Glenigan

A Hubexo Product

Construction Review

Reflecting activity to the end of July 2026

August 2026

- **10% rise in detailed planning approvals** against the preceding three months
- **17% rise in main contract awards** against the preceding three months
- **7% decline in project starts** against the preceding three months

Expert insights

to support your construction strategy

Glenigan provides bespoke research and analysis to help construction businesses identify opportunities and plan with confidence. Led by Allan Wilén, with over 30 years' experience in construction market analysis, our team combines industry expertise with robust, data-led insight.

Our analysis is trusted across the sector, supporting commercial organisations, government bodies, and trade associations with forecasting, market intelligence, and tailored research.

Unlock targeted insights with Glenigan's bespoke research. Learn more: Glenigan.com/bespoke

Methodology

Glenigan's Construction Review draws on our comprehensive database of UK construction projects, providing a detailed view of activity from planning through to contract award.

Headline indicators are presented as three-month rolling averages, covering project starts, detailed planning approvals and main contract awards. This approach reduces volatility and provides a clearer view of market trends. Activity is analysed by sector, with regional breakdowns and a distinction between underlying projects, defined as those below £100 million, and major projects valued at £100 million and above.

Underlying activity is seasonally adjusted, with recent periods subject to provisional weighting to reflect reporting lags.

Elements of this report have been prepared using AI-assisted drafting tools applied to Glenigan's proprietary data. All content is reviewed, edited and verified by Glenigan's economics team prior to publication.

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Executive Summary

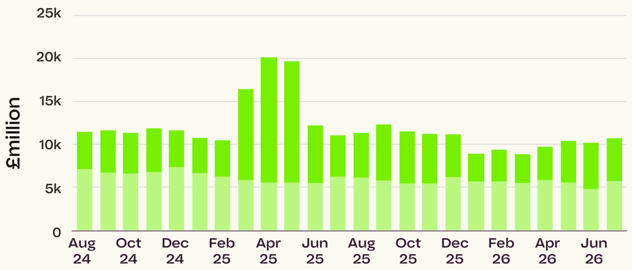
- **3% decline** in detailed planning approvals against the previous year
- **169% rise** in main contract awards against the previous year
- **0% change** in project starts against the previous year

UK construction activity presented a mixed picture during the latest period. Detailed planning approvals increased by 10% against the preceding three months, while main contract awards rose by 17%, pointing to a strengthening short-term pipeline. In contrast, project starts fell by 7%, suggesting pipeline improvements have yet to fully translate into on-site activity.

Compared with a year earlier, detailed planning approvals were 3% lower, although this marked a relatively modest decline. Main contract awards surged by 169%, driven by several major schemes, while project starts remained broadly unchanged.

Looking ahead, the industry's outlook will continue to depend on economic conditions, investor confidence and public sector spending. Strong growth in contract awards provides encouragement for future workloads, while the quarterly recovery in planning approvals suggests improving market activity. However, the pace at which opportunities convert into project starts will remain a key measure of sector performance in the coming months.

Detailed Planning Approvals

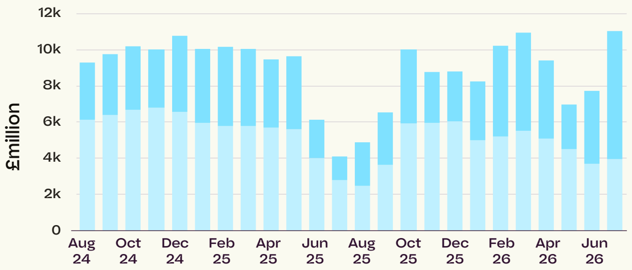


Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	17,096	15,012	**32,107**
YoY	-8%	3%	**-3%**
Prev. 3 months	-2%	29%	**10%**
Prev. 3 months (SA)	-100%		

Source: Glenigan. Three month average

Main Contract Awards

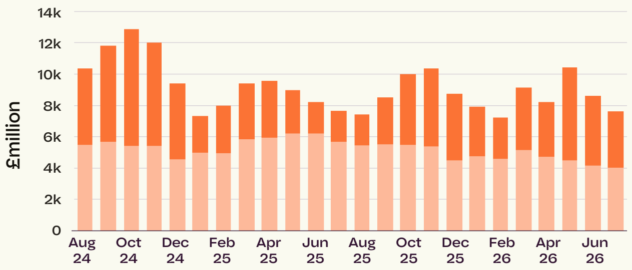


Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	11,816	21,280	**33,096**
YoY	42%	434%	**169%**
Prev. 3 months	-23%	64%	**17%**
Prev. 3 months (SA)	-7%		

Source: Glenigan. Three month average

Starts



Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	12,068	10,820	**22,889**
YoY	-29%	82%	**0%**
Prev. 3 months	-15%	3%	**-7%**
Prev. 3 months (SA)	-11%		

Source: Glenigan. Three month average

Economic Outlook

UK economy battles geopolitical uncertainty

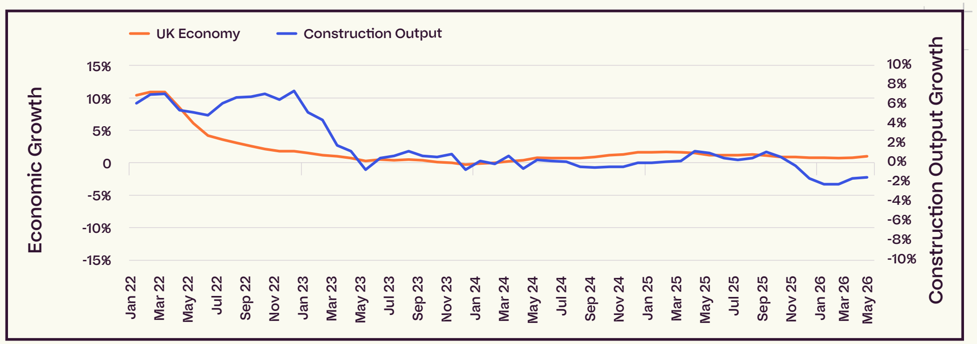
- Economic growth despite headwinds
- Rise in manufacturing and services sectors
- Tentative recovery in consumer confidence and spending

The UK economy returned to growth in May, according to ONS data, increasing by 0.1% despite current headwinds, geopolitical uncertainty, and energy costs. Annual growth has also edged up with GDP 1.1% up against May last year. Manufacturing output has ticked up, aided by firms front-loading and stockpiling to hedge against global supply chain disruptions. The CIPS Manufacturing PMI surveys point to continued growth during June and July.

Services was the main economic driver, growing by 0.3% in May, in part due to a strengthening in consumer related areas such as retail sales and leisure spending. This points to a tentative improvement in consumer confidence. Retail sales volumes continued to strengthen in June, and the latest GfK consumer survey also reports a modest improvement in confidence over the summer.

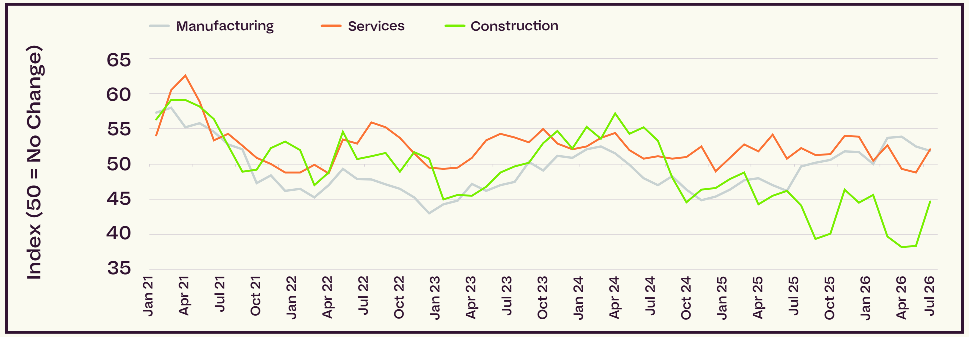
The tentative improvement in consumer spending is an encouraging sign for a moribund housing market. House prices during the three months to July were unchanged on the previous three months, while the number of mortgage applications in June were 12% down on a year earlier. A further strengthening in consumer confidence would help support a recovery in property transactions and new house sales over the coming months.

Construction & The Economy



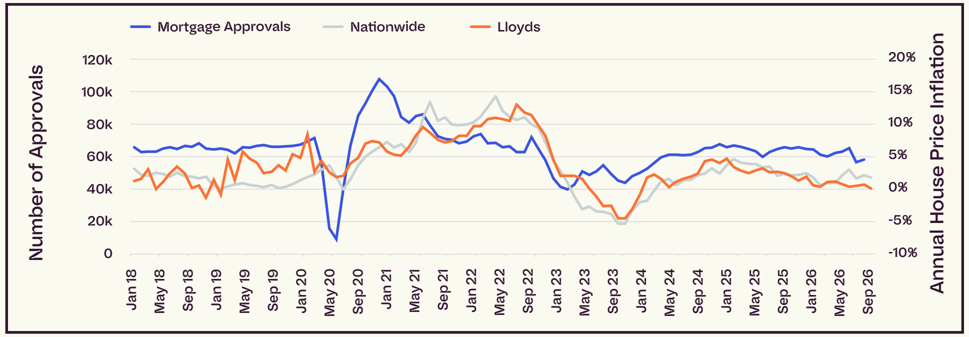
Source: ONS

CIPS Activity Surveys



Sources: IHS Markit/CIPS

Mortgage Approvals & House Prices



Sources: Bank of England, Nationwide & Lloyds

Top 50 Contractors

Last 12 month totals:	
1,022 projects	£47,394m

Last month totals:	
98 projects	£12,053m

August 2025 to July 2026

	Contractors	#	£m	★
1	Morgan Sindall	197	3,913	1
2	Graham Construction	24	2,554	4
3	Skanska UK	7	2,531	16
4	STRABAG	7	2,437	-3
5	Sir Robert McAlpine	9	2,233	13
6	Bovis	11	2,229	3
7	Wates	61	2,051	7
8	Kier	95	1,942	4
9	Mace	6	1,844	-5
10	Winvic	20	1,801	5
11	Willmott Dixon	80	1,521	0
12	Sacyr UK	1	1,500	NEW
13	Bowmer & Kirkland	29	1,496	-10
14	Vital Energi Utilities	12	1,395	-9
15	Laing O'Rourke	7	1,170	28
16	Galliford Try	120	1,067	-9
17	VINCI	16	1,029	16
18	Bouygues	5	1,009	-8
19	McLaren	9	942	-6
20	Royal BAM	32	894	-4
21	Sisk	6	726	-13
22	Caddick Group	25	670	-2
23	Robertson	41	667	-6
24	Dragados UK	1	648	NEW
25	Balfour Beatty	15	534	-3
26	Marlborough Surfacing	5	519	-3
27	JRL Group	3	505	-6
28	Worley Europe	1	500	-4
29	Equitix	1	498	-3
30	McLaughlin & Harvey	14	484	4
31	Hill Group	16	432	-4
32	M Group Services	8	350	-3
33	Glencar Construction	12	346	4
34	UI Social Infrastructure	4	344	-4
35	Tilbury Douglas	36	342	4
36	Axis Group UK	9	327	-4
37	VolkerWessels	16	322	-9
38	Corrigenda	2	316	-3
39	HG Construction	4	314	-3
40	Mears Group	2	312	-2
41	Envision Energy	1	310	NEW
42	Tusker Construction Group	1	300	-2
43	JJ Rhatigan & Company	4	288	-2
44	GMI Construction	20	266	0
45	Vistry	11	265	-3
46	Costain	7	262	-15
47	Multiplex	2	258	NEW
48	Flynn	1	250	-3
49	Structure Tone	2	247	-3
50	Murphy	4	237	-2

July 2026

	Contractors	#	£m	★
1	Skanska UK	1950	2	1
2	Sacyr UK	1500	1	NEW
3	Graham Construction	1500	1	NEW
4	Laing O'Rourke	900	1	NEW
5	Morgan Sindall	746	15	8
6	Kier	651	3	-1
7	VINCI	650	1	NEW
8	Sir Robert McAlpine	650	1	NEW
9	Dragados UK	648	1	NEW
10	Bovis	400	1	NEW
11	Willmott Dixon	360	3	1
12	Wates	319	9	-2
13	Bowmer & Kirkland	210	5	NEW
14	Multiplex	200	1	NEW
15	Mace	150	1	NEW
16	McLaughlin & Harvey	106	2	NEW
17	Caddick Group	100	3	12
18	Galliford Try	68	7	NEW
19	Ground Control	60	2	NEW
20	Flood Control (NI)	60	1	NEW
21	Aitch Group	54	1	NEW
22	FK Construction Services	44	1	NEW
23	Sisk	41	2	-20
24	Grove Construction	40	2	NEW
25	Red Construction Group	39	1	NEW
26	HBC Construction Group	38	2	NEW
27	Magrock	37	1	8
28	Trinity Homes UK	37	1	NEW
29	Lutley Group	33	1	NEW
30	Equans Sci Tech	31	1	1
31	Vistry	31	1	NEW
32	Urban Fox Networks	30	1	NEW
33	Synergize	27	1	NEW
34	McConnell	27	1	NEW
35	One Group Construction	27	2	NEW
36	Headoffice3	26	2	NEW
37	C.Wynne & Sons	24	1	NEW
38	Kind & Company	24	1	NEW
39	Conlon Construction	22	1	NEW
40	Hill Group	21	1	NEW
41	Duncan Cameron Huchinson	21	1	NEW
42	John F Hunt Regeneration	20	1	NEW
43	Urbanise	20	1	NEW
44	LNT Construction	19	2	NEW
45	Rothwell Plumbing Services	16	2	NEW
46	Interclass	16	1	NEW
47	Make One Group	15	1	NEW
48	Tilbury Douglas	15	1	NEW
49	Amiri Group	15	1	NEW
50	Short Construction	15	1	NEW

★ Change in ranking since the previous period

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Top 50 Clients

August 2025 to July 2026

	Clients	#	£m	★
1	Department of Health	224	8585	3
2	United Utilities Group	14	3475	-1
3	Department for Education	78	1553	2
4	Univ. Dest. and Experiences	3	1261	NEW
5	East West Railway Company	1	1250	NEW
6	Comcast	1	1250	NEW
7	Bedford Borough Council	1	1250	NEW
8	Mitsui Fudosan	1	1100	-5
9	Ministry of Defence	29	809	-3
10	States of Jersey	2	710	NEW
11	Ministry of Justice	35	591	-4
12	Cadent Gas	1	500	-3
13	Network Rail	24	471	-3
14	Therme Group UK	1	450	NEW
15	The City of Cardiff Council	13	360	NEW
16	Hampshire County Council	30	333	-5
17	Manby BGE	1	300	-5
18	R&F Properties QS	1	300	-5
19	Dev. Control Plann. Thurrock	5	296	-5
20	Land Securities Group	4	285	-5
21	Battersea Project Phase 3	1	280	-5
22	Prologis UK	5	278	-4
23	Department for Transport	26	269	-6
24	Hertfordshire CC.	5	258	-5
25	Derwent London	3	256	NEW
26	Tribus Clean Energy	1	250	-6
27	Telehouse International	1	250	-6
28	Leeds City Council	21	247	-2
29	Kemble Water	21	235	0
30	Westminster City Council	5	230	-8
31	Sanctuary Housing	2	228	-8
32	Tower Hamlets Council	4	225	-8
33	Legal & General Group	9	221	1
34	Northern Ireland Executive	2	211	-9
35	Herefordshire Council	9	210	-8
36	Great Portland Estates	5	207	-8
37	Environment Agency	23	205	4
38	Greater London Authority	8	205	2
39	Heidelberg Materials	1	203	-9
40	Southend On Sea BC.	2	203	-9
41	Fusion Students	3	200	-9
42	Immersa	1	200	-9
43	London Bor. of Hackney	10	192	NEW
44	RB of Windsor & Maidenhead	3	188	NEW
45	Cole Waterhouse	1	185	-9
46	Barclays Bank	6	184	-9
47	London Borough of Haringey	20	180	-2
48	Welsh Government	19	180	NEW
49	Lidl UK	44	179	NEW
50	British Land	4	178	-11

July 2026

	Clients	#	£m	★
1	Department of Health	23	7703	9
2	Derwent London Plc	1	200	NEW
3	Department for Education	4	173	15
4	London Borough of Hackney	2	155	NEW
5	St Martins Property Corp.	1	150	NEW
6	Croudace Homes	1	127	NEW
7	Rolls-Royce Plc	1	100	NEW
8	Cheltenham Bor. Council	2	97	NEW
9	Unilever UK Central Resour.	1	80	NEW
10	London Bor. of Southwark	2	63	NEW
11	Northumbria University	1	61	NEW
12	South Derbyshire DC.	2	59	NEW
13	Ministry of Justice	3	59	-6
14	University of Hertfordshire	1	55	NEW
15	MHS Homes	1	54	NEW
16	Vistry Group PLC	1	53	NEW
17	The Guinness Partnership	1	53	NEW
18	Barratt Redrow Plc	2	53	NEW
19	Northumberland CC.	3	53	NEW
20	Cumberland Council	3	51	NEW
21	Test Valley Borough Council	1	50	NEW
22	Abstract Dev. Services	1	49	NEW
23	Orbit Group	1	48	NEW
24	Kemble Water Limited	1	48	NEW
25	Merchant Taylor Guildford	1	44	NEW
26	Lombard Fields Limited	1	39	NEW
27	The London Irish Centre	1	38	NEW
28	Wepa Uk Ltd	1	38	NEW
29	Cityheart Ltd	1	38	NEW
30	Linear Living	1	37	NEW
31	Eastbourne Bor. Council	1	37	NEW
32	Capital & Centric	1	33	NEW
33	Westmede Properties Ltd	2	32	NEW
34	The Accord Group	1	31	NEW
35	Homes England and Countryside Properties UK	1	31	NEW
36	Together Housing Group	2	29	NEW
37	Tribe Avonmouth House	1	27	NEW
38	Newington Causeway Inv.	1	27	NEW
39	Denbighshire CC.	1	24	NEW
40	London Bor. of Wandsworth	1	24	NEW
41	Network Rail Limited	3	22	NEW
42	Equity Housing Group	1	22	NEW
43	Wigan Met. Bor. Council	1	22	NEW
44	Orion Capital Managers	1	20	NEW
45	CyrusOne	1	20	NEW
46	Helical plc	1	20	NEW
47	State Street Bank & Trust Co	1	20	NEW
48	Tonic Weight Loss Surgery	1	20	NEW
49	North Lincolnshire Council	1	20	NEW
50	Y & Y Management Limited	1	20	NEW

★ Change in ranking since the previous period

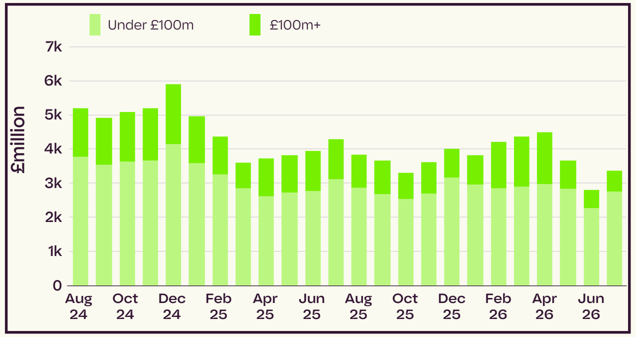
Housing

Overview

- **39% decrease** in project starts year-on-year.
- **60% increase** in main contract awards from last year.
- **22% decrease** in detailed planning approvals compared to 2025.

Residential activity weakened significantly during the period, with project starts and planning approvals both falling sharply against last year. Contract awards performed more strongly on a year ago, driven by growth in major schemes. Quarter on quarter performance, however, remained weak, suggesting ongoing pressure on near-term workloads.

Detailed Planning Approvals

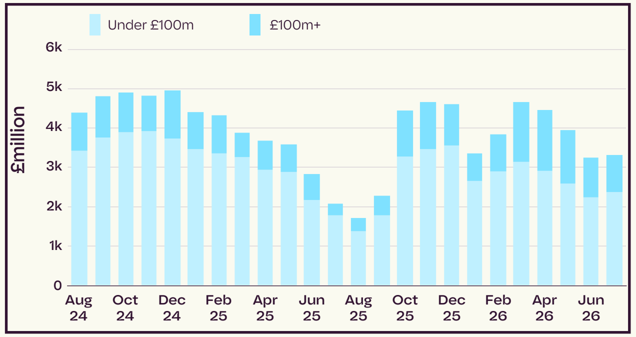


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	8,253	1,834	**10,087**
YoY	-12%	-48%	**-22%**
Prev. 3 months	-8%	-60%	**-25%**
Prev. 3 months (SA)	-100%		

Main Contract Awards

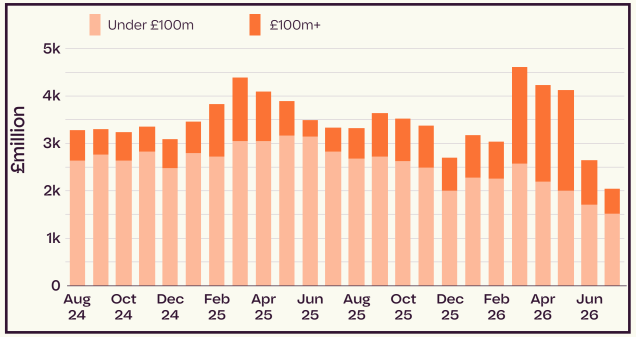


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	7,123	2,828	**9,951**
YoY	33%	219%	**60%**
Prev. 3 months	-19%	-39%	**-26%**
Prev. 3 months (SA)	-4%		

Housing Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	4,548	1,597	**6,145**
YoY	-46%	4%	**-39%**
Prev. 3 months	-31%	-74%	**-52%**
Prev. 3 months (SA)	-25%		

Housing

Types of projects started

Sub sector performance was weak, with all major residential categories declining against the previous year.

- Private Housing accounted for the largest share (40%), having decreased 52% year on year to total £2,434 million.
- Private Apartments fell 23% against the previous year, totalling £1,630 million.
- Social Sector Housing decreased 27% year on year to total £821 million.

Project Spotlight

Camley Street Regeneration Project

Detailed plans have been approved on the £250 million Camley Street new neighbourhood development in King's Cross. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q1 2028.

PROJECT ID: 25537056

IMAGE SOURCE: FCBS

Types of Housing Projects Started

Three months to August 2026

	£ million	Percentage
Private Apartments	1,630	**27%**
Elderly Persons Homes	0	**0%**
Private Housing	2,434	**40%**
Private Sheltered Housing	163	**3%**
Social Sector Sheltered Housing	65	**1%**
Social Sector Apartments	537	**9%**
Social Sector Housing	821	**13%**
Homes, Hostels Etc.	1	**0%**
Student Accommodation	492	**8%**
Total	6,145	**100%**

Housing League Tables

August 2025 to July 2026

Contractors	Projects	£m
Bloor Homes	61	2,172
Barratt Redrow	66	2,150
Persimmon	73	1,992
Taylor Wimpey	49	1,799
Vistry	28	1,157
Bellway	46	1,007
Hill	27	962
The Berkeley Group	8	859
Graham Constr.	5	778
Apollo Management	37	749

Clients	Projects	£m
Bloor Homes	65	2,215
Taylor Wimpey	67	2,055
Barratt Redrow	76	2,053
Persimmon Plc	82	1,819
Vistry	57	1,466
Bellway	51	1,156
The Guinness Prnts.	6	1,090
The Berkeley Group	12	980
Apollo Management	38	690
Keepmoat	20	469

Housing

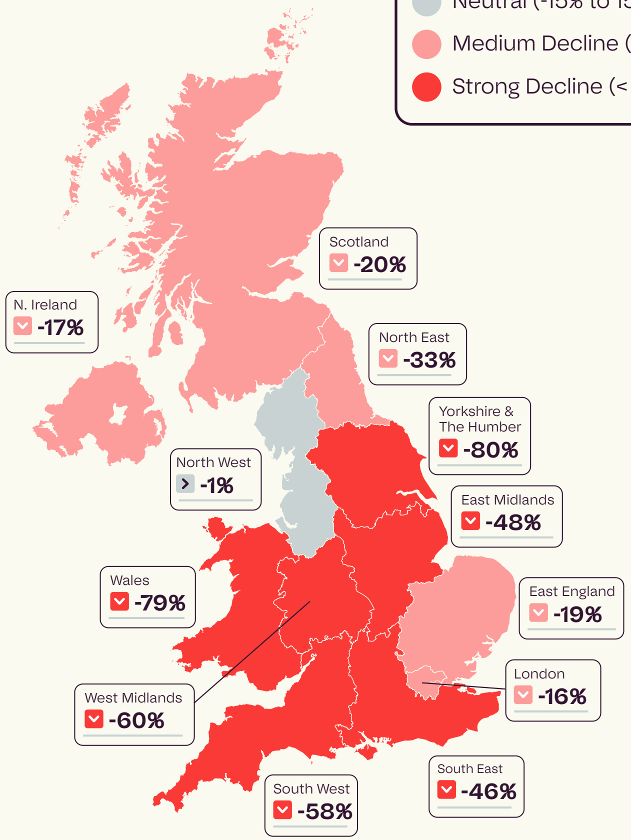
Regional

- London was the most active region despite a decrease on a year ago.
- Most regions experienced declines in activity.
- Wales experienced strong growth in planning approvals.

London led residential project starts at £1,250 million despite a 16% decline on a year ago. The North West followed, totalling £962 million and broadly matching last year's level with just a 1% decline. The South West, the West Midlands and Wales all recorded steep declines, highlighting widespread weakness across the sector.

Changes in Housing Starts

on a Year Earlier

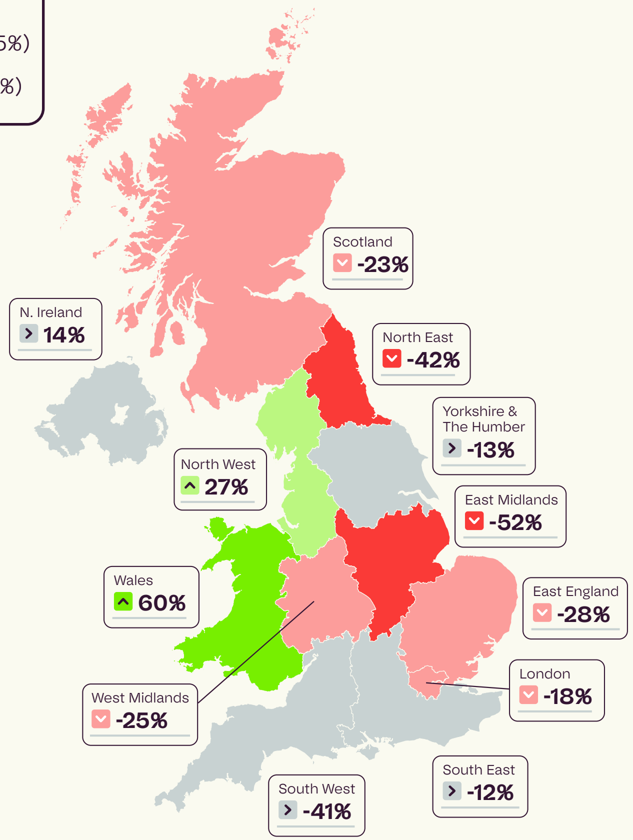


Growth or Decline

- 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



Industrial

Overview

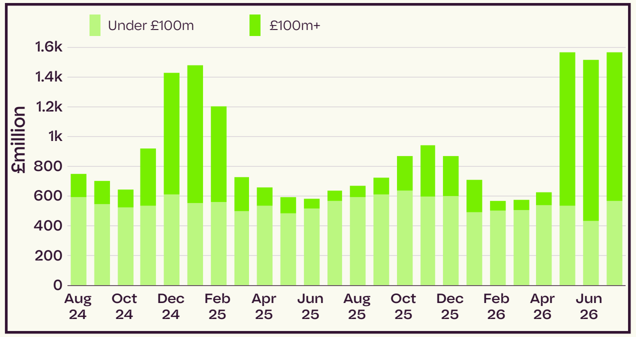
43% decrease in project starts year on year.

7% increase in main contract awards from last year.

147% increase in detailed planning approvals compared to 2025.

Industrial project starts remained weak compared with last year, although quarter on quarter performance improved significantly. Main contract awards also increased slightly on an annual basis, while detailed planning approvals surged due to a substantial rise in major schemes, strengthening the sector's pipeline considerably despite softer starting activity.

Detailed Planning Approvals

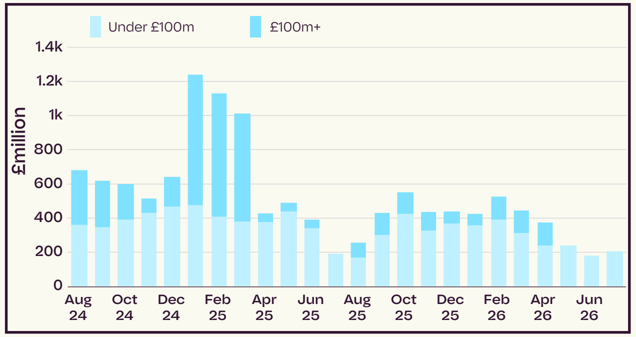


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,698	3,002	**4,700**
YoY	0%	1401%	**147%**
Prev. 3 months	5%	1076%	**151%**
Prev. 3 months (SA)	-100%		

Main Contract Awards

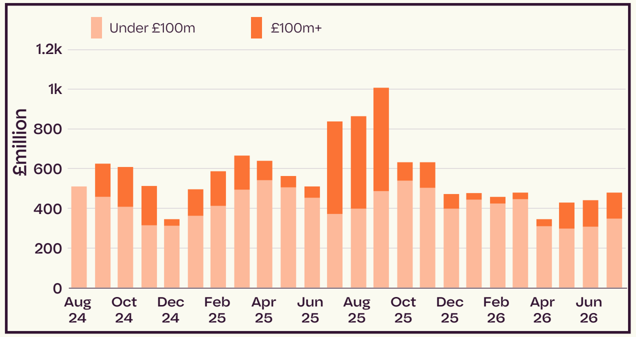


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	621	-	**621**
YoY	7%		**7%**
Prev. 3 months	-14%	-100%	**-45%**
Prev. 3 months (SA)	-15%		

Industrial Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,041	400	**1,441**
YoY	-6%	-71%	**-43%**
Prev. 3 months	12%	284%	**39%**
Prev. 3 months (SA)	30%		

Industrial

Types of projects started

Sub-sector performance was weak, with all three categories down on a year ago.

- Manufacturing accounted for the largest share (84%), despite having decreased 31% year on year to total £1,204 million.
- Warehousing & logistics fell 70% against the previous year, totalling £217 million.
- Other industrial projects decreased 65% year on year to total £20 million.

Project Spotlight

BAE Rochester Development

£220m

Detailed plans have been approved for the £220 million factory, office, and deep storage building at BAE Rochester. A main contractor is yet to be appointed on the scheme with works due to be completed in Q3 2027.

PROJECT ID: 21374953

IMAGE SOURCE: CASSIDY ASHTON ARCHITECTURE

Types of Industrial Projects Started

Three months to August 2026

	£ million	Percentage
Manufacturing	1,204	**84%**
Other Industrial	20	**1%**
Warehousing & Logistics	217	**15%**
Total	1,441	**100%**

Industrial League Tables

August 2025 to July 2026

Contractors	Projects	£m
Winvic	13	483
Glencar Constr.	10	247
Caddick	9	196
Benniman	6	190
MCS	10	180
TSL Projects	2	149
GMI Construction	7	127
The Barnfield Group	7	116
Magrock	8	116
Robertson Group	6	110

Clients	Projects	£m
Prologis	6	294
Sadel Group	1	161
DP World	3	141
Howden Joinery	1	100
Panattoni UK Dev.	5	97
Indurent	5	91
Amazon UK	2	89
Firethorn Trust	1	74
Pulpex	2	71
Cereal Partners UK	1	66

Industrial

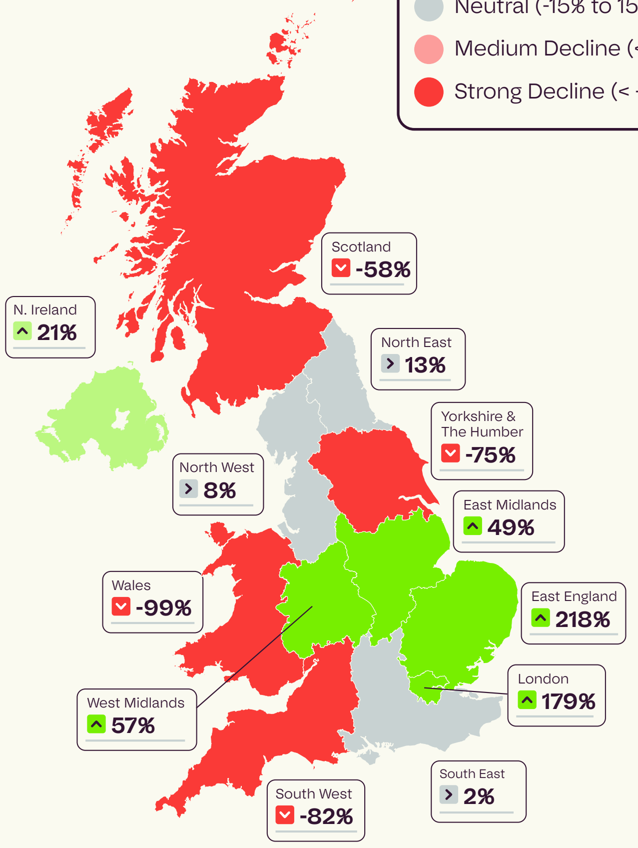
Regional

- Strong project start growth was recorded in the East of England, the West Midlands, the East Midlands and London.
- Several regions experienced steep declines, particularly Wales and the South West.
- Detailed planning approval performance was highly mixed across the UK.

The East of England was the most active region for industrial starts, rising 218% year on year to £465 million. The East and West Midlands also recorded strong growth, totalling £236 million and £183 million respectively. By contrast, Wales, Scotland and the South West experienced substantial declines from last year's levels.

Changes in Industrial Starts

on a Year Earlier

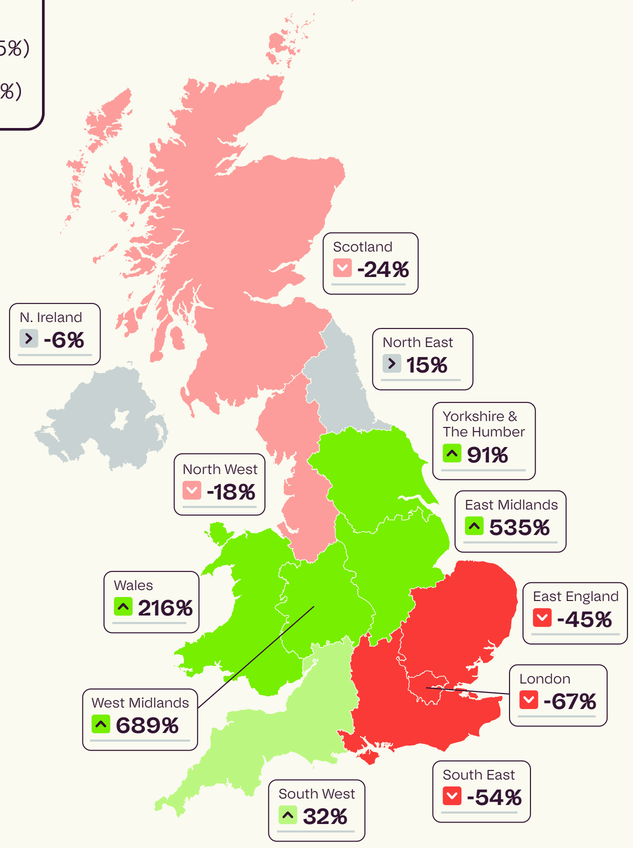


Growth or Decline

- 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



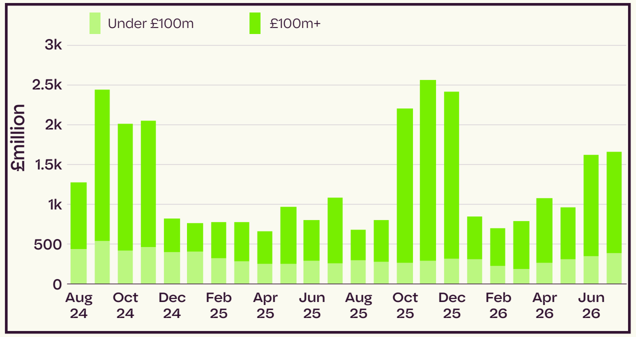
Offices

Overview

- **3% decrease** in project starts year on year.
- **9% decrease** in main contract awards from last year.
- **54% increase** in detailed planning approvals compared to a year ago.

The office sector experienced a mixed period. Project starts and contract awards both fell compared with last year and the previous three months, reflecting weaker near-term activity. More positively, detailed planning approvals increased strongly and rose against both a year ago and the previous quarter, indicating a healthier pipeline of future projects.

Detailed Planning Approvals

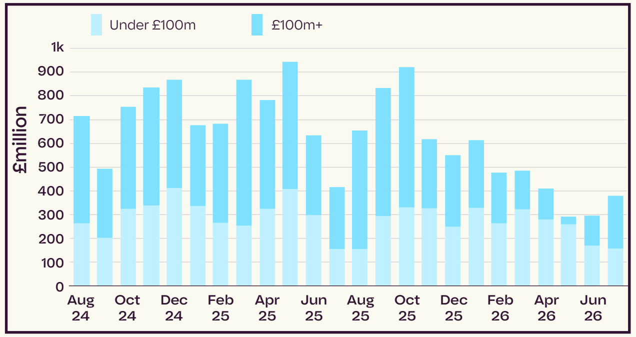


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,145	3,830	**4,975**
YoY	49%	55%	**54%**
Prev. 3 months	47%	56%	**54%**
Prev. 3 months (SA)	-100%		

Main Contract Awards

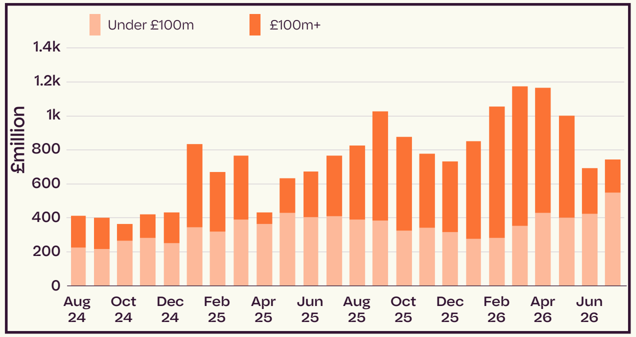


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	468	670	**1,138**
YoY	1%	-14%	**-9%**
Prev. 3 months	-44%	71%	**-7%**
Prev. 3 months (SA)	-29%		

Office Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,641	589	**2,230**
YoY	34%	-45%	**-3%**
Prev. 3 months	27%	-73%	**-36%**
Prev. 3 months (SA)	25%		

Offices

Types of projects started

Performance strengthened in most value bands, with only two declining year-on-year

- Project starts in the over £100 million value band totalled £589 million, despite a 45% decrease year on year.
- The £20 million to £50 million value band grew 18% year on year, totalling £627 million.
- The £50 million to £100 million value band increased 80% on a year ago to total £361 million.

Project Spotlight

SEGRO Park Premier Data Centre

Detailed plans have been approved for the £1 billion SEGRO Park Premier Data Centre development in Brent, London. Works are due to complete in Q1 2030, with a main contractor yet to be appointed on the scheme.

PROJECT ID: 25160156

IMAGE SOURCE: BUILDING DESIGN

Types of Office Projects Started

Three months to August 2026

	£ million	Percentage
Up to £5 million	144	**6%**
£5 million up to £10 million	256	**11%**
£10 million up to £20 million	253	**11%**
£20 million up to £50 million	627	**28%**
£50 million up to £100 million	361	**16%**
Over £100 million	589	**26%**
Total	2230	**100%**

Office League Tables

August 2025 to July 2026

Contractors	Projects	£m
Mace	4	1,540
Morgan Sindall	98	898
Skanska UK	2	555
McLaren	3	303
Newarthill	2	270
Flynn	1	250
Structure Tone	2	247
Bovis	2	210
Willmott Dixon	5	174
Kier	2	126

Clients	Projects	£m
Mitsui Fudosan UK	1	1,100
Land Securities	2	283
Telehouse Int.	1	250
Great Portland Est.	5	207
Barclays Bank	6	184
British Land	3	178
Great. London Auth.	5	153
St Martins Property	1	150
IJM Corporation	1	150
GIC	1	137

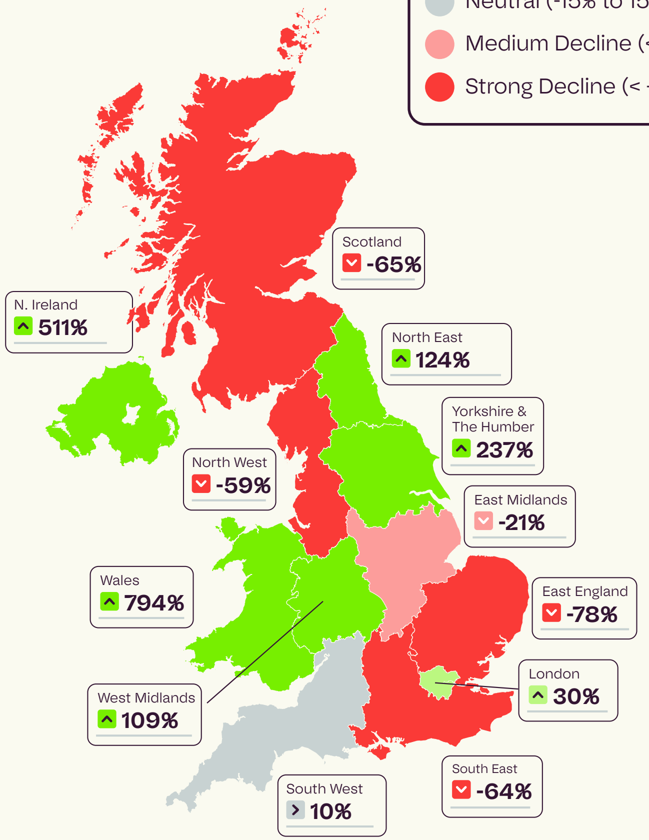
Offices

Regional

- Most regions experienced growth in both project starts and planning approvals.
- London continued to dominate office starts.
- Strong project start growth was recorded in the West Midlands, the North East and Wales.

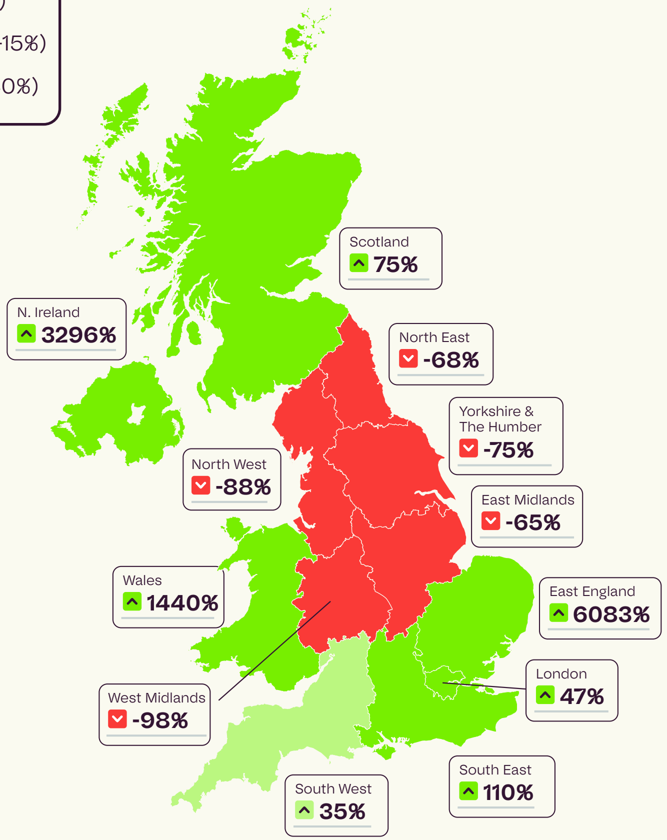
London accounted for the majority of office starts, totalling £1,531 million and rising 30% year on year. The West Midlands also performed strongly, increasing 109% to £168 million. Yorkshire & the Humber tripled on a year ago to total £92 million. In contrast, the South East, Scotland and the North West all recorded sharp declines, highlighting ongoing regional divergence within the sector.

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



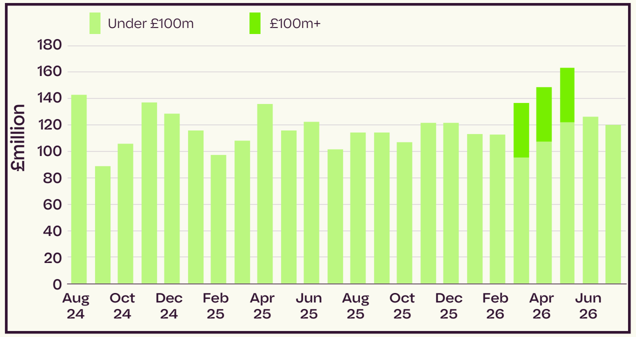
Retail

Overview

- **16% decrease** in project starts year on year.
- **72% increase** in main contract awards from last year.
- **18% increase** in detailed planning approvals compared to 2025.

The retail sector recorded a weak performance in project starts, which fell on both an annual and quarterly basis. Short-term pipeline activity also weakened, with contract awards and detailed planning approvals down on the previous three months. More positively, contract awards increased significantly compared with last year and planning approvals also strengthened.

Detailed Planning Approvals

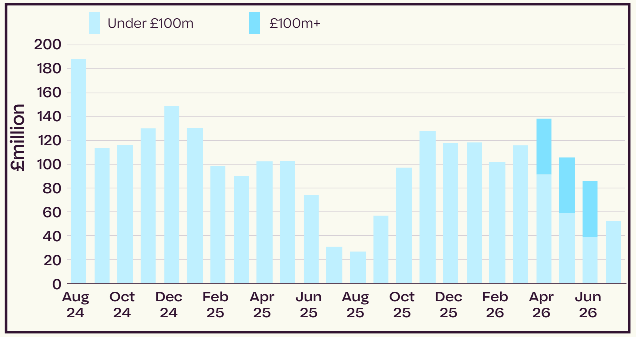


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	360	-	360
YoY	18%		18%
Prev. 3 months	12%	-100%	-19%
Prev. 3 months (SA)	-100%		

Main Contract Awards

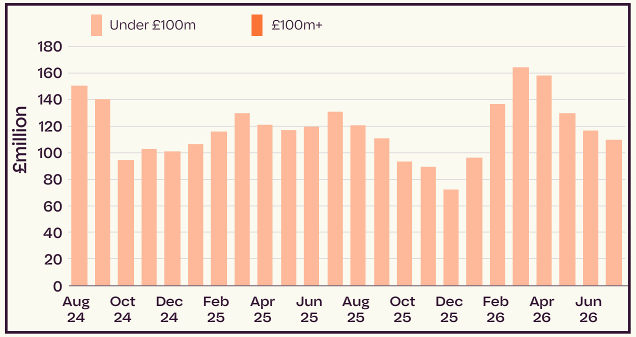


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	157	-	157
YoY	72%		72%
Prev. 3 months	-43%	-100%	-62%
Prev. 3 months (SA)	-36%		

Retail Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	329	-	329
YoY	-16%		-16%
Prev. 3 months	-31%		-31%
Prev. 3 months (SA)	-30%		

Retail

Types of projects started

Sub-sector performance was mixed, with half of the categories experiencing growth

- Supermarkets accounted for the largest share (61%), having increased 2% year-on-year to total £201 million.
- Petrol Filling Stations increased 7% year on year to total £17 million.
- Shops fell 36% against the previous year, totalling £94 million.

Project Spotlight

M&S Gun Cotton Way

Detailed plans have been approved for the £15.6 million M&S Gun Cotton Way development in Stowmarket, Suffolk. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 23366568

IMAGE SOURCE: HULME UPRIGHT LTD

Types of Retail Projects Started

Three months to August 2026

	£ million	Percentage
Other Retail	2	**1%**
Petrol Filling Stations	17	**5%**
Retail Warehousing	0	**0%**
Shopping Centres	15	**5%**
Shops	94	**29%**
Supermarkets	201	**61%**
Total	329	**100%**

Retail League Tables

August 2025 to July 2026

Contractors	Projects	£m
McLaren	1	140
DSP Construction	11	40
Vistry	1	40
McPhillips Wellington	1	37
HBC Construction	1	21
Willmott Dixon	1	20
The Barnfield Group	1	20
VINCI	1	20
Braithwaite	6	19
FDT Construction	4	18

Clients	Projects	£m
Lidl UK	38	171
Aldi	35	117
Buckminster Estate	1	70
Rioja Developments	1	70
McPhillips Wellington	1	37
T J Morris	11	37
Metrocentre Partnership	1	35
Sovereign Centros	1	35
Marks & Spencer Grp.	8	26
J Sainsbury	11	25

Retail

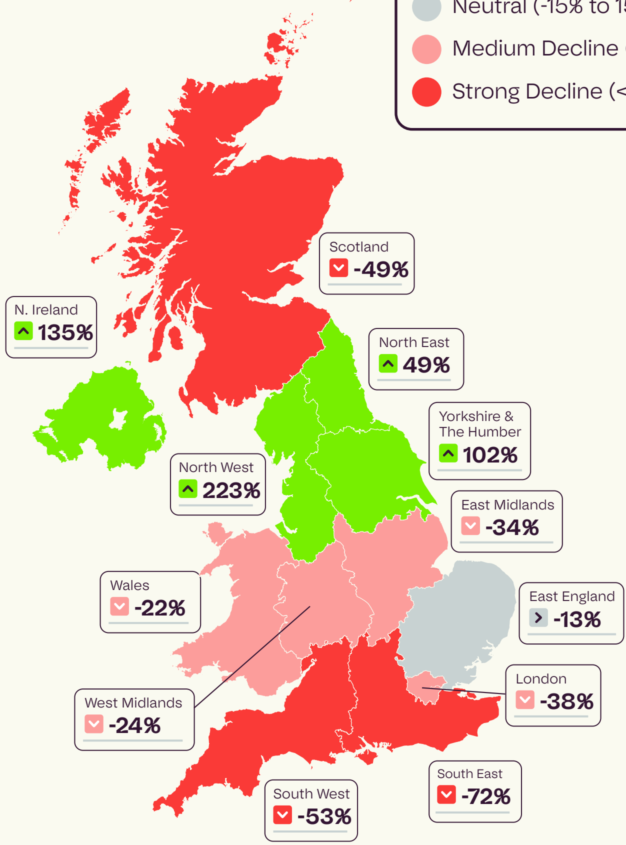
Regional

- Most regions experienced declines in project starts and detailed planning approvals.
- Strong project start growth was recorded in the North West, Yorkshire & the Humber and Northern Ireland.
- Approvals grew in the East of England, London, the South East, the South West, and Scotland.

The North West was the leading region for retail starts, rising 223% year on year to total £50 million. Yorkshire & the Humber and Northern Ireland also recorded strong growth. In contrast, the South East fell 72% on a year ago, while Scotland and the South West also experienced substantial declines.

Changes in Retail Starts

on a Year Earlier

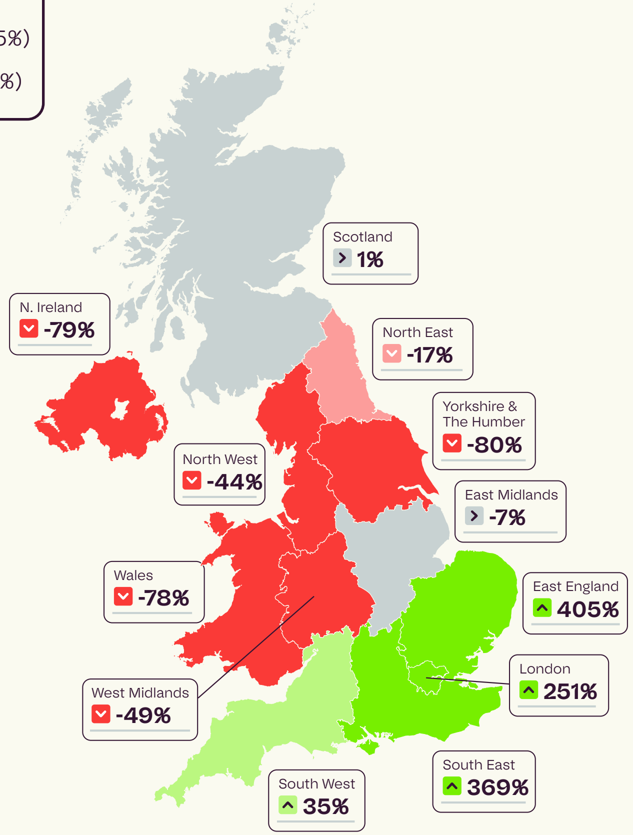


Growth or Decline

- 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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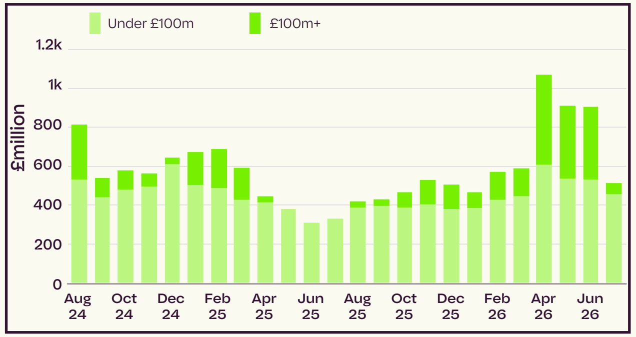
Hotel & Leisure

Overview

- **17% decrease** in project starts year-on-year.
- **787% increase** in main contract awards from last year.
- **56% increase** in detailed planning approvals compared to 2025.

Hotel & leisure activity weakened during the period, with project starts falling against both last year and the preceding quarter. In contrast, main contract awards surged both year-on-year and quarter-on-quarter due to a significant increase in major projects, while planning approvals also strengthened considerably on an annual basis. Despite softer starts, the pipeline remains robust thanks to strong awards and approvals activity.

Detailed Planning Approvals

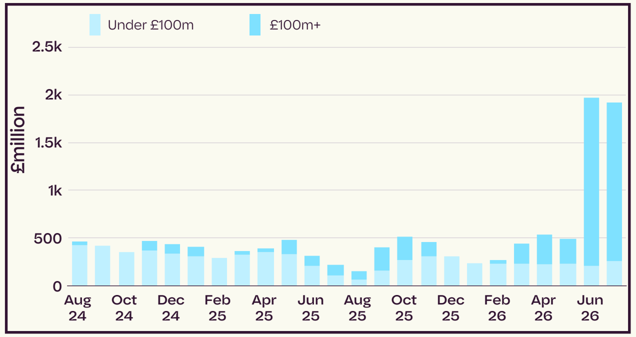


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,368	170	**1,538**
YoY	39%		**56%**
Prev. 3 months	-25%	-88%	**-52%**
Prev. 3 months (SA)	-100%		

Main Contract Awards

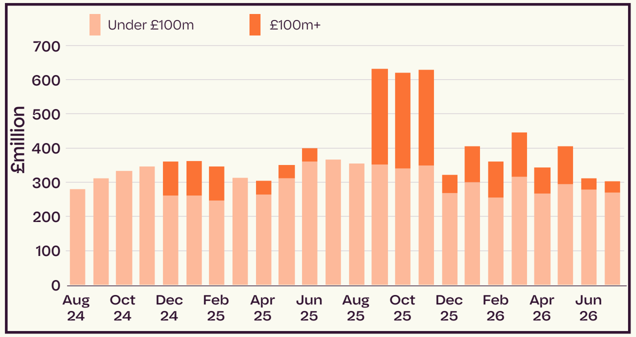


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	765	5,000	**5,765**
YoY	139%	1415%	**787%**
Prev. 3 months	15%	437%	**261%**
Prev. 3 months (SA)	7%		

Hotel & Leisure Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	809	100	**909**
YoY	-26%	-	**-17%**
Prev. 3 months	1%	-57%	**-12%**
Prev. 3 months (SA)	-4%		

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Hotel & Leisure

Types of projects started

Sub-sector performance was weak, with only two sectors increasing year-on-year.

- Sport Facilities accounted for the largest share (33%), having increased 24% year on year to total £295 million.
- Hotels & Guest Houses grew 8% against the previous year, totalling £239 million.
- Indoor Leisure Facilities fell 46% year on year to total £184 million.

Project Spotlight

Southwark Bridge Road Hotel

Plans have been approved for the Southwark Bridge Road Hotel development in London. A main contractor is yet to be appointed on the £100 million scheme, with works expected to be completed in Q4 2027.

PROJECT ID: 24248580

IMAGE SOURCE: BUCKLEY GRAY YEOMAN

Types of Hotel & Leisure Projects Started

Three months to August 2026

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	69	**8%**
Cinemas & Theatres	22	**2%**
Hotels, Guest Houses	239	**26%**
Indoor Leisure Facilities	184	**20%**
Other Hotel & Leisure	99	**11%**
Sport Facilities	295	**33%**
Total	909	**100%**

Hotel & Leisure League Tables

August 2025 to July 2026

Contractors	Projects	£m
Newarthill	6	1,313
Wates	4	1,092
Morgan Sindall	6	1,076
Winvic	1	1,000
Bovis	1	1,000
W. End (London) Prop.	1	400
Willmott Dixon	12	159
McLaren	2	153
Robertson	5	151
Royal BAM	2	114

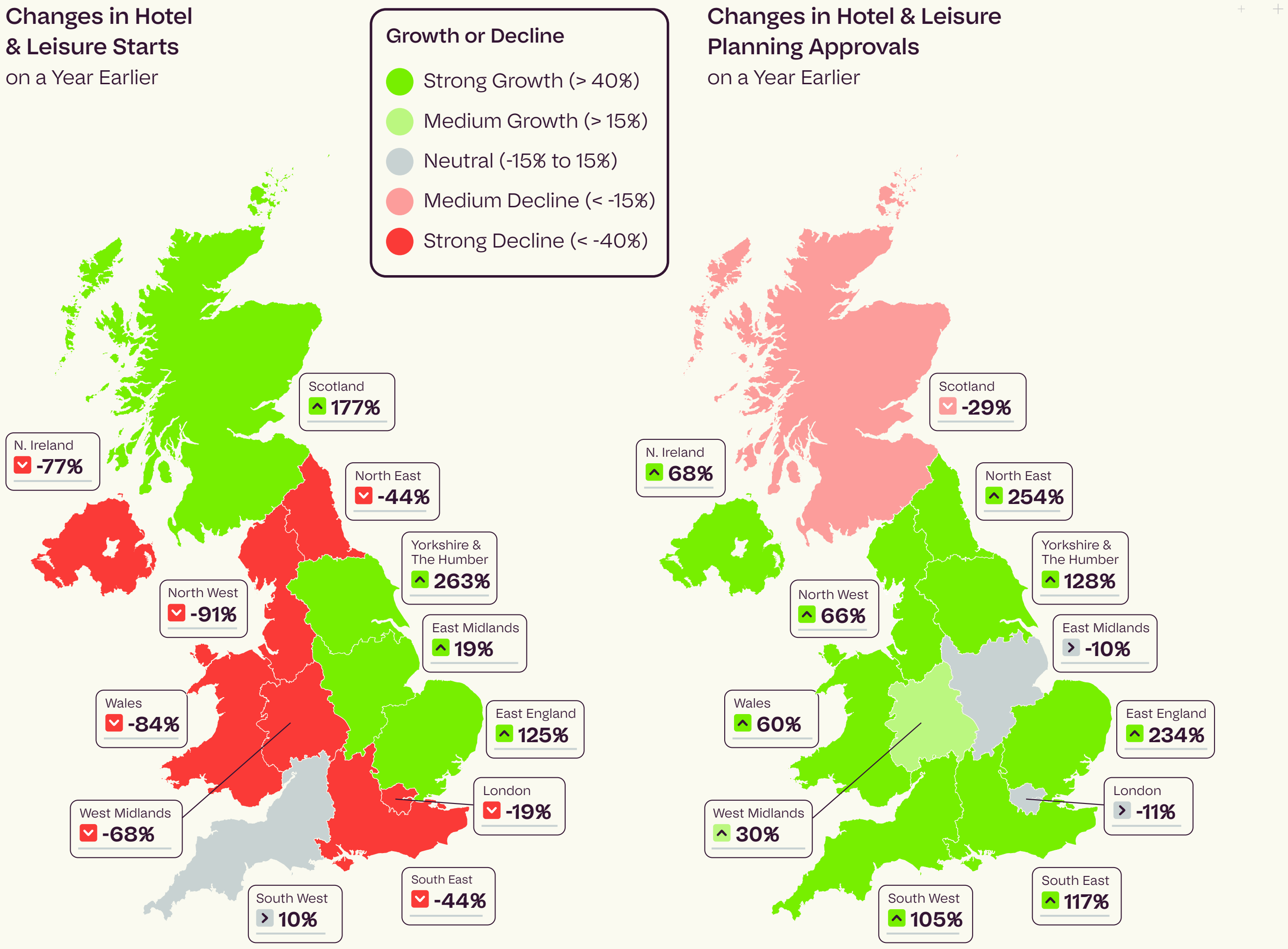
Clients	Projects	£m
Univ. Dest. & Exper.	1	1,250
Bedford BC.	1	1,250
Comcast	1	1,250
East West Railway	1	1,250
Therme UK	1	450
Cardiff CC.	3	281
Criterion Capital	2	135
W. End (London) Prop.	1	133
NEOS Hospitality	1	133
Alvarez & Marsal	1	131

Hotel & Leisure

Regional

- The East of England, Scotland and Yorkshire & the Humber experienced strong growth in project starts.
- Most regions recorded declines in project starts.
- Detailed planning approvals saw strong growth in most regions.

Yorkshire & the Humber led hotel & leisure starts at £178 million following a sharp increase on a year ago. Scotland also performed strongly, rising 177% to total £123 million, while the East of England jumped 125% to £145 million. In contrast, activity in the North West and Northern Ireland fell markedly against last year's levels.



Health

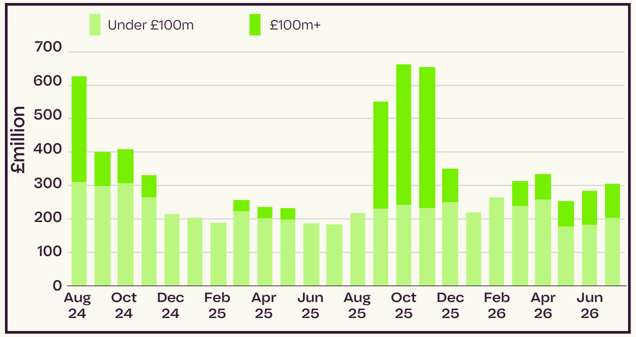
Overview

- **32% increase** in project starts against the previous year.
- **634% rise** in main contract awards year-on-year.
- **65% increase** in detailed planning approvals compared to the previous year.

The sector recorded a strong performance in terms of activity on site, with project starts increasing against the previous year. Growth in detailed planning approvals and a substantial rise in main contract awards indicates strengthening market confidence and a significantly expanded pipeline of future work. This points to improving workload prospects over the coming quarters.

The sector's outlook is further supported by major healthcare investment programmes, including the New Hospital Programme and wider NHS capital expenditure commitments. Collectively, these measures are expected to sustain project activity and provide continued support to healthcare construction workloads over the coming period.

Detailed Planning Approvals

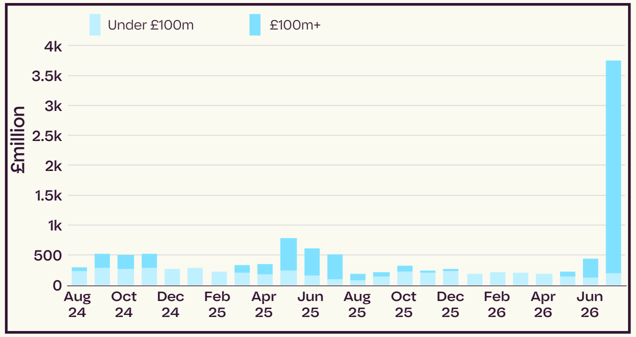


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	610	305	916
YoY	10%		65%
Prev. 3 months	-22%	36%	-9%
Prev. 3 months (SA)	-100%		

Main Contract Awards

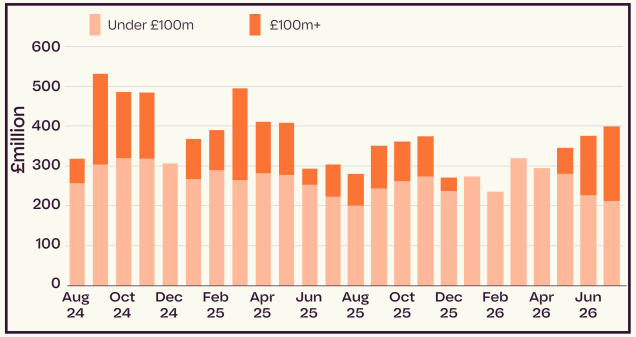


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	591	10,648	11,239
YoY	103%	759%	634%
Prev. 3 months	6%		1911%
Prev. 3 months (SA)	16%		

Health Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	638	562	1,200
YoY	-4%	132%	32%
Prev. 3 months	-28%		36%
Prev. 3 months (SA)	-1%		

Health

Types of projects started

- Hospitals accounted for over half of total starts, rising 75% against the previous year.
- Nursing Homes & Hospices accounted for almost a quarter of activity, increasing 44% year-on-year.
- Dental and primary care facilities recorded exceptionally strong growth, accounting for an 11% share of total starts.

Project Spotlight

Richmond Village Battersea Park

Detailed plans have been approved for a new retirement and care home at Richmond Village, Battersea Park, London. A main contractor is yet to be appointed on the £55 million scheme, with works expected to be completed in Q4 2028.

PROJECT ID: 25468140

IMAGE SOURCE: POZZONI

Types of Health Projects Started

Three months to August 2026

	£ million	Percentage
Day Centres	-	0%
Dental, Health & Veterinary Centres/ Surgeries	133	11%
Hospitals	657	55%
Nursing Homes & Hospices	291	24%
Other Health	118	10%
Total	1,200	100%

Health League Tables

August 2025 to July 2026

Contractors	Projects	£m
Skanska UK	2	1,950
Graham Constr.	2	1,507
Sacyr UK	1	1,500
Bouygues UK	3	999
Laing O'Rourke	2	923
Newarthill	1	650
VINCI	1	650
Dragados UK	1	648
Morgan Sindall	11	635
Kier	1	600

Clients	Projects	£m
Department of Health	203	8,501
States Of Jersey	1	710
John Innes Centre	1	125
The Sainsbury Lab.	1	125
Rolls-Royce	1	100
Kadans Science	1	100
Syngenta	1	94
Cheltenham BC.	1	92
Cleveland Clinic	1	81
Unilever UK Central	1	80

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Health

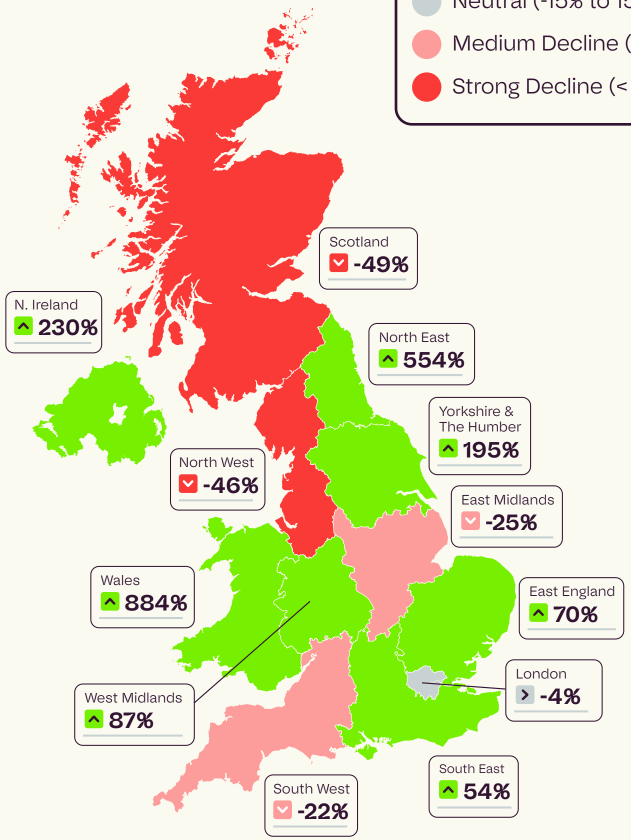
Regional

- The South East and Yorkshire & the Humber recorded the highest levels of activity for project starts.
- Wales, Yorkshire & the Humber and the North East all delivered strong year-on-year growth for project starts.
- Wales and Scotland recorded the highest level of approvals.

Regional performance was led by the South East, which accounted for £321 million of project starts, representing around 27% of the sector total. Yorkshire & the Humber also experienced a strong period, with starts rising 195% against the previous year to total £285 million.

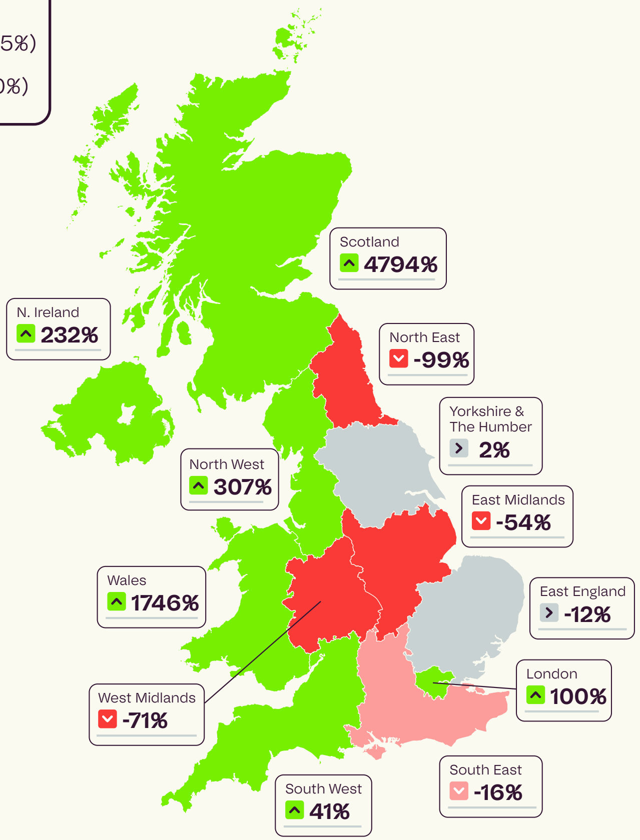
Wales was the most active region for approvals, accounting for £183 million and recording growth of 1,746% against the previous year. Scotland accounted for the second largest share of approvals at £139 million, supported by exceptionally strong annual growth.

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

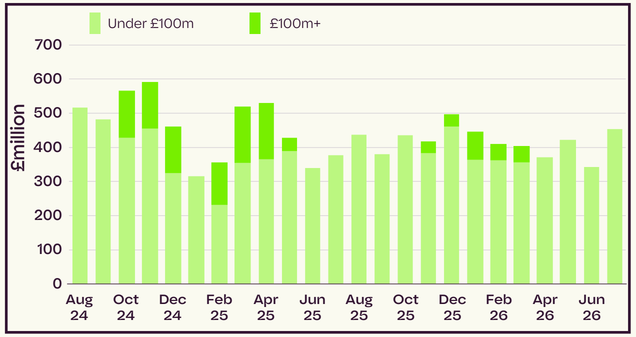
Overview

- **44% decline** in project starts against the previous year.
- **204% rise** in main contract awards year-on-year.
- **20% increase** in detailed planning approvals compared to the previous year.

Education sector activity weakened significantly in terms of starts, although both contract awards and planning approvals recorded growth against the previous year. The reduction in on-site activity contrasts with improving pipeline indicators, suggesting a more favourable outlook for future workloads.

Looking ahead, the sector's prospects remain favourable. Ongoing policy commitments to upgrading the existing school estate, together with major initiatives such as the Schools Rebuilding Programme, are set to provide underlying support to activity levels and sustain workload growth across the education sector in the future.

Detailed Planning Approvals

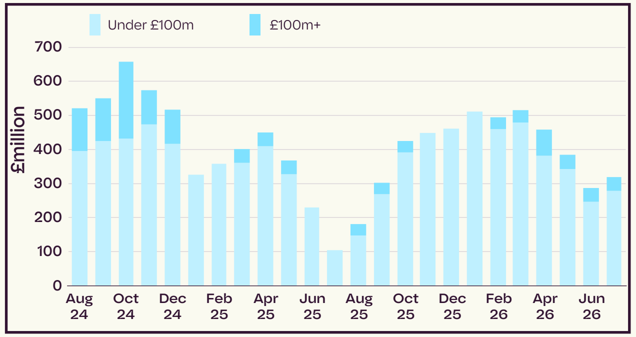


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,360	-	**1,360**
YoY	20%		**20%**
Prev. 3 months	22%		**22%**
Prev. 3 months (SA)	-100%		

Main Contract Awards

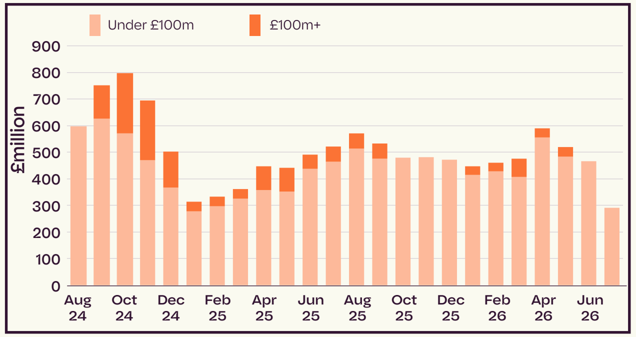


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	838	120	**958**
YoY	166%		**204%**
Prev. 3 months	-27%	-48%	**-30%**
Prev. 3 months (SA)	-12%		

Education Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	872	-	**872**
YoY	-37%	-100%	**-44%**
Prev. 3 months	-48%	-100%	**-51%**
Prev. 3 months (SA)	-42%		

Glenigan
A Hubexo Product

Education

Types of projects started

- Schools dominated activity, accounting for almost four-fifths of total project starts.
- University projects represented the second largest area of activity despite a modest year-on-year decline.
- College projects recorded a substantial decline from the previous year, limiting their share of total starts.

Project Spotlight

Brookleigh Primary School

Plans have been approved for Brookleigh Primary School in Burgess Hill, West Sussex. A main contractor is yet to be appointed on the £60.9 million scheme, with works due to complete in Q1 2029.

PROJECT ID: 26320225

IMAGE SOURCE: HOMES ENGLAND

Types of Education Projects Started

Three months to August 2026

	£ million	Percentage
Colleges	60	**7%**
Other Education	12	**1%**
Schools	686	**79%**
Universities	114	**13%**
Total	872	**100%**

Education League Tables

August 2025 to July 2026

Contractors	Projects	£m
Bowmer & Kirkland	15	560
Willmott Dixon	34	535
Royal BAM	13	473
Morgan Sindall	32	420
Kier	18	417
Robertson Group	7	273
Graham Constr.	5	237
Galliford Try	17	211
Tilbury Douglas	15	194
Wates Group	2	136

Clients	Projects	£m
Dep. for Education	80	1,562
London Met. Univ.	2	126
Aberdeen CC.	3	113
University of London	3	104
Univ. of Portsmouth	3	101
Univ. of Herts.	2	70
Northumbria Univ.	3	69
Univ. of Edinburgh	3	66
WEPco	2	57
Suffolk CC.	3	55

Education

Regional

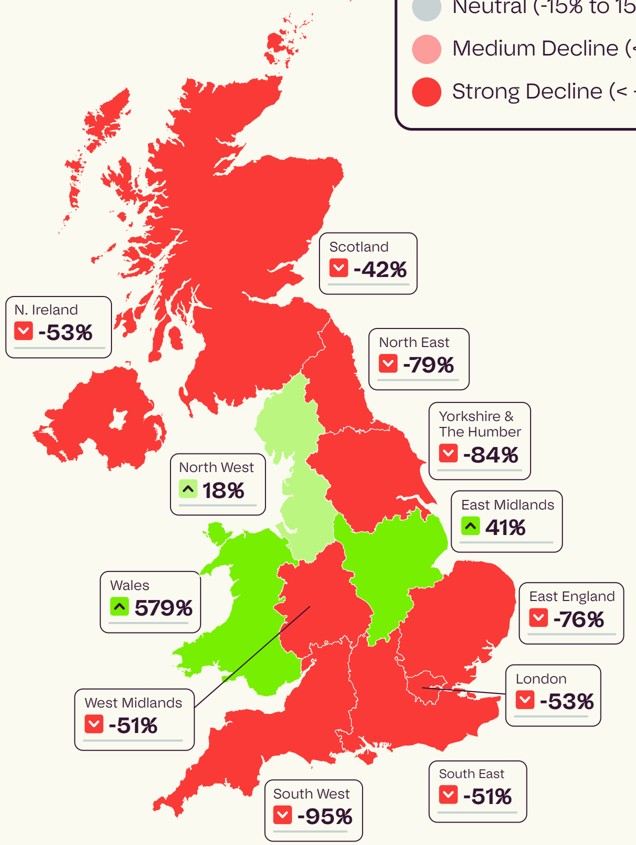
- Scotland was the most active area for project starts.
- Wales and the East Midlands recorded strong growth from a lower base.
- The South East accounted for the largest share of approvals.

Scotland, at £154 million, accounted for the largest share of sector starts despite activity remaining below the previous year. Wales experienced the strongest growth, rising 579% year-on-year to total £132 million, while the East Midlands also recorded stronger activity than a year earlier.

The South East accounted for the largest share of sector approvals, totalling £236 million and rising 130% against the previous year. The East of England was the second largest approvals market at £197 million, while Northern Ireland recorded the strongest annual growth, increasing 1,047%.

Changes in Education Starts

on a Year Earlier

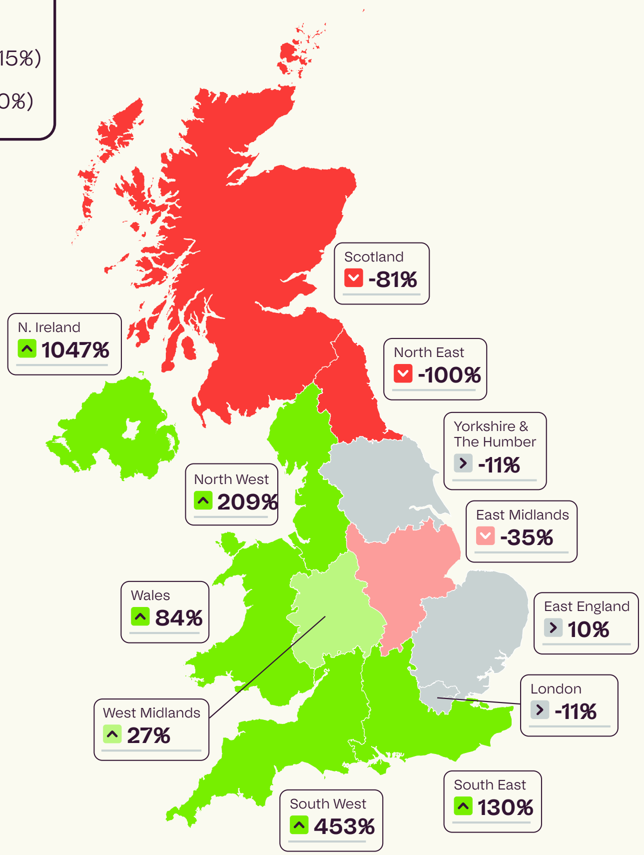


Growth or Decline

- 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



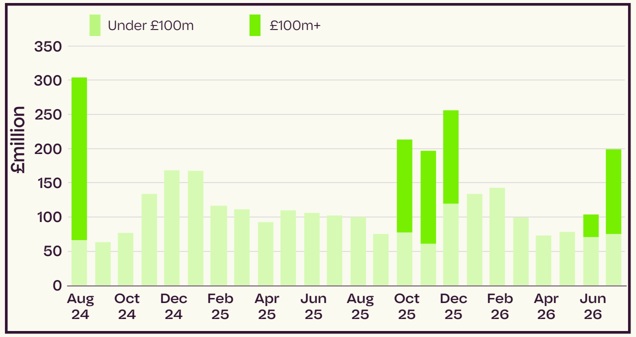
Community & Amenity

Overview

- **34% decrease** in project starts year-on-year.
- **182% increase** in main contract awards from last year.
- **95% increase** in detailed planning approvals compared to 2025.

Community & amenity activity remained weaker than last year at the project start stage but strengthened slightly in the last three months. However, both contract awards and planning approvals experienced substantial growth against both periods. Growth in contract awards was exclusively driven by underlying projects, while approvals were boosted by major schemes.

Detailed Planning Approvals

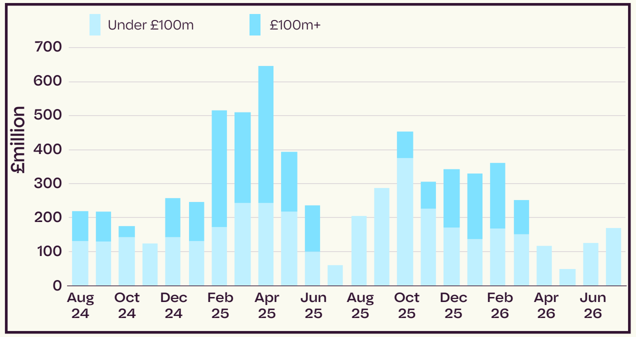


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	226	371	**597**
YoY	-26%		**95%**
Prev. 3 months	3%		**173%**
Prev. 3 months (SA)	-100%		

Main Contract Awards

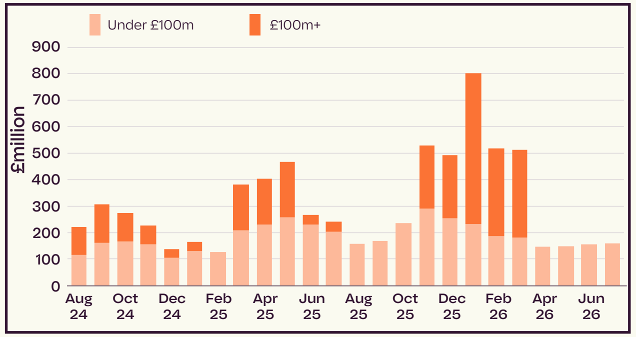


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	507	-	**507**
YoY	182%		**182%**
Prev. 3 months	45%		**45%**
Prev. 3 months (SA)	94%		

Community & Amenity Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	478	-	**478**
YoY	-22%	-100%	**-34%**
Prev. 3 months	8%		**8%**
Prev. 3 months (SA)	18%		

Community & Amenity

Types of projects started

Sub-sector performance was weak, with growth concentrated in blue light and military projects.

- Blue light projects accounted for the largest share (31%), having grown 89% year on year to total £150 million.
- Military projects increased 466% on a year ago to total £126 million.
- Prison projects fell 22% year-on-year to total £126 million.

Project Spotlight

Royal Hillsborough-Public Realm

Detailed plans have been approved for the Royal Hillsborough-Public Realm village centre alterations. A main contractor is yet to be appointed on the £25 million development, with works due to be completed in Q1 2028.

PROJECT ID: 22398276

IMAGE SOURCE: THE PAUL HOGARTH COMPANY

Types of Community & Amenity Projects Started

Three months to August 2026

	£ million	Percentage
Blue Light	150	31%
Government Buildings	31	6%
Law Courts	-	0%
Local Facilities	33	7%
Military	126	26%
Places of Worship	12	3%
Prisons	126	26%
Total	478	100%

Community & Amenity League Tables

August 2025 to July 2026

Contractors	Projects	£m
Corrigenda	2	316
Bowmer & Kirkland	7	237
Morgan Sindall	10	115
Willmott Dixon	8	113
Galliford Try	4	103
Wates	13	96
Kier	4	95
Graham Constr.	2	56
Reds10 (UK)	1	36
Laing O'Rourke	2	29

Clients	Projects	£m
Ministry of Defence	19	777
Ministry of Justice	30	542
Hampshire CC.	1	300
Home Office	40	109
Liverpool City Auth.	2	65
UK Parliament	1	59
The Guinness Prtns.	1	53
Church Of JCoLDS	1	48
Reuben Brothers	1	46
HMRC	1	46

Community & Amenity

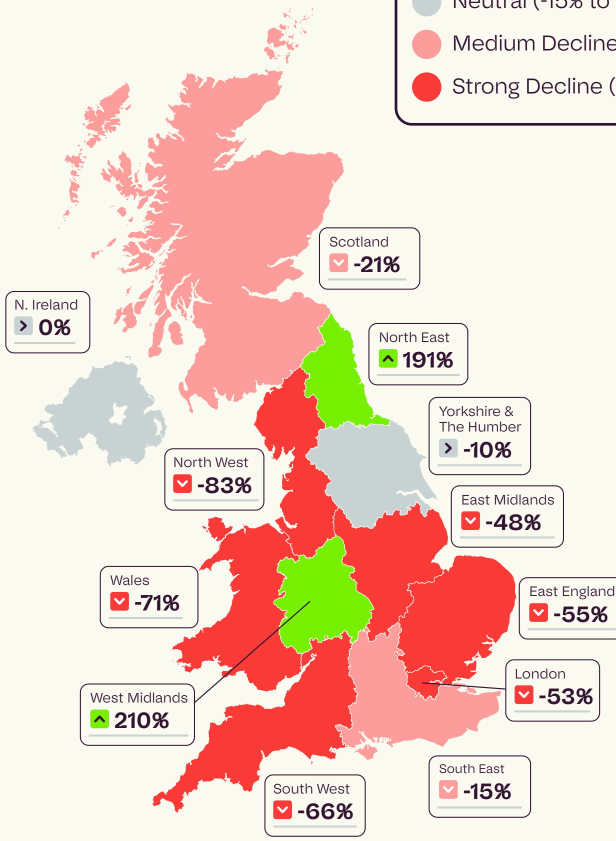
Regional

- Strong growth in project starts was recorded in the West Midlands and the North East.
- Most regions experienced declines in projects starting on site compared with last year.
- Performance in detailed planning approvals was mixed.

London was the most active region for community & amenity starts at £105 million despite a 53% decline on a year ago. The West Midlands grew strongly to £88 million, while the North East increased 191% to total £33 million. Elsewhere, activity weakened considerably across much of the UK, particularly in the North West, the East Midlands and the South West.

Changes in Community & Amenity Starts

on a Year Earlier

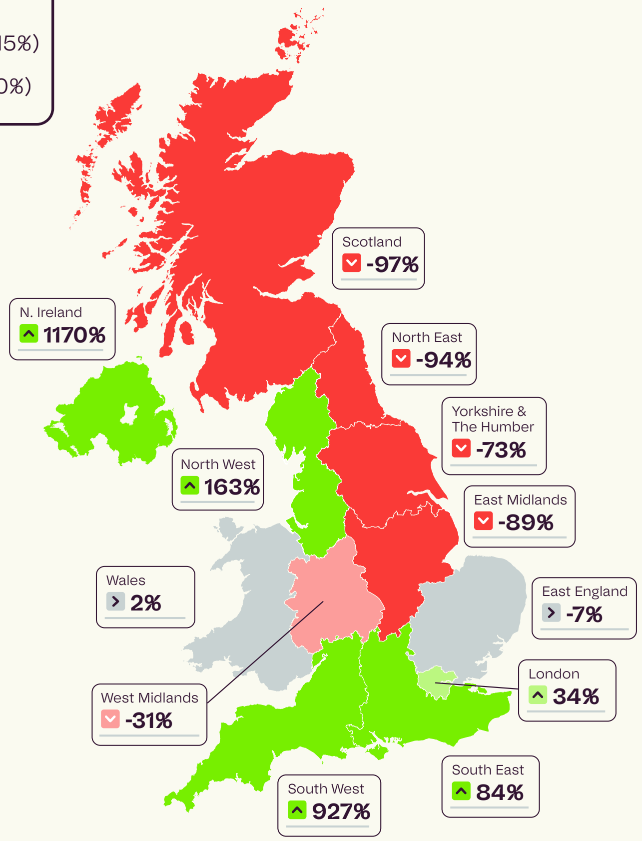


Growth or Decline

- 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

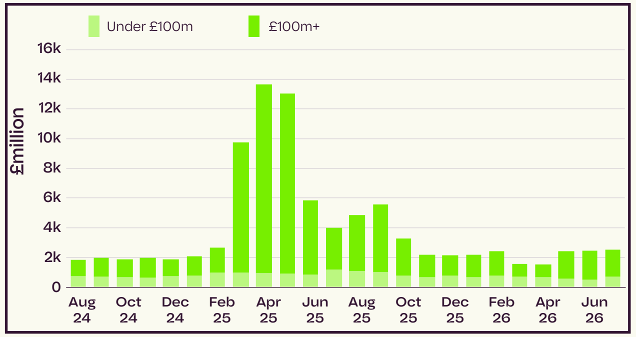
Overview

- **171% increase** in project starts against the previous year.
- **85% rise** in main contract awards year-on-year.
- **37% fall** in detailed planning approvals compared to the previous year.

Civil engineering activity strengthened significantly, with project starts and contract awards both recording strong increases against the previous year. While planning approvals declined, the substantial uplift in projects commencing on site suggests a marked improvement in current activity levels across the sector.

The wider outlook for the sector remains supported by planned investment across transport, energy, utilities and environmental infrastructure. Rising expenditure on strategic infrastructure and net-zero related projects is expected to underpin future workloads despite softer approvals activity.

Detailed Planning Approvals

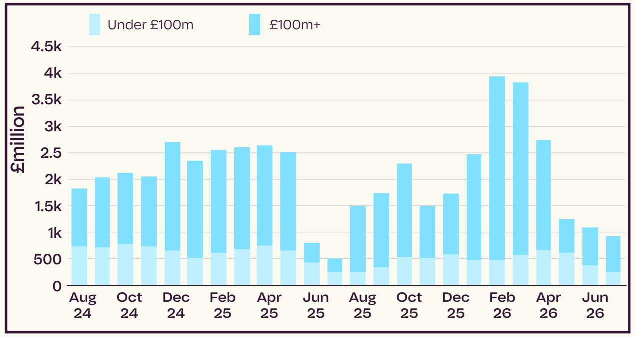


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	2,076	5,499	**7,574**
YoY	-42%	-34%	**-37%**
Prev. 3 months	6%	108%	**65%**
Prev. 3 months (SA)	-100%		

Main Contract Awards

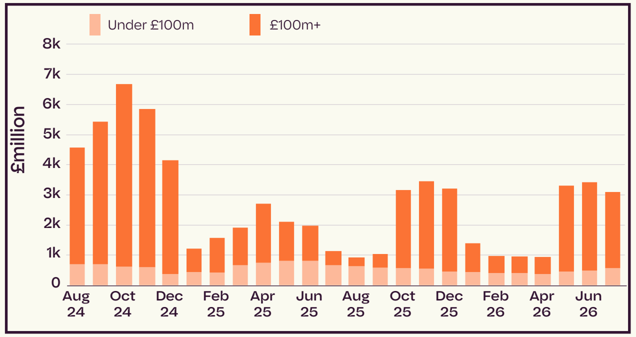


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	745	2,013	**2,758**
YoY	0%	171%	**85%**
Prev. 3 months	-62%	-68%	**-66%**
Prev. 3 months (SA)	-36%		

Civil Engineering Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,712	7,573	**9,285**
YoY	-15%	440%	**171%**
Prev. 3 months	53%	345%	**229%**
Prev. 3 months (SA)	34%		

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Civil Engineering

Types of projects started

- Roads projects recorded strong growth and accounted for almost 30% of activity.
- Harbour/Ports projects also performed strongly, contributing to the overall increase in sector starts.

Project Spotlight

Liverpool Baltic Station

Detailed plans have been approved for the £100 million Liverpool Baltic Station development. A main contractor is yet to be appointed on the scheme, with works expected to complete in Q1 2029.

PROJECT ID: 22445719

IMAGE SOURCE: RAILADVENT

Types of Civil Engineering Projects Started

Three months to August 2026

	£ million	Percentage
Airports	1	**0%**
Other Civils	5,332	**57%**
Rail	250	**3%**
Roads	2,627	**28%**
Harbours/Ports	368	**4%**
Energy	624	**7%**
Water Industry	78	**1%**
Waste	4	**0%**
Total	9,285	**100%**

Civil Engineering League Tables

August 2025 to July 2026

Contractors	Projects	£m
STRABAG	7	2,437
Vital Energi Utilities	11	1,401
Kier	65	534
Marlborough Surfac.	5	519
Balfour Beatty	14	510
Worley Europe	1	500
Equitix	1	498
Galliford Try	80	359
M Group Services	7	349
Envision Energy	1	310

Clients	Projects	£m
United Utilities	14	3,475
Trafford Met. BC	1	1,330
Cadent Gas	1	500
Network Rail	22	376
Manby BGE	1	300
Statkraft UK	3	255
Tribus Clean Energy	1	250
Hertfordshire CC.	2	241
Department for Transport	21	235
Kemble Water	21	235

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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

Civil Engineering

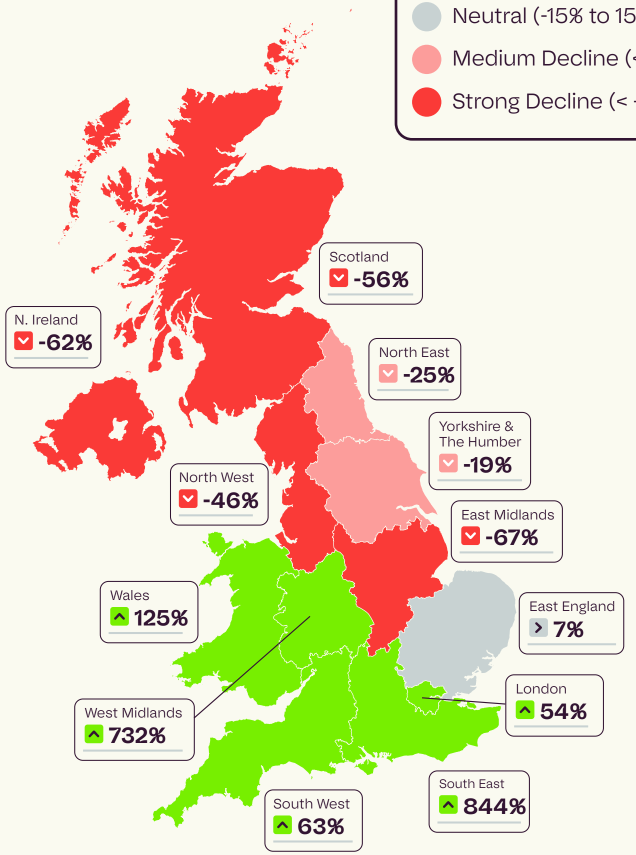
Regional

- The South East was the dominant region for project-start activity.
- The West Midlands and the South West also delivered strong growth for project starts.
- The North East accounted for the largest share of sector approvals.

The South East accounted for the largest share of sector starts, rising 844% against the previous year to total £6,009 million and accounting for almost two-thirds of total activity. The West Midlands also experienced substantial growth, with starts increasing 732% to £1,241 million.

The North East accounted for the largest share of sector approvals, totalling £3,069 million and rising 688% against the previous year. The East Midlands also experienced strong growth, increasing 159% to £1,141 million and representing a significant proportion of the approvals pipeline.

Changes in Civil Engineering Starts
on a Year Earlier



Growth or Decline

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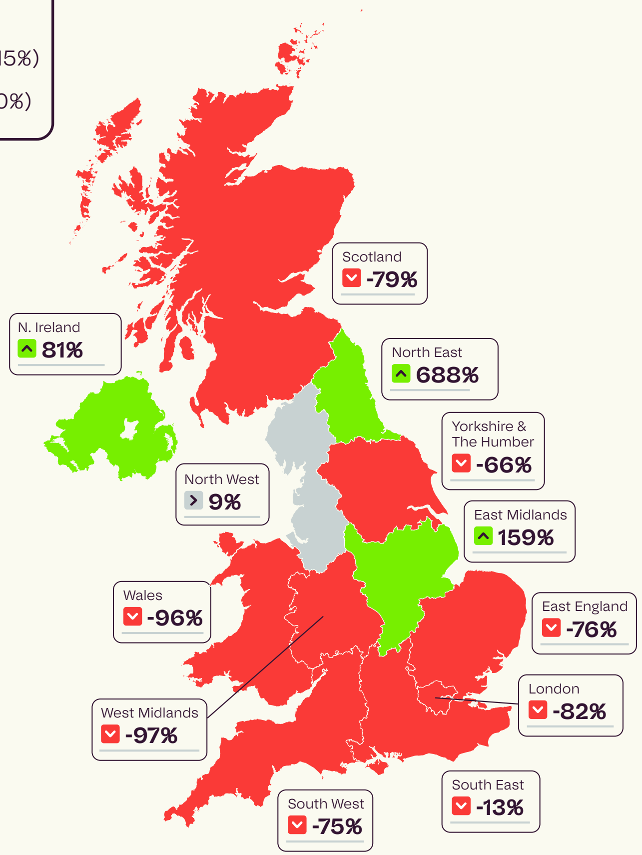
Changes in Civil Engineering Planning Approvals
on a Year Earlier



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