



Glenigan

A Hubexo Product

Construction Review

Reflecting activity to the end of November 2025

December 2025

- ✓ 9% decrease in detailed planning approvals against the preceding three months
- ✓ 10% decline in main contract awards against the preceding three months
- ▲ 14% rise in project starts against the preceding three months



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Civil Engineering

Expert insights

to drive your construction strategy forward

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

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

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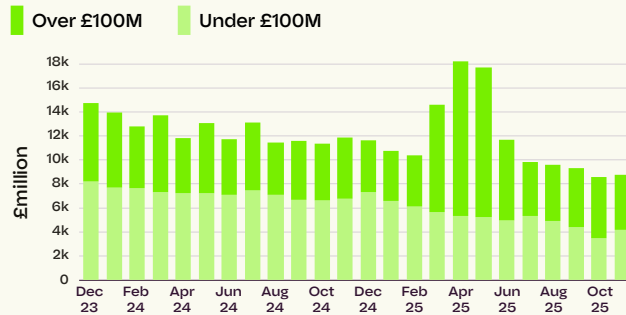
Executive Summary

- ✓ **26% decline** in detailed planning approvals against the previous year
- ✓ **26% decrease** in main contract awards against the previous year
- ✓ **29% decrease** in project starts against the previous year

The latest data shows a slowdown in UK construction activity. Project starts, contract awards and planning approvals fell year on year, although starts rose over the past three months while contract awards and approvals declined.

The November 2025 UK Budget produced a mixed outlook for the sector. Despite over £120 billion committed to infrastructure across the Parliament, including roads, rail, energy and regional schemes, near-term performance remains weak as minimum wage increases raise labour costs.

Detailed Planning Approvals

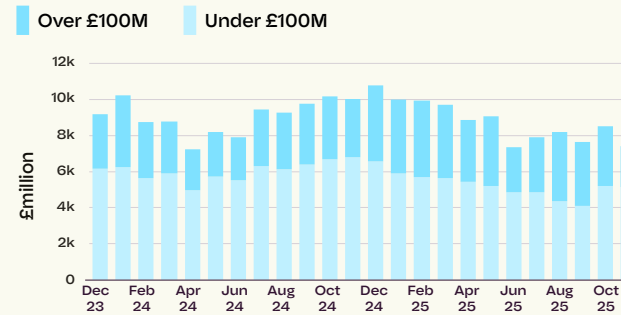


Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£million	12,508	13,758	26,266
YoY	-38%	-10%	-26%
Prev. 3 months	-15%	-2%	-9%
Prev. 3 months (SA)	-15%		

Source: Glenigan. Three month average

Main Contract Awards

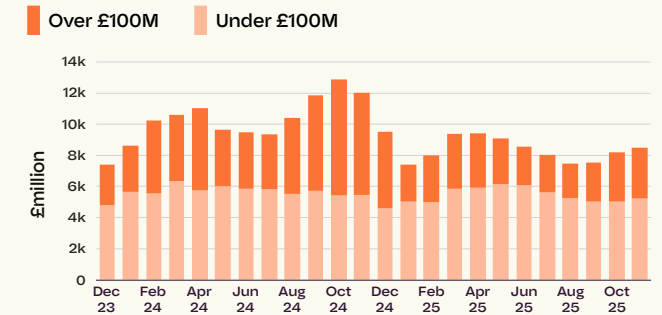


Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	15,402	6,813	22,215
YoY	-25%	-30%	-26%
Prev. 3 months	17%	-41%	-10%
Prev. 3 months (SA)	6%		

Source: Glenigan. Three month average

Starts



Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	15,669	9,818	25,487
YoY	-4%	-50%	-29%
Prev. 3 months	-1%	48%	14%
Prev. 3 months (SA)	3%		

Source: Glenigan. Three month average

Economic Outlook

Sluggish UK economic growth in third quarter

- ▼ Weak economic growth in Q3 as manufacturing declines
- ▼ Subdued growth forecast for 2026 and 2027
- ▲ Strong rise in government investment from April

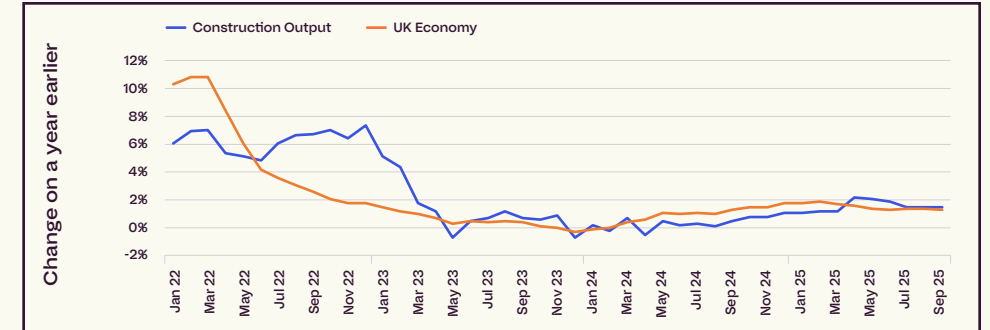
Economic growth slowed to just 0.1% during the third quarter and to 1.3% against a year ago. Services were the main engine for growth. In contrast manufacturing output declined by 0.8% against the previous three months and was 1.0% lower than a year ago, in part due to a sharp fall in vehicle manufacturing following the cyber-attack at Jaguar Land Rover.

Industry surveys by CIPS point to some improvement during the final quarter, with manufacturing and service sector activity growing in November. In contrast the CIPS survey has recorded a sharp decline in construction activity, which may reflect the impact of the decline in project starts recorded by Glenigan over the summer months.

The official OBR forecast published alongside the Budget upgraded overall UK economic growth this year to 1.8%, pointing to some recovery during the final quarter. Less encouragingly growth is expected to moderate to 1.5% during each of the next two years.

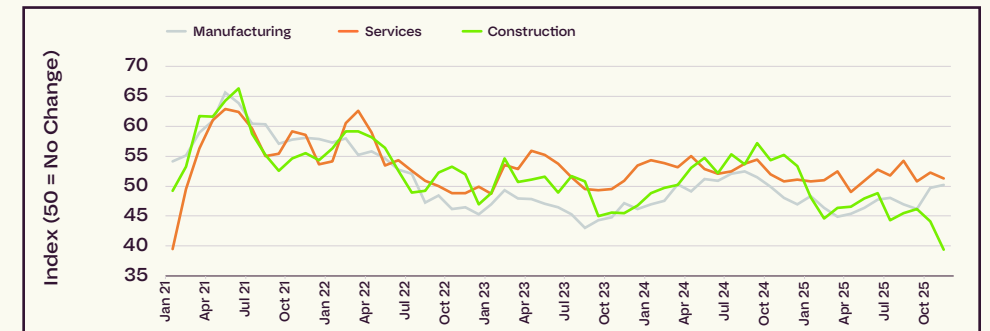
The OBR also expects general government investment to grow by 7.8% next year, fuelled by capital funding commitments in the Spending Review. Investment in private dwellings is projected to grow by 1.4%, up slightly on 1.0% this year. However, business investment is forecast to slip back by 0.4%, with an increase of only 0.6% expected in 2026. A more robust recovery in business investment is needed if the Government is to secure the upturn in UK productivity that it is seeking.

UK Economy and Construction



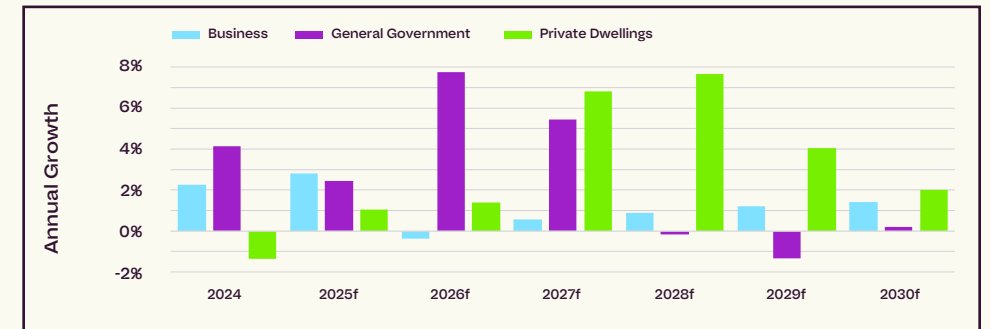
Source: ONS

CIPS Activity Surveys



Source: IHS Markit/CIPS

UK Investment



Source: OBR

Top 50 Contractors

Last 12
month
totals:

1022 projects
£38,417m

Last
month
totals:

90 projects
£2,628m

December 2024 to November 2025

Contractors	#	£m	★
1 STRABAG	7	2636	0
2 Kier	76	2468	2
3 Mace	13	2436	-1
4 Morgan Sindall	224	2238	1
5 Royal BAM	38	2228	-2
6 Sir Robert McAlpine	5	1651	0
7 Ferrovial	2	1615	0
8 Bowmer & Kirkland	33	1595	0
9 Laing O'Rourke	9	1273	0
10 Graham Construction	28	1135	0
11 Wates	49	1127	0
12 Bovis	9	1127	9
13 Willmott Dixon	57	945	3
14 M Group Services	13	939	0
15 Costain	5	931	-2
16 Bouygues	25	779	-4
17 Mears Group	4	777	-2
18 Galliford Try	125	771	1
19 McLaren	13	760	-1
20 Winvic	17	744	2
21 McAleer & Rushe UK	11	624	-4
22 TSL Projects	7	596	-2
23 Jones Bros	3	548	0
24 John Sisk & Son	6	533	0
25 Caddick Group	15	480	4

November 2025

Contractors	#	£m	★
1 Mace	2	236	NEW
2 Morgan Sindall	9	196	1
3 Domis Construction	1	185	NEW
4 Structure Tone	1	150	NEW
5 Willmott Dixon	6	143	24
6 Bowmer & Kirkland	5	137	11
7 Murphy	2	132	NEW
8 Winvic	2	130	38
9 Galliford Try	7	103	13
10 MTX Contracts	2	87	-5
11 Graham Construction	4	86	NEW
12 Zest Eco	2	82	NEW
13 Believ	1	80	NEW
14 Urban Fox Networks	1	80	NEW
15 McLaren	1	57	NEW
16 Taylored Facilities	1	45	NEW
17 Esh Group	1	37	10
18 CCG (Scotland)	2	35	NEW
19 Mellior Group	1	35	NEW
20 Tilbury Douglas	6	35	-8
21 Caddick Group	2	34	NEW
22 Knight Harwood	1	30	NEW
23 Ailsa Building Contractors	1	28	NEW
24 Kind & Company	1	26	NEW
25 J T Mackley & Co	1	25	NEW

★ Change in ranking since the previous period

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Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Top 50 Clients

December 2024 to November 2025

Clients	#	£m	★
1 Department for Transport	36	4327	0
2 United Utilities Group	5	2930	0
3 Ministry of Justice	43	1417	2
4 Department of Health	150	1302	0
5 Tata Steel Group	4	1263	-2
6 Oxfordshire County Council	8	1004	0
7 Dep. for Env., Food & Rural	10	947	0
8 Ministry of Defence	43	945	0
9 Dep. for Education	63	784	3
10 Mitsui Fudosan	1	700	-1
11 Scottish Prison Service	3	685	-1
12 British Land	5	651	-1
13 Kingsway Solar Farm	1	500	1
14 Community Wind Power	1	500	1
15 Milton Keynes BC.	3	494	1
16 Kent County Council	9	472	1
17 Tritax Group	3	467	-4
18 Kemble Water	5	423	0
19 National Grid	8	376	0
20 Dover District Council	2	360	0
21 Mitsubishi Estate London	2	350	0
22 MVV Environ. Devonport	1	300	0
23 Lidl UK	40	268	1
24 Gov. Property Agency	3	260	1
25 Hertfordshire CC.	5	259	NEW

Clients	#	£m	★
26 Greater London Authority	9	259	24
27 Transport Scotland	1	257	NEW
28 Lon. Borough of Havering	4	234	3
29 Sanctuary Housing	3	229	-1
30 Clarion Housing Group	6	225	-1
31 Elements Green	1	216	-1
32 Natural History Museum	2	204	1
33 Con. and Procurement	4	201	1
34 Southwark Charities	1	200	NEW
35 Aviva Staff Pensions	1	200	1
36 JTRE London	1	200	NEW
37 Immersa	1	200	1
38 Urenco UK	1	196	1
39 Cole Waterhouse	1	185	NEW
40 Home Office	26	173	NEW
41 Fusion Students	3	170	1
42 Ass. British Ports Holdings	1	170	1
43 HSBC Bank	4	169	1
44 Obayashi	1	165	1
45 Sellar Property Group	1	165	1
46 Enso Energy	3	164	1
47 Aldi	54	163	NEW
48 Midlothian Council	3	163	0
49 North Lanarkshire Council	13	160	-9
50 Greater London Authority	8	159	-1

November 2025

Clients	#	£m	★
1 Hertfordshire County Council	2	247	NEW
2 Cole Waterhouse	1	185	NEW
3 Department for Education	6	171	10
4 Barclays Bank	2	151	NEW
5 Department of Health	17	129	-3
6 Clifford Chance	1	100	NEW
7 Places for London	1	100	NEW
8 Greater London Authority	1	100	NEW
9 Ministry of Justice	1	64	-8
10 Walsall Met. BC.	2	63	NEW
11 Feldberg Capital	1	63	NEW
12 Henry Boot	1	63	NEW
13 Network Rail	3	55	NEW
14 Ministry of Defence	4	51	-11
15 TRU West Alliance	1	50	NEW
16 Swansea City Council	1	50	3
17 Birmingham Prop. Group	1	43	NEW
18 Heim Global Investor UK	1	43	NEW
19 Oasis Southside	1	43	NEW
20 ISOS Housing	1	37	NEW
21 DWS Group	1	36	NEW
22 University of East London	1	35	NEW
23 J2 Corporation	1	35	NEW
24 BNY International	1	34	NEW
25 Lawnmist	1	29	NEW

Clients	#	£m	★
26 Global Holdings	1	29	NEW
27 Richardson Developments	1	26	NEW
28 London Borough of Hackney	1	26	NEW
29 East Riding of Yorkshire Cou.	1	25	NEW
30 North Somerset Council	1	25	NEW
31 Lon. Borough of Havering	1	24	NEW
32 Bridgend County BC.	1	22	NEW
33 Infinity Park Derby	1	21	NEW
34 Bor. Cof King's Lynn & W. Norfolk	1	20	NEW
35 Thanet District Council	1	20	NEW
36 Scottish Borders Council	1	19	NEW
37 Alchemy Asset Mngmnt.	1	18	NEW
38 Felberco Investments	1	17	NEW
39 Precis Group	1	17	NEW
40 CityLife Developments	1	16	NEW
41 Next Generation Clubs	2	15	NEW
42 North Yorkshire CC.	2	15	NEW
43 Oxfordshire CC.	1	13	NEW
44 Stoke on Trent City Council	2	13	NEW
45 Trent & Dove Housing	1	12	NEW
46 Caledonian Maritime Assets	1	12	NEW
47 Kingdom Housing Assoc.	1	12	NEW
48 Nexus	1	12	NEW
49 Sunderland City Council	1	12	NEW
50 Lincolnshire Com. and Hosp.	1	11	NEW

★ Change in ranking since the previous period

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Glenigan Index

Underlying construction starts (under £100 million) increased slightly on the preceding three months but remained below the previous year. A strong performance in offices and industrial helped support overall activity.

- The value of underlying work starting on-site during the three months to November increased 3% but remained 4% below 2024 levels.

Sector Analysis

	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
Residential	6,959	-8%	-6%	-18%
Industrial	1,504	29%	33%	60%
Offices	2,082	57%	56%	147%
Retail	240	-23%	-11%	-22%
Hotel & Leisure	643	-29%	-28%	-39%
Education	1,234	-21%	-4%	-13%
Health	739	12%	0%	-24%
Community & Amenity	481	6%	8%	-2%
Civil Engineering	1,788	-1%	4%	-1%
Total	15,669	-1%	3%	-4%

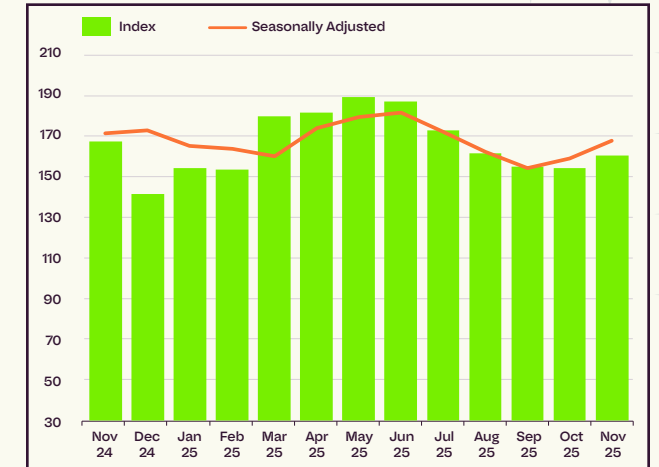
- Residential construction starts **declined 6%** on the preceding three months and declined 18% against 2024 figures.
- Non-residential project-starts **increased 14%** against the preceding three months to stand 15% up on a year ago.
- Civils work starting on-site **increased 4%** against the preceding three months but declined 1% against the previous year.

Regional Analysis

	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
East of England	1,576	-8%	-7%	-19%
East Midlands	1,231	42%	33%	0%
London	2,990	58%	77%	56%
North East	836	-7%	-2%	72%
North West	1,310	-17%	-17%	-24%
Northern Ireland	392	-22%	9%	28%
Scotland	1,104	-22%	-18%	-26%
South East	2,044	-22%	-11%	-19%
South West	1,561	14%	15%	8%
Wales	408	-29%	-36%	-59%
West Midlands	1,095	-16%	-13%	-9%
Yorkshire & the Humber	1,122	8%	11%	3%

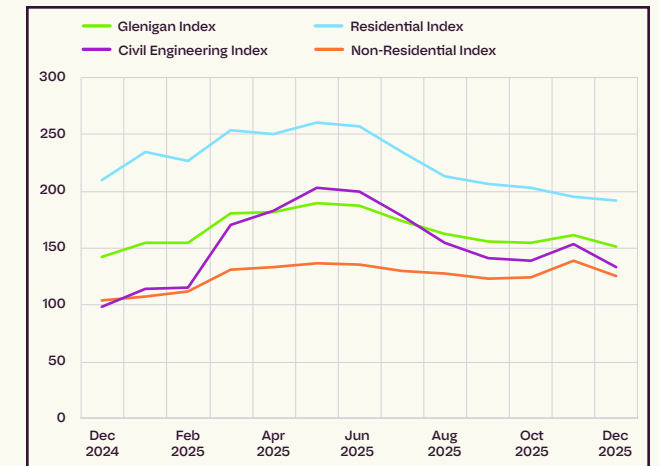
N.B. Index 2006 =100

Glenigan Index



Source: Glenigan

Indices Growth



Source: Glenigan

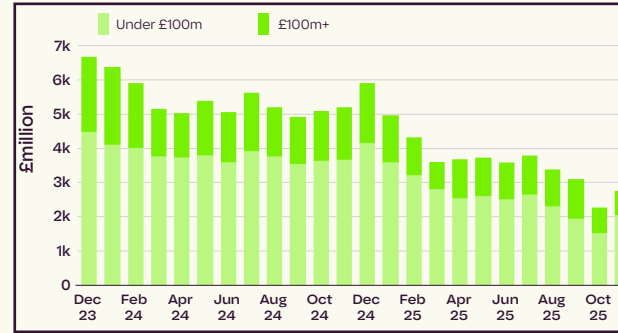
Housing

Overview

- ▼ **11% decrease** in project starts year-on-year.
- ▼ **11% decrease** in main contract awards from last year.
- ▼ **47% decrease** in detailed planning approvals compared to 2024.

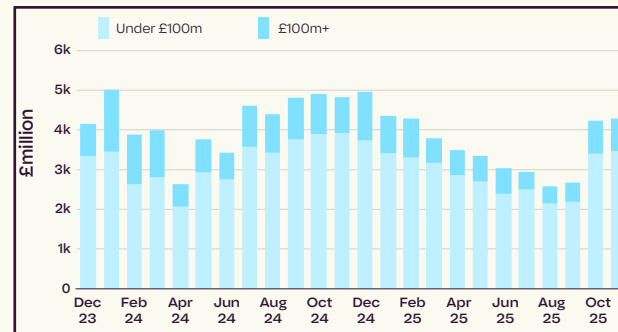
Residential project-starts and detailed planning approvals declined against both last year and preceding quarter during the three months to November. Private Housing and Social Housing both performed poorly. More positively, there was strong growth in main contract awards compared to the previous quarter.

Detailed Planning Approvals



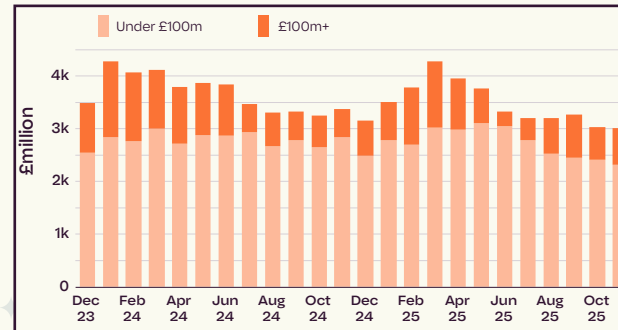
Source: Glenigan

Main Contract Awards



Source: Glenigan

Housing Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	6,140	2,131	8,270
YoY	-44%	-54%	-47%
Prev. 3 months	-11%	-34%	-18%
Prev. 3 months (SA)	-7%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	10,387	2,485	12,871
YoY	-12%	-7%	-11%
Prev. 3 months	62%	88%	66%
Prev. 3 months (SA)	36%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	6,959	2,062	9,021
YoY	-18%	29%	-11%
Prev. 3 months	-8%	1%	-6%
Prev. 3 months (SA)	-6%		

Housing

Types of projects started

Sub-sector performance was weak, with only three categories up on a year ago.

- Private housing accounted for the largest share (46%), decreasing 33% year-on-year to total £4,154 million.
- Private apartments grew 75% year-on-year, totalling £2,063 million.
- Student accommodation totalled £1,202 million, growing 187% compared with a year ago.

Types of Housing Projects Started

Three months to November 2025

	£ million	Percentage
Private Apartments	2,063	23%
Elderly Persons Homes	2	0%
Private Housing	4,154	46%
Private Sheltered Housing	180	2%
Social Sector Sheltered Housing	25	0%
Social Sector Apartments	306	3%
Social Sector Housing	1,090	12%
Homes, Hostels Etc.	-	0%
Student Accommodation	1,202	13%
Total	9,021	100%

Project Spotlight

Fallowfield Campus Redevelopment

Detailed plans have been approved on the £400 million Fallowfield Campus Redevelopment. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q1 2027.

PROJECT ID: 23180716

IMAGE SOURCE: GRAHAM

£400m



Housing League Tables

December 2024 to November 2025

Contractors	Projects	£m
Bloor Homes	70	2,526
Barratt Redrow	77	2,355
Persimmon	79	1,936
Hill	31	1,642
Taylor Wimpey	46	1,324
Bellway	46	1,036
Mears	6	818
Vistry	23	652
Bouygues	16	600
Keepmoat	18	557

Clients	Projects	£m
Barratt Redrow	86	2,436
Bloor Homes	69	2,354
Persimmon	91	2,009
Taylor Wimpey	58	1,632
Bellway	51	1,207
Vistry	50	941
Milton Keynes BC.	4	730
Hill Group	14	659
Apollo Management	33	530
The Berkeley Group	9	498

Housing

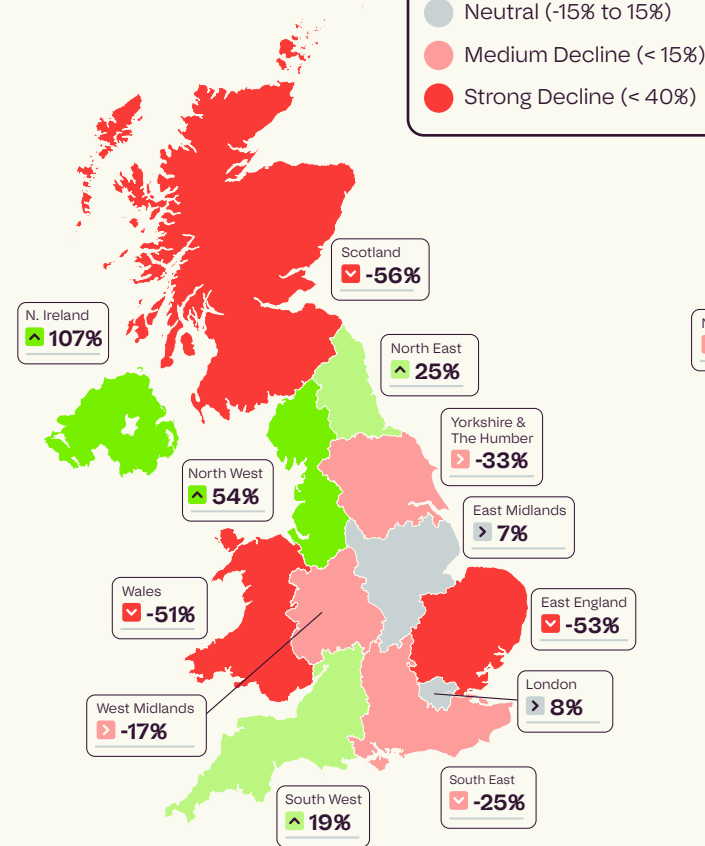
Regional

- Project starts had a mixed regional performance, with half of the regions down on a year ago.
- Regional performance was weak for detailed planning approvals, with all regions down year-on-year.
- Northern Ireland and the North West experienced strong growth in project starts.

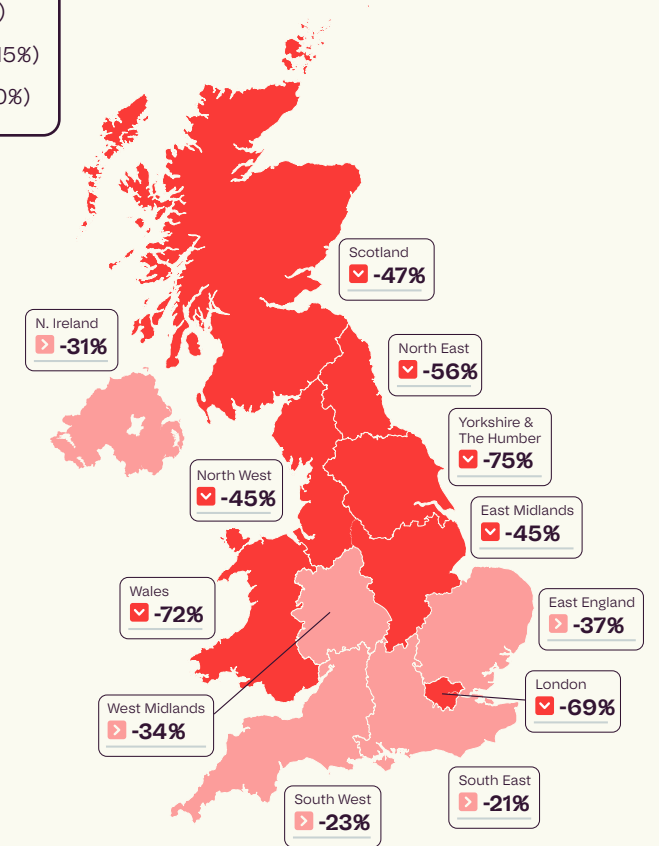
London led residential project starts, thanks to an 8% increase to total £1,775 million. The North West also grew 54% to total £1,438 million. The South West also climbed 19% to total £1,039 million. The South East, on the other hand, performed poorly, having decreased 25% on a year ago to total £1,093 million.

The South East was the most active region for detailed planning approvals, accounting for a 20% share, despite having fallen 21% year-on-year. London also decreased 69% on a year ago to total £1,083 million, a 13% share of the sector. Accounting for the same share at £1,038 million, the North West slipped back 45% on a year ago.

Changes in Housing Starts
on a Year Earlier



Changes in Housing Planning Approvals
on a Year Earlier



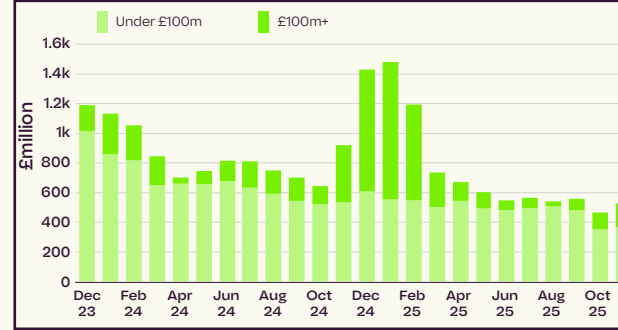
Industrial Overview

- ▼ **2% decrease** in project starts year-on-year.
- ▼ **45% decrease** in main contract awards from last year.
- ▼ **43% decrease** in detailed planning approvals compared to 2024.

Performance in the industrial sector was weak during the three months to November. Starts were 2% down on a year ago and 41% lower than the preceding three months, dragged down by the lack of major projects (£100 million or more) commencing on site. Main contract awards were 39% lower than the preceding quarter, to stand 45% down year-on-year. Detailed planning approvals declined 2% quarter-on-quarter to stand 43% down on a year ago.

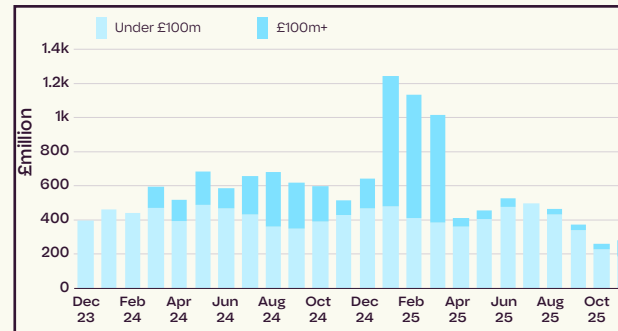
The sector continues to suffer from geopolitical instability. However, major contract awards and approvals improved, providing a boost to the pipeline. The S&P Global Manufacturing PMI also reported growth, which may signal that recovery is on the horizon.

Detailed Planning Approvals



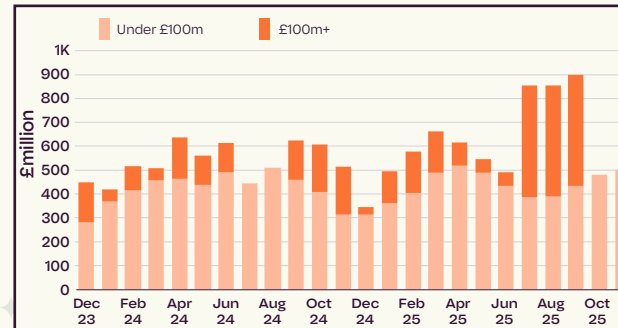
Source: Glenigan

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	1,098	484	1,582
YoY	-31%	-58%	-43%
Prev. 3 months	-28%	384%	-2%
Prev. 3 months (SA)	-19%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	556	288	844
YoY	-57%	13%	-45%
Prev. 3 months	-57%	188%	-39%
Prev. 3 months (SA)	-52%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,504	-	1,504
YoY	60%	-100%	-2%
Prev. 3 months	29%	-100%	-41%
Prev. 3 months (SA)	33%		

Industrial

Types of projects started

In line with the overall weak performance of the sector, project starts only grew in one out of three categories.

- Manufacturing accounted for 46% of industrial project starts, down 28% year-on-year to total £696 million.
- Other industrial projects totalled £149 million, accounting for 10% of starts and representing a 22% decrease year-on-year.
- Warehousing & logistics grew 72% year-on-year to total £658 million, representing a 44% share of the sector.

Types of Industrial Projects Started

Three months to November 2025

	£ million	Percentage
Manufacturing	696	46%
Other Industrial	149	10%
Warehousing & Logistics	658	44%
Total	1,504	100%

Project Spotlight

Logic 54 Wolverhampton

Detailed plans have been approved for the £138.5 million Logic 54 Wolverhampton development. A main contractor is yet to be appointed on the scheme with works due to be completed in Q1 2029.

PROJECT ID: 19338665

IMAGE SOURCE: BHP DESIGN

£138.5m



Industrial League Tables

December 2024 to November 2025

Contractors	Projects	£m
Newarthill	2	1,270
TSL Projects	6	565
Winvic	11	509
Enka	1	350
Caddick	12	315
Bowmer & Kirkland	4	286
Marshall	5	225
Glencar Construction	12	179
Benniman	8	176
McLaren	5	151

Clients	Projects	£m
Tata Steel Group	1	1,250
Tritax Group	3	467
Lidl UK GMBH	2	154
Marshall Holdings	4	127
Prologis UK	4	109
Howden Joinery	1	100
Panattoni UK	5	93
GLP	1	92
Indurent	7	92
Vertex Hydrogen	1	88

Industrial

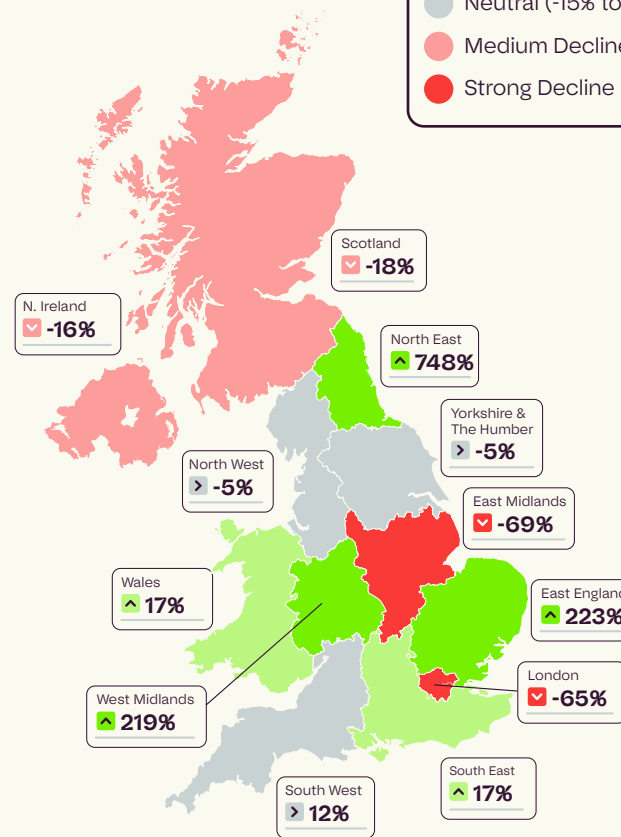
Regional

- Regional performance in project starts was mixed.
- Detailed planning approvals increased in most regions.
- Wales grew in both project starts and approvals.

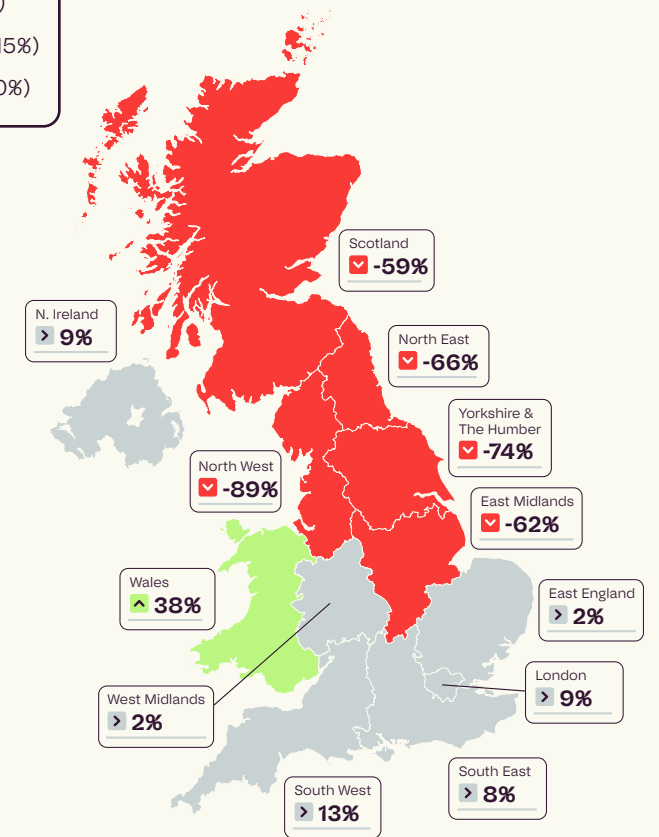
The East of England accounted for 22% of project starts, totalling £328 million. The region grew 223% on a year ago. Accounting for 16%, starts in the West Midlands also tripled, totalling £238 million. The East Midlands, on the other hand, fell 69% on a year ago to total £184 million.

The South East led detailed planning approvals, thanks to 8% growth on a year ago, totalling £332 million. The South West also increased 13%, totalling £220 million. Consents grew 2% in the West Midlands, bumping the total to £189 million.

Changes in Industrial Starts
on a Year Earlier



Changes in Industrial Planning Approvals
on a Year Earlier



Offices

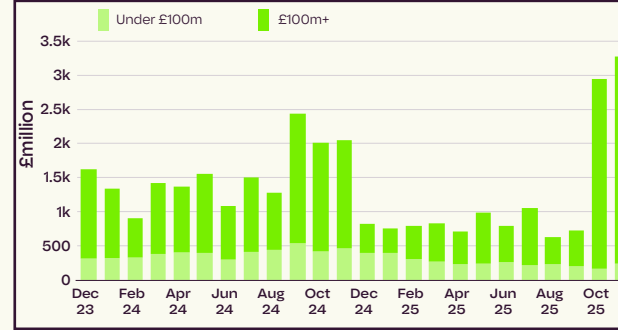
Overview

- ▲ **161% increase** in project starts year-on-year.
- ▼ **49% decrease** in main contract awards from last year.
- ▲ **60% increase** in detailed planning approvals compared to 2024.

The office sector had a mixed performance during the three months to November, with a decline in main contract awards against both the previous three months and a year ago. However, project starts and detailed planning approvals grew strongly against both periods.

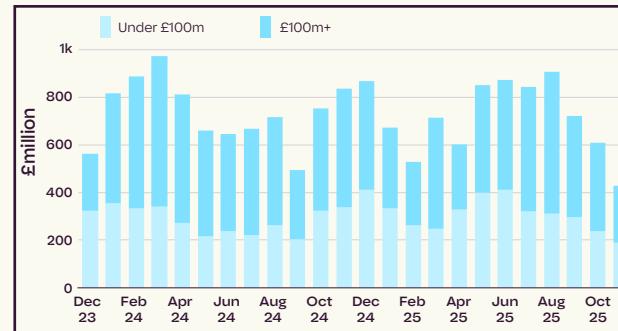
The demand for data centres continues as the increase in planning approvals was driven by large developments for these facilities.

Detailed Planning Approvals



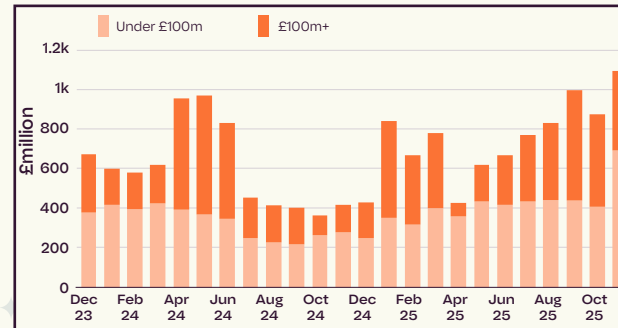
Source: Glenigan

Main Contract Awards



Source: Glenigan

Office Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	724	9,088	9,812
YoY	-48%	91%	60%
Prev. 3 months	5%	662%	421%
Prev. 3 months (SA)	-21%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	564	718	1,282
YoY	-44%	-52%	-49%
Prev. 3 months	-39%	-60%	-53%
Prev. 3 months (SA)	-32%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	2,082	1,200	3,282
YoY	147%	189%	161%
Prev. 3 months	57%	3%	32%
Prev. 3 months (SA)	56%		

Offices

Types of projects started

- In line with the overall growth in the sector, all value bands experienced growth in project starts.
- Project starts in the over £100 million value band totalled £1,200 million, having grown 189% on a year ago.
 - The £20 million to £50 million value band jumped 171% year-on-year, totalling £661 million.
 - The £50 million to £100 million value band increased 145% year-on-year, totalling £634 million.

Types of Office Projects Started

Three months to November 2025

	£ million	Percentage
Up to £5 million	249	8%
£5 million up to £10 million	308	9%
£10 million up to £20 million	230	7%
£20 million up to £50 million	661	20%
£50 million up to £100 million	634	19%
Over £100 million	1,200	37%
Total	3282	100%

Project Spotlight

99 Bishopsgate

Detailed plans have been approved for the £477 million 99 Bishopsgate development. Works are due to complete in Q4 2029, with a main contractor yet to be appointed on the scheme.

PROJECT ID: 23331236

IMAGE SOURCE: RSHP

£477m



Office League Tables

December 2024 to November 2025

Contractors	Projects	£m
Mace	9	2,136
Morgan Sindall	125	931
JRL	3	495
Bovis	2	390
McLaren	4	327
Wates	19	308
Multiplex Cons.	1	300
Structure Tone	3	247
Bowmer & Kirkland	3	225
Royal BAM	4	211

Clients	Projects	£m
Mitsui Fudosan UK	1	700
British Land	3	640
Mitsubishi Estate	2	350
Endurance Land	1	300
JTRE London	1	200
Southwark Charities	1	200
HSBC Bank	4	169
Obayashi	1	165
Sellar Property	1	165
The Crown Estate	4	156

Offices

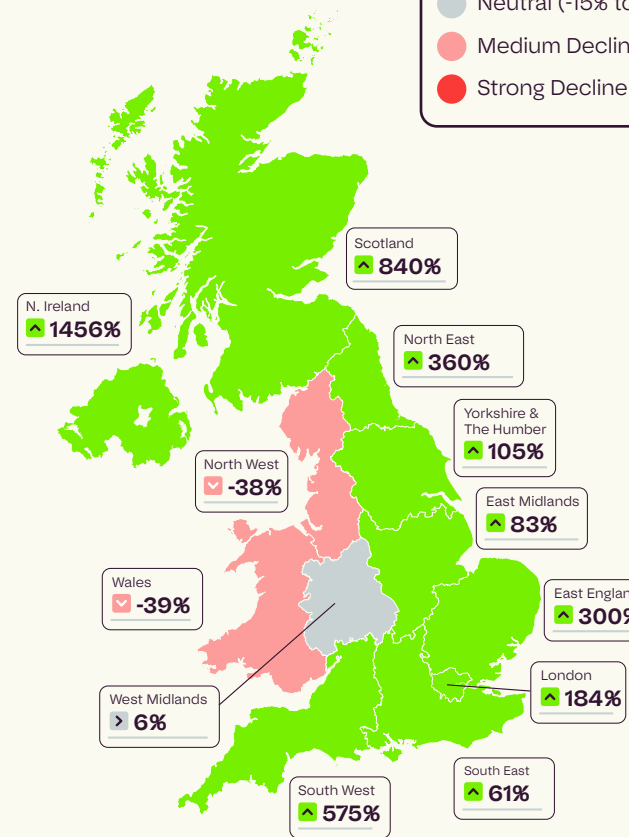
Regional

- Strong performance in project starts, with only two regions down against last year.
- Most regions saw a decline in detailed planning approvals, despite the overall growth in office consents.
- The East Midlands, London, the North East and the South East experienced strong growth in both project starts and planning approvals.

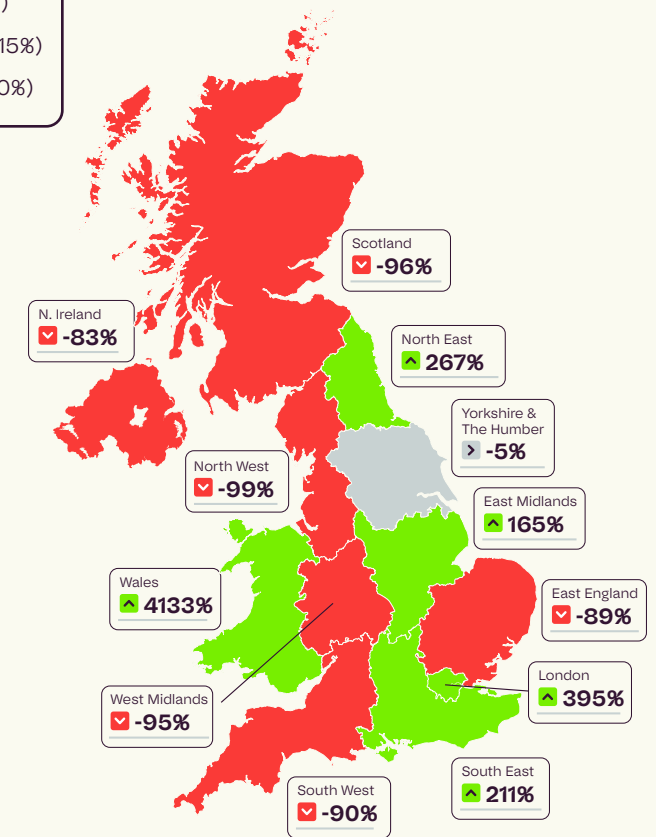
London had the highest share (80%) of project starts during the period, thanks to a 184% increase boosted by the £800 million Project Vista development in Lambeth. Totalling £135 million, starts in the South West jumped nearly seven times on a year ago. The East of England quadrupled against last year to total £124 million.

Wales led detailed planning approvals, having jumped more than 40 times year-on-year to total £5,001 million. Activity in the region was driven by the £5,000 million CWL41 data centre development in Bridgend. London also jumped 395% against 2024 to total £3,112 million, boosted by the £2,500 million LON6 LON7 & LON8 data centre development. At £857 million the South East tripled against last year's figures.

Changes in Office Starts
on a Year Earlier



Changes in Office Planning Approvals
on a Year Earlier



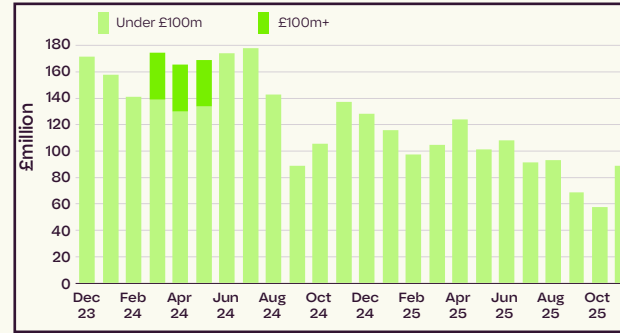
Retail

Overview

- ▼ **22% decrease** in project starts year-on-year.
- ▼ **71% decrease** in main contract awards from last year.
- ▼ **35% decrease** in detailed planning approvals compared to the previous year.

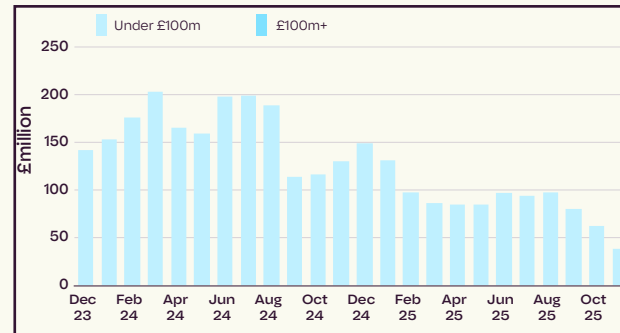
Performance in the retail sector continued a downward trajectory in the three months to November, with project starts, main contract awards and detailed planning approvals all down year-on-year and quarter-on-quarter. No major projects (over £100 million) reached any of the three stages in the development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

Detailed Planning Approvals



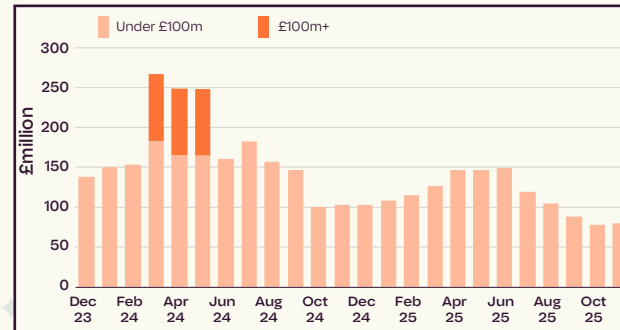
Source: Glenigan

Main Contract Awards



Source: Glenigan

Retail Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	267	-	267
YoY	-35%		-35%
Prev. 3 months	-5%		-5%
Prev. 3 months (SA)	-19%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	115	-	115
YoY	-71%		-71%
Prev. 3 months	-61%		-61%
Prev. 3 months (SA)	-50%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	240	-	240
YoY	-22%		-22%
Prev. 3 months	-23%		-23%
Prev. 3 months (SA)	-11%		

Retail

Types of projects started

Performance in the retail sector was very weak, with only two categories growing compared to a year ago.

- Supermarkets accounted for the largest share (71%), increasing 18% year-on-year to total £170 million.
- Petrol filling stations totalled £11 million, up 13% year-on-year.
- Shop projects totalled £41 million, representing a 62% decrease compared with a year ago.

Types of Retail Projects Started

Three months to November 2025

	£ million	Percentage
Other Retail	8	3%
Petrol Filling Stations	11	4%
Retail Warehousing	0	0%
Shopping Centres	10	4%
Shops	41	17%
Supermarkets	170	71%
Total	240	100%

Project Spotlight

Buchanan Galleries Development

Detailed plans have been approved for the £50 million Buchanan Galleries development in Glasgow. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 25371274

IMAGE SOURCE: THREESIXTY ARCHITECTURE

£50m



Retail League Tables

December 2024 to November 2025

Contractors	Projects	£m
Kier	2	50
McPhillips Wellington	1	37
Mildren Cons.	2	27
VINCI	1	20
DSP	6	17
Clark Contracts	3	17
Audas Project	2	16
FDT Construction	4	14
Neilcott Cons.	1	14
B Team	5	14

Clients	Projects	£m
Lidl UK	35	109
Aldi	52	75
T J Morris	12	45
Walsall Metropolitan	1	41
McPhillips Wellington	1	37
Tesco	52	36
Marks & Spencer Group	23	32
J Sainsbury	15	21
Marks and Spencer	1	14
Celpark	1	11

Retail

Regional

- Project starts and detailed planning approvals were down in most regions.
- Northern Ireland saw strong growth in project starts.
- Detailed planning approvals only grew in the South West and the West Midlands.

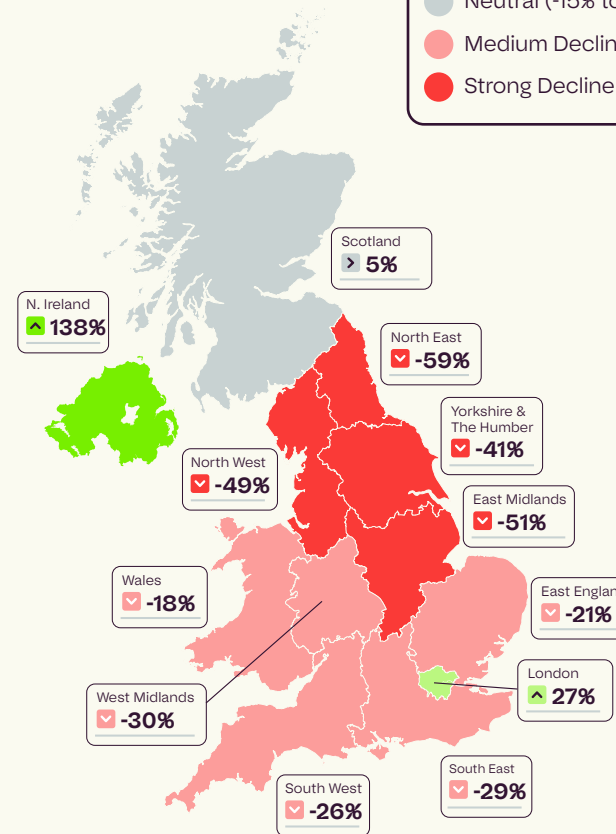
Yorkshire & the Humber dominated retail project starts, despite a 41% decline on a year ago. The region accounted for 13% at £32 million. The South East also decreased 29%, totalling £30 million. In contrast, starts in Northern Ireland more than doubled on a year ago to total £28 million. At £25 million, London grew 27% against last year.

Totalling £65 million, Scotland led detailed planning approvals, having declined 3% on a year ago. The North West also fell 32% year-on-year to total £37 million. At £28 million, consents in the North East were 32% down against last year. In contrast, the West Midlands grew 24% on a year ago to total £32 million. Totalling £26 million, the South West also climbed 2% against 2024 figures.

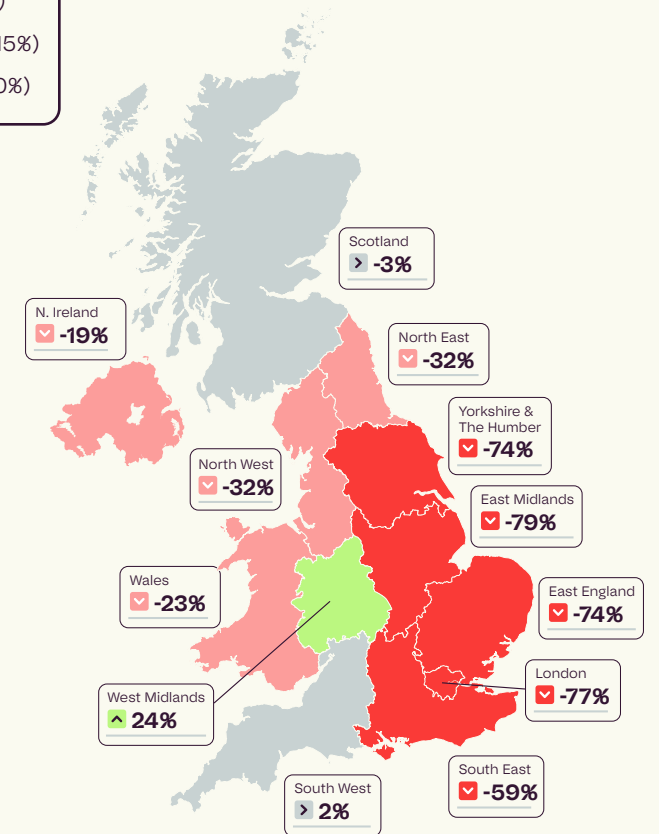
Changes in Retail Starts on a Year Earlier

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



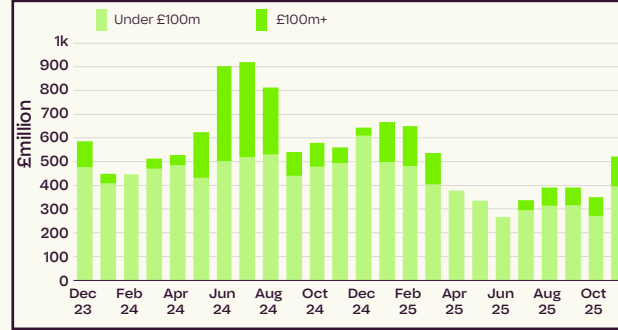
Hotel & Leisure

Overview

- ▲ **31% increase** in project starts year-on-year.
- ▲ **25% increase** in main contract awards from last year.
- ▼ **7% decrease** in detailed planning approvals compared to a year ago.

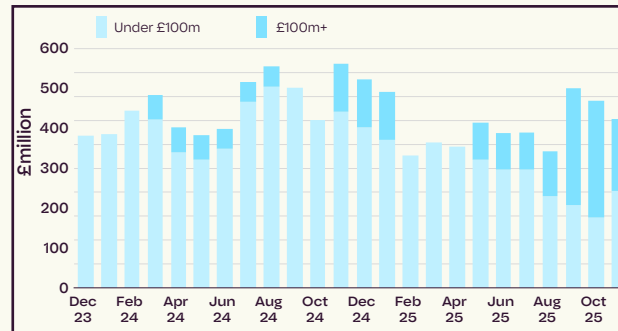
Project starts saw growth both year-on-year and quarter-on-quarter. Main contract awards and detailed planning approvals both fell against last year but grew against the previous three months. There was an overall positive trend in major projects (£100 million or more), however performance in underlying projects (under £100 million) was mixed.

Detailed Planning Approvals



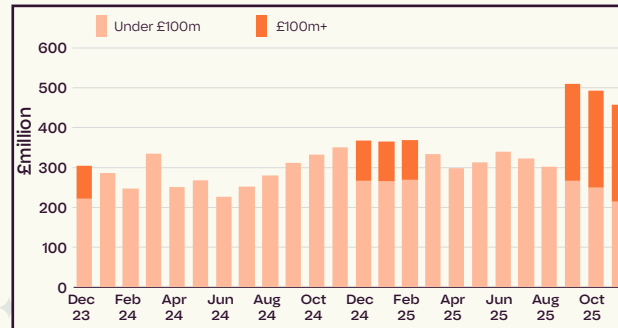
Source: Glenigan

Main Contract Awards



Source: Glenigan

Hotel & Leisure Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,183	379	1,562
YoY	-20%	89%	-7%
Prev. 3 months	26%	65%	33%
Prev. 3 months (SA)	19%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	608	450	1,058
YoY	-45%	50%	-25%
Prev. 3 months	6%	61%	24%
Prev. 3 months (SA)	22%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	643	730	1,373
YoY	-39%		31%
Prev. 3 months	-29%		52%
Prev. 3 months (SA)	-28%		

Hotel & Leisure

Types of projects started

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

- Indoor leisure facilities accounted for 42%, having jumped 131% year-on-year.
- Sport facilities totalled £351 million, growing 188% year-on-year.
- Hotels & guest houses fell 62% year-on-year, accounting for a 12% share.

Types of Hotel & Leisure Projects Started

Three months to November 2025

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	9	1%
Cinemas & Theatres	93	7%
Hotels, Guest Houses	160	12%
Indoor Leisure Facilities	580	42%
Other Hotel & Leisure	179	13%
Sport Facilities	351	26%
Total	1,373	100%

Project Spotlight

The London Golf Club

Work has started on the £134 million London Golf Club development. A main contractor has yet to be appointed on the scheme, with works due to be completed in Q4 2026.

PROJECT ID: 24185119

IMAGE SOURCE: ARCHITECTS JOURNAL

£134m



Hotel & Leisure League Tables

December 2024 to November 2025

Contractors	Projects	£m
Newarthill	2	231
Morgan Sindall	7	181
McLaren	1	140
Bovis	1	100
Willmott Dixon	8	87
Graham Cons.	2	84
Legendre	1	82
Speller Metcalfe	4	74
Tilbury Douglas Cons.	4	72
Barnwood	1	68

Clients	Projects	£m
Great. London Auth.	2	135
Crystal Palace FC.	1	100
Fc100	1	82
Whitbread	21	75
Peel Holdings	1	71
The Property Trust	1	49
Alliance Leisure	4	35
Calderdale BC.	2	35
Birdworld	1	34
Haskins Garden Cen.	1	34

Hotel & Leisure

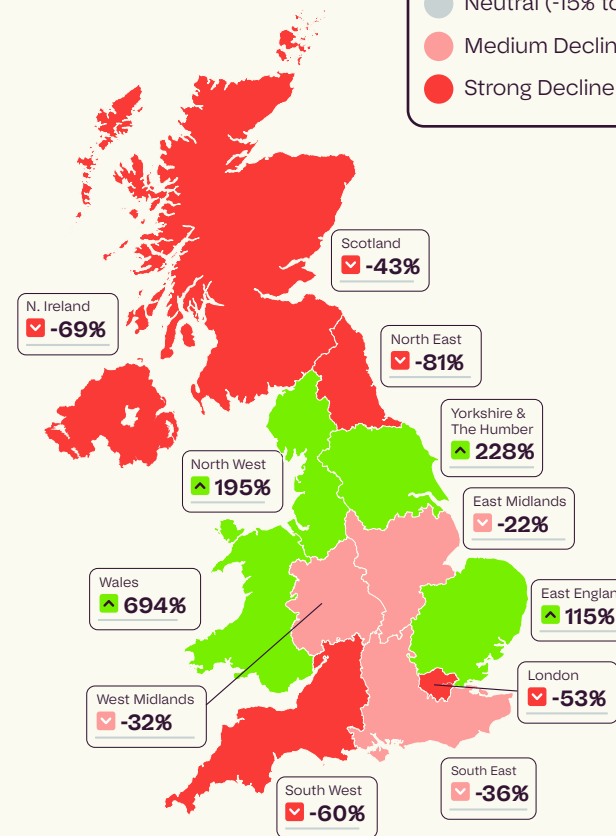
Regional

- Despite overall growth in the sector, most regions saw a decline in project starts.
- Regional performance in detailed planning approvals was mixed.
- The East of England, Wales and Yorkshire & the Humber grew in both starts and approvals.

The North West was the leader in hotel & leisure project starts, having grown 195% year-on-year to total £539 million. Activity in the region was boosted by the £450 million Therme Manchester development. Wales also jumped almost eight times to total £293 million, driven by the £280 million Cardiff Arena & Hotel Atlantic Wharf Phase 1 development. In contrast, accounting for an 8% share at £108 million, London slipped back 53% against last year.

The West Midlands dominated detailed planning approvals, thanks to 307% growth on the previous year. The region totalled £313 million and accounted for a 20% share. Totalling £299 million, the South East also grew 40% against last year. In contrast, London fell 66% to total £210 million.

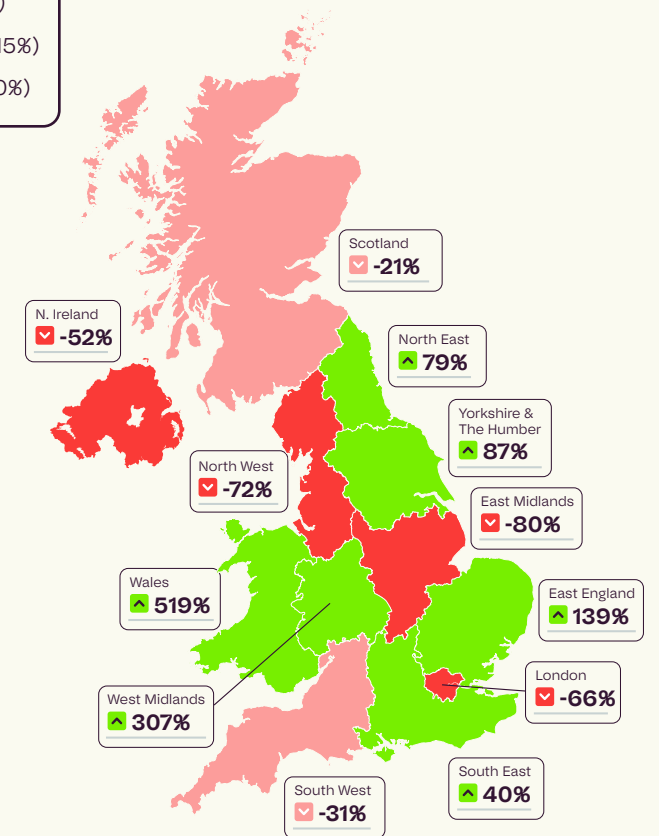
Changes in Hotel & Leisure Starts
on a Year Earlier



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



Health

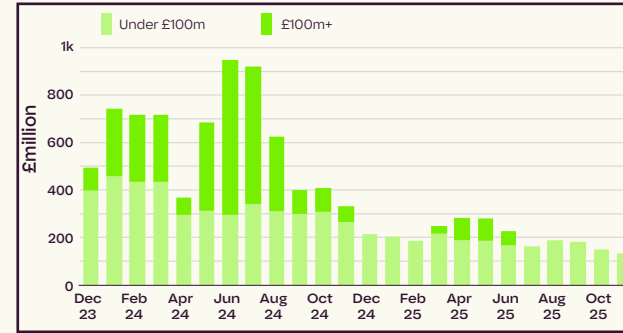
Overview

- Project starts **increased 33%** against the preceding three months.
- Main contract awards **declined 33%** against the preceding three months
- Detailed planning approvals **declined 30%** compared to the preceding three months

The health sector experienced a poor period in the three months to November. Project-starts, main contract awards and detailed planning approvals all declined against the previous year. Project-starts rose against the preceding three months, whereas contract awards and approvals declined.

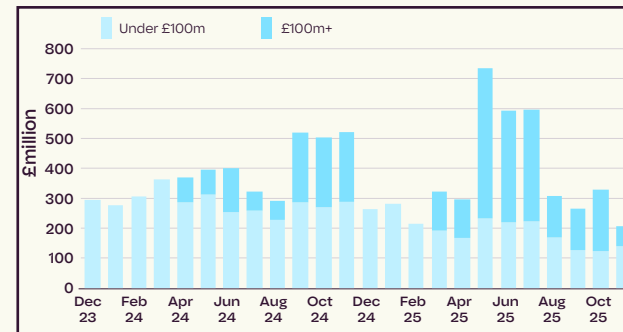
High profile schemes such as the New Hospital Programme create cause for optimism for the future, with proposed investments in NHS technology and increased funding commitments for routine spending from the Budget also signalling a positive future for the sector. The increased funding is set to drive an increase in healthcare starts in 2026/7.

Detailed Planning Approvals



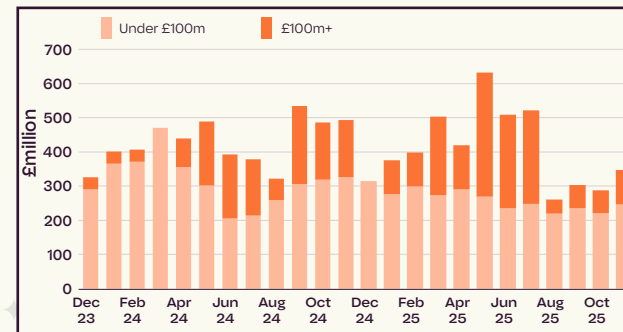
Source: Glenigan

Main Contract Awards



Source: Glenigan

Health Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	398	-	398
YoY	-50%	-100%	-60%
Prev. 3 months	-30%		-30%
Prev. 3 months (SA)	-41%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	418	200	618
YoY	-52%	-71%	-60%
Prev. 3 months	-18%	-52%	-33%
Prev. 3 months (SA)	-19%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	739	301	1,040
YoY	-24%	-40%	-30%
Prev. 3 months	12%	146%	33%
Prev. 3 months (SA)	0%		

Health

Types of projects started

The health sector experienced a poor performance compared to the previous year, with Nursing Homes & Hospices a relative bright spark.

- Nursing Homes & Hospices accounted for the largest share (29%), growing 80% year-on-year to total £299 million.
- Dental, Health & Veterinary Centres/Surgeries totalled £205 million, increasing 5% year-on-year.
- Hospitals experienced a 73% decline year-on-year to total £126 million, representing a 12% share of the total value.

Types of Health Projects Started

Three months to November 2025

	£ million	Percentage
Day Centres	-	0%
Dental, Health & Veterinary Centres/ Surgeries	205	20%
Hospitals	126	12%
Nursing Homes & Hospices	299	29%
Other Health	410	39%
Total	1,040	100%

Project Spotlight

Boston Integrated Health & Care Centre

Detailed plans have been approved for the £18 million Boston Integrated Health & Care Centre. A main contractor is yet to be appointed, with works expected to be completed in Q4 2027.

PROJECT ID: 25169902

IMAGE SOURCE: HEALTHCARE DESIGN PARTNERSHIP

£18m



Health League Tables

December 2024 to November 2025

Contractors	Projects	£m
Laing O'Rourke	2	919
Graham Construction	3	394
Mace Group	2	286
McLaughlin & Harvey	4	216
Bouygues UK	1	215
MTX Contracts	4	167
Morgan Sindall	10	161
Bowmer & Kirkland	4	122
SDC	3	80
Kier	5	74

Clients	Projects	£m
Dep. of Health	134	1,265
Dep. for Environ.	3	927
Nat. History Museum	1	201
CPD	1	195
Kadans Science Prtn.	1	100
Univ. of Cambridge	2	86
Central Lab. Research	1	85
LNT	9	66
MBDA (UK)	1	59
Welbeck Health Prtn.	2	44

Health

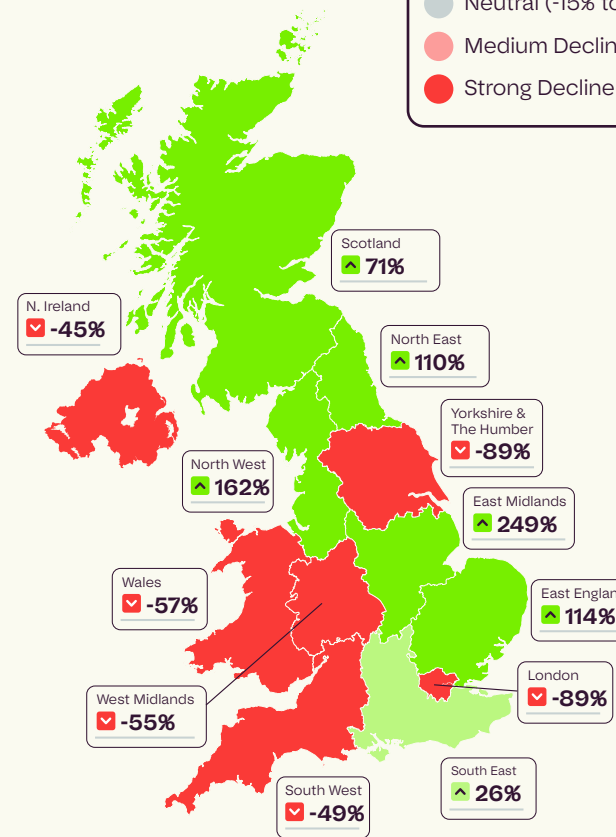
Regional

- The South East accounted for the largest share of project-starts, performing strongly against the previous year.
- Various regions experienced sharp growth in project-starts.
- Wales accounted for the largest share of approvals and experienced a sharp rise against the previous year.

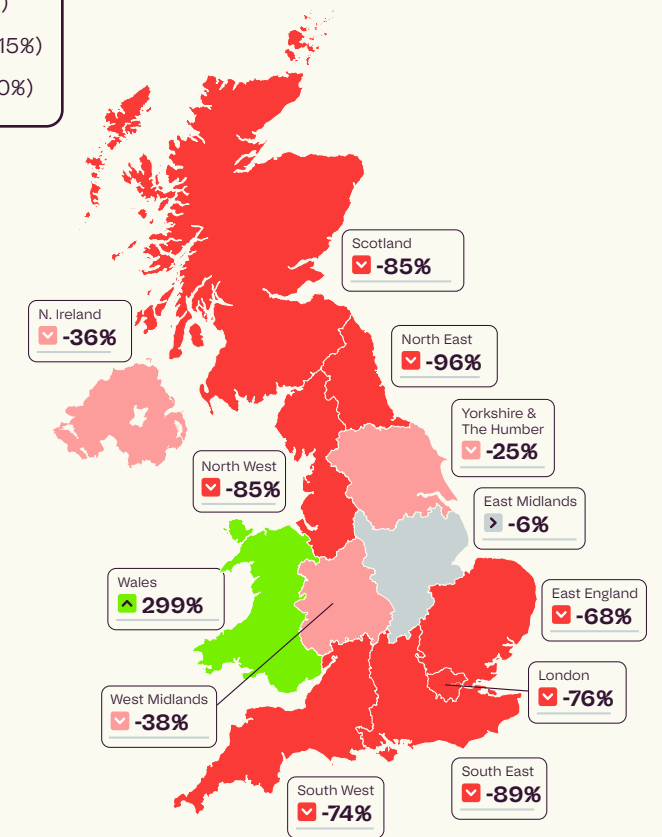
The South East at £352 million was the most active region for project starts, accounting for 34% of the total, with the region rising 26% against the previous year. The North West of England at £147 million experienced sharp growth, rising 162% against the previous year to account for 14% of the total value, the second most active region. The East Midlands (+249%), the East of England (+114%) and the North East (+110%) also experienced triple-digit growth against the previous year.

Wales accounted for the largest share of approvals (22%), increasing 299% against the previous year. The East Midlands at £82 million accounted for the second largest share of approvals at 21%, declining 6% against the previous year.

Changes in Health Starts
on a Year Earlier



Changes in Health Planning Approvals
on a Year Earlier



Education

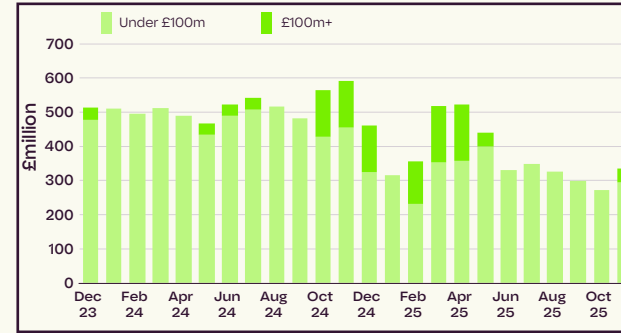
Overview

-  **26% decline** in project starts against the preceding three months.
-  Main contract awards **increased 8%** against the preceding three months.
-  **3% rise** in detailed planning approvals compared to the preceding three months.

Education experienced a mixed three months to November; main contract awards and detailed planning approvals increased against the preceding three months but remained below the previous years' levels. Elsewhere, project-starts declined on both periods.

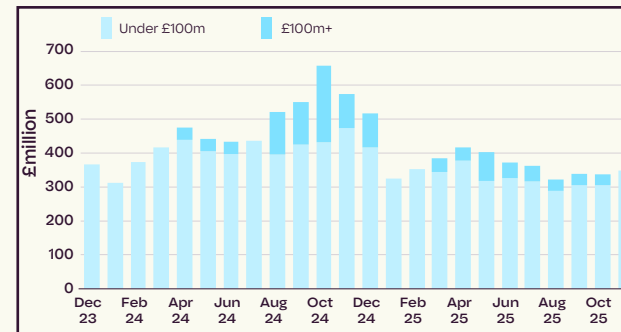
The November 2025 UK Budget delivered several education-linked investments with implications for construction activity over the medium term. The government's £15 million boost for school libraries and literacy improvement, alongside continued support grants for schools and colleges facing rising costs, are set to support activity in the future, with anticipated growth in 2026 and 2027 expected.

Detailed Planning Approvals



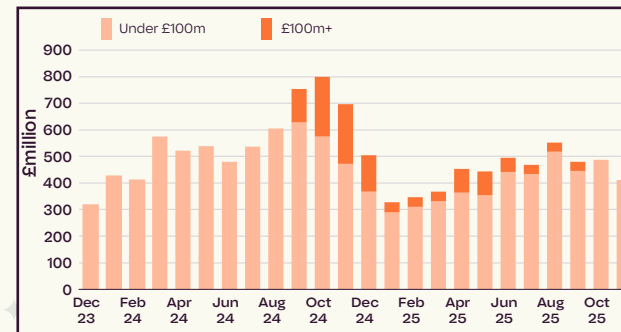
Source: Glenigan

Main Contract Awards



Source: Glenigan

Education Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	884	120	1,004
YoY	-35%	-71%	-43%
Prev. 3 months	-10%		3%
Prev. 3 months (SA)	-6%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	1,043	-	1,043
YoY	-27%	-100%	-39%
Prev. 3 months	21%	-100%	8%
Prev. 3 months (SA)	6%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,234	-	1,234
YoY	-13%	-100%	-41%
Prev. 3 months	-21%	-100%	-26%
Prev. 3 months (SA)	-4%		

Education

Types of projects started

Project-starts in the education sector experienced a poor performance, with all segments declining against the previous year.

- Schools totalled £968 million, accounting for the largest share of starts (78%) and declining 24% year-on-year.
- Universities totalled £111 million, accounting for the second largest share of starts (9%) and declining 79% year-on-year.
- Colleges declined 53% year-on-year to total £92 million.

Types of Education Projects Started

Three months to November 2025

	£ million	Percentage
Colleges	92	7%
Other Education	63	5%
Schools	968	78%
Universities	111	9%
Total	1,234	100%

Project Spotlight

Outwood Academy Kirkby

Work has started on the Outwood Academy Kirkby development with works due to be completed in Q2 2029 for the £85 million development.

PROJECT ID: 21338392

IMAGE SOURCE: WILMOTT DIXON

£85m



Education League Tables

December 2024 to November 2025

Contractors	Projects	£m
Morgan Sindall	40	515
Bowmer & Kirkland	12	281
Kier	15	273
Royal BAM	9	245
Willmott Dixon	19	231
Galliford Try	22	190
Tilbury Douglas	17	176
McLaren	1	100
Castle Building	1	95
Wates	5	89

Clients	Projects	£m
Dep. for Education	64	806
Midlothian Council	3	163
University of London	9	115
Univ. of Portsmouth	3	101
Swansea City Council	3	80
Educ. Auth. N. Ireland	12	65
LB. of Havering	2	63
Kent County Council	6	60
WEPCo Ltd	2	58
Scott. Borders Coun.	2	58

Education

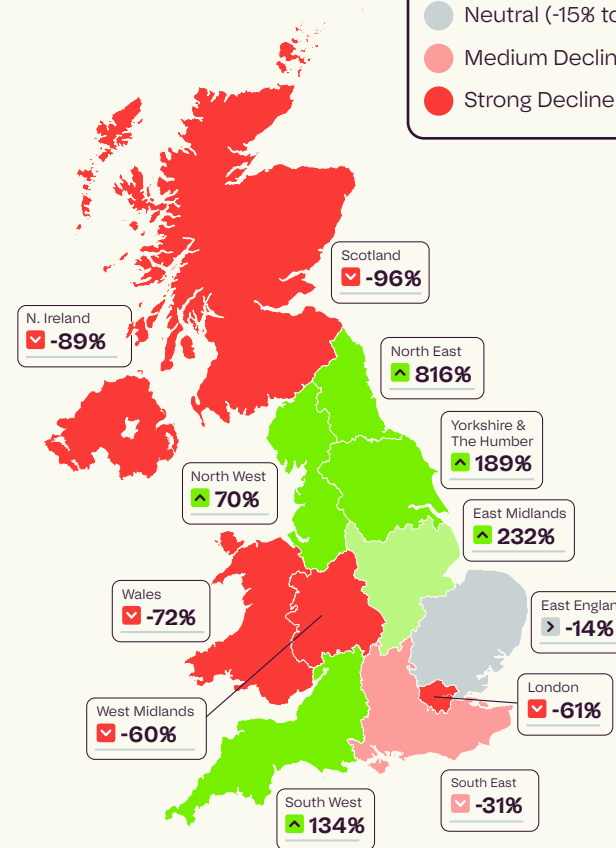
Regional

- The North East and the East Midlands accounted for the joint-largest share of sector starts, with both regions experiencing a sharp rise against the previous year.
- Scotland accounted for the largest share of sector approvals, despite the area experiencing a decline against the previous year.
- Yorkshire & the Humber experienced sharp growth for project-starts.

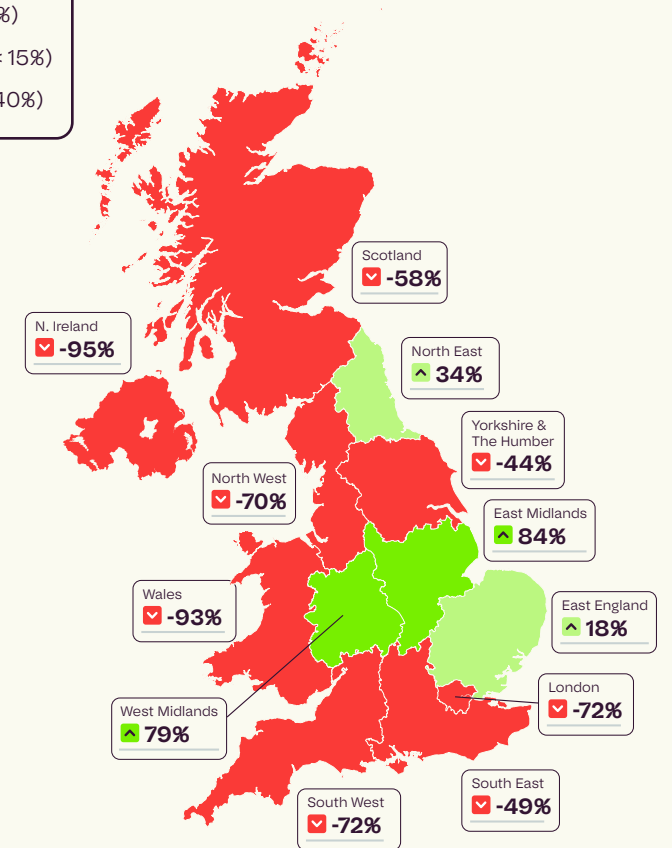
The East Midlands at £213 million was the joint most active region for project starts accounting for 17% of the total value. The region experienced a 232% rise against the previous year. The North East at £204 million experienced the sharpest rise of any region, increasing 816% against the previous year to account for 17% of the total value.

Scotland accounted for the largest share of approvals (17%), despite declining 58% against the previous year to total £171 million. Elsewhere, the East Midlands accounted for 14% of the total value, with the region experiencing an 84% rise against the previous year to total £140 million.

Changes in Education Starts
on a Year Earlier



Changes in Education Planning Approvals
on a Year Earlier

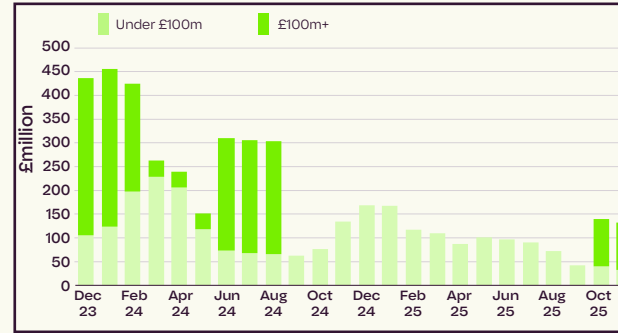


Community & Amenity Overview

- 103% increase in project starts year-on-year.
- 228% increase in main contract awards from last year.
- 1% decrease in detailed planning approvals compared to 2024.

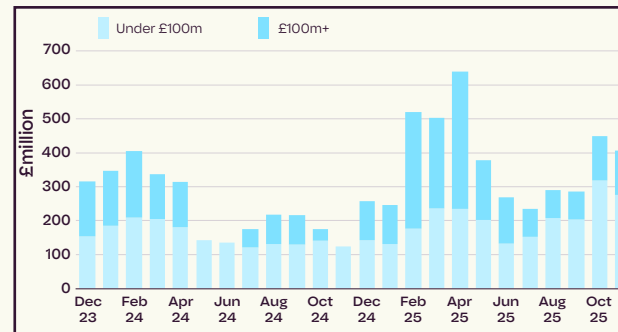
The sector experienced a relatively strong performance. Project starts and main contract awards were up year-on-year and quarter-on-quarter. Detailed planning approvals also grew against the preceding quarter. Major projects (£100 million and more) performed especially well, with increases across all three contract stages against both the previous three months and last year.

Detailed Planning Approvals



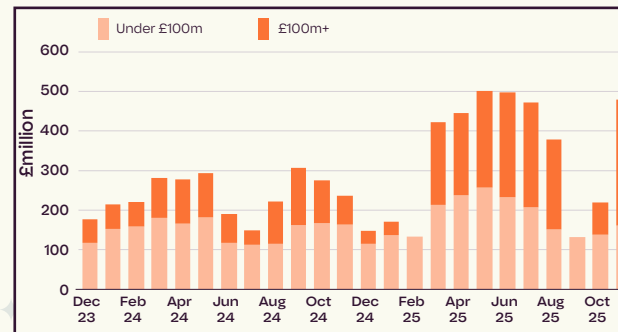
Source: Glenigan

Main Contract Awards



Source: Glenigan

Community & Amenity Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	97	300	397
YoY	-76%		-1%
Prev. 3 months	-55%		84%
Prev. 3 months (SA)	-63%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	827	391	1,218
YoY	123%		228%
Prev. 3 months	32%	59%	40%
Prev. 3 months (SA)	46%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	481	959	1,440
YoY	-2%	341%	103%
Prev. 3 months	6%	40%	27%
Prev. 3 months (SA)	8%		

Community & Amenity

Types of projects started

Reflecting the overall growth in the sector, most sub-sectors saw an increase in project starts.

- Prisons accounted for the largest share (67%), growing 198% year-on-year to total £959 million.
- Local facilities totalled £185 million, increasing 30% year-on-year.
- Government buildings totalled £151 million, up 141% year-on-year.

Types of Community & Amenity Projects Started

Three months to November 2025

	£ million	Percentage
Blue Light	126	9%
Government Buildings	151	11%
Law Courts	-	0%
Local Facilities	185	13%
Military	17	1%
Places of Worship	1	0%
Prisons	959	67%
Total	1,440	100%

Project Spotlight

HMP Welland Oaks

Work has started on HMP Welland Oaks. Wates has been appointed as main contractors on the £713 million development, with works due to be completed in Q3 2028.

PROJECT ID: 21301670

IMAGE SOURCE: HARBOROUGH MAIL

£713m



Community & Amenity League Tables

December 2024 to November 2025

Contractors	Projects	£m
Kier	16	1,143
Wates	16	437
Laing O'Rourke	3	329
Galliford Try	11	201
Bowmer & Kirkland	7	123
Morgan Sindall	9	111
Willmott Dixon	9	100
Goldbeck Bower	1	78
Tilbury Douglas	3	74
Graham Construction	3	55

Clients	Projects	£m
Ministry of Justice	38	1,438
Ministry of Defence	29	757
Scottish Prison	3	685
UK Parliament	2	112
Gov. Property Agency	1	105
Home Office	26	95
Sandwell Met BC.	3	81
Cardiff CC.	1	78
L.B. of Haringey	1	54
Mersey Travel	1	45

Community & Amenity

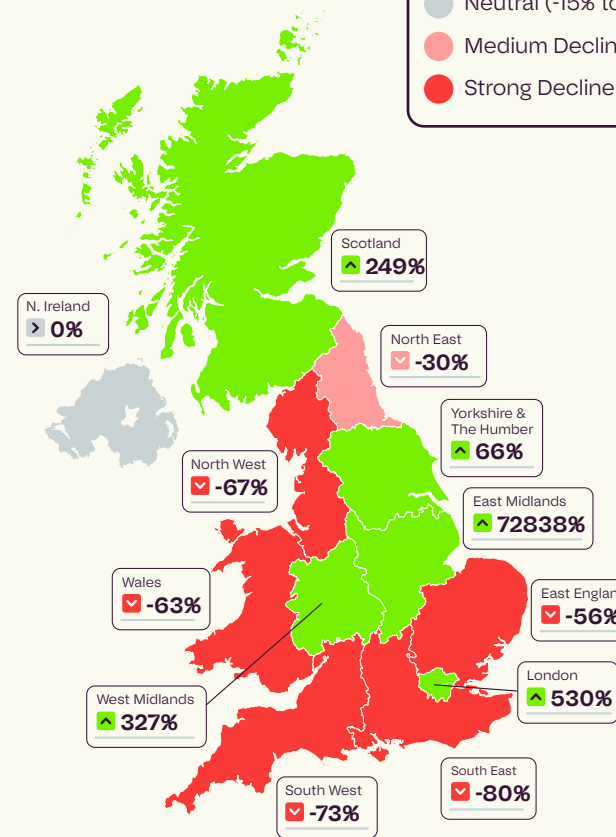
Regional

- Despite overall growth in the sector, project starts were down year-on-year in most regions.
- Detailed planning approvals had a weak performance in most regions.
- Strong growth in both starts and approvals in London.

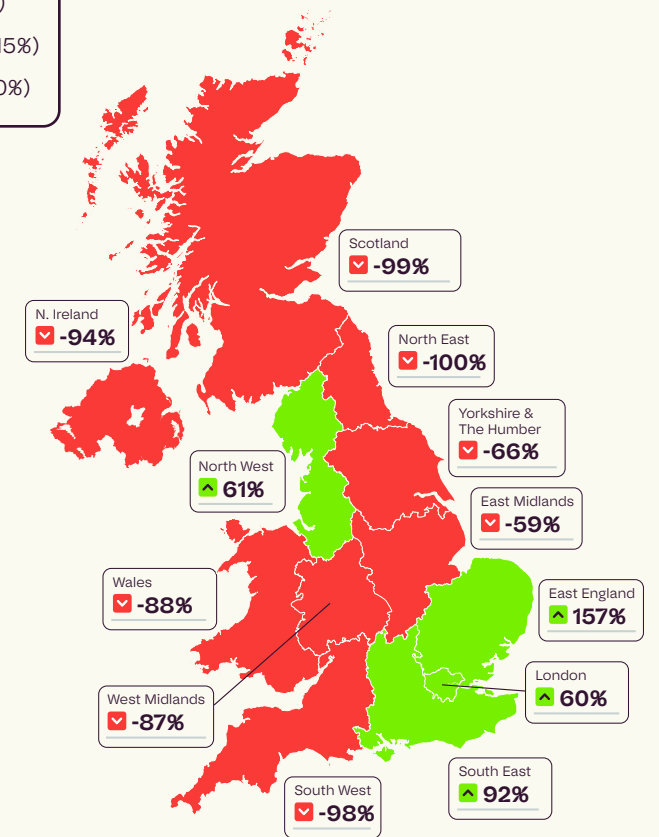
The East Midlands accounted for the highest share of project starts, having jumped more than 700 times to total £758 million. Growth was mainly driven by the £713 million HMP Welland Oaks development in Leicestershire. Accounting for 20%, London also grew more than six times on a year ago to total £294 million. Totalling £113 million project starts in Scotland grew 249%.

The South East accounted for 78% of detailed planning approvals after a 92% increase year-on-year to total £311 million. This growth was boosted by the £300 million HMP Grendon Underwood development in Aylesbury. Accounting for a 7% share, the East of England also grew 157% on a year ago to total £28 million.

Changes in Community & Amenity Starts on a Year Earlier



Changes in Community & Amenity Planning Approvals on a Year Earlier



Civil Engineering Overview

▲ **118% rise** in project starts against the preceding three months.

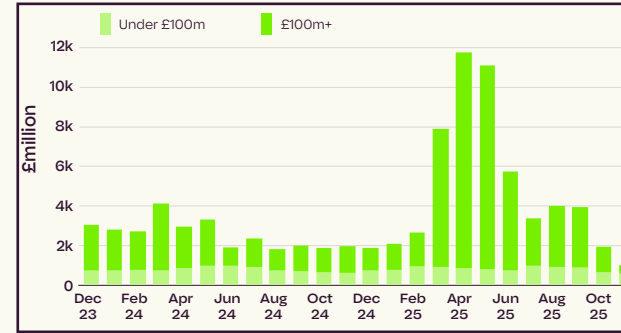
▼ **64% decline** in main contract awards against the preceding three months.

▼ **50% decline** in detailed planning approvals compared to the previous year.

Civil Engineering project starts weakened against the previous year but rose sharply against the preceding three months, with main contract awards and detailed planning approvals declining against both periods.

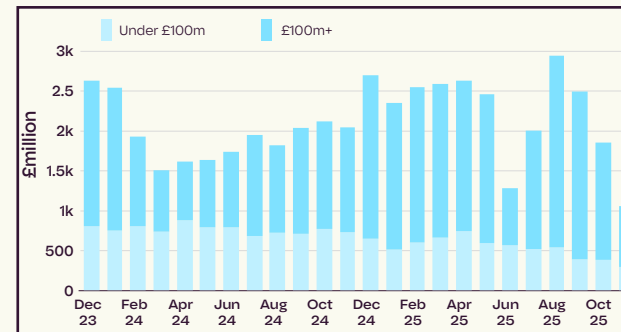
The 2025 UK Budget offers a notable boost for civil engineering through expanded regional infrastructure funding and accelerated transport investment. The devolved £13 billion for metro mayors, alongside higher capital allocations for highways maintenance, strengthens activity for local road, transport, and utility projects, with the sector anticipating growth in 2026 and 2027.

Detailed Planning Approvals



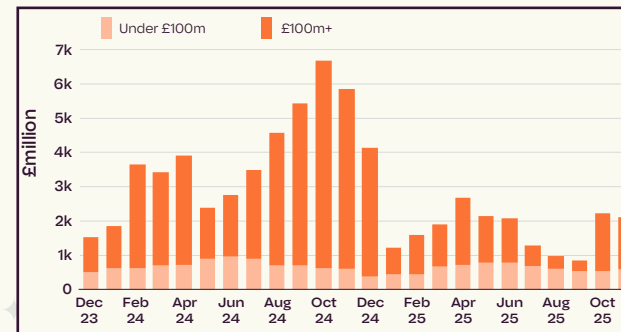
Source: Glenigan

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	1,718	1,257	2,975
YoY	-8%	-69%	-50%
Prev. 3 months	-37%	-86%	-75%
Prev. 3 months (SA)	-33%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	883	2,282	3,165
YoY	-60%	-42%	-48%
Prev. 3 months	-45%	-68%	-64%
Prev. 3 months (SA)	-50%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,788	4,566	6,354
YoY	-1%	-71%	-64%
Prev. 3 months	-1%	308%	118%
Prev. 3 months (SA)	4%		

Civil Engineering

Types of projects started

Performance across segments in the sector was poor, with four of seven sectors declining against the previous year.

- Roads totalled £4,601 million, accounting for the largest share of starts (72%) and increasing 335% year-on-year.
- Energy accounted for the second largest share of starts (11%), declining 92% year-on-year to total £708 million.
- Harbour/Ports totalled £248 million, increasing 267% year-on-year.

Types of Civil Engineering Projects Started

Three months to November 2025

	£ million	Percentage
Airports	-	0%
Other Civils	407	6%
Rail	0	0%
Roads	4,601	72%
Harbours/Ports	248	4%
Energy	708	11%
Water Industry	251	4%
Waste	138	2%
Total	6,354	100%

Project Spotlight

EfW CHP Facility

Detailed plans have been approved for the £300 million EfW CHP Facility in Wisbech, Cambridgeshire. Kanadevia Inova have been appointed as the civil contractors on the scheme, with works expected to complete in Q2 2029.

PROJECT ID: 20074930

IMAGE SOURCE: CAMBRIDGESHIRE NEWS

£300m



Civil Engineering League Tables

December 2024 to November 2025

Contractors	Projects	£m
STRABAG	6	2,598
Royal BAM	20	1,732
Ferrovial	2	1,615
M GROUP	10	933
Costain	5	931
Jones Bros	3	548
Downing	1	500
Bouygues UK	9	412
G W Highways	1	400
ACCIONA	1	400

Clients	Projects	£m
Dep. for Transport	35	4,323
United Utilities Group	5	2,930
Oxfordshire CC.	5	1,002
Comm. Wind Power	1	500
Kingsway Solar Farm	1	500
Kemble Water	5	423
Kent CC.	5	416
National Grid	5	368
MVV Environment	1	300
Transport Scotland	1	257

Civil Engineering

Regional

- The East of England accounted for the largest share of sector starts, despite experiencing a decline against the previous year.
- The East Midlands accounted for the largest share and experienced the sharpest growth for approvals.
- London experienced sharp growth in project starts.

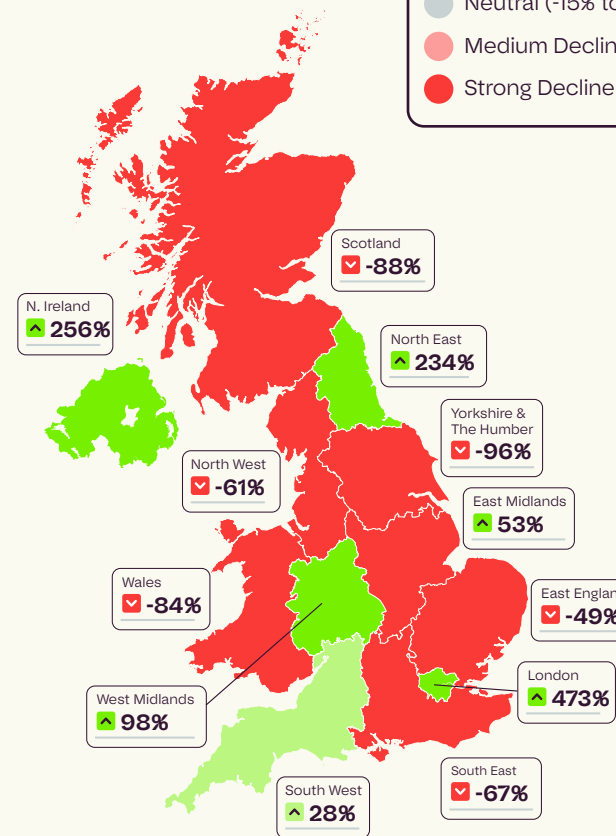
The East of England was the most active region for project starts, totalling £4,319 million and accounting for 68% of the total, despite a 49% decline year-on-year. London performed strongly, rising 473% to £190 million.

For planning approvals, the East Midlands led with a 20% share, growing 345% year-on-year to £600 million. The North West held an 18% share, with approvals surging 44% to £549 million.

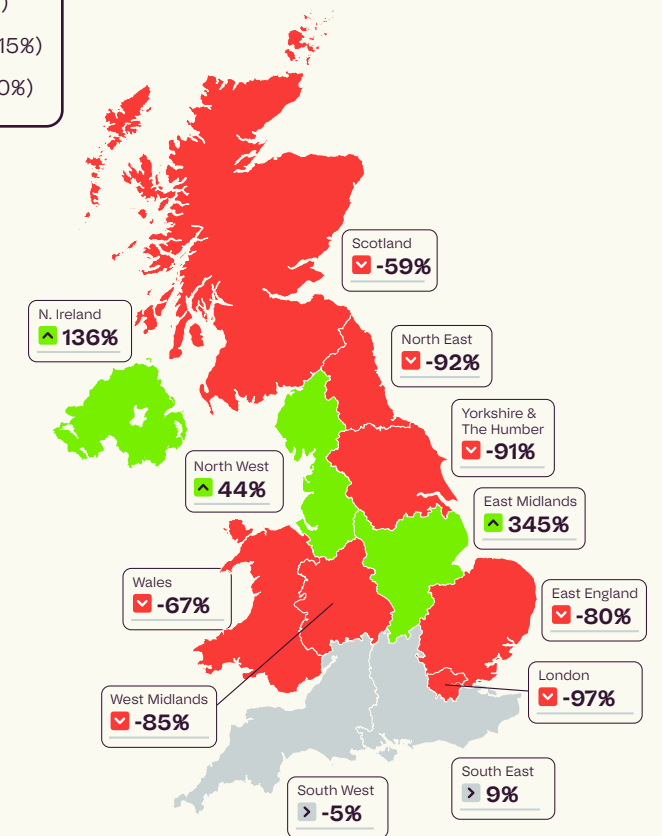
Changes in Civil Engineering Starts on a Year Earlier

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





Glenigan

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