Glenigan

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Construction Review

Reflecting activity to the end of January 2026

February 2026

- **30% decline in detailed planning approvals** against the preceding three months
- **37% decline in main contract awards** against the preceding three months
- **31% decline in project starts** against the preceding three months

Expert insights

to drive your construction strategy forward

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

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

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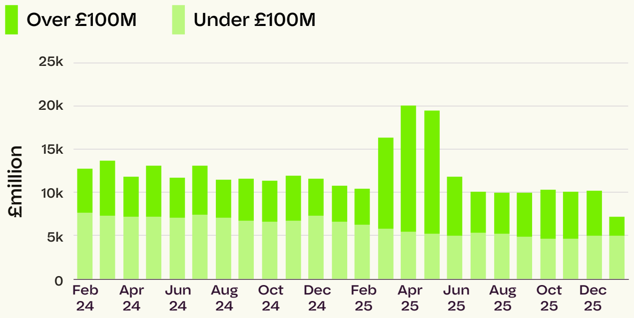
Executive Summary

- **33% decline** in approvals against the previous year
- **43% decrease** in main contract awards against the previous year
- **20% decrease** in project starts against the previous year

The latest figures show a slowdown in UK construction activity, with project-starts, main contract awards, and detailed planning approvals all falling compared with the preceding three months and the previous year.

Despite a poor start to the year, key schemes across the economy such as the New Hospital Programme, the School Rebuilding Programme as well as a strong pipeline of infrastructure and utilities programmes are set to help support overall construction activity in the future.

Detailed Planning Approvals

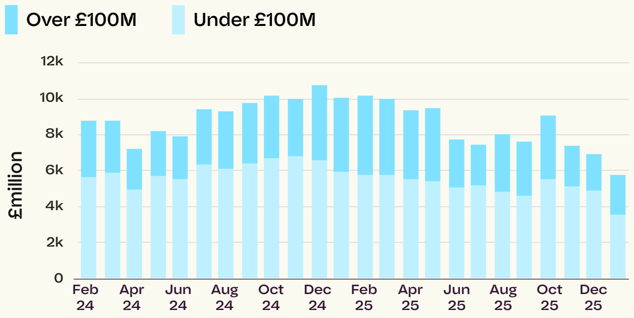


Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£million	15,016	6,567	**21,582**
YoY	-24%	-47%	**-33%**
Prev. 3 months	8%	-62%	**-30%**
Prev. 3 months (SA)	1%		

Source: Glenigan. Three month average

Main Contract Awards

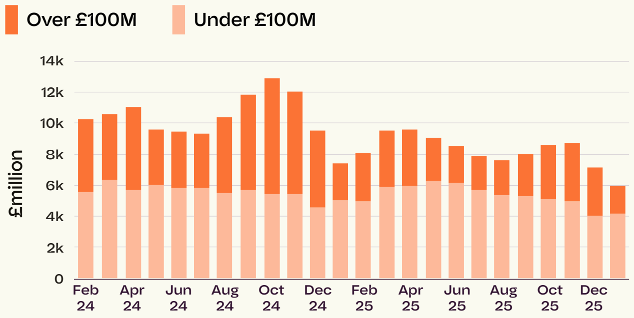


Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	10,734	6,535	**17,269**
YoY	-40%	-47%	**-43%**
Prev. 3 months	-35%	-38%	**-37%**
Prev. 3 months (SA)	-32%		

Source: Glenigan. Three month average

Starts



Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	12,602	5,176	**17,778**
YoY	-16%	-28%	**-20%**
Prev. 3 months	-18%	-50%	**-31%**
Prev. 3 months (SA)	-9%		

Source: Glenigan. Three month average

Economic Outlook

Mixed signals for UK economy

- Manufacturing and construction hold back economic growth
- Higher average earnings boost consumer spending
- Private sector employment falters

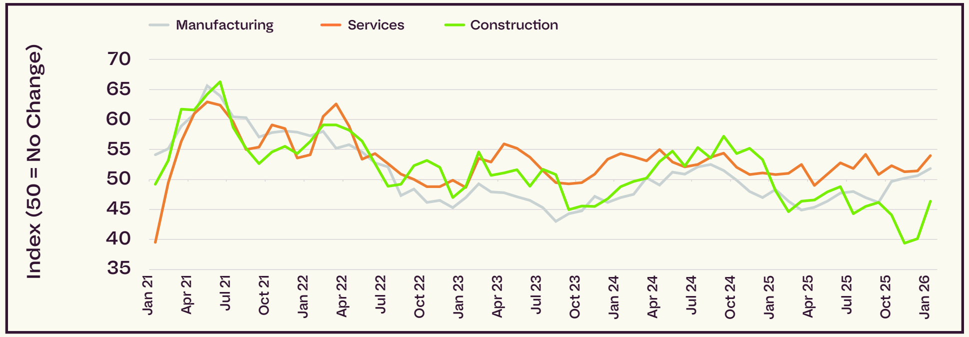
The economy grew by just 0.1% during the three months to November as a rise in service sector output was largely offset by a weakening in manufacturing and construction. Consumer-facing services were particularly strong, increasing by 0.5% compared to the preceding three months as rising household incomes supported increased expenditure on travel, sports & leisure, and retail purchases. Industry surveys point to a tentative upturn in UK economic growth during January, led by a strengthening service sector.

Higher average earnings have supported the rise in consumer-facing services. Average earnings during November were 4.3% up on a year earlier, outpacing inflation at 3.3%. Earnings growth has not been evenly distributed. Public sector earnings were 7.9% higher than a year ago.

In contrast, private sector wage growth rose by 3.5%, with construction increasing by 2.2%. This reflects sluggish demand growth and higher production costs in the private sector. Job vacancies have also declined, accompanied by an uptick in unemployment to 5.1%.

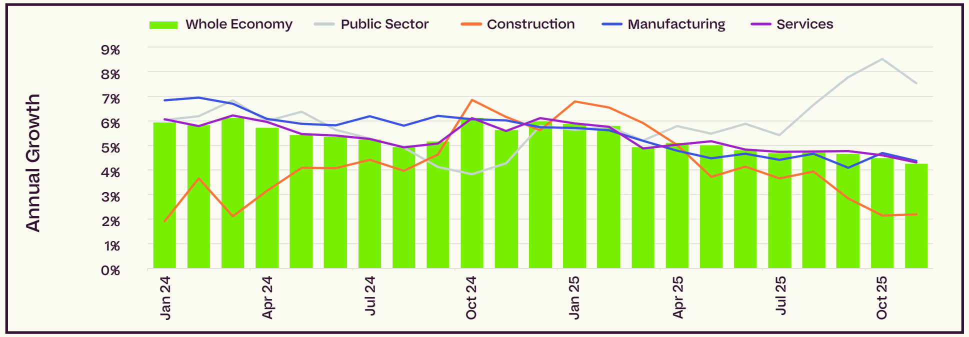
This has the potential to dampen consumer confidence and spending over the coming months. An early interest rate cut would help to rebuild both consumer and business confidence.

CIPS Activity Surveys



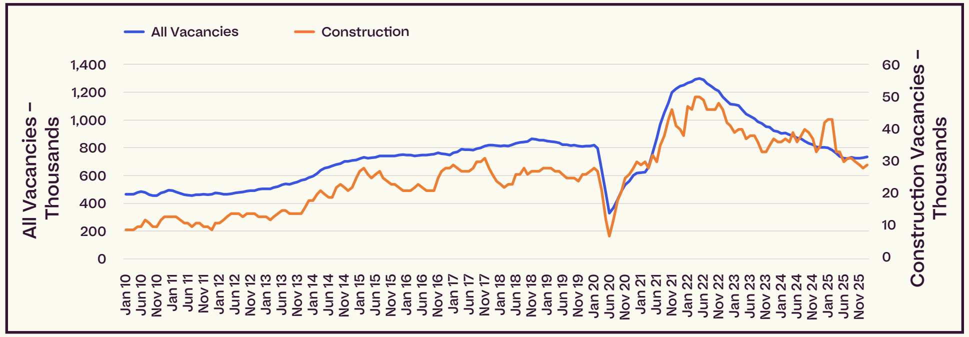
Source: IHS Markit/CIPS

CIPS Activity Surveys



Source: ONS

UK Investment



Source: ONS

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Top 50 Contractors

Last 12 month totals:	993 projects	£32,888m
Last month totals:	95 projects	£2,865m

February 2025 to January 2026

	Contractors	#	£m	★
1	STRABAG	7	2,636	0
2	Morgan Sindall	208	2,358	2
3	Mace	12	2,136	-1
4	Kier	79	1,949	-1
5	Bowmer & Kirkland	29	1,893	0
6	Bovis	11	1,458	0
7	Laing O'Rourke	11	1,442	0
8	Graham Construction	29	1,155	0
9	Mclaren	15	1,009	9
10	Willmott Dixon	58	975	1
11	M Group Services	11	934	-1
12	Jones Bros	4	898	10
13	Winvic	22	836	0
14	Galliford Try	122	830	0
15	Wates	46	804	-3
16	Mears Group	4	787	0
17	Royal BAM	37	783	0
18	Sisk	7	566	1
19	McAleer & Rushe UK	10	537	1
20	Sir Robert McAlpine	4	401	-11
21	G W Highways	1	400	4
22	ACCIONA	1	400	4
23	Costain	4	392	16
24	Bouygues	21	379	-9
25	Tilbury Douglas	32	368	2
26	VINCI	25	363	2
27	Hill Group	15	360	-3
28	Glencar Construction	21	337	10
29	Equitix	1	332	2
30	Corrigenda	4	324	NEW
31	Kanadevia Inova UK	2	319	3
32	TSL Projects	6	319	-3
33	Ian Williams	8	294	NEW
34	Balfour Beatty	19	292	-2
35	Marlborough Surfacing	2	285	0
36	Murphy	6	278	1
37	Caddick Group	14	273	-4
38	McLaughlin & Harvey	9	263	-2
39	Bennett Construction	3	252	2
40	Flynn	1	250	NEW
41	Structure Tone	3	247	4
42	GMI Construction	13	242	NEW
43	Esh Group	17	230	6
44	Domis Construction	2	229	3
45	Gilbert Ash	3	220	-1
46	G2 Energy	1	216	4
47	HG Construction	6	216	NEW
48	Collins Cons. Projects	11	212	NEW
49	RE: GEN Group	14	210	-3
50	Castle Building Services	4	202	NEW

January 2026

	Contractors	#	£m	★
1	Bowmer & Kirkland	3	378	11
2	McLaren	5	321	NEW
3	Corrigenda	1	300	NEW
4	Morgan Sindall	11	289	NEW
5	UI Social Infrastructure	1	138	NEW
6	Cardo Group	1	137	NEW
7	Ian Williams	1	137	NEW
8	Costain	1	123	NEW
9	Boulevard Construction	1	60	NEW
10	Multiplex	1	58	NEW
11	Winvic	1	55	NEW
12	GMI Construction	4	53	-1
13	Royal BAM	1	51	-8
14	SDC Holdings	3	46	NEW
15	Keady Construction	1	46	NEW
16	Willmott Dixon	4	38	32
17	Bouygues	3	36	NEW
18	Glencar Construction	2	35	2
19	Galliford Try	7	34	-13
20	Kier	2	31	-12
21	Legendre Construction	1	30	NEW
22	Benniman Limited	1	30	-4
23	City Gate Cons (Scotland)	1	28	NEW
24	Charles Brand	1	26	NEW
25	Wills Bros	1	23	NEW
26	Overbury	5	23	NEW
27	Mears Group	1	22	NEW
28	Eric Wright	3	22	NEW
29	One Group Construction	1	22	NEW
30	Thakeham Group	1	20	NEW
31	Erith Contractors	1	19	NEW
32	Barnwood Group	1	18	NEW
33	Speller Metcalfe	1	16	NEW
34	Uk Gas Services	1	15	NEW
35	Gap Prop. Serv. Leicester	1	15	NEW
36	Jerram Falkus Cons.	1	15	NEW
37	Kiely Bros	1	15	NEW
38	Hanson Quarry Products	1	15	NEW
39	Stainforth Construction	1	14	NEW
40	Neilcott Construction	2	14	NEW
41	Lindum Group	2	11	NEW
42	CLC Group	2	11	NEW
43	Carnegie Steel Buildings	1	11	NEW
44	Classic Builders S. West	1	11	-20
45	Edgewater Contracts	1	10	NEW
46	Jr Construction Scotland	1	10	NEW
47	Triton Construction	1	9	NEW
48	MD Building Services	1	9	-45
49	TR Group	1	9	NEW
50	Wates	3	9	-36

★ Change in ranking since the previous period

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Top 50 Clients

February 2025 to January 2026

	Clients	#	£m	★
1	United Utilities Group	5	2930	0
2	Department of Health	147	1235	2
3	Ministry of Justice	36	1088	-1
4	Oxfordshire County Council	9	1005	1
5	Dep. for Environment, Food & Rural Affairs	10	956	1
6	Ministry of Defence	42	909	1
7	Department for Education	67	856	1
8	Mitsui Fudosan	1	700	1
9	Scottish Prison Service	3	685	1
10	British Land	5	653	1
11	Community Wind Power	1	500	1
12	Milton Keynes BC.	3	494	1
13	Kemble Water	9	483	2
14	Kent County Council	8	482	0
15	National Grid	9	383	2
16	Dover District Council	2	360	2
17	Enso Energy	4	339	29
18	Department for Transport	31	322	-2
19	Hampshire County Council	6	317	NEW
20	MVV Environ.Devonport	1	300	0
21	Highview Power	1	300	0
22	SSEN Transmission	5	293	NEW
23	Greater London Authority	10	267	0
24	Hertfordshire CC.	5	262	-2
25	Tribus Clean Energy	1	250	1
26	Telehouse International	1	250	1
27	Lidl UK	34	249	-2
28	Prologis UK	6	235	14
29	Westminster City Council	2	230	NEW
30	Sanctuary Housing	3	229	-2
31	Clarion Housing Group	5	219	-1
32	Elements Green	1	216	-1
33	Echelon Consultancy	2	212	NEW
34	CPD	4	204	-1
35	Natural History Museum	2	204	-1
36	Great Portland Estates	4	201	NEW
37	Immersa	1	200	0
38	London Bor. of Havering	3	196	0
39	Urenco UK	1	196	0
40	Cole Waterhouse	1	185	1
41	University of London	11	185	2
42	Midlothian Council	4	175	-13
43	Simec Atlantis Energy	1	175	NEW
44	Aldi	47	172	4
45	NTT Data UK	1	165	NEW
46	Obayashi	1	165	-2
47	Sellar Property Group	1	165	-2
48	The Crown Estate	4	160	-1
49	Dep. for Infrastructure	5	159	0
50	Vita Meadows	1	158	NEW

January 2026

	Clients	#	£m	★
1	Hampshire County Council	2	300	NEW
2	Westminster City Council	1	229	NEW
3	Dudley Met. BC.	1	138	NEW
4	Liverty	1	137	NEW
5	Echelon Consultancy	1	137	NEW
6	Department for Transport	2	137	NEW
7	London Bor. of Southwark	1	92	NEW
8	BDO	1	75	NEW
9	Department of Health	8	68	14
10	London Borough of Enfield	1	55	NEW
11	Lego Company	1	55	NEW
12	Define	1	51	NEW
13	Sizewell C	1	50	NEW
14	Drum Property Group	1	47	NEW
15	Department for Education	5	47	-12
16	Elder Develop (greyfriars)	1	46	NEW
17	Wellcome Trust	1	42	NEW
18	Mountpark Properties	2	36	NEW
19	Indurent	2	35	NEW
20	Renfrewshire Council	4	31	NEW
21	Satara Projects	1	30	NEW
22	London Green	1	30	NEW
23	Indurent PropCo C2	1	30	NEW
24	Berkeley Square Holdings	1	30	NEW
25	Native Land	1	29	NEW
26	Sampson Hse & Ludgate Hse	1	29	NEW
27	Arkwood Developments	1	28	NEW
28	Sherrif Way Nottingham	1	28	NEW
29	Cassidy Group	1	28	NEW
30	Highland Council	1	26	NEW
31	Foxwood School	1	25	NEW
32	North Ayrshire Council	1	23	NEW
33	Kent County Council	2	23	NEW
34	Kemble Water	1	21	-3
35	Torus Housing Group	1	20	NEW
36	Stonewater	1	20	NEW
37	FlightSafety Int. UK	1	18	NEW
38	J Pullan & Sons	1	17	NEW
39	London Bor. of Bromley	1	15	NEW
40	T J Morris	2	14	NEW
41	Birtenshaw School	1	14	NEW
42	Lok'nStore	1	14	NEW
43	W8 Developments	2	14	NEW
44	Greater London Authority	2	14	NEW
45	BBC	1	13	NEW
46	BMR Edgware	2	12	NEW
47	University of Cambridge	2	12	NEW
48	Aster Group	2	11	NEW
49	Norfolk County Council	1	11	NEW
50	East Sussex Highways	1	11	NEW

★ Change in ranking since the previous period

Housing

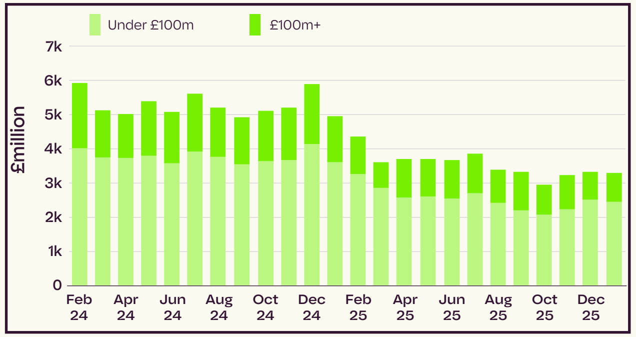
Overview

- **24% decrease** in project starts year-on-year.
- **33% decrease** in main contract awards from last year.
- **34% decrease** in detailed planning approvals year-on-year.

Residential project-starts and main contract awards experienced a decline against both last year and the preceding quarter during the three months to January. More positively, there was growth in detailed planning approvals against the previous quarter. Major project starts (£100 million or more) are also showing signs of recovery.

With UK house prices rising in January, the outlook for the housing sector appears promising despite experiencing a weak quarter. In 2026, private housing and social housing are forecast to rise by 6%.

Detailed Planning Approvals

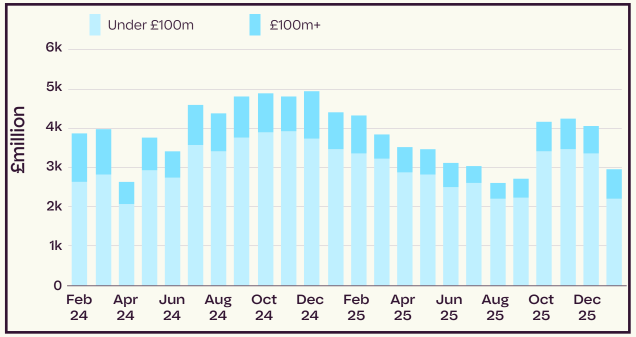


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	7,378	2,482	**9,859**
YoY	-32%	-40%	**-34%**
Prev. 3 months	19%	-5%	**12%**
Prev. 3 months (SA)	9%		

Main Contract Awards

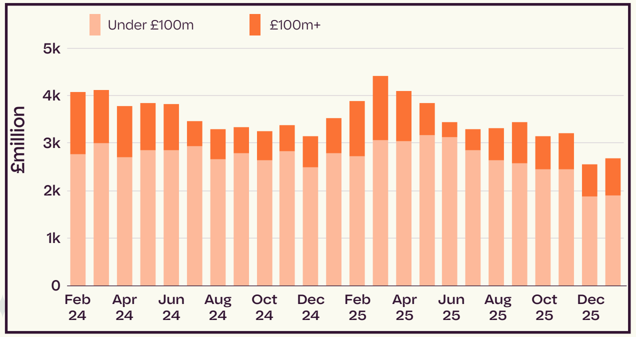


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	6,619	2,240	**8,859**
YoY	-36%	-21%	**-33%**
Prev. 3 months	-35%	-4%	**-29%**
Prev. 3 months (SA)	-31%		

Housing Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	5,701	2,371	**8,072**
YoY	-32%	9%	**-24%**
Prev. 3 months	-23%	14%	**-15%**
Prev. 3 months (SA)	-24%		

Housing

Types of projects started

Sub-sector performance was mixed, with five categories up on a year ago.

- Private housing accounted for the largest share (38%), having decreased 51% year-on-year to total £3,107 million.
- Private apartments grew 43% against the previous year, totalling £2,493 million.
- Social Sector Housing started on site grew 3% compared to a year ago to a total of £1,038 million.

Project Spotlight

Cambridge Halls

Detailed plans have been approved on the £390 million Cambridge Halls student accommodation development in Manchester. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q4 2027.

PROJECT ID: 24273061

IMAGE SOURCE: ALL SAINTS CAMPUS

Types of Housing Projects Started

Three months to January 2026

	£ million	Percentage
Private Apartments	2,493	**31%**
Elderly Persons Homes	16	**0%**
Private Housing	3,107	**38%**
Private Sheltered Housing	97	**1%**
Social Sector Sheltered Housing	36	**0%**
Social Sector Apartments	477	**6%**
Social Sector Housing	1,038	**13%**
Homes, Hostels Etc.	106	**1%**
Student Accommodation	703	**9%**
Total	8,072	**100%**

Housing League Tables

January 2025 to February 2026

Contractors	Projects	£m
Barratt Redrow	64	2,031
Bloor Homes	62	1,943
Taylor Wimpey	40	1,316
Persimmon	56	1,282
Bellway	42	960
Hill Group	24	843
Mears Group	4	787
Vistry	22	602
Apollo Mngmt. Int.	29	543
Keepmoat	17	518

Clients	Projects	£m
Barratt Redrow	75	2,072
Bloor Homes	66	2,070
Taylor Wimpey	52	1,768
Persimmon	66	1,354
Bellway	46	1,110
Vistry	46	930
Milton Keynes BC.	3	716
Apollo Mngmt. Int.	31	529
The Berkeley Group	10	429
Dover District Council	1	350

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Housing

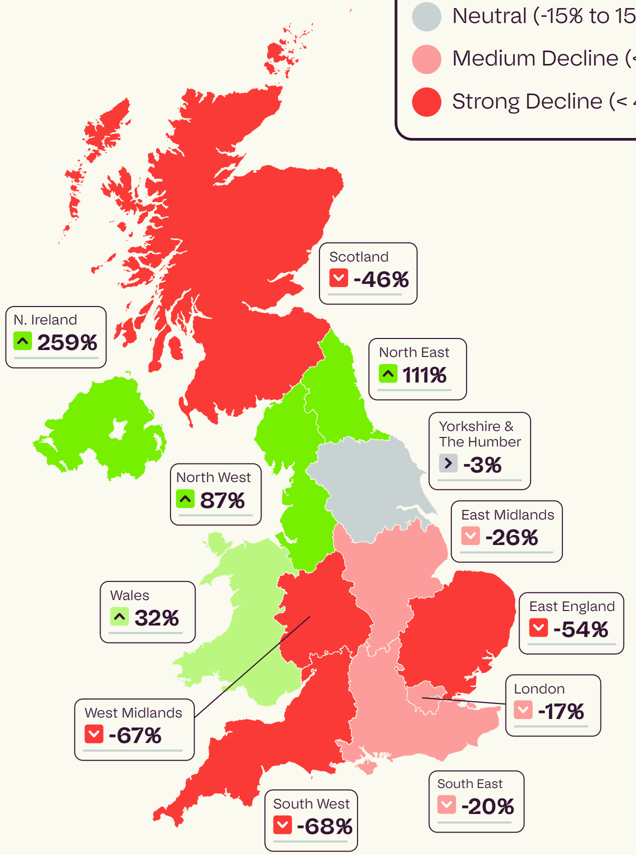
Regional

- Project starts were weak, with most regions down on a year ago.
- Only two regions showed growth in detailed planning approvals.
- Northern Ireland and the North West experienced growth in project starts and approvals.

The North West led residential project starts, thanks to an 87% increase to total £1,449 million. London, on the other hand, performed poorly, having decreased 17% on a year ago to total £1,439 million. The South East fell 20% to total £904 million. The East Midlands experienced a 26% slump to total £714 million.

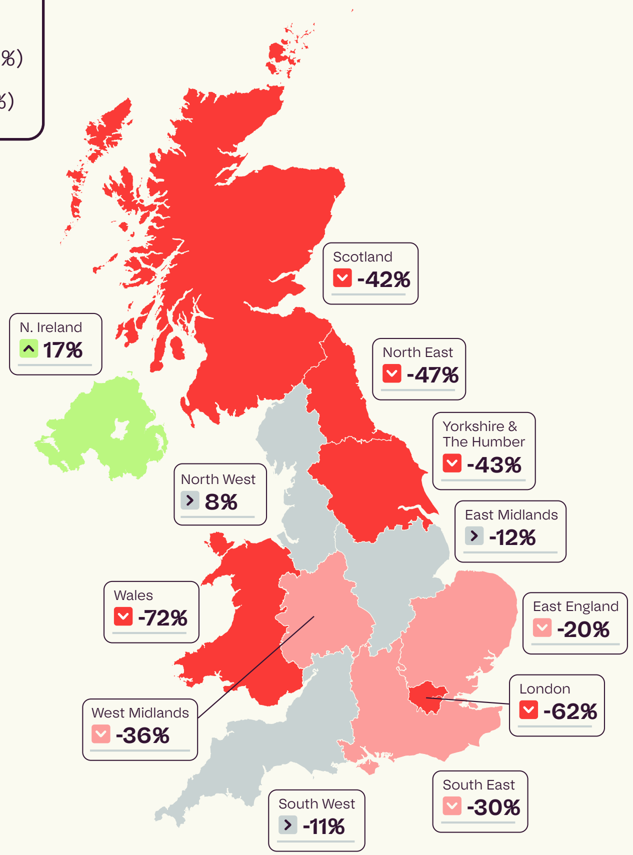
At £1,490 million, the South East was the most active region for detailed planning approvals, despite having fallen 30% year-on-year. London decreased 62% on a year ago to total £1,484 million. Totalling £1,269 million, the South West slipped back 11% on a year ago. In contrast, approvals in the North West increased 8% to total £1,316 million.

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

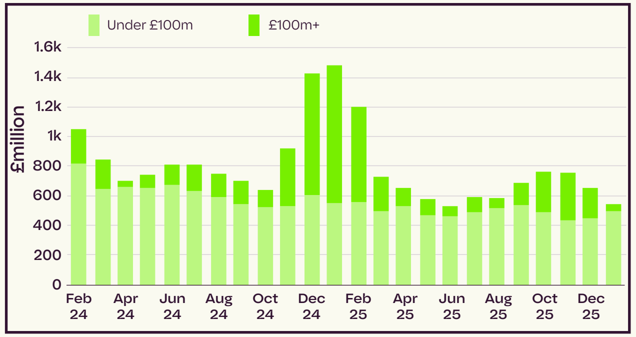
Overview

- **13% decrease** in project starts year-on-year.
- **79% decrease** in main contract awards from last year.
- **63% decrease** in detailed planning approvals compared to 2024.

Performance in the industrial sector was weak during the three months to January. Starts were 13% down on a year ago and 7% lower than the preceding three months. Main contract awards were 28% lower than the preceding quarter, to stand 79% down year-on-year.

Detailed planning approvals declined 29% quarter-on-quarter to stand 63% down on a year ago. More positively, there was growth in underlying projects starting on-site (under £100 million), both quarter-on-quarter (SA) and year-on-year.

Detailed Planning Approvals

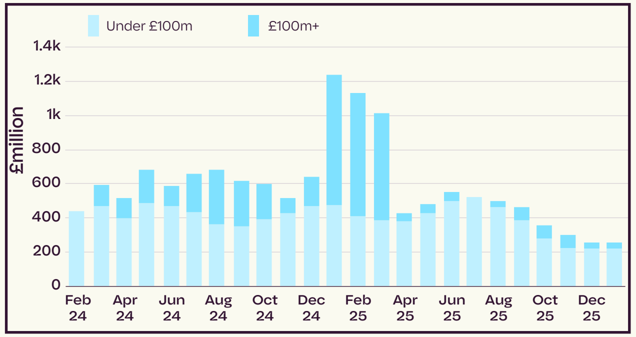


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,500	139	**1,639**
YoY	-10%	-95%	**-63%**
Prev. 3 months	2%	-83%	**-29%**
Prev. 3 months (SA)	-5%		

Main Contract Awards

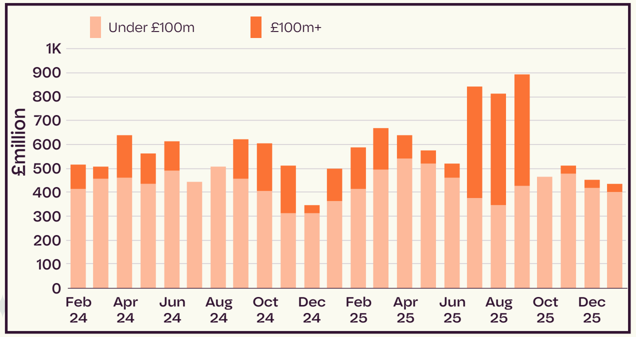


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	667	100	**767**
YoY	-53%	-96%	**-79%**
Prev. 3 months	-21%	-55%	**-28%**
Prev. 3 months (SA)	-28%		

Industrial Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,212	100	**1,312**
YoY	10%	-75%	**-13%**
Prev. 3 months	-14%		**-7%**
Prev. 3 months (SA)	2%		

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 61% of industrial project starts, 36% up on a year ago to total £800 million.
- Totalling £447 million, Warehousing & logistics accounted for 34%, a 46% decrease.
- Other industrial projects fell 21% year-on-year, totalling £64 million, a 5% share of the sector.

Project Spotlight

Encirc Automated Warehouse

Detailed plans have been approved for the £60.2 million Encirc Automated Warehouse development in Elton, Chester. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 23076376

IMAGE SOURCE: AEW ARCHITECTS

£60.2m

Types of Industrial Projects Started

Three months to January 2026

	£ million	Percentage
Manufacturing	800	**61%**
Other Industrial	64	**5%**
Warehousing & Logistics	447	**34%**
Total	1,312	**100%**

Industrial League Tables

January 2025 to February 2026

Contractors	Projects	£m
Winvic	14	545
TSL Projects	5	288
Caddick	11	277
Glencar Construction	16	269
Benniman	9	156
J W Muir	7	140
GMI Construction	5	130
Wilten Construction	10	121
Magrock	11	118
Murphy	2	106

Clients	Projects	£m
Prologis UKd	6	244
Lidl UK	2	154
Indurent	9	111
Howden Joinery	1	100
Panattoni	5	93
Aldi	1	84
Avonmouth Indust.	2	83
Waldens Wilts Foods	1	74
Caddick	3	68
Amazon UK	3	64

Industrial

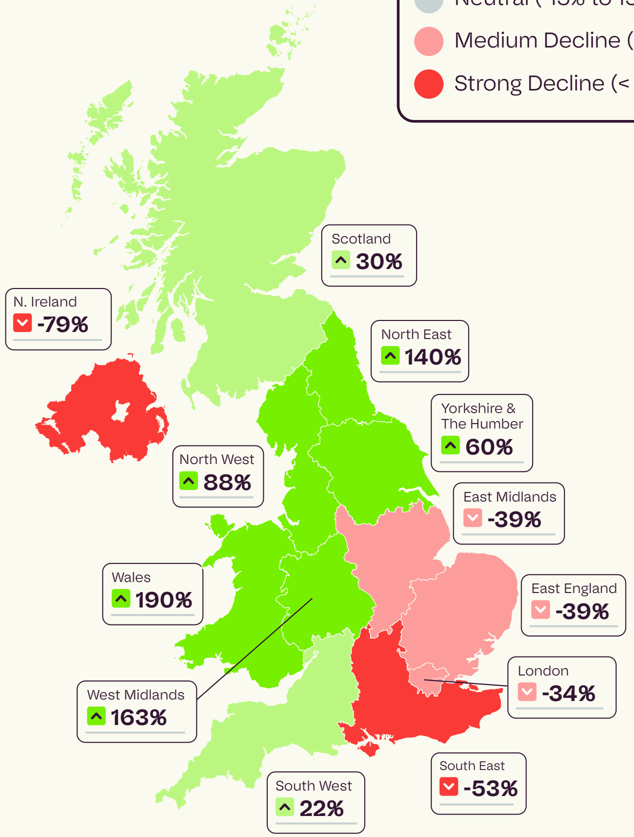
Regional

- Regional performance in project starts was strong, with most regions up year-on-year.
- Detailed planning approvals only increased in two regions.
- West Midlands grew in both project starts and approvals.

The East Midlands accounted for 19% of project starts, totalling £246 million. The region fell 39% on a year ago. Accounting for 12%, starts in the South East decreased 53%, totalling £159 million. The West Midlands, on the other hand, almost tripled on a year ago to total £179 million.

The North West led detailed planning approvals in the industrial sector, despite a 69% decline year-on-year, totalling £253 million. Yorkshire & the Humber decreased 55%, totalling £228 million. In contrast, consents grew 2% in the West Midlands, bumping the total to £239 million.

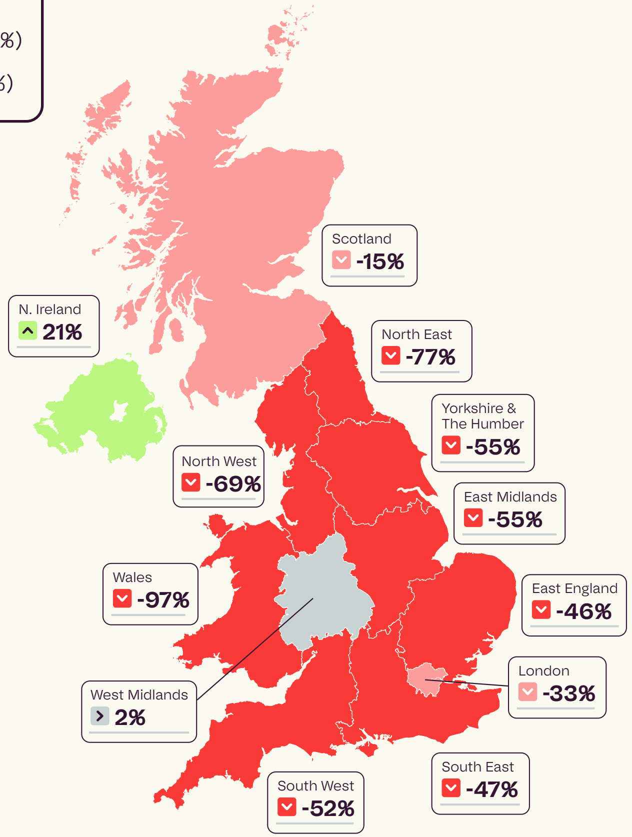
Changes in Industrial Starts
on a Year Earlier



Growth or Decline

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

Changes in Industrial Planning Approvals
on a Year Earlier



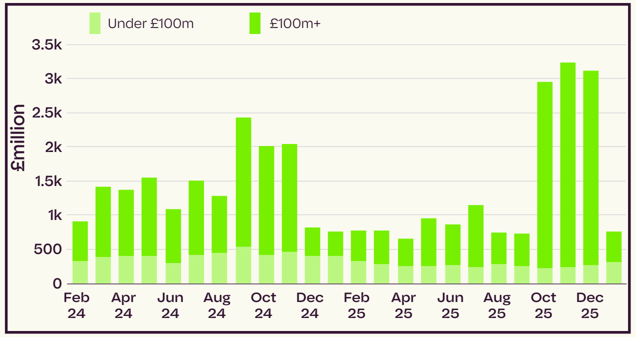
Offices

Overview

- **20% decrease** in project starts year-on-year.
- **16% decrease** in main contract awards from last year.
- **1% decrease** in detailed planning approvals compared to a year ago.

The office sector had a weak performance during the three months to January, with a decline in project starts, main contract awards and detailed planning approvals against both the previous three months and a year ago. However, underlying project starts (under £100 million) grew against both periods.

Detailed Planning Approvals

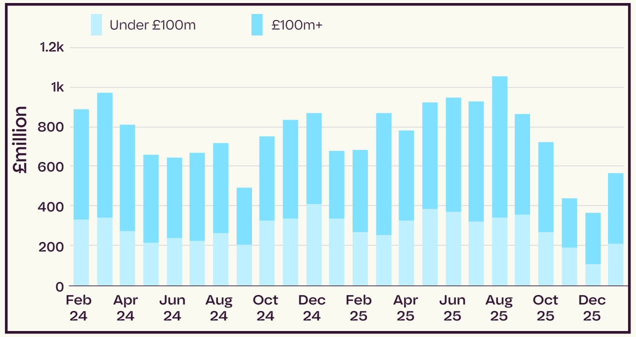


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	911	1,351	**2,262**
YoY	-24%	25%	**-1%**
Prev. 3 months	43%	-84%	**-75%**
Prev. 3 months (SA)	27%		

Main Contract Awards

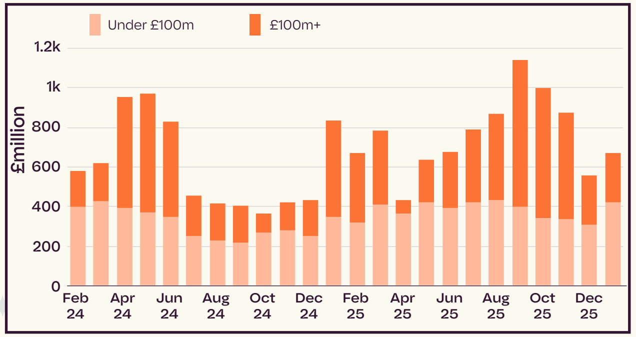


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	624	1,080	**1,704**
YoY	-38%	5%	**-16%**
Prev. 3 months	-22%	-21%	**-22%**
Prev. 3 months (SA)	-21%		

Office Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,255	750	**2,005**
YoY	21%	-49%	**-20%**
Prev. 3 months	22%	-62%	**-33%**
Prev. 3 months (SA)	7%		

Offices

Types of projects started

In line with the overall decline in the sector, only two value bands experienced growth in project starts.

- Project starts in the over £100 million value band totalled £750 million, having decreased 49% on a year ago.
- The £50 million to £100 million value band decreased 30% year-on-year, totalling £252 million.
- The £20 million to £50 million value band jumped 70% year-on-year, totalling £580 million.

Project Spotlight

Camomile Park

Detailed plans have been approved for the £500 million Camomile Park development in the City of London. Work is due to complete in Q1 2030, with a main contractor yet to be appointed on the scheme.

PROJECT ID: 24138635

IMAGE SOURCE: FLETCHER PRIEST

Types of Office Projects Started

Three months to January 2026

	£ million	Percentage
Up to £5 million	109	**5%**
£5 million up to £10 million	192	**10%**
£10 million up to £20 million	122	**6%**
£20 million up to £50 million	580	**29%**
£50 million up to £100 million	252	**13%**
Over £100 million	750	**37%**
Total	2005	**100%**

Office League Tables

January 2025 to February 2026

Contractors	Projects	£m
Mace	8	1,836
Morgan Sindall	115	1,063
Bowmer & Kirkland	5	722
Bovis	2	480
Multiplex Cons. Eur.	2	358
McLaren	4	346
Kier	6	266
Flynn	1	250
Structure Tone	3	247
Collins Construc.	10	204

Clients	Projects	£m
Mitsui Fudosan UK	1	700
British Land	3	642
Endurance Land	1	300
Telehouse Int.	1	250
Grt.Portland Estates	4	201
Obayashi	1	165
NTT Data	1	165
Sellar Property	1	165
The Crown Estate	5	162
Barclays Bank	2	151

Offices

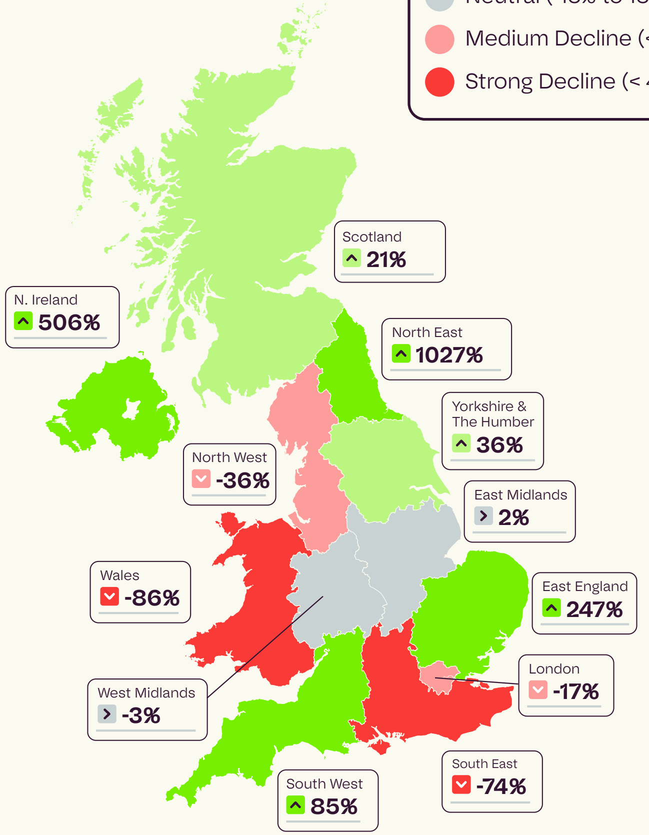
Regional

- Most regions saw growth in projects commencing on-site, despite the overall decline in office starts.
- Mixed regional performance in project starts, with half of the regions up against last year.
- North East and Northern Ireland experienced strong growth in both project starts and planning approvals.

London had by far the highest share (68%) of project starts during the period, despite a 17% decline to total £1,372 million. Totalling £115 million, starts in the North West fell 36% on a year ago. In contrast, the East of England jumped 247% against last year to total £168 million.

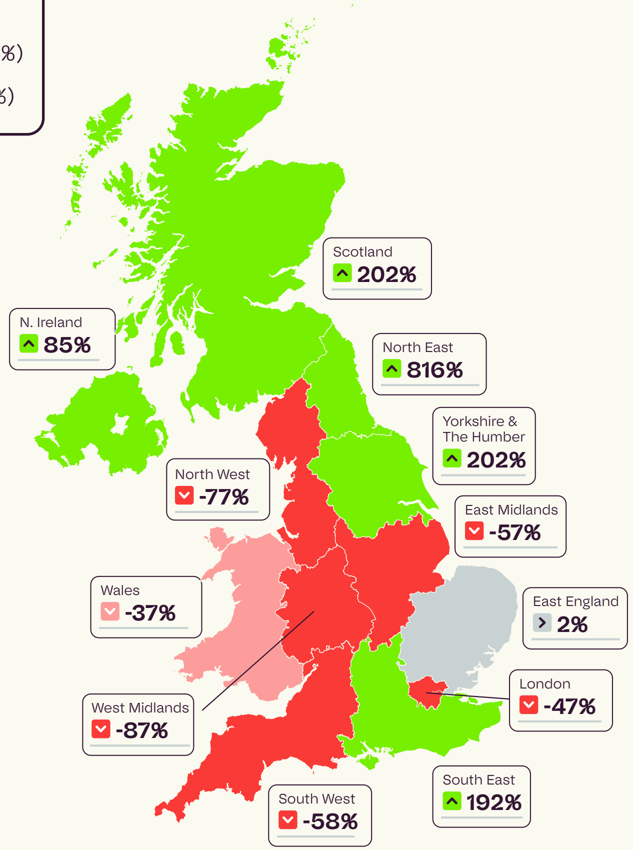
The South East led detailed planning approvals in the office sector, having jumped 192% year-on-year to total £822 million. The East of England climbed 2% against the previous year to total £290 million. At £262 million the North East grew nine times against last year's figures. In contrast, totalling £522 million, consents in London fell 47%.

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



Glenigan
A Hubexo Product

Retail

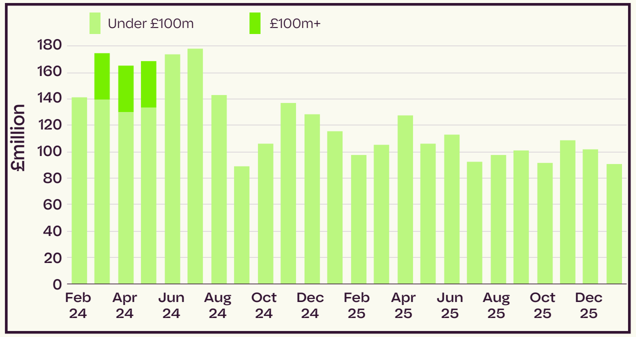
Overview

- **13% decrease** in project starts year-on-year.
- **79% decrease** in main contract awards from last year.
- **21% decrease** in detailed planning approvals compared to the previous year.

Performance in the Retail sector was weak in the three months to January, with project starts, main contract awards and detailed planning approvals all down year-on-year. No major projects (over £100 million) reached any of the three stages in the development pipeline.

Underlying contract awards and approvals (under £100 million) were also down against both periods. More positively, project starts grew 9% against the previous three months, driven by an increase in underlying starts.

Detailed Planning Approvals

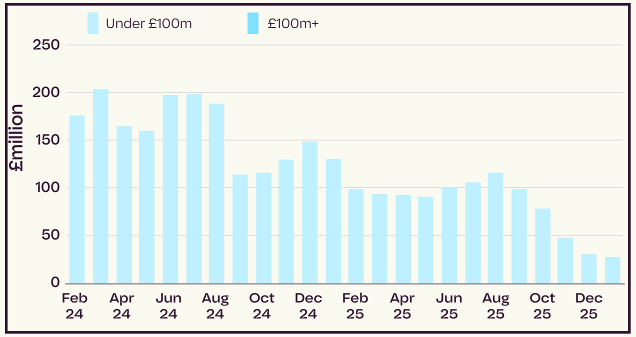


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	273	-	273
YoY	-21%		-21%
Prev. 3 months	-1%		-1%
Prev. 3 months (SA)	-3%		

Main Contract Awards

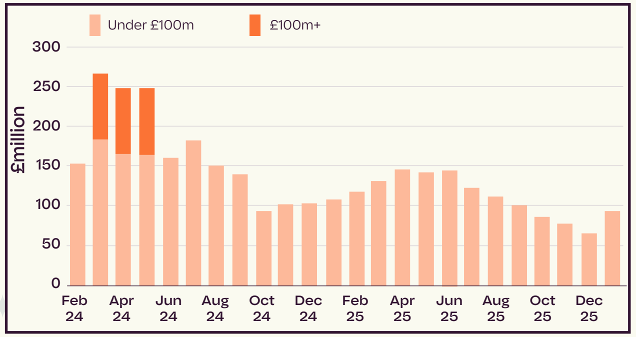


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	80	-	80
YoY	-79%		-79%
Prev. 3 months	-65%		-65%
Prev. 3 months (SA)	-68%		

Retail Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	283	-	283
YoY	-13%		-13%
Prev. 3 months	9%	-100%	9%
Prev. 3 months (SA)	14%		

Retail

Types of projects started

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

- Supermarkets accounted for the largest share (64%), having increased 26% year-on-year to total £181 million.
- Totalling £9 million, petrol filling stations were 170% higher year-on-year.
- Totalling £81 million, shop projects starting on site decreased 31% on a year ago.

Project Spotlight

Meenan Square Development

Detailed plans have been approved for the £12.4 million Meenan Square Development in Derry, Co Londonderry. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 23119047

IMAGE SOURCE: TURLEY

Types of Retail Projects Started

Three months to January 2026

	£ million	Percentage
Other Retail	5	**2%**
Petrol Filling Stations	9	**3%**
Retail Warehousing	-	**0%**
Shopping Centres	9	**3%**
Shops	81	**28%**
Supermarkets	181	**64%**
Total	283	**100%**

Retail League Tables

January 2025 to February 2026

Contractors	Projects	£m
Kier	1	41
McPhillips Wellington	1	37
Mildren Construc.	3	32
VINCI Construction	1	20
DSP Construction	6	17
Red Construction	1	17
Audas Project Mgt.	2	16
FDT Construction	4	14
Neilcott Construc.	1	14
Clark Contracts	2	12

Clients	Projects	£m
Lidl UK	29	92
Aldi	45	84
Walsall Met BC.	1	41
T J Morris	12	40
McPhillips Wellington	1	37
Marks & Spencer Grp	22	36
Tesco	45	32
Watford Health	1	17
Marks and Spencer Plc	1	14
J Sainsbury	12	12

Retail

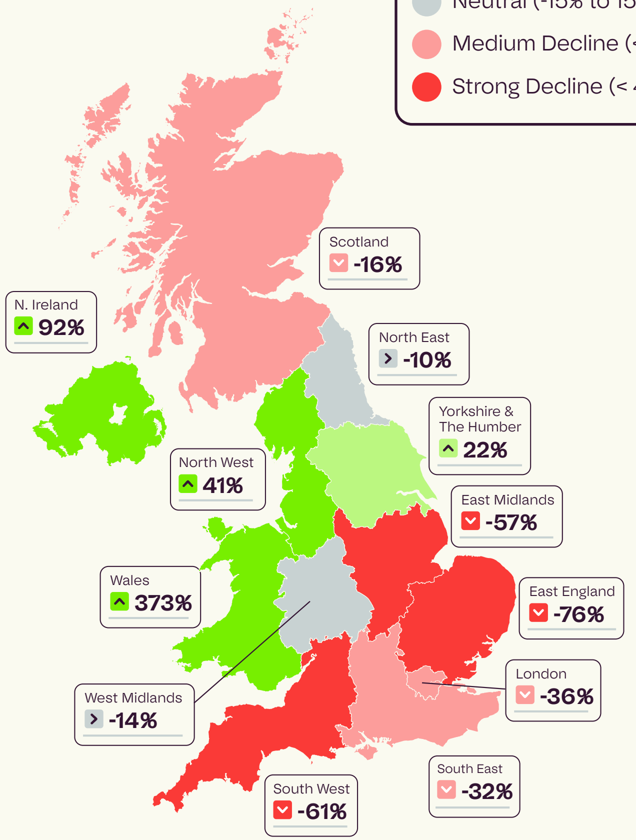
Regional

- Project starts and detailed planning approvals were down in most regions.
- Northern Ireland, the North West and Wales saw strong growth in project starts.
- Detailed planning approvals grew strongly in the South East and Wales.

The North West had the highest value of retail project starts, thanks to a 41% increase on a year ago to total £46 million. Yorkshire & the Humber increased 22%, totalling £38 million. In contrast, starts in London fell 36% on a year ago to total £45 million. At £33 million, the South East decreased 32% against last year.

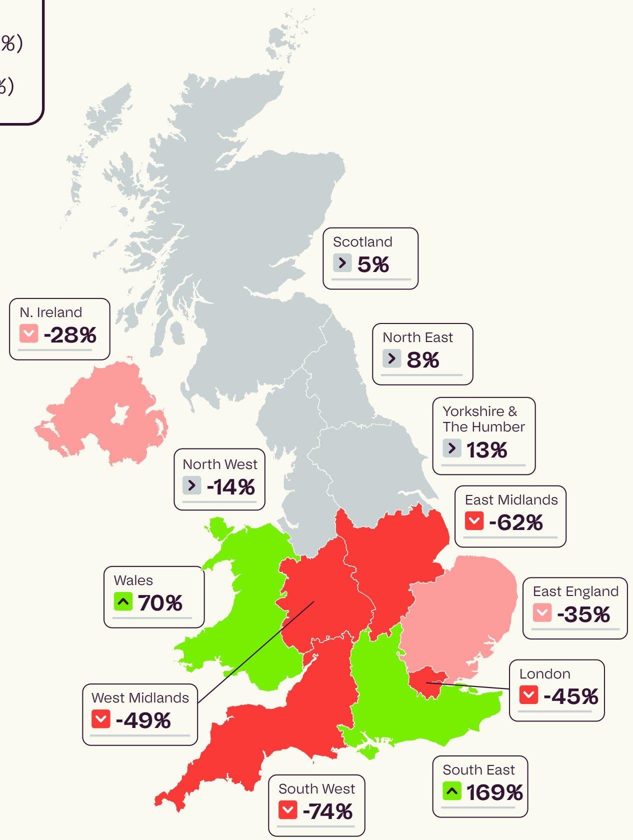
Totalling £47 million, the North West led detailed planning approvals, but declined 14% on a year ago. In contrast, the South East jumped 169% year-on-year to total £39 million. At £38 million, consents in the North East were 8% up against last year. Scotland grew 5% on a year ago to total £27 million.

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

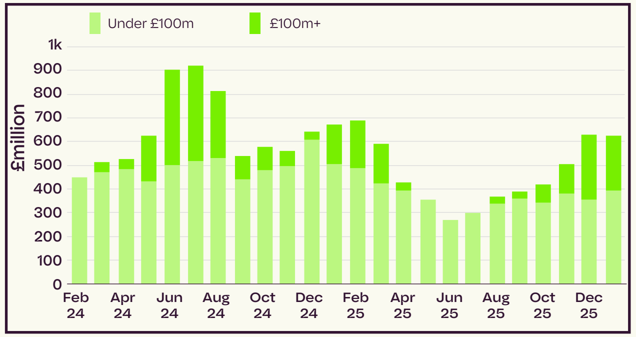
Overview

- **21% decrease** in project starts year-on-year.
- **62% decrease** in main contract awards from last year.
- **7% decrease** in detailed planning approvals compared to a year ago.

Project starts and main contract awards declined both year-on-year and quarter-on-quarter. No major projects (£100 million or more) were awarded during the period.

Detailed planning approvals fell against last year but grew against the previous three months, with major consents (£100 million and more) up against both periods.

Detailed Planning Approvals

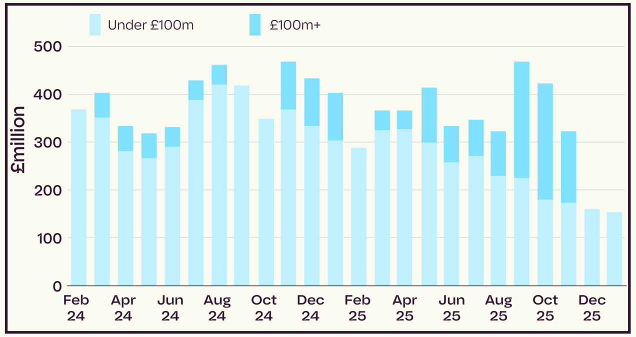


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,180	695	**1,875**
YoY	-22%	38%	**-7%**
Prev. 3 months	15%	197%	**48%**
Prev. 3 months (SA)	15%		

Main Contract Awards

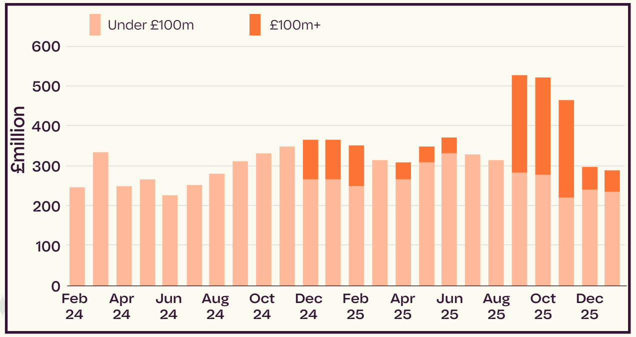


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	460	-	**460**
YoY	-50%	-100%	**-62%**
Prev. 3 months	-15%	-100%	**-64%**
Prev. 3 months (SA)	-19%		

Hotel & Leisure Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	708	162	**870**
YoY	-12%	-46%	**-21%**
Prev. 3 months	-15%	-78%	**-44%**
Prev. 3 months (SA)	24%		

Hotel & Leisure

Types of projects started

Sub-sector performance was weak, with only two categories experiencing growth.

- Cinemas & Theatres accounted for 35%, having jumped 260% on a year ago.
- Totalling £297 million, Other Hotel & Leisure grew 145% year-on-year.
- Hotels & guest houses fell 72% against the previous year, accounting for a 19% share.

Project Spotlight

Gresham Hotel

Plans have been approved for the £35 million Gresham Hotel development in Middlesbrough. Wates has been appointed as the main contractor on the scheme.

PROJECT ID: 24299771

IMAGE SOURCE: GRESHAM HOTEL

Types of Hotel & Leisure Projects Started

Three months to January 2026

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	37	**4%**
Cinemas & Theatres	303	**35%**
Hotels, Guest Houses	165	**19%**
Indoor Leisure Facilities	23	**3%**
Other Hotel & Leisure	297	**34%**
Sport Facilities	46	**5%**
Total	870	**100%**

Hotel & Leisure League Tables

January 2025 to February 2026

Contractors	Projects	£m
Newarthill	2	231
McLaren	2	153
Morgan Sindall	4	145
Gilbert Ash	1	120
Bovis	1	100
Walter Lilly & Co	1	90
GMI Construction	4	84
Graham Construc.	2	84
Legendre UK	1	82
Willmott Dixon	6	77

Clients	Projects	£m
Greater London Auth.	2	135
Crystal Palace FC.	1	100
Rayners Penn	1	90
Peel Holdings	2	86
Whitbread	21	85
Fc100	1	82
Staycity Group	1	60
The Property Trust	1	60
Alliance Leisure	4	35
Calderdale BC.	2	35

Hotel & Leisure

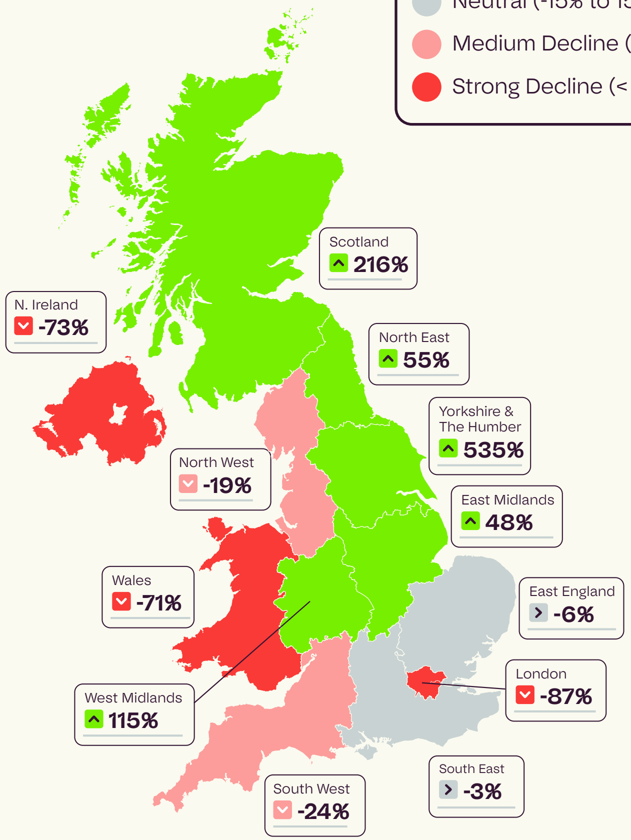
Regional

- In line with the overall weak performance in the sector, most regions saw a decline in project starts.
- Regional performance in detailed planning approvals was strong.
- The North East, Scotland, the West Midlands and Yorkshire & the Humber grew strongly in both starts and approvals.

Scotland was the leader for project starts, having grown 216% year-on-year to total £291 million. Yorkshire & the Humber also jumped more than six times to total £111 million. In contrast, totalling £84 million, the North West slipped back 19% against last year. The South East also totalled £84 million, having declined 3% on a year ago.

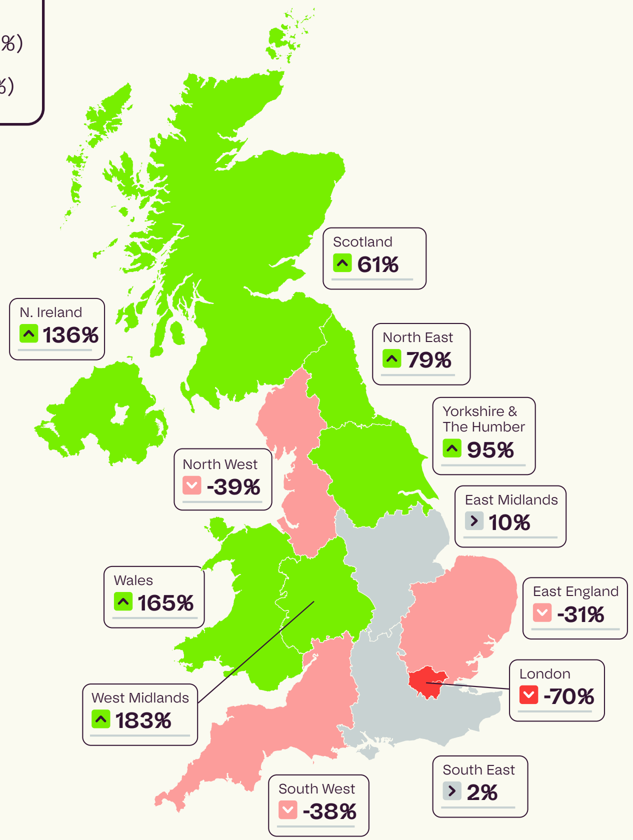
Scotland also dominated detailed planning approvals, thanks to a 61% increase on the previous year. The region totalled £510 million and accounted for a 27% share. Totalling £303 million, the West Midlands increased 183% against last year. In contrast, London fell 70% to total £237 million.

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



Glenigan
A Hubexo Product

Health

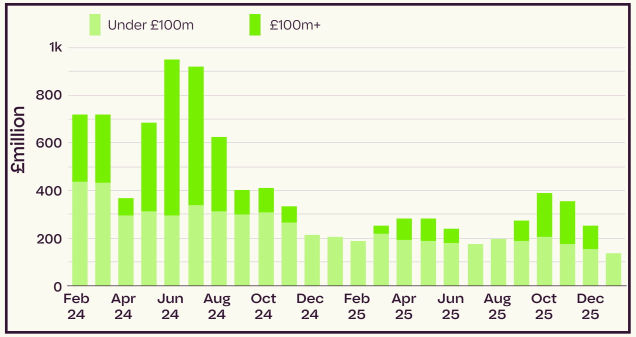
Overview

- **32% decline** in project starts against the preceding three months.
- **71% decline** in main contract awards against the preceding three months.
- **65% decrease** in detailed planning approvals compared to the preceding three months.

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

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

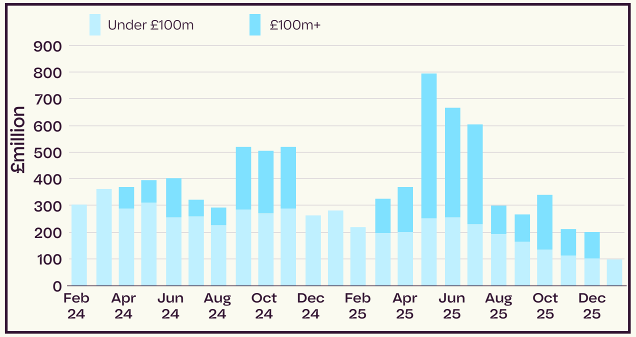


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	408	-	408
YoY	-33%		-33%
Prev. 3 months	-34%	-100%	-65%
Prev. 3 months (SA)	-15%		

Main Contract Awards

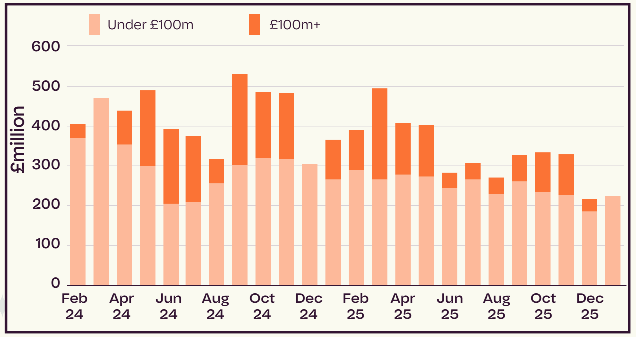


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	296	-	296
YoY	-65%		-65%
Prev. 3 months	-26%	-100%	-71%
Prev. 3 months (SA)	-35%		

Health Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	680	-	680
YoY	-15%	-100%	-38%
Prev. 3 months	-3%	-100%	-32%
Prev. 3 months (SA)	-3%		

Glenigan
A Hubexo Product

Health

Types of projects started

The health sector experienced a poor performance compared to the previous year, with Dental, Health & Veterinary Centres/Surgeries relative bright spots.

- Dental, Health & Veterinary Centres/ Surgeries accounted for the largest share (38%), having grown 34% year-on-year to total £258 million.
- Totalling £116 million, the value of Nursing Homes & Hospices starting on site declined 44% on a year ago.
- Hospitals experienced an 83% decline against the previous year to total £103 million, a 15% share of the total value.

Types of Health Projects Started

Three months to January 2026

	£ million	Percentage
Day Centres	9	**1%**
Dental, Health & Veterinary Centres/ Surgeries	258	**38%**
Hospitals	103	**15%**
Nursing Homes & Hospices	116	**17%**
Other Health	193	**28%**
Total	680	**100%**

Project Spotlight

Chapel Allerton Hospital

Detailed plans have been approved for The Chapel Allerton Hospital development in Leeds. Kier has been appointed as the main contractor on the £27 million scheme, with work expected to be completed in Q1 2027.

PROJECT ID: 22318904

IMAGE SOURCE: P+HS ARCHITECTS

Health League Tables

January 2025 to February 2026

Contractors	Projects	£m
Laing O'Rourke	3	942
Graham Construction	2	390
Mace Group	2	286
Bouygues UK	1	215
MTX Contracts	4	167
VINCI Construction	4	159
McLaughlin & Harvey	2	132
Morgan Sindall	8	123
Kori Construction	5	77
SDC	3	74

Clients	Projects	£m
Dep. of Health	134	1,152
Dep. for Environ., Food & Rural Affairs	3	927
Nat. History Museum	1	201
CPD	1	195
Kadans Science	1	100
Univ. of Cambridge	2	86
Central Lab. of the Research Councils	1	85
LNT Group	10	69
Welbeck Health	2	44
Elysian Residences	1	43

Health

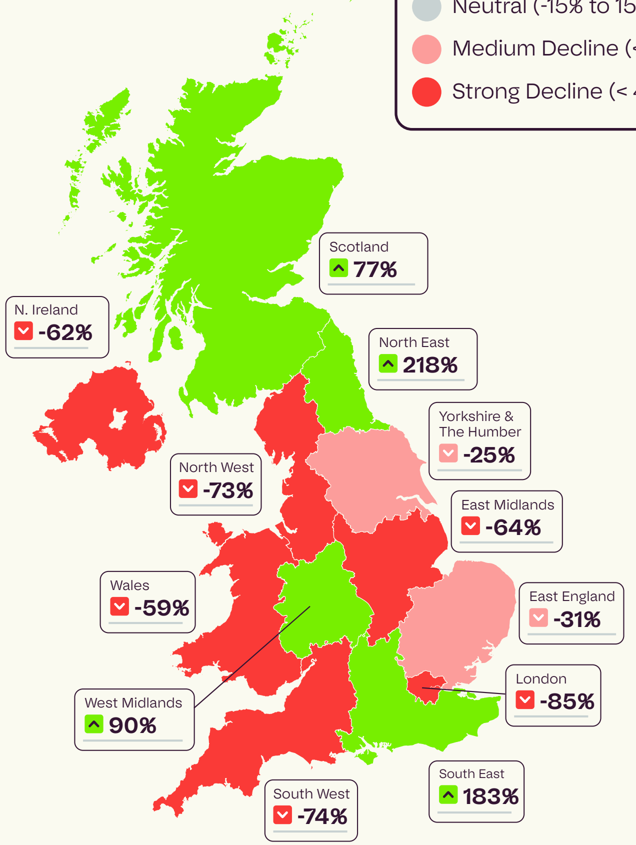
Regional

- The South East accounted for the largest share of project-starts, with strong performance against the previous year.
- The North East experienced sharp growth in project-starts and approvals.
- Yorkshire & the Humber accounted for the largest share of approvals but experienced a sharp decline against the previous year.

The South East at £244 million was the most active region for project starts, accounting for 36% of the total, with the region rising 183% against the previous year. The North East, at £27 million also experienced sharp growth, rising 218% against the previous year to account for 4% of the total value. The East of England at £115 million accounted for the second largest share of starts (17%), despite experiencing a 31% decline against the previous year.

In planning approvals, Yorkshire & the Humber accounted for the largest share of approvals (17%), but declined 61% against the previous year. The North East (+673%) and Northern Ireland (+455%) bucked the national trend, rising sharply against the previous year to account for a 9% and 12% share of approvals respectively.

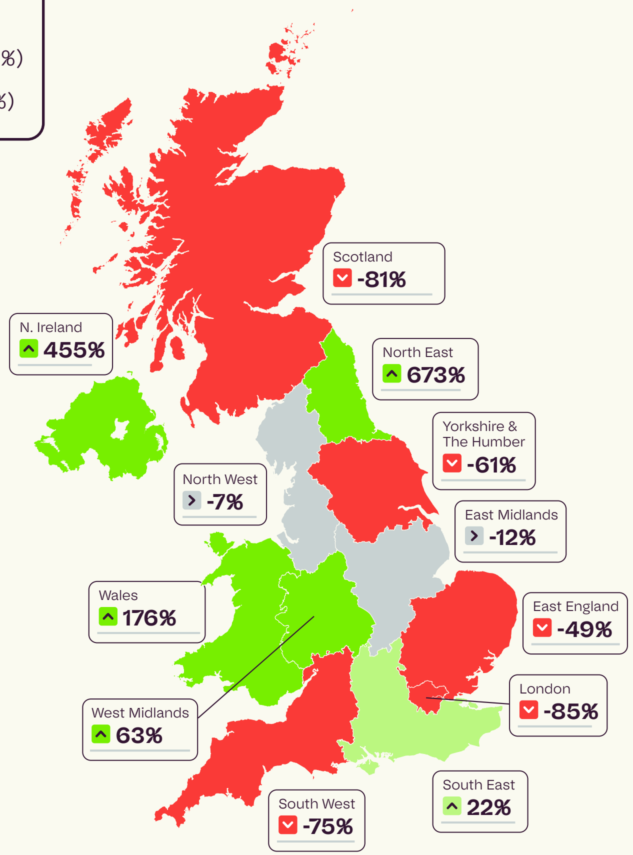
Changes in Health Starts
on a Year Earlier



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



Glenigan
A Hubexo Product

Education

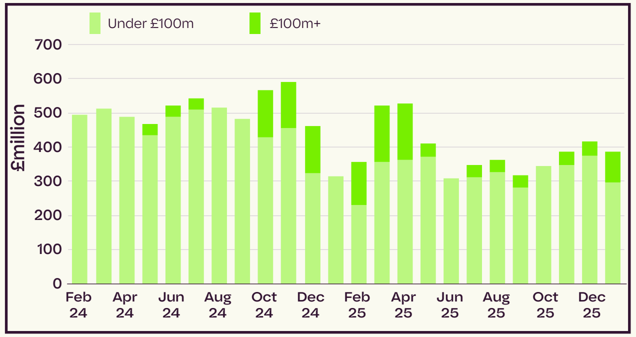
Overview

- **29% rise** in project starts against the previous year.
- **28% decline** in main contract awards against the preceding three months.
- **11% rise** in detailed planning approvals compared to the preceding three months.

Education projects experienced a mixed three months to January with detailed planning approvals and project starts increasing against the previous year, and approvals rising on the preceding three months. Elsewhere, main contract awards declined on both periods.

Despite a mixed performance, there are reasons for optimism in the sector. The school rebuilding programme will remain a key driver of activity, with around £2.4 billion committed annually. Additional funding to address RAAC will provide further support.

Detailed Planning Approvals

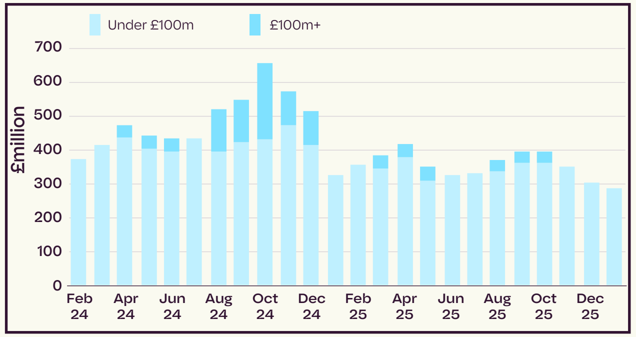


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	893	262	1,155
YoY	-6%		22%
Prev. 3 months	-14%		11%
Prev. 3 months (SA)	-9%		

Main Contract Awards

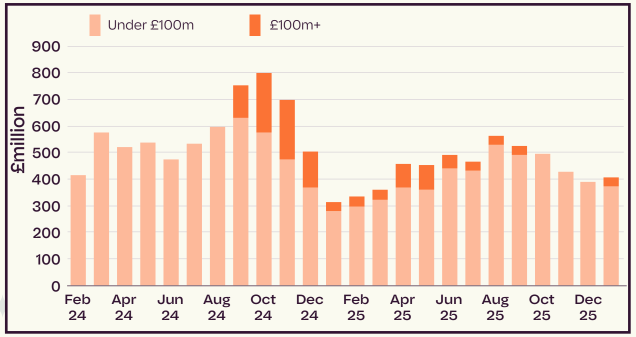


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	861	-	861
YoY	-12%		-12%
Prev. 3 months	-21%	-100%	-28%
Prev. 3 months (SA)	-7%		

Education Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,119	100	1,219
YoY	34%	-9%	29%
Prev. 3 months	-25%		-18%
Prev. 3 months (SA)	5%		

Glenigan
A Hubexo Product

Education

Types of projects started

Project-starts in the education sector experienced a strong performance, with almost all segments rising against the previous year.

- Schools, at £873 million, accounted for the largest share of starts (72%), with the sector growing 33% year-on-year.
- Universities, at £216 million, represented the second-largest share (18%), with activity increasing 55% year-on-year.
- Colleges recorded £91 million in starts, up 9% year-on-year.

Project Spotlight

University of St Andrews – Madras New College Building

Plans have been approved for the University of St Andrews – Madras New College Building development. A main contractor is yet to be appointed on the £142 million scheme, with work due to be completed in Q2 2026.

PROJECT ID: 21572505

IMAGE SOURCE: UNIVERSITY OF ST ANDREWS

£142m

Types of Education Projects Started

Three months to January 2026

	£ million	Percentage
Colleges	91	**7%**
Other Education	38	**3%**
Schools	873	**72%**
Universities	216	**18%**
Total	1,219	**100%**

Education League Tables

January 2025 to February 2026

Contractors	Projects	£m
Morgan Sindall	35	464
Royal BAM	10	351
Bowmer & Kirkland	12	318
Willmott Dixon	19	255
Kier	14	248
Tilbury Douglas	17	192
Galliford Try	20	147
Graham Construc.	5	132
McLaren Construc.	2	112
Castle Building	2	105

Clients	Projects	£m
Dep. for Education	69	908
Midlothian Council	3	163
University of London	9	115
Univ. of Portsmouth	3	101
Swansea City Council	3	80
Educ.Auth. N. Ireland	13	65
WEPco	2	58
Scot. Borders Council	2	58
Tyne Coast College	2	57
Kent County Council	4	51

Education

Regional

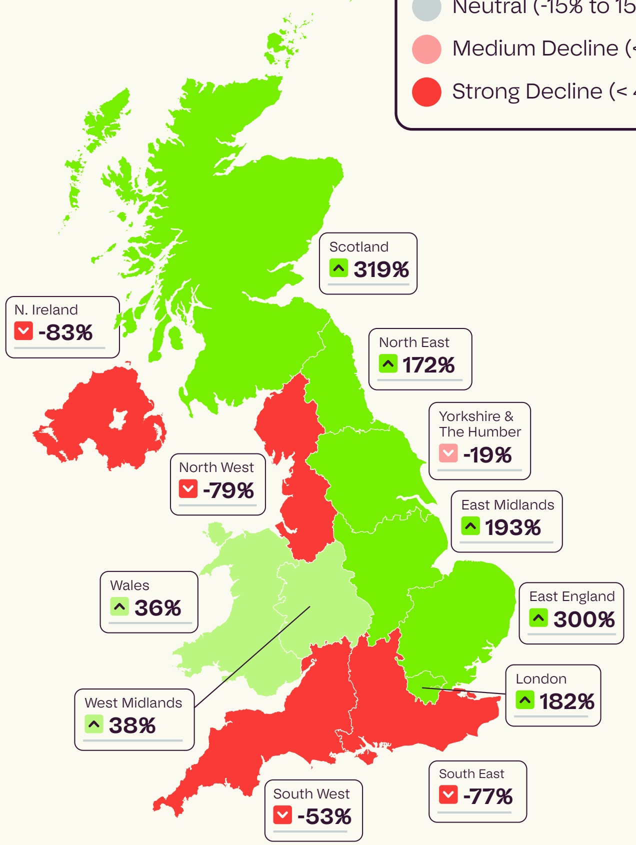
- London accounted for the largest share of sector starts, experiencing a sharp rise against the previous year.
- Scotland accounted for the largest share of sector approvals, with a sharp rise against the previous year.
- Various areas of the UK experienced triple digit growth in project starts.

London, at £263 million, was the most active region for project starts, accounting for 22% of total value and recording a 182% year-on-year increase. Scotland, at £198 million, saw the sharpest regional growth, rising 319% year-on-year to represent 16% of total value.

In planning approvals, Scotland held the largest share (37%), increasing 147% year-on-year to £427 million. Elsewhere, London (+116%) and Yorkshire & the Humber (+124%) also recorded triple-digit year-on-year growth.

Changes in Education Starts

on a Year Earlier

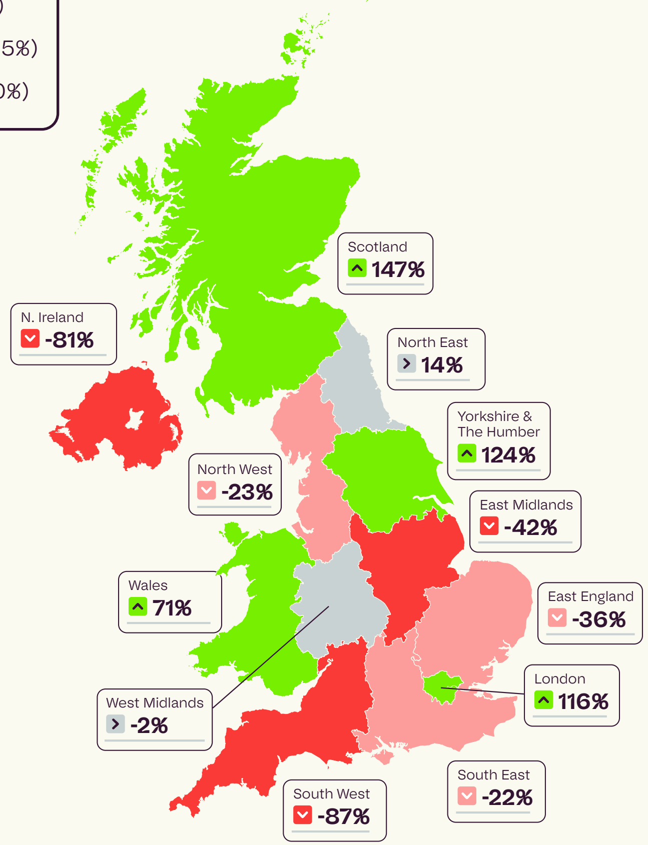


Growth or Decline

- 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

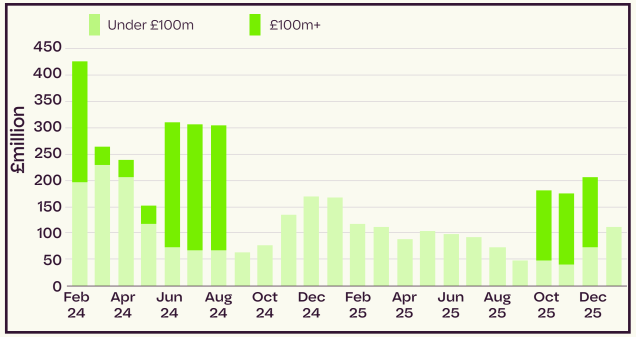
Overview

- **125% increase** in project starts year-on-year.
- **22% increase** in main contract awards from last year.
- **34% decrease** in detailed planning approvals compared to 2024.

The Community & Amenity sector experienced a relatively strong performance. Project starts and main contract awards were up year-on-year. Major project starts and awards (£100 million or more) performed especially well, with strong increases against both the previous three months and last year.

Detailed planning approvals, on the other hand, fell against the preceding quarter and the previous year, with no major projects approved during the period.

Detailed Planning Approvals

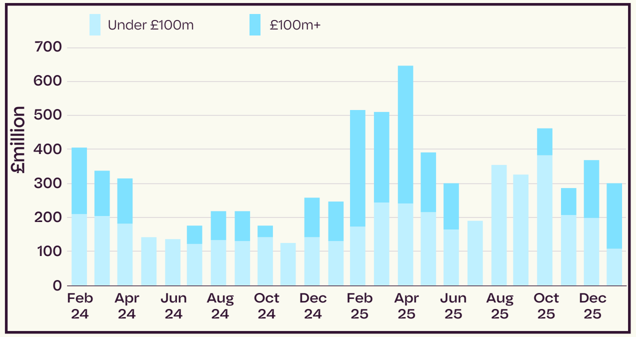


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	333	-	333
YoY	-34%		-34%
Prev. 3 months	133%	-100%	-39%
Prev. 3 months (SA)	27%		

Main Contract Awards

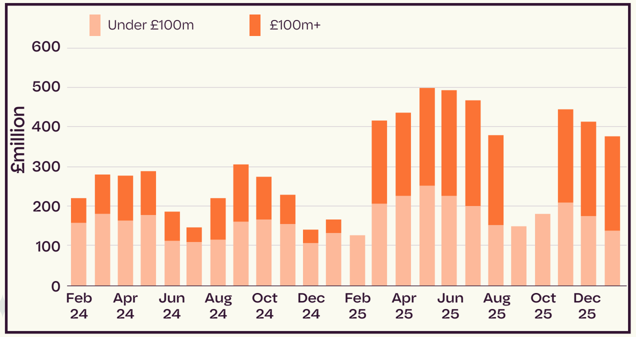


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	322	579	901
YoY	-18%	67%	22%
Prev. 3 months	-72%	145%	-35%
Prev. 3 months (SA)	-67%		

Community & Amenity Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	418	713	1,131
YoY	4%	602%	125%
Prev. 3 months	-24%		107%
Prev. 3 months (SA)	-3%		

Community & Amenity

Types of projects started

Despite overall growth in the sector, only half of the sub-sectors saw an increase in project starts.

- Prisons accounted for the largest share (63%), thanks to a 262% growth to total £716 million.
- Government buildings increased 207% on a year ago, totalling £230 million.
- Local facilities totalled £113 million, 7% down year-on-year.

Project Spotlight

Foregate Civic Space & Mobility Hub

£19.75m

Detailed plans have been approved for the Foregate Civic Space & Mobility Hub development in Kilmarnock, Strathclyde. A main contractor is yet to be appointed on the £19.75 million development, with work due to be completed in Q4 2027.

PROJECT ID: 25578103

IMAGE SOURCE: AYRSHIRE POST

Types of Community & Amenity Projects Started

Three months to January 2026

	£ million	Percentage
Blue Light	43	**4%**
Government Buildings	230	**20%**
Law Courts	-	**0%**
Local Facilities	113	**10%**
Military	10	**1%**
Places of Worship	18	**2%**
Prisons	716	**63%**
Total	1,131	**100%**

Community & Amenity League Tables

January 2025 to February 2026

Contractors	Projects	£m
Kier	15	903
Laing O'Rourke	3	329
Corrigenda	4	324
Wates	14	265
Galliford Try	10	216
Bowmer & Kirkland	7	214
Willmott Dixon	10	120
Morgan Sindall	9	111
Goldbeck Bower	1	78
Tilbury Douglas	1	65

Clients	Projects	£m
Ministry of Justice	34	1,114
Ministry of Defence	30	791
Scott. Prison Service	3	685
Hampshire CC.	2	302
UK Parliament	1	111
Sandwell Met. BC.	3	81
Cardiff CC.	1	78
Home Office	21	78
Liverpool City Region Combined Authority	2	65
Sizewell C	1	50

Community & Amenity

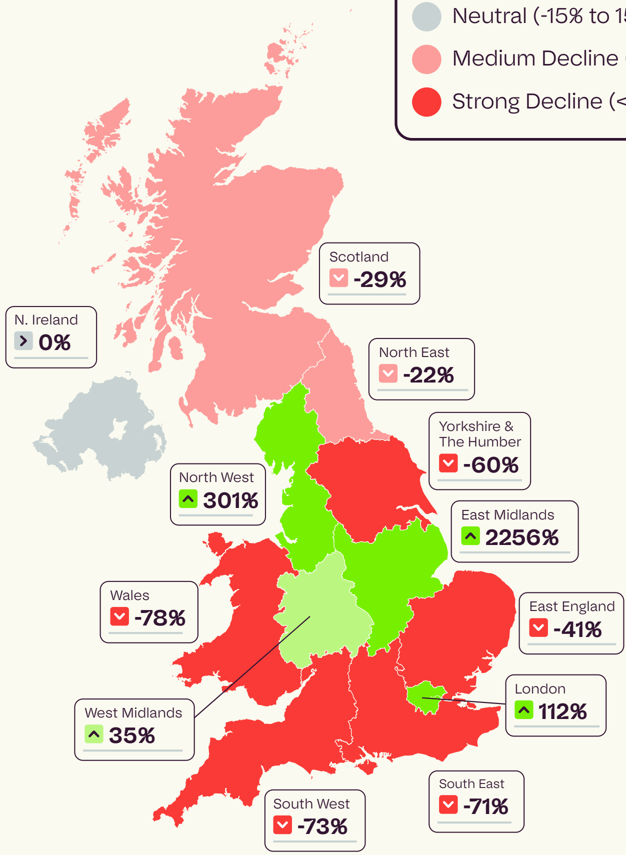
Regional

- 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.
- The North West saw strong growth in both starts and approvals.

The East Midlands accounted for the largest share of project starts, rising more than 23-fold to £755 million. The North West, representing 11% of total starts, grew four times compared with the previous year to £129 million. In London, project starts totalled £55 million, an increase of 112% year-on-year.

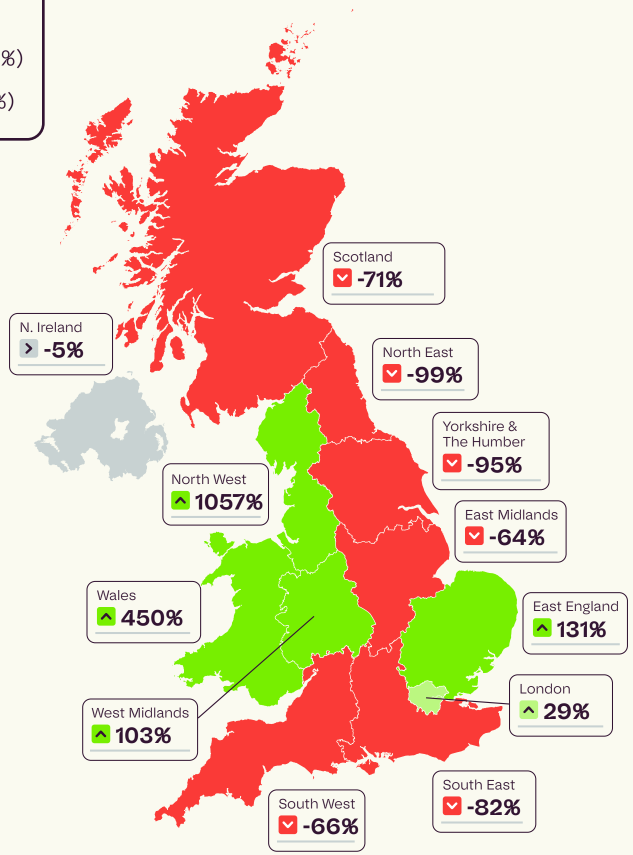
In detailed planning approvals, Wales accounted for 35% of the total, with approvals rising 450% year-on-year to £116 million. The North West, with a 13% share, grew more than 11-fold to £42 million, while the East of England doubled to £36 million.

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



Civil Engineering

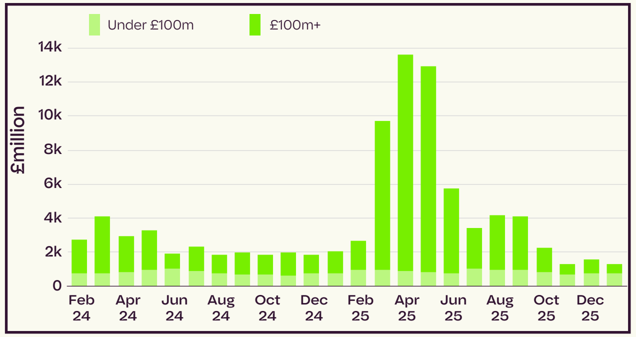
Overview

- **68% decline** in project starts against the preceding three months.
- **47% decline** in main contract awards against the preceding three months.
- **44% decline** in detailed planning approvals compared to the preceding three months.

Civil Engineering experienced a poor period in the three months to January. Project-starts, main contract awards and detailed planning approvals all declined against the preceding three months and the previous year.

Despite a poor start to the year, there is cause for optimism for the sector. Infrastructure work is expected rise steadily, with the latest Spending Review paving the way for additional road and rail investment from 2026/27 onwards. At the same time, utilities output is expected to strengthen, underpinned by increased funding for electricity generation and grid upgrades to support the UK's net zero ambitions, alongside higher capital programmes in the water sector.

Detailed Planning Approvals

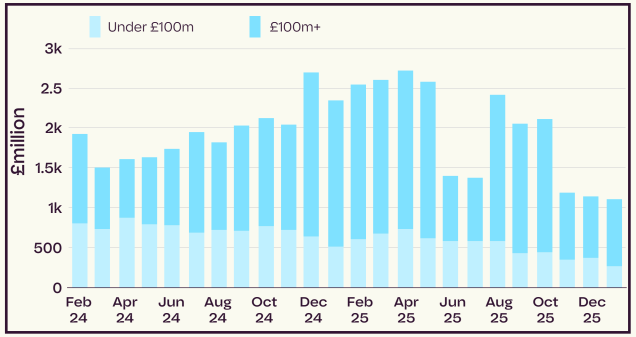


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	2,141	1,639	3,779
YoY	-7%	-58%	-39%
Prev. 3 months	-14%	-62%	-44%
Prev. 3 months (SA)	-19%		

Main Contract Awards

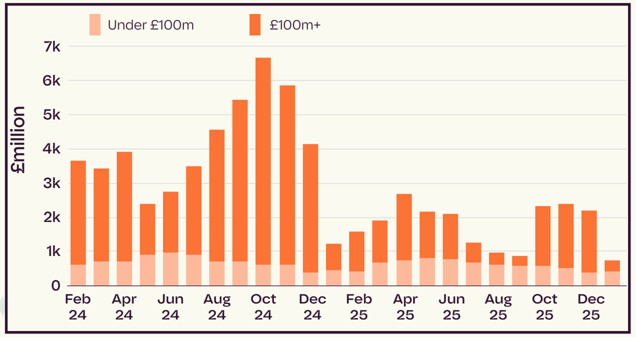


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	806	2,536	3,341
YoY	-48%	-54%	-53%
Prev. 3 months	-40%	-49%	-47%
Prev. 3 months (SA)	-34%		

Civil Engineering Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,227	980	2,207
YoY	-8%	-58%	-40%
Prev. 3 months	-27%	-82%	-68%
Prev. 3 months (SA)	0%		

Civil Engineering

Types of projects started

Performance across segments was mixed, with some bucking the national trend.

- Energy, at £1,392 million, accounted for the largest share of starts (63%), with the sector growing 101% year-on-year.
- Roads, representing the second-largest share (13%), declined 5% year-on-year to £295 million.
- Airports rose 394% year-on-year to £112 million.

Project Spotlight

West Winch Housing Access Road

£121.8m

Detailed plans have been approved for the £121.8 million West Winch Housing Access Road development on the outskirts of King's Lynn, Norfolk. A civil contractor is yet to be appointed on the scheme, with work expected to complete in Q4 2028.

PROJECT ID: 21141425

IMAGE SOURCE: NORFOLK COUNTY COUNCIL

Types of Civil Engineering Projects Started

Three months to January 2026

	£ million	Percentage
Airports	112	**5%**
Other Civils	278	**13%**
Rail	-	**0%**
Roads	295	**13%**
Harbours/Ports	32	**1%**
Energy	1,392	**63%**
Water Industry	92	**4%**
Waste	5	**0%**
Total	2,207	**100%**

Civil Engineering League Tables

January 2025 to February 2026

Contractors	Projects	£m
STRABAG	6	2,598
M GROUP Services	9	932
Jones Bros	4	898
ACCIONA	1	400
G W Highways	1	400
Costain	4	392
Equitix	1	332
Kanadevia Inova UK	2	319
Galliford Try	74	318
Graham Construc.	9	304

Clients	Projects	£m
United Utilities	5	2,930
Oxfordshire CC.	5	1,002
Com. Wind Power	1	500
Kemble Water	9	483
Kent CC.	6	435
National Grid	6	375
Enso Energy	4	339
Dep. for Transport	29	304
MVV Environment Devonport	1	300
Highview Power	1	300

Civil Engineering

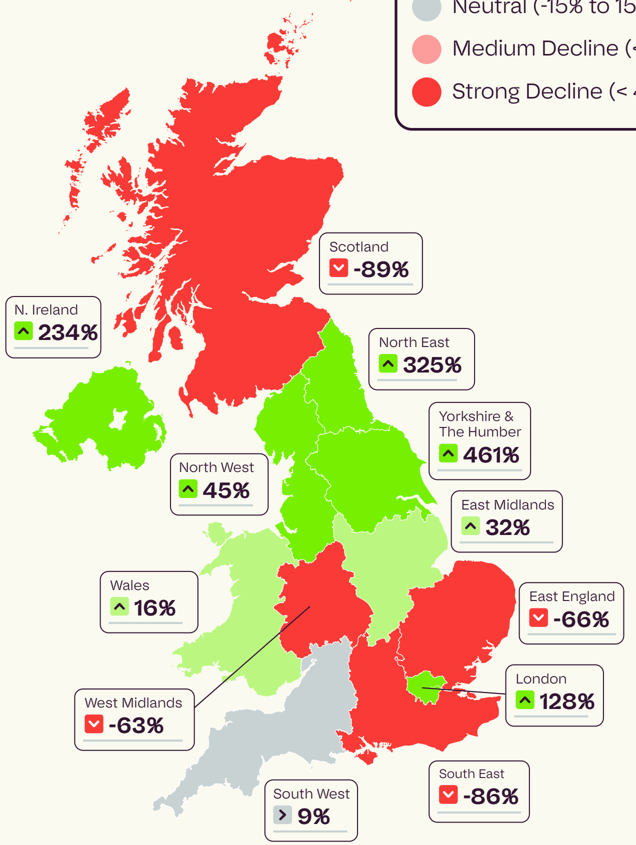
Regional

- Wales accounted for the largest share of sector starts, with the sector experiencing a rise against the previous year.
- Scotland accounted for the largest share of sector approvals, despite experiencing a decline year-on-year.
- Yorkshire & the Humber experienced sharp growth for project-starts.

Wales, at £421 million, was the most active region for project starts, representing 19% of the total and recording a 16% year-on-year increase. Yorkshire & the Humber, at £223 million, accounted for 10% of total value, with activity rising 461% year-on-year.

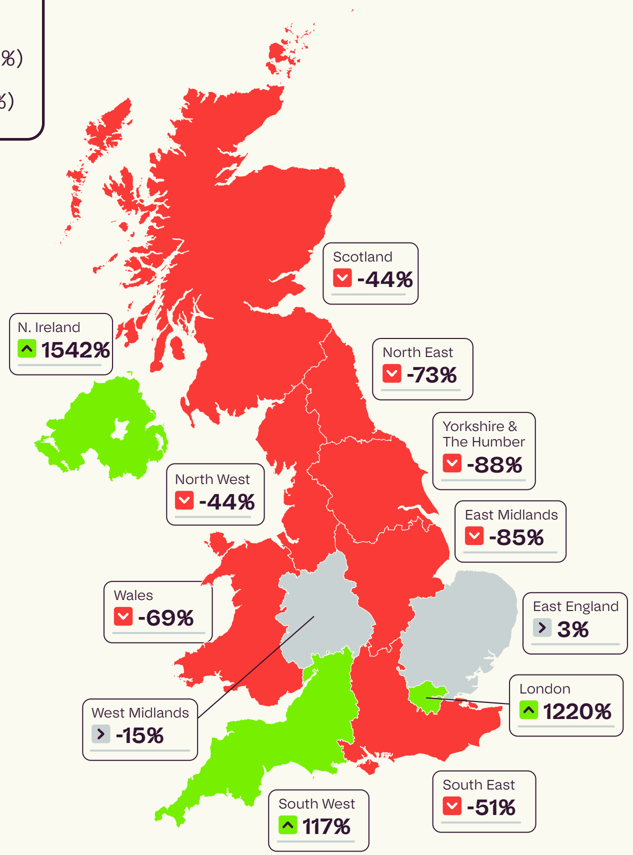
In planning approvals, Scotland held the largest share (24%), though total approvals declined 44% year-on-year to £899 million. Northern Ireland experienced the sharpest growth, rising more than 16-fold to £299 million.

Changes in Civil Engineering Starts
on a Year Earlier



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

Changes in Civil Engineering Planning Approvals
on a Year Earlier



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