY	9%		9%
Prev. 3 months	-2%	-100%	-50%
Prev. 3 months (SA)	2%		

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Hotel & Leisure

Types of projects started

Sub-sector performance was strong, with most categories experiencing growth.

- Sport facilities accounted for the largest share (36%), having jumped 73% on a year ago to total £301 million.
- Accounting for 29%, indoor leisure facilities grew nearly six times year-on-year.
- Hotels and guest houses decreased 60% against the previous year, accounting for a 16% share.

Project Spotlight

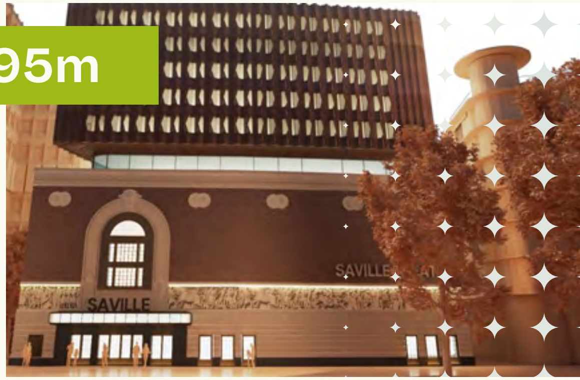
Saville Theatre

Detailed plans have been approved for the £95 million redevelopment of the Saville Theatre in Camden, London. A main contractor is yet to be appointed on the scheme, with work due to be completed in Q2 2029.

PROJECT ID: 18012420

IMAGE SOURCE: SPPARC

£95m



Types of Hotel & Leisure Projects Started

Three months to July 2025

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	71	**9%**
Cinemas & Theatres	54	**7%**
Hotels, Guest Houses	134	**16%**
Indoor Leisure Facilities	241	**29%**
Other Hotel & Leisure	25	**3%**
Sport Facilities	301	**36%**
Total	827	**100%**

Hotel & Leisure League Tables

August 2024 to July 2025

Contractors	Projects	£m
Newarthill	3	319
Morgan Sindall	6	169
Pellikaan	4	158
Galliford Try	8	106
Robertson	3	103
Bovis	1	100
Gilbert Ash	3	97
Graham	2	83
Legendre UK	1	82
Barnwood	1	68

Clients	Projects	£m
Marriott Int.	1	300
C1 Capital	1	225
Frogmore Real Estate	1	225
Greater London Auth.	2	135
Crystal Palace F.C.	1	100
Alliance Leisure	6	83
Fc100	1	82
N. Galleries Of Scot.	1	75
Fermanagh D.C.	1	70
Csg Queensferry	1	50

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Hotel & Leisure

Regional

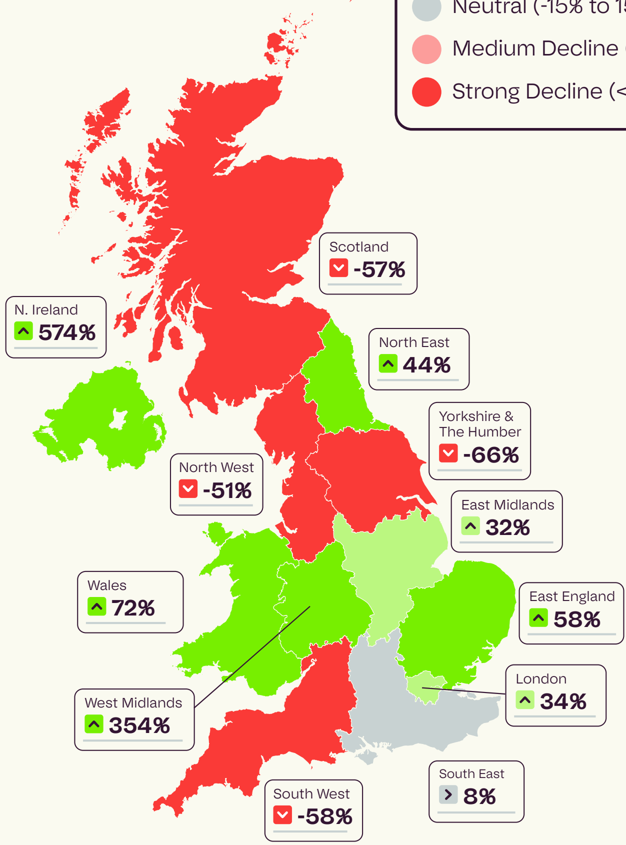
- Regional performance in project starts was strong
- Most regions saw a decline in detailed planning approvals
- The East Midlands grew in both starts and approvals

London was the leader in hotel & leisure project starts, having grown 34% year-on-year to total £187 million. The South East climbed 8% to total £133 million. Accounting for 12%, Northern Ireland jumped almost seven times on a year ago to total £95 million, boosted by the £70 million Lakeland Forum leisure centre.

London led in detailed planning approvals, despite a 71% drop from the previous year, totalling £365 million and accounting for 42% of the national total. The North West accounted for 10% (£89 million), down 58% year-on-year, while Scotland matched this 10% share but was 78% lower than a year earlier.

Changes in Hotel & Leisure Starts

on a Year Earlier

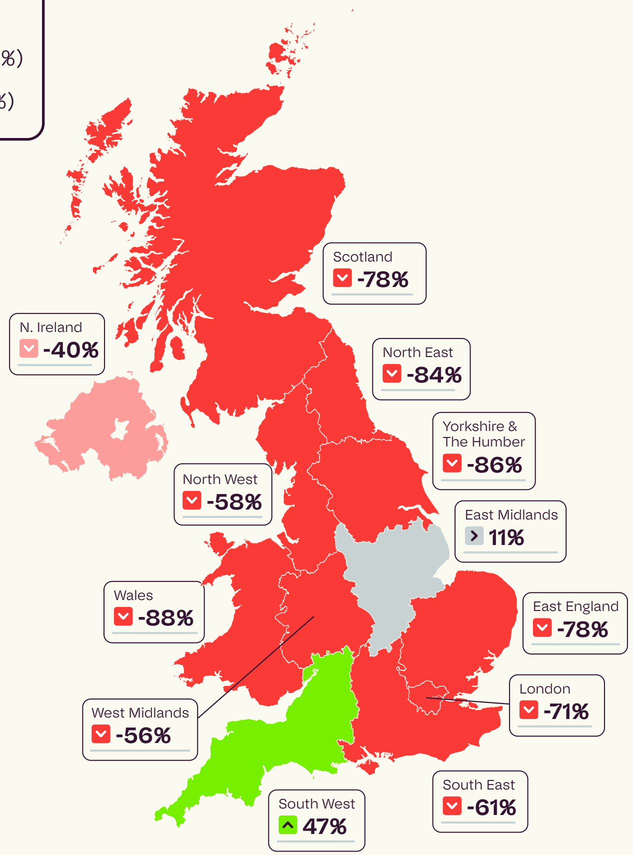


Growth or Decline

- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)

Changes in Hotel & Leisure Planning Approvals

on a Year Earlier



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Health

Overview

15% decline in project starts compared to the previous three months.

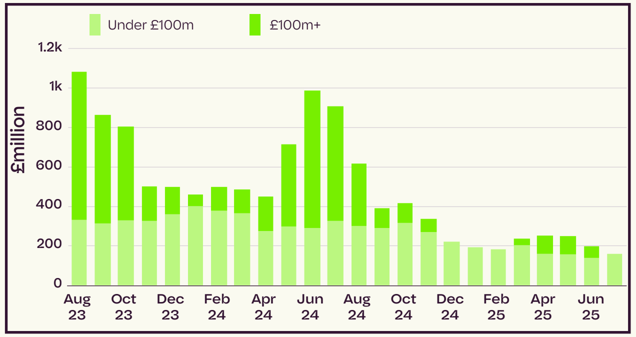
71% increase in main contract awards compared to the previous three months.

82% decrease in detailed planning approvals compared to the previous three months.

The health sector experienced a poor period in the three months to July, with detailed planning approvals and project-starts down on both periods, dragged down by a decline in major projects (over £100 million). More positively, main contract awards experienced increases against the preceding three months and previous year, with a strong performance in major projects accelerating growth.

The UK healthcare construction sector is undergoing a transformative phase, supported by a record capital investment increase of £2.3 billion in real terms as outlined in the 2025 Spending Review. This significant boost underscores the government's commitments to major hospital schemes, particularly those addressing urgent safety concerns such as RAAC-affected sites. Funding continues for the New Hospital Programme, including the rebuilding of seven hospitals affected by RAAC.

Detailed Planning Approvals

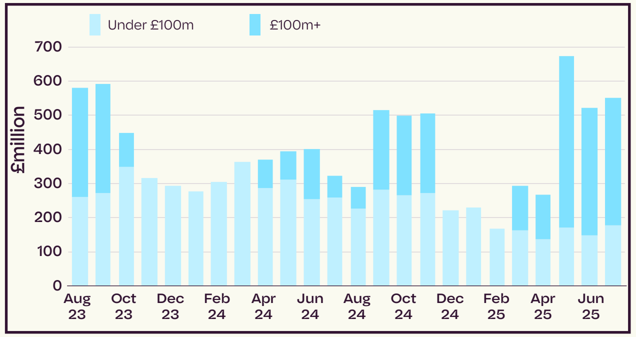


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	483	-	483
YoY	-51%	-100%	-82%
Prev. 3 months	0%	-100%	-37%
Prev. 3 months (SA)	5%		

Main Contract Awards

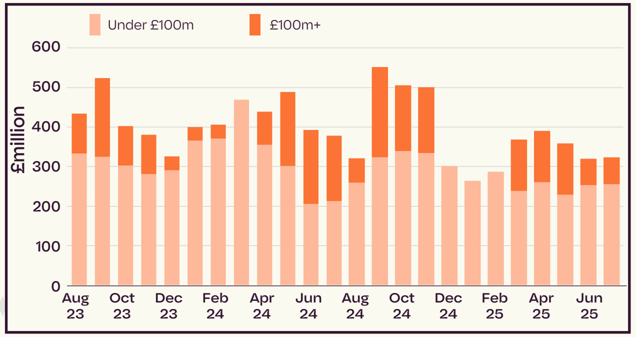


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	533	1,120	1,653
YoY	-31%	489%	71%
Prev. 3 months	29%	188%	106%
Prev. 3 months (SA)	29%		

Health Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	768	201	969
YoY	20%	-59%	-15%
Prev. 3 months	-2%	-48%	-17%
Prev. 3 months (SA)	11%		

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Types of projects started

The health sector performed poorly, with only one sub-sector up year-on-year.

- Other health accounted for the largest share (64%), having grown 164% year-on-year to total £616 million.
- Totalling £208 million, the value of Nursing Homes & Hospices starting on site declined 4% on a year ago.
- Hospitals experienced an 82% decline against the previous year to total £104 million, an 11% share of the total value.

Project Spotlight

Wellcome Genome Campus Expansion Parcel D

Reserved matters have been granted for the Wellcome Genome Campus Expansion Parcel D development in Essex. A main contractor is yet to be appointed on the £41.75 million scheme, with work expected to be completed in Q4 2026.

PROJECT ID: 25120092

IMAGE SOURCE: DAVID LOCK ASSOCIATES

Types of Health Projects Started

Three months to July 2025

	£ million	Percentage
Day Centres	5	**1%**
Dental, Health & Veterinary Centres/ Surgeries	35	**4%**
Hospitals	104	**11%**
Nursing Homes & Hospices	208	**21%**
Other Health	616	**64%**
Total	969	**100%**

Health League Tables

August 2024 to July 2025

Contractors	Projects	£m
Laing O'Rourke	3	1,619
Graham	3	415
Mace	2	286
McLaughlin & Harvey	3	121
Bowmer & Kirkland	4	120
Morgan Sindall	10	117
VINCI Construction	4	75
Kier	9	56
LNT Construction	6	50
Galliford Try	1	50

Clients	Projects	£m
Dep. of Health	139	1,440
D. for Env. Food & RA	2	919
CPD	1	201
Nat. History Museum	1	85
Central Lab. Research	2	75
John Innes Centre	1	59
MBDA (UK)	8	53
LNT Group	1	50
Univ. of Birmingham	1	39
ARC Oxford	1	39

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Health

Regional

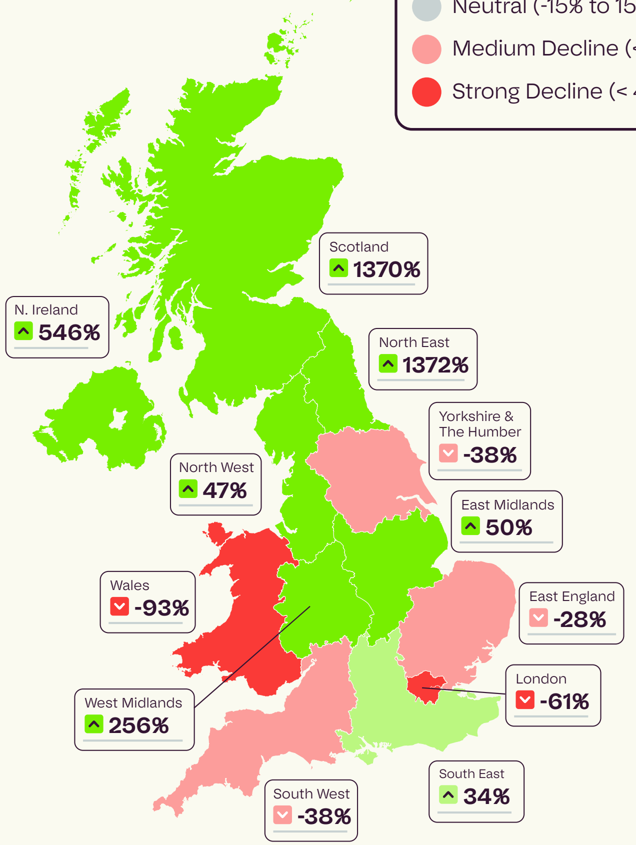
- Despite the overall sector slump, most regions experienced growth in project starts
- Detailed planning approvals only grew in two regions
- The East Midlands experienced growth in both starts and approvals

The South East at £416 million was the most active region for project starts, accounting for 43% of the total, with the region having grown 34% against the previous year. Activity in the region was boosted by the £201 million Natural History Museum Science and Digitisation Centre in Reading. The North West also grew 47% on a year ago to total £107 million.

Totalling £185 million, the East of England accounted for the largest share of planning approvals (38%). The region declined 82% against the previous year. In contrast, accounting for 14%, the East Midlands grew 31% against the previous year to total £67 million.

Changes in Health Starts

on a Year Earlier

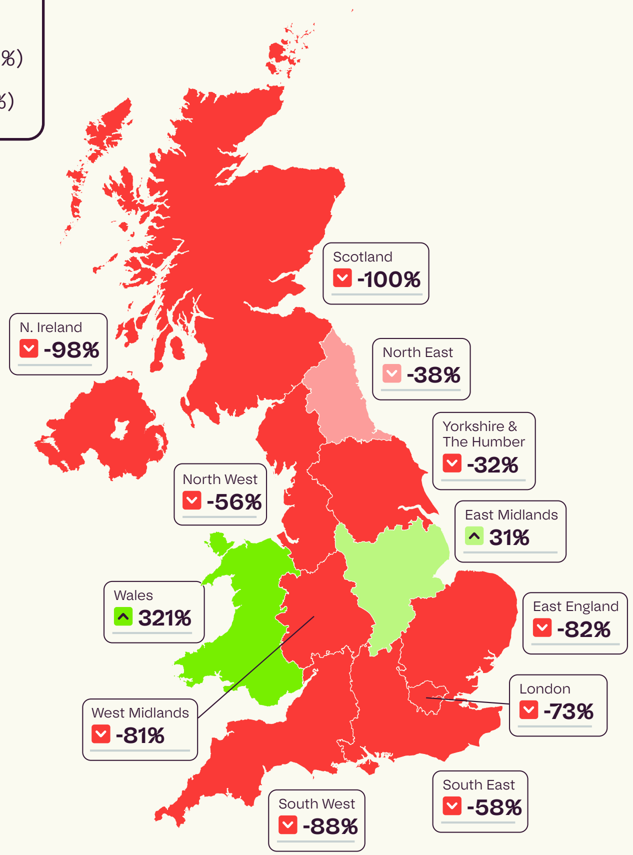


Growth or Decline

- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)

Changes in Health Planning Approvals

on a Year Earlier



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Education

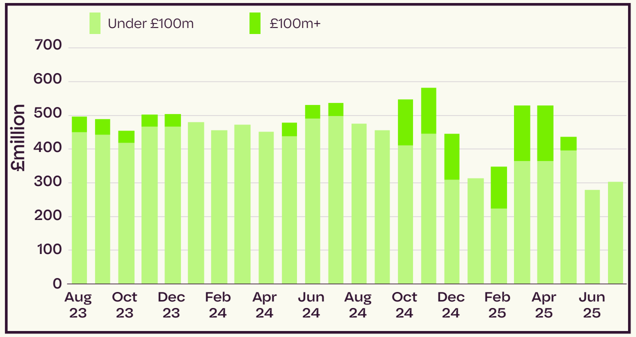
Overview

- **36% decrease** in project starts compared to the previous year.
- **52% decrease** in main contract awards compared to the previous year.
- **44% decrease** in detailed planning approvals compared to the previous year.

The education sector experienced a weak quarter in the three months to July, with project starts, main contract awards, and detailed planning approvals all falling compared to both the previous quarter and the same period last year. No major projects (over £100 million) reached any of these stages during the period. However, smaller projects (under £100 million) saw modest growth in starts compared with the previous three months.

We expect this setback to be temporary. The 2025 Spending Review outlined several initiatives, with the government committing approximately £2.4 billion annually to the School Rebuilding Programme over the next four years, a significant increase from earlier funding levels and a strong signal of long-term investment in school infrastructure. Additionally, annual spending on school maintenance and repairs is set to rise by around £400 million, reaching £2.3 billion by 2029-30, further supporting growth in the education sector.

Detailed Planning Approvals

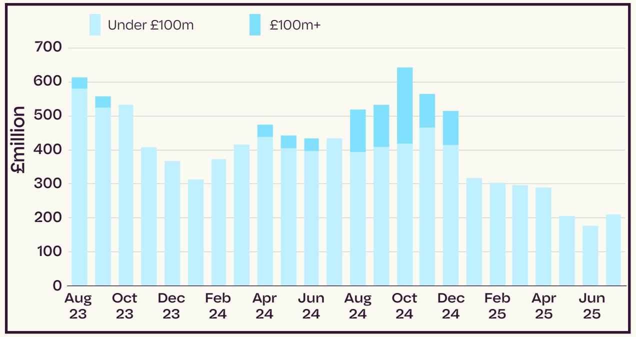


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	911	-	911
YoY	-39%	-100%	-44%
Prev. 3 months	-17%	-100%	-43%
Prev. 3 months (SA)	-9%		

Main Contract Awards

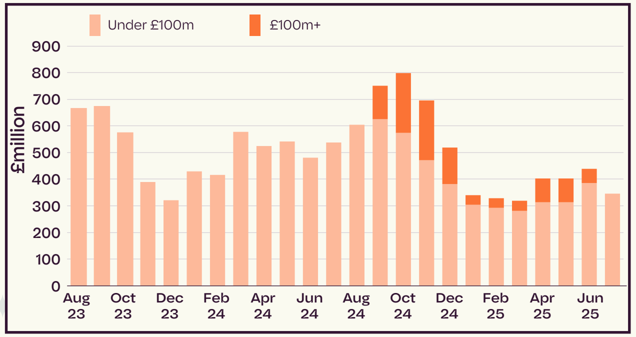


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	631	-	631
YoY	-52%		-52%
Prev. 3 months	-27%		-27%
Prev. 3 months (SA)	-21%		

Education Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,035	-	1,035
YoY	-36%		-36%
Prev. 3 months	10%	-100%	-14%
Prev. 3 months (SA)	6%		

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Education

Types of projects started

Project starts in the education sector performed poorly overall; however, colleges saw an increase compared to the previous year.

- Schools, at £638 million, accounted for the largest share of starts (62%), and the sector declined 43% gainst the previous year.
- Colleges accounted for the second largest share of starts at £284 million (27%), with the sector growing 8% compared to the previous year.
- Universities fell 61% against the previous year to total £64 million.

Project Spotlight

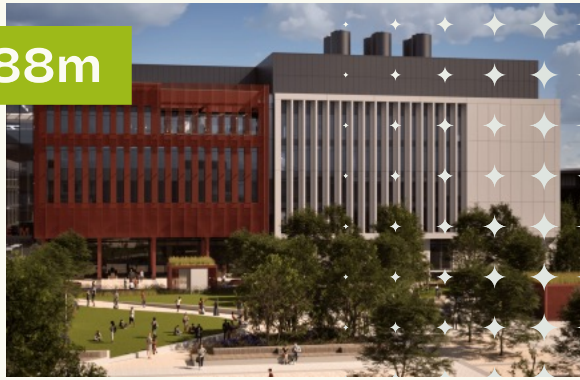
Phase 1 University of Warwick Science and Engineering Precinct

Detailed plans have been approved for Phase 1 of the University of Warwick Science and Engineering Precinct development. A main contractor is yet to be appointed on the £88 million scheme, with work due to be completed in Q1 2028.

PROJECT ID: 25340310

IMAGE SOURCE: UNIVERSITY OF WARWICK

£88m



Types of Education Projects Started

Three months to July 2025

	£ million	Percentage
Colleges	284	**27%**
Other Education	48	**5%**
Schools	638	**62%**
Universities	64	**6%**
Total	1,035	**100%**

Education League Tables

August 2024 to July 2025

Contractors	Projects	£m
Kier	24	425
Morgan Sindall	36	341
Multiplex	1	300
Bowmer & Kirkland	13	227
Royal BAM Group	9	203
Lowry Buil. & Civil Eng.	2	188
Woodvale	2	188
Tilbury Douglas	17	187
Galliford Try	20	170
Graham	4	104

Clients	Projects	£m
Dep. for Education	70	810
Univ. of Glasgow	2	301
CPD	1	188
Educ. Auth. N. Ireland	12	115
City of Edinburgh	8	80
Aberdeenshire	3	75
Rhondda Cynon Taf	8	67
Cambridgeshire C.C.	7	58
Scot. Borders Council	1	57
Tyne Coast College	1	47

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Education

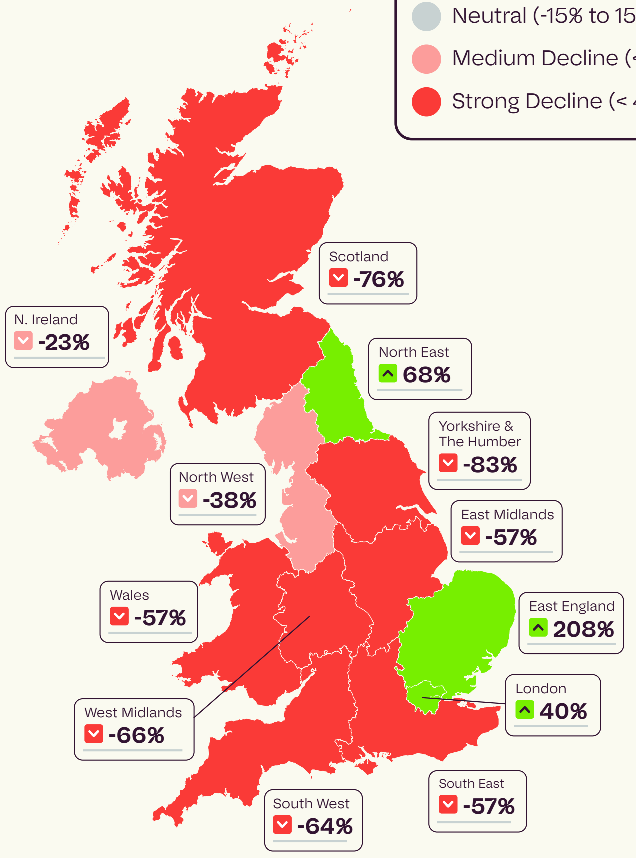
Regional

- Consistent with the overall sector trend, project starts and detailed planning approvals declined in most regions
- Starts grew in the East of England, London and the North East
- The East Midlands and the West Midlands experienced sharp growth for detailed planning approvals.

The East of England, at £208 million, was the most active region for project starts, accounting for 20% of the total value. The region tripled compared to the previous year. The North East also had a strong period, with project starts valued at £183 million, an increase of 68% compared to the previous year, accounting for 18% of the total value.

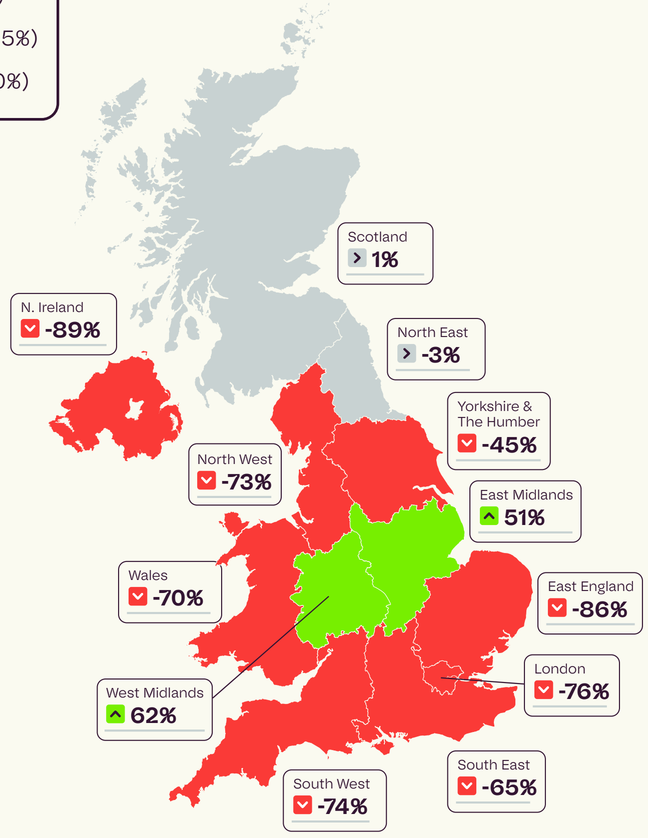
In planning approvals, the West Midlands accounted for the largest share at 25%, growing 62% year-on-year to £230 million. Scotland represented 15% of the total, with a slight 1% increase to £138 million. In contrast, the North East declined 3% to £157 million.

Changes in Education Starts
on a Year Earlier



Growth or Decline
- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)

Changes in Education Planning Approvals
on a Year Earlier



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Community & Amenity

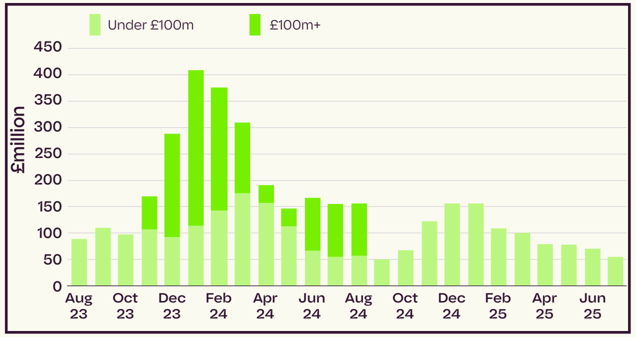
Overview

- **8% decrease** in project starts year-on-year.
- **30% decrease** in main contract awards from last year.
- **65% decrease** in detailed planning approvals compared to 2024.

The sector experienced a slump, with project starts, main contract awards, and detailed planning approvals down both year-on-year and quarter-on-quarter. No major projects (over £100 million) were awarded or approved. However, underlying projects (under £100 million) saw growth in both project starts, and contract awards compared to last year.

While the government's £2.3 billion investment in prison buildings boosted starts earlier this year, the sector slowed during the three months to July. However, increased defense funding is expected to drive activity in the sector over the medium term.

Detailed Planning Approvals

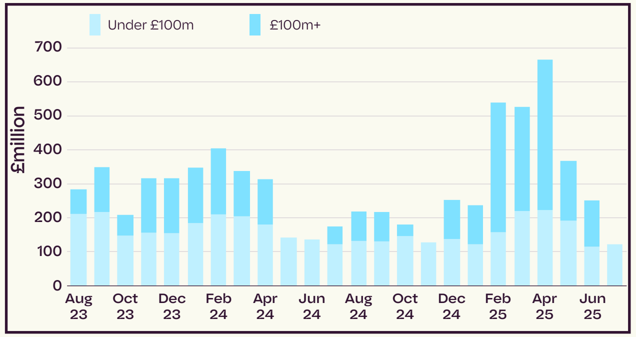


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	164	-	164
YoY	-1%	-100%	-65%
Prev. 3 months	-31%		-31%
Prev. 3 months (SA)	-19%		

Main Contract Awards

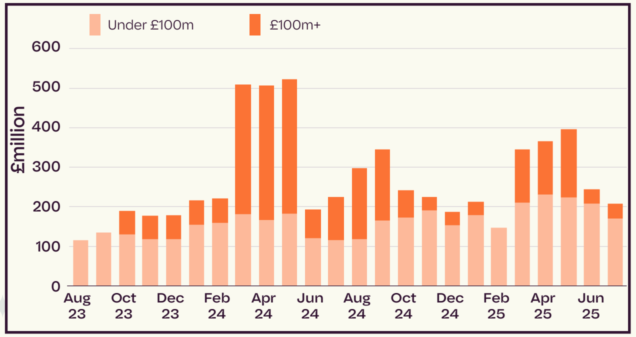


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	367	-	367
YoY	1%	-100%	-30%
Prev. 3 months	-45%	-100%	-82%
Prev. 3 months (SA)	-27%		

Community & Amenity Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	511	111	622
YoY	48%	-66%	-8%
Prev. 3 months	-26%	-73%	-43%
Prev. 3 months (SA)	-16%		

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Community & Amenity

Types of projects started

Despite the overall decline in the sector, most sub-sectors saw growth in project starts.

- Government buildings accounted for the largest share (34%), thanks to a 247% jump.
- Local facilities fell 2% on a year ago, totalling £153 million.
- Accounting for 19%, prisons totalled £117 million, 73% down year-on-year.

Project Spotlight

Wythenshawe Public Realm & Culture Hub

Detailed plans have been approved for the Wythenshawe Public Realm & Culture Hub development in Manchester. Kier has been appointed as the main contractor on the scheme, with work due to be completed in Q1 2027.

PROJECT ID: 25175630

IMAGE SOURCE: CONSTRUCTION ENQUIRER

£32m

Types of Community & Amenity Projects Started

Three months to July 2025

	£ million	Percentage
Blue Light	84	**13%**
Government Buildings	210	**34%**
Law Courts	39	**6%**
Local Facilities	153	**25%**
Military	17	**3%**
Places of Worship	2	**0%**
Prisons	117	**19%**
Total	622	**100%**

Community & Amenity League Tables

August 2024 to July 2025

Contractors	Projects	£m
Kier	23	1,310
Wates	16	385
Laing O'Rourke	1	300
Galliford Try	13	213
Tilbury Douglas	5	103
Goldbeck Bower	1	78
Morgan Sindall	7	68
John Sisk & Son	1	54
Willmott Dixon	4	37
Speller Metcalfe	6	32

Clients	Projects	£m
Ministry of Justice	31	784
Scot. Prison Service	4	685
Ministry of Defence	20	489
UK Parliament	1	111
Gov. Property Agency	1	105
Home Office	18	104
Cardiff C.C.	2	92
Sandwel Met. B.C.	3	81
London Bor. of Haringey	1	54
Gosport B.C.	1	51

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Community & Amenity

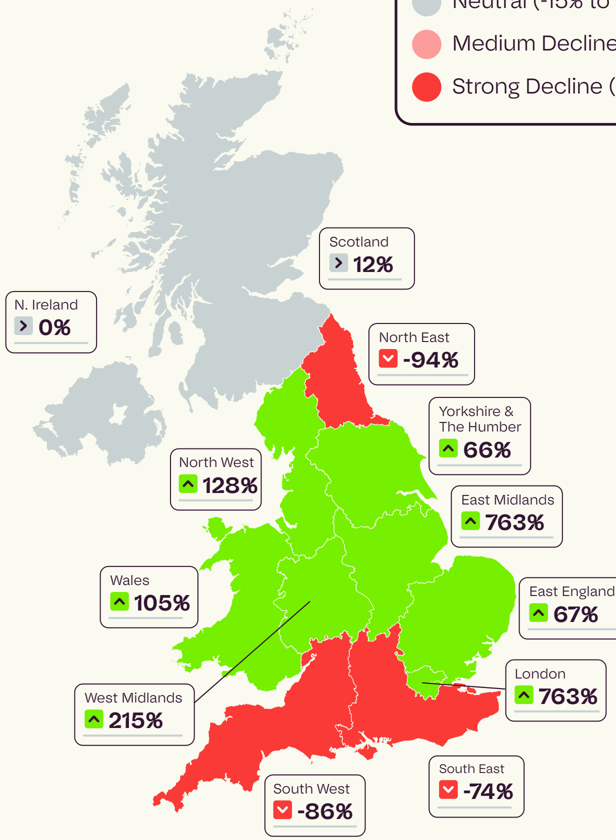
Regional

- Project starts and detailed planning approvals were up in most regions, despite the overall decline of the sector
- The East of England, the North West, and the West Midlands experienced strong growth in both starts and approvals
- Project approvals also grew strongly in the North East and the South East

London accounted for the highest share of project starts, having grown more than eight times to total £223 million. Activity in the region was boosted by the £110.6 million Victoria Tower Fabric Safety Project in Westminster. Accounting for 15%, the North West grew 128% on a year ago to total £92 million.

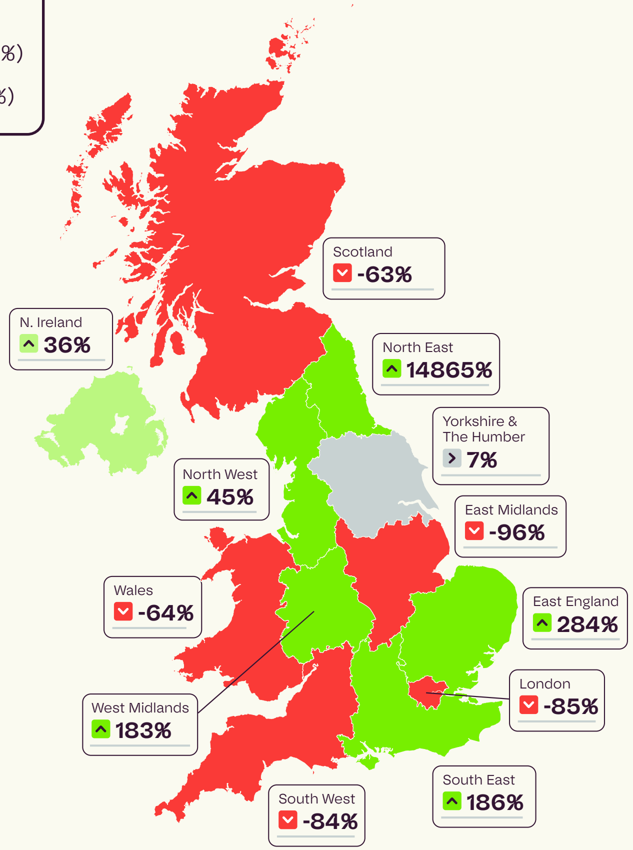
The South East accounted for 34% of detailed planning approvals, thanks to 186% growth year-on-year to total £56 million. Accounting for a 24% share, the North West also grew 45% on a year ago to total £40 million. In contrast, totalling £12 million, the East Midlands fell 96%.

Changes in Community & Amenity Starts
on a Year Earlier



Growth or Decline
- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)

Changes in Community & Amenity Planning Approvals
on a Year Earlier



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Civil Engineering

Overview

66% decline in project starts against the preceding year.

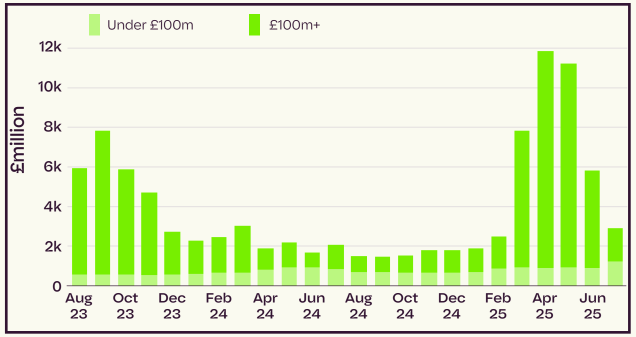
73% decline in main contract awards against the previous year.

42% increase in detailed planning approvals compared to last year.

Civil Engineering project-starts and main contract awards declined comparted to both the preceding three months and the previous year. Elsewhere, detailed planning approvals rose against the previous year to signal a strengthening of the development pipeline. Despite this, values remained below the preceding three months due to a weakening in the value of major projects against the preceding three-month period.

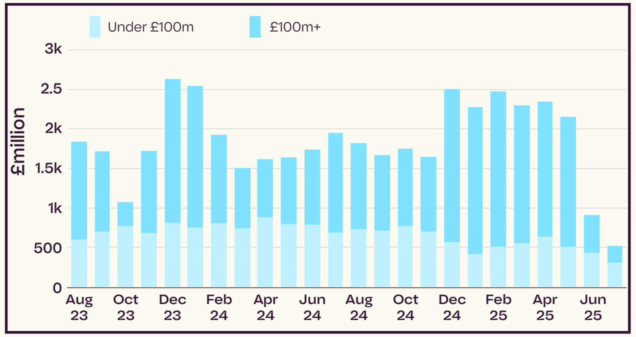
The government has committed to at least £725 billion in public infrastructure investment over the next decade, ensuring capital funding grows in line with inflation and providing a stable pipeline for the sector as part of the 10-year infrastructure strategy. Major allocations include funding for HS2, road improvements, and investment for the Sizewell C nuclear power station—and significant resources for energy infrastructure, including clean power and carbon capture.

Detailed Planning Approvals



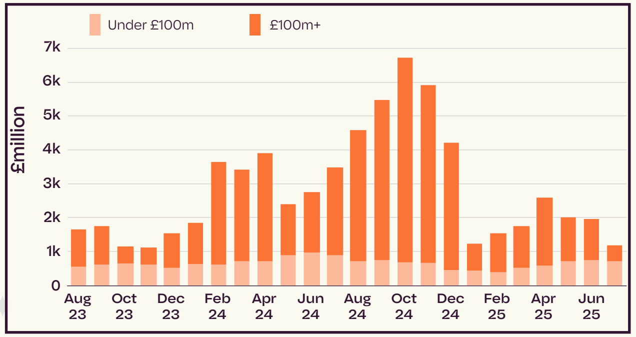
Source: Glenigan

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	3,718	5,048	**8,766**
YoY	46%	39%	**42%**
Prev. 3 months	36%	-85%	**-75%**
Prev. 3 months (SA)	65%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	931	630	**1,561**
YoY	-55%	-83%	**-73%**
Prev. 3 months	-51%	-88%	**-78%**
Prev. 3 months (SA)	-35%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	2,131	1,401	**3,532**
YoY	-21%	-82%	**-66%**
Prev. 3 months	23%	-77%	**-54%**
Prev. 3 months (SA)	15%		

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Civil Engineering

Types of projects started

Performance across segments in the sector was poor, with five out of eight sectors declining against the previous year.

- Roads at £1,241 million accounted for the largest share of starts (35%), the sector increased 35% against the previous year.
- Harbour/Ports increased 232% against the previous year to total £362 million.
- Energy accounted for the second largest share of starts (28%), the sector declined 84% against the previous year to total £985 million.

Project Spotlight

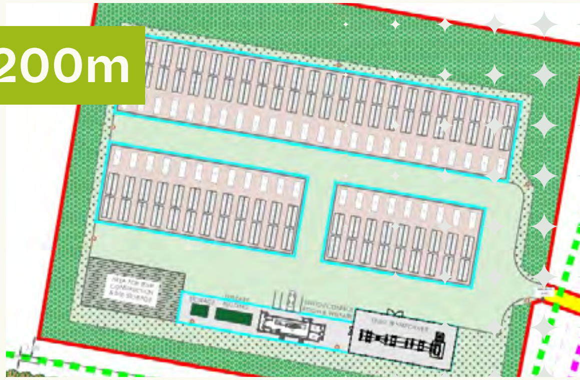
Staithes Road, Hull BESS

£200m

Detailed plans have been approved for the £200 million Staithes Road, Hull BESS battery storage facility. A main contractor is yet to be appointed on the scheme, with works expected to be completed in Q1 2031.

PROJECT ID: 24118892

IMAGE SOURCE: NEWTON ENERGI LTD



Types of Civil Engineering Projects Started

Three months to July 2025

	£ million	Percentage
Airports	28	**1%**
Other Civils	532	**15%**
Rail	29	**1%**
Roads	1,241	**35%**
Harbours/Ports	362	**10%**
Energy	985	**28%**
Water Industry	325	**9%**
Waste	30	**1%**
Total	3,532	**100%**

Civil Engineering League Tables

August 2024 to July 2025

Contractors	Projects	£m
Royal BAM	19	2,020
Ferrovial	3	1,617
Ringway	3	1,159
M Group Services	12	947
Costain	4	669
Siemens	7	653
Balfour Beatty	38	644
Downing	16	568
Graham	7	470
Bouygues	8	469

Clients	Projects	£m
Dep. for Transport	52	4,823
Hertfordshire C.C.	1	1,155
SSEN Transmission	12	1,054
Oxfordshire C.C.	4	1,013
National Grid	5	718
GE Hitachi Nucl. En.	1	500
Kingsway Solar Farm	1	500
N. Lanarkshire Council	3	451
Kemble Water	5	426
Kent C.C.	3	410

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Civil Engineering

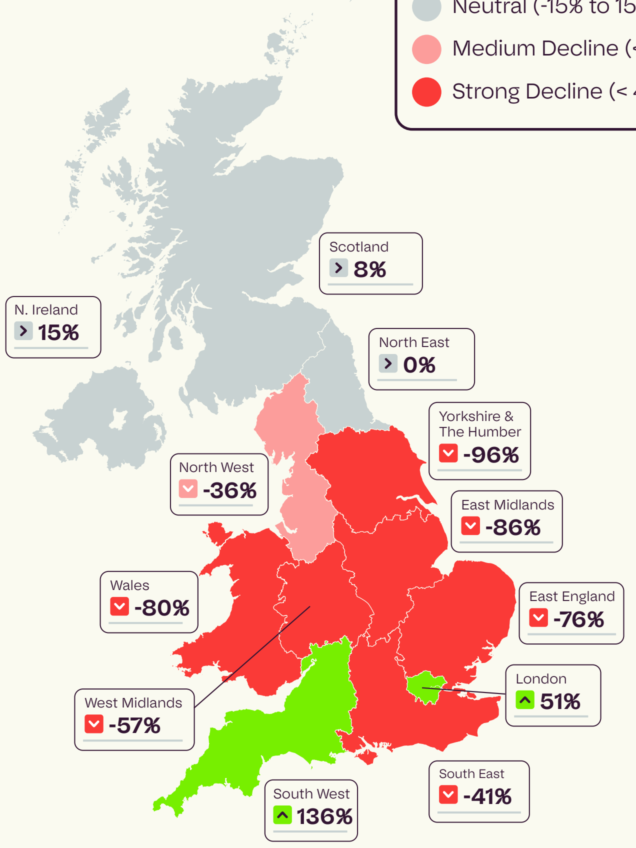
Regional

- Weak regional performance in project starts, with only four regions up on a year ago
- Mixed performance in detailed planning approvals, with half of the regions up year-on-year
- Starts and approvals grew in Northern Ireland and the South West

Scotland, at £796 million was the most active region for project starts, accounting for 23% of the total. The region climbed 8% against the previous year, boosted by the £400 million Strathy South Wind Farm. The South West, at £553 million, jumped 136% against the previous year to account for 16% of the total value. This growth was accelerated by the £249 million Bridgwater Tidal Barrier development.

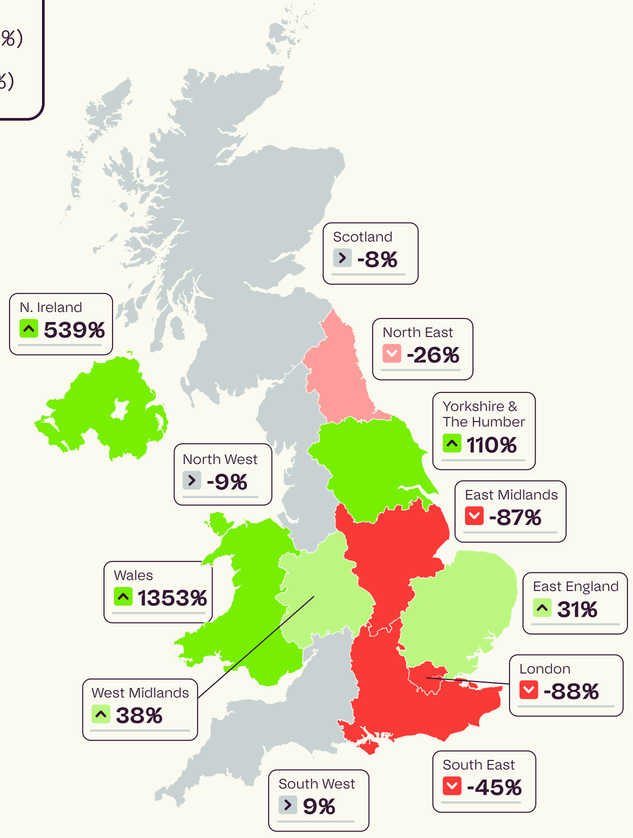
Wales accounted for the largest share of detailed planning approvals (36%), with the region having jumped more than 14 times against the previous year to total £3,123 million. Activity in the region was driven by the £3 billion Mona Offshore Wind farm in Flint. Yorkshire & the Humber accounted for the second largest share of approvals (14%), having doubled against the previous year to total £1,228 million.

Changes in Civil Engineering Starts
on a Year Earlier



Growth or Decline
- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)

Changes in Civil Engineering Planning Approvals
on a Year Earlier



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