Glenigan

A Hubexo Product

Construction Review

Reflecting activity to the end of June 2026

July 2026

- **13% rise in detailed planning approvals** against the preceding three months
- **43% decline in main contract awards** against the preceding three months
- **8% decline in project starts** against the preceding three months

Glenigan
A Hubexo Product

Expert insights

to support your construction strategy

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

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

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

Methodology

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

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

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

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

Authors

Written by
Allan Wilén
Glenigan Economics Director

30 years experience in providing insightful market analysis and forecasts on UK construction and the built environment that can inform companies' business development and market strategies.

Co-written by
Yuliana Ivanykovych
Senior Economist

Yuliana contributes to Glenigan's monthly industry reports through detailed research and analysis. She also works closely with clients, offering expert insights to support their strategic decision-making processes.

Co-written by
Drilon Baca
Economist

Drilon provides analysis and insights for Glenigan's monthly industry reports. He collaborates with clients to deliver tailored data and expertise, helping to inform their strategic decisions.

Glenigan
A Hubexo Product

Executive Summary

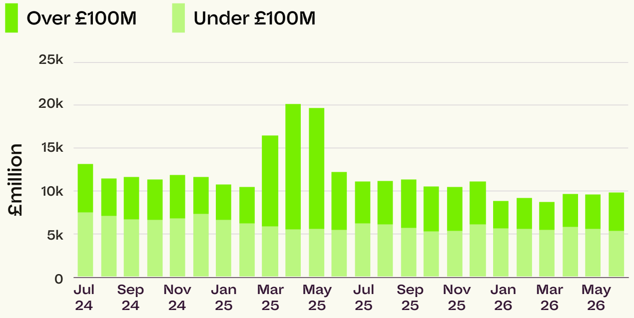
- **20% decline** in detailed planning approvals against the previous year
- **6% decline** in main contract awards against the previous year
- **8% decrease** in project starts against the previous year

UK construction activity was mixed in the latest period. Detailed planning approvals rose 13% on the preceding three months, driven by a 39% increase in major (£100m+) approvals, strengthening the future pipeline. However, main contract awards fell 43% and project starts declined 8%, reflecting continued caution in bringing schemes to site.

Year-on-year, all three indicators remained below 2025 levels. Detailed planning approvals were down 20%, largely due to fewer major project approvals. Main contract awards fell 6%, while project starts decreased 8%, despite strong growth in major (£100m+) starts helping offset weakness in smaller projects.

The outlook remains finely balanced. Stronger planning approvals point to underlying demand, but weaker awards and starts highlight ongoing challenges around viability, financing, and investor confidence. Interest rate movements, construction cost inflation and government infrastructure investment will be critical in determining whether the stronger pipeline translates into sustained growth in project activity.

Detailed Planning Approvals

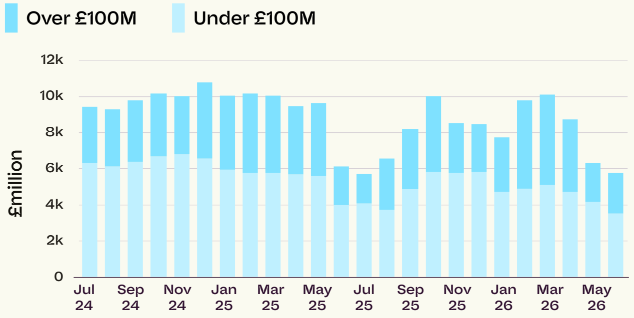


Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	16,014	13,467	**29,480**
YoY	-2%	-34%	**-20%**
Prev. 3 months	-2%	39%	**13%**
Prev. 3 months (SA)	-60%		

Source: Glenigan. Three month average

Main Contract Awards

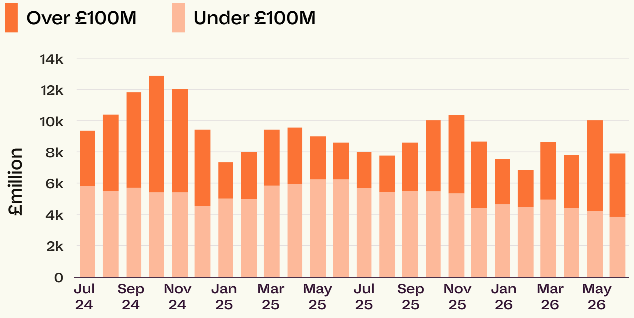


Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	10,581	6,713	**17,294**
YoY	-12%	5%	**-6%**
Prev. 3 months	-31%	-55%	**-43%**
Prev. 3 months (SA)	-23%		

Source: Glenigan. Three month average

Starts



Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	11,500	12,231	**23,731**
YoY	-38%	73%	**-8%**
Prev. 3 months	-22%	11%	**-8%**
Prev. 3 months (SA)	-15%		

Source: Glenigan. Three month average

Glenigan
A Hubexo Product

Economic Outlook

Iran War disruption felt across UK economy and construction

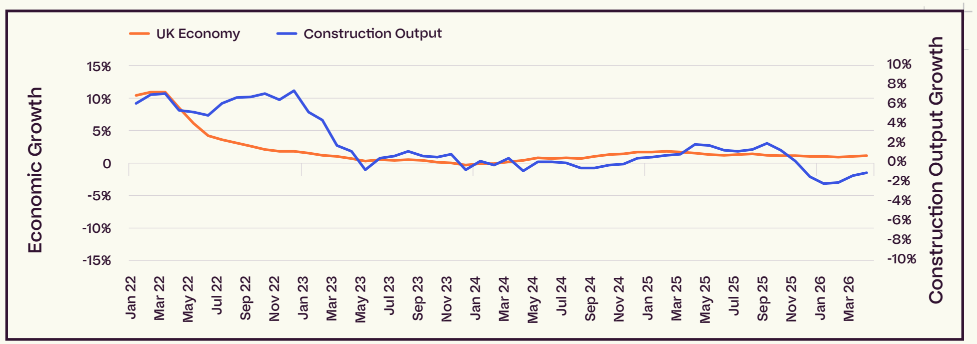
- Weak economic growth
- Geopolitical uncertainty dents business confidence
- Rising construction costs

UK economic activity fell by 0.1% in April compared with the previous month. The decline was driven by weaker services and construction activity. Business surveys suggest economic momentum remained subdued through May and June.

The CIPS Manufacturing PMI improved to 52.5 in June, signalling growth, with firms reporting increases in output, new orders and employment. In contrast, the CIPS Services PMI remained below the growth threshold at 48.8, indicating continued contraction. Service sector firms reported falling output and order books, citing weak domestic demand, geopolitical uncertainty and greater caution among clients.

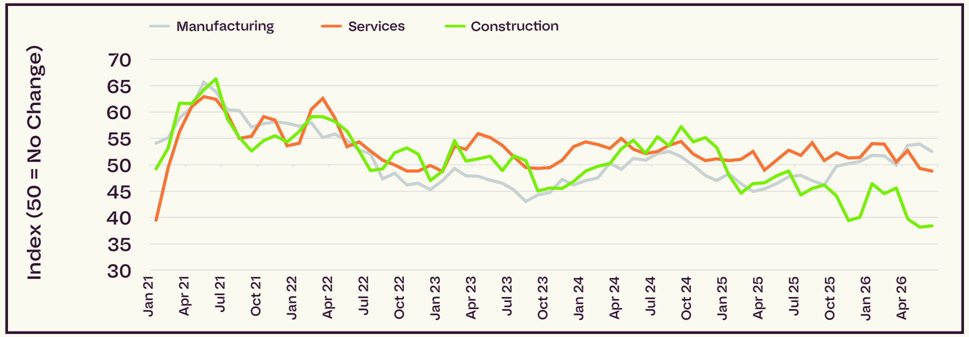
The CIPS Construction PMI also pointed to a sharp decline in activity, led by weaker housebuilding and civil engineering workloads. These findings are consistent with Glenigan data showing a continued fall in project starts. Economic uncertainty appears to be a key factor, with developers and clients reassessing and delaying planned investments. Rising costs due to the Iran War are also a concern, although construction inflation has so far been modest compared with the sharp increases seen in 2021 and 2022. Overall construction material costs were 5.4% higher in May than a year earlier, driven by increases in petroleum-based products, including plastics, and energy-intensive materials such as aggregates and steel. Further upward pressure is likely from the introduction of new steel tariffs.

Construction & The Economy



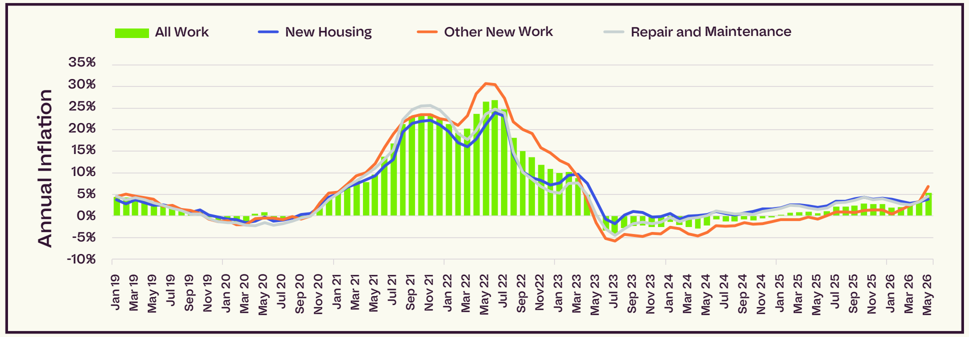
Source: ONS

CIPS Activity Surveys



Sources: IHS Markit/CIPS

Construction Material Inflation



Source: ONS/BEIS

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

Top 50 Contractors

Last 12 month totals:	979 projects	£32,171m

Last month totals:	94 projects	£3,511m

July 2025 to June 2026

	Contractors	#	£m	★
1	STRABAG	8	2,475	0
2	Morgan Sindall	181	2,224	0
3	Bowmer & Kirkland	24	1,519	0
4	Mace	4	1,474	0
5	Vital Energi Utilities	15	1,400	NEW
6	Graham Construction	22	1,113	5
7	Galliford Try	117	1,051	-1
8	Sisk	6	1,045	4
9	Bovis	10	1,029	-4
10	Bouygues	7	1,014	13
11	Willmott Dixon	76	1,003	-1
12	Kier	92	934	-4
13	Mclaren	10	926	-6
14	Wates	55	841	-5
15	Winvic	19	785	-2
16	Royal BAM	30	655	-2
17	Robertson	34	637	-1
18	Sir Robert McAlpine	8	607	-3
19	Skanska UK	5	581	21
20	Caddick Group	22	543	-3
21	JRL Group	4	525	1
22	Balfour Beatty	14	519	4
23	Marlborough Surfacing	4	515	2
24	Worley Europe	1	500	-6
25	Jones Bros	1	500	-6

	Contractors	#	£m	★
26	Equitix	1	498	-6
27	Hill Group	17	489	-6
28	VolkerWessels	19	376	-4
29	M Group Services	8	349	-2
30	UI Social Infrastructure	4	344	0
31	Costain	6	329	13
32	Axis Group UK	9	325	-1
33	VINCI	16	321	-4
34	McLaughlin & Harvey	12	317	-2
35	Corrigenda	2	316	-2
36	HG Construction	5	315	14
37	Glencar Construction	12	314	-9
38	Mears Group	2	312	-3
39	Tilbury Douglas	35	309	-2
40	Tusker Construction Group	1	300	-2
41	JJ Rhatigan & Company	4	288	5
42	Vistry	12	276	-3
43	Laing O'Rourke	6	270	-2
44	GMI Construction	21	267	-10
45	Flynn	1	250	0
46	Structure Tone	2	247	-4
47	Fortem Solutions	2	240	0
48	Murphy	4	237	0
49	Bennett Construction	3	236	0
50	Wills Bros	6	229	NEW

June 2026

	Contractors	#	£m	★
1	Bouygues	1	710	23
2	Skanska UK	2	306	NEW
3	Sisk	1	280	NEW
4	Marlborough Surfacing	1	150	NEW
5	Kier	11	149	38
6	Winvic	1	130	35
7	Costain	1	122	NEW
8	Balfour Beatty	1	121	NEW
9	HG Construction	1	95	-2
10	Wates	6	91	3
11	Amber Cons. Services	1	75	NEW
12	Willmott Dixon	4	68	-6
13	Morgan Sindall	10	65	-9
14	Kori Construction	5	63	NEW
15	Gilmartins	1	60	NEW
16	Ian Williams	2	55	NEW
17	Cardo Group	2	53	NEW
18	Burton Building Con. UK	1	53	NEW
19	TCL Group (London)	1	53	NEW
20	Hardyman & Co.	1	53	NEW
21	Combined Facilities Mgmnt.	1	53	NEW
22	Pk Murphy Construction	1	53	NEW
23	Greenview Gas	1	53	NEW
24	Nicor Construction	1	53	NEW
25	JJ Rhatigan & Company	1	50	-5

	Contractors	#	£m	★
26	Robertson	3	36	-17
27	Ferguson Bidco	1	35	NEW
28	8Build	3	32	-13
29	Caddick Group	1	30	NEW
30	Sureserve Group	3	26	NEW
31	Equans Sci Tech	1	23	NEW
32	Domis Construction	1	23	NEW
33	Higgins	1	21	NEW
34	Formation Arch. Design	1	20	NEW
35	Magrock	1	20	NEW
36	R G Carter	3	20	-15
37	MSB Group	1	20	NEW
38	Stonebond Properties	1	19	NEW
39	Gilbert Ash	1	17	NEW
40	Classic Builders S. West	2	17	NEW
41	Advanced Inter. Solutions	2	16	NEW
42	DE Group Contracting	1	15	NEW
43	Brims Construction	1	15	NEW
44	Insite Contracts	1	15	NEW
45	Ecosafe Heating	1	15	NEW
46	Wates Construction	1	15	NEW
47	Torfaen Maint. Services	1	13	NEW
48	Stainforth Construction	1	13	NEW
49	OB Construction	1	12	NEW
50	Speller Metcalfe	1	12	-16

★ Change in ranking since the previous period

Glenigan
A Hubexo Product

Top 50 Clients

July 2025 to June 2026

	Clients	#	£m	★
1	United Utilities Group	15	3478	0
2	SSEN Transmission	8	1809	9
3	Mitsui Fudosan	1	1100	-1
4	Department of Health	209	1032	-1
5	Department for Education	63	1000	-1
6	Ministry of Defence	30	656	0
7	Ministry of Justice	34	548	-2
8	Community Wind Power	1	500	-1
9	Cadent Gas	1	500	-1
10	Network Rail	19	345	-1
11	Hampshire County Council	18	328	-1
12	Manby BGE	1	300	0
13	R&F Properties QS	1	300	0
14	DCP Thurrock Council	5	296	0
15	Land Securities Group	3	284	NEW
16	Battersea Project Phase 3	1	280	NEW
17	Department for Transport	25	267	-2
18	Prologis UK	4	258	-1
19	Hertfordshire CC.	4	252	-3
20	Tribus Clean Energy	1	250	-2
21	Telehouse International	1	250	-2
22	Westminster City Council	3	230	-1
23	Sanctuary Housing	2	228	-3
24	Tower Hamlets Council	4	225	4
25	Northern Ireland Executive	3	223	NEW

	Clients	#	£m	★
26	Leeds City Council	19	220	NEW
27	Herefordshire Council	7	216	-4
28	Great Portland Estates	6	213	-3
29	Kemble Water	20	207	-7
30	Heidelberg Materials	1	203	-4
31	Southend On Sea BC.	2	203	-7
32	Fusion Students	3	200	10
33	Immersa	1	200	-6
34	Legal & General Group	6	195	-5
35	Aldi	30	185	-3
36	Cole Waterhouse	1	185	-6
37	Barclays Bank	5	181	-6
38	University of London	7	179	-4
39	British Land	4	178	-6
40	Greater London Authority	10	176	NEW
41	Environment Agency	20	166	0
42	Sadel Group	1	161	-4
43	Sunderland City Council	6	159	6
44	Vita Meadows	1	158	-5
45	London Bor. of Haringey	18	158	-10
46	Clarion Housing Group	7	157	NEW
47	Manchester Met. University	2	153	NEW
48	Transport Scotland	2	153	-5
49	Dudley Met. BC.	5	150	-1
50	Rail For London	1	150	-5

June 2026

	Clients	#	£m	★
1	Land Securities Group	1	282	NEW
2	Battersea Project Phase 3	1	280	NEW
3	Northern Ireland Executive	1	210	NEW
4	National Grid	1	121	NEW
5	Fusion Residential	1	95	NEW
6	Norfolk County Council	3	80	NEW
7	Ministry of Justice	3	62	NEW
8	BC. of King's Lynn & W.Norfolk	1	61	NEW
9	Hebburn Riverside Dev.	1	56	NEW
10	Department of Health	11	51	7
11	Clarion Housing Group	2	45	NEW
12	Helios Real Estate	1	43	NEW
13	Lisbon Street Developments	1	43	NEW
14	Marrico Asset Management	1	43	NEW
15	RB.of Kensington & Chelsea	1	37	NEW
16	Lancaster W.Neighbourhood	1	37	NEW
17	Ashill Land	1	35	NEW
18	Department for Education	3	33	4
19	Richardsons Leisure	1	32	NEW
20	Colico Living (Birmingham)	1	31	NEW
21	Mickleburgh	1	31	NEW
22	Delamere Health Prop Co 1	1	30	NEW
23	Whitbread	2	25	NEW
24	Hub Residential	1	25	NEW
25	150 Minories	1	25	NEW

	Clients	#	£m	★
26	Greater London Authority	1	24	NEW
27	English Cities Fund	1	23	NEW
28	LB. of Hammer. & Fulham	1	21	NEW
29	Tower Hamlets Council	2	21	NEW
30	Sheffield City Council	1	20	NEW
31	Plymouth Community Homes	3	19	NEW
32	Thirteen Housing Group	3	18	NEW
33	Vale Of Glamorgan	2	18	NEW
34	Miller Homes	1	16	NEW
35	Trust. Of The Nat. Gallery	2	16	NEW
36	Sunderland City Council	1	15	NEW
37	Ardmore Group	1	15	NEW
38	BCP Council	1	15	NEW
39	Bristows	1	15	NEW
40	Sellafield	1	15	NEW
41	Leeds City College	2	15	NEW
42	Scarborough Group Int.	1	14	NEW
43	Cockermouth School	1	13	NEW
44	Springboard Two Housing Ass.	1	13	NEW
45	Notting Hill Genesis	1	13	NEW
46	Southern Water Services	5	12	NEW
47	HDD Ashford	1	11	NEW
48	Mr. D Perry	1	11	NEW
49	Torridge District Council	4	11	NEW
50	Food and Tipple	1	10	NEW

★ Change in ranking since the previous period

Glenigan
A Hubexo Product

Housing

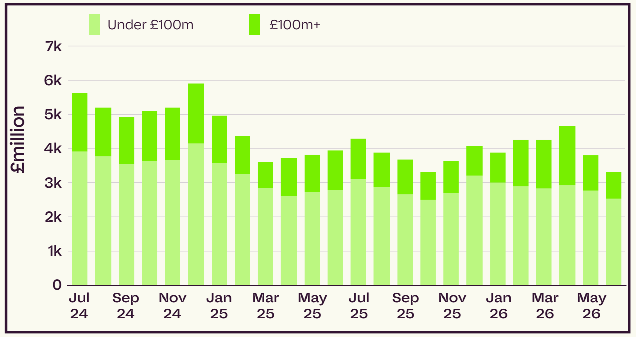
Overview

- **34% decline** in project starts against the previous year.
- **16% increase** in main contract awards year-on-year.
- **16% fall** in detailed planning approvals compared to the previous year.

Residential activity weakened significantly during the period, with project starts falling sharply compared with the previous year. While main contract awards increased, indicating continuing commitment to major schemes, detailed planning approvals declined, pointing to softer conditions further back in the development pipeline.

Despite the recent slowdown, underlying demand for new housing remains substantial. A gradual recovery in private housing is expected from 2027, supported by lower borrowing costs, rising real incomes, and improving consumer confidence. Supply-side conditions should also ease as regulatory bottlenecks diminish, and planning reforms increase site availability.

Detailed Planning Approvals

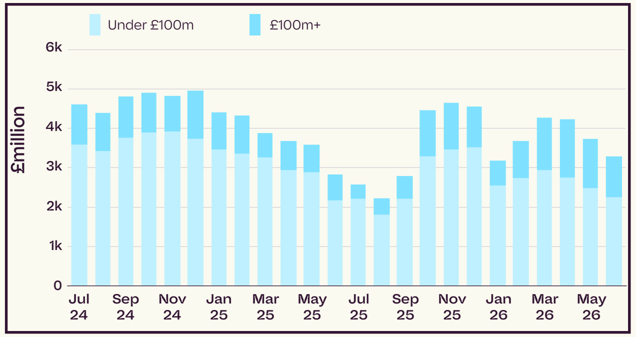


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	7,619	2,354	9,973
YoY	-9%	-33%	-16%
Prev. 3 months	-11%	-45%	-22%
Prev. 3 months (SA)	-64%		

Main Contract Awards

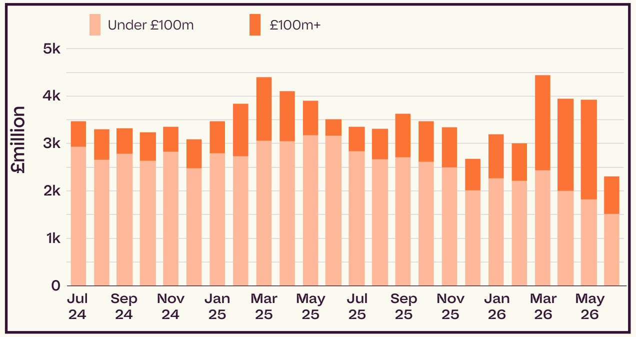


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	6,737	3,108	9,845
YoY	3%	57%	16%
Prev. 3 months	-23%	-22%	-23%
Prev. 3 months (SA)	-15%		

Housing Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	4,541	2,391	6,932
YoY	-52%	128%	-34%
Prev. 3 months	-38%	-60%	-48%
Prev. 3 months (SA)	-31%		

Glenigan
A Hubexo Product

Housing

Types of projects started

- Social Sector Housing accounted for the largest share of activity, recording strong growth against the previous year.
- Private Housing remained a significant contributor despite a sharp decline year-on-year.
- Private Apartments also recorded a substantial decrease compared with the previous year.

Project Spotlight

Borough Triangle

Detailed plans have been approved for the £600 million Borough Triangle mixed-use residential and commercial development. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q3 2034.

PROJECT ID: 14435269

IMAGE SOURCE: MACCREANOR LAVINGTON

£600m

Types of Housing Projects Started

Three months to July 2026

	£ million	Percentage
Private Apartments	876	**13%**
Elderly Persons Homes	10	**0%**
Private Housing	2,146	**31%**
Private Sheltered Housing	242	**3%**
Social Sector Sheltered Housing	56	**1%**
Social Sector Apartments	679	**10%**
Social Sector Housing	2,204	**32%**
Homes, Hostels Etc.	0	**0%**
Student Accommodation	719	**10%**
Total	6,932	**100%**

Housing League Tables

June 2025 to July 2026

Contractors	Projects	£m
Bloor Homes	56	2,027
Barratt Redrow	55	1,792
Taylor Wimpey	40	1,400
Persimmon	48	1,213
Graham Cons.	6	988
Vistry	25	935
Hill	23	783
Bellway	32	644
JRL	5	601
Morgan Sindall	21	587

Clients	Projects	£m
Bloor Homes	59	2,086
Barratt Redrow	58	1,679
Taylor Wimpey	52	1,658
Vistry	46	1,217
Persimmon	54	1,150
The Guinness Prtnrs.	8	1,093
Bellway	37	814
Apollo Mngt.	28	484
The Berkeley	10	417
Orbit	10	302

Glenigan
A Hubexo Product

Housing

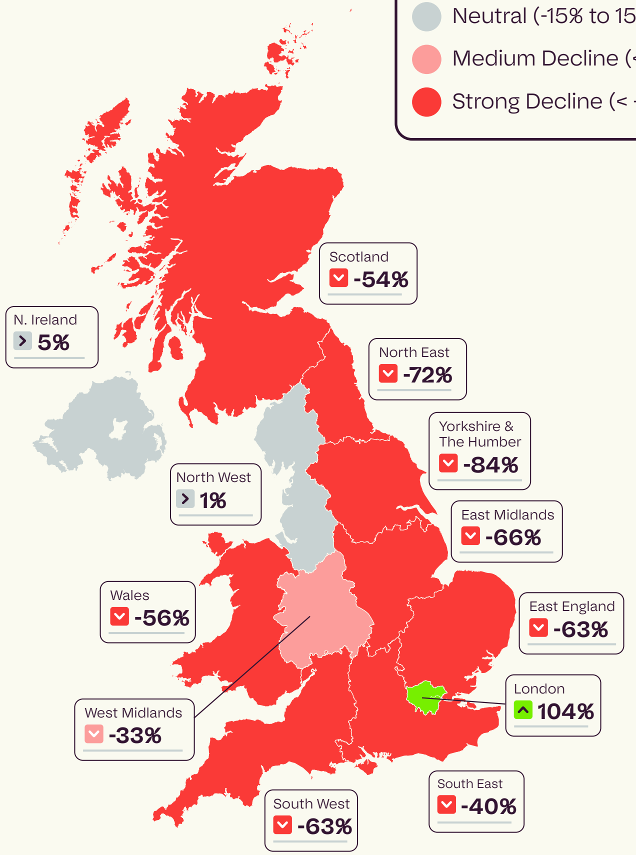
Regional

- London recorded the highest level of residential project-start activity.
- The South East remained a significant contributor despite weaker performance.
- Most regions recorded year-on-year declines in activity.

London dominated residential project starts, rising to £2.5 billion and accounting for the largest share of activity. The South East also remained an important market despite weaker performance. In contrast, most regions recorded significant declines, highlighting the challenging conditions facing the residential sector despite resilience in selected locations.

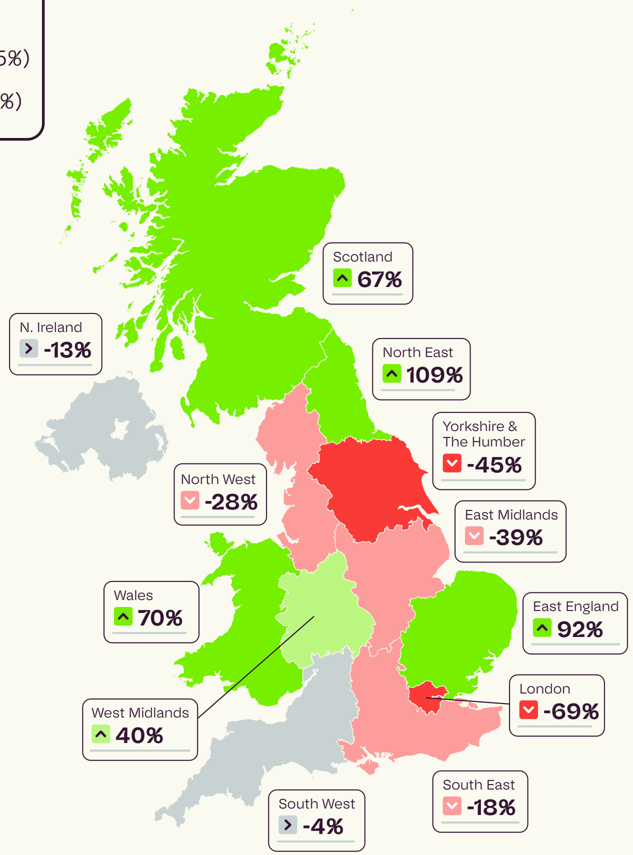
The East of England accounted for the largest share of sector approvals (18%), with the region experiencing a 92% rise against the previous year. The North East at £612 million also experienced a significant rise, more than doubling (+109%) against the previous year.

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

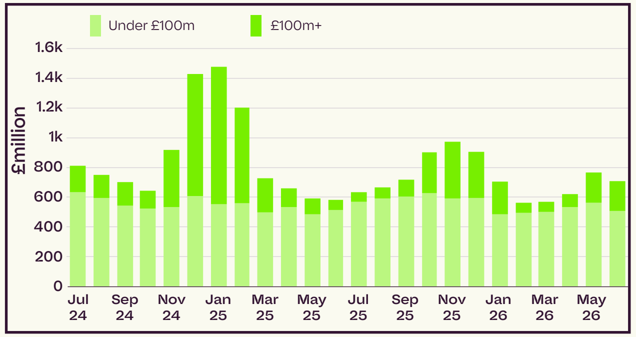
- **37% decline** in project starts against the previous year.
- **63% fall** in main contract awards compared with the previous year.
- **22% increase** in detailed planning approvals compared with the previous year.

Industrial activity remained subdued during the period, with both project starts and contract awards falling sharply compared with the previous year. However, detailed planning approvals increased, indicating improving conditions within the development pipeline.

Looking ahead, demand for manufacturing facilities and strategically located logistics developments are expected to support activity levels. As geopolitical disruption eases, delayed projects are likely to progress.

Growth will be supported by continued expansion in the logistics sector, driven by ecommerce, last-mile delivery demand, and ongoing investment in distribution networks. Policy support, including the National Planning Policy Framework and wider industrial strategy, is also expected to facilitate development, particularly for logistics hubs and advanced manufacturing.

Detailed Planning Approvals

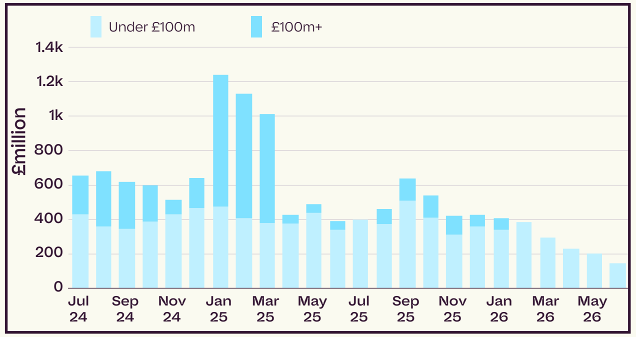


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,525	603	2,127
YoY	-1%	201%	22%
Prev. 3 months	1%	201%	25%
Prev. 3 months (SA)	-70%		

Main Contract Awards

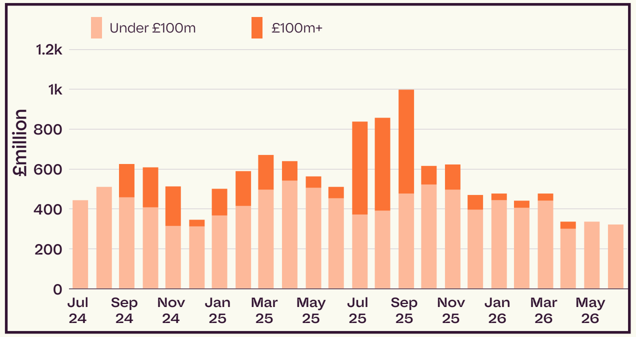


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	441	-	441
YoY	-57%	-100%	-63%
Prev. 3 months	-50%		-50%
Prev. 3 months (SA)	-50%		

Industrial Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	964	-	964
YoY	-29%	-100%	-37%
Prev. 3 months	-27%	-100%	-33%
Prev. 3 months (SA)	-15%		

Glenigan
A Hubexo Product

Industrial

Types of projects started

- Manufacturing projects accounted for the largest share of activity.
- Warehousing and logistics schemes remained an important contributor despite a marked decline.

Project Spotlight

EM EX Worksop

Detailed plans have been approved for the £347 million EM EX Worksop business park development. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 20446731

IMAGE SOURCE: KPP ARCHITECTS

£347m

Types of Industrial Projects Started

Three months to July 2026

	£ million	Percentage
Manufacturing	633	**66%**
Other Industrial	39	**4%**
Warehousing & Logistics	292	**30%**
Total	964	**100%**

Industrial League Tables

June 2025 to July 2026

Contractors	Projects	£m
Winvic	12	468
Glencar Cons.	10	214
Benniman	6	199
MCS	10	194
Caddick	8	178
TSL Projects	2	149
GMI Construction	7	127
Robertson	6	110
The Barnfield Group	7	107
Murphy	1	100

Clients	Projects	£m
Prologis UK	5	274
Sadel	1	161
DP World	3	141
Howden Joinery	1	100
Amazon UK	2	89
Whyte & MacKay	1	85
Aldi	1	84
Panattoni UK	4	82
Indurent	6	79
Firethorn Trust	1	74

Glenigan
A Hubexo Product

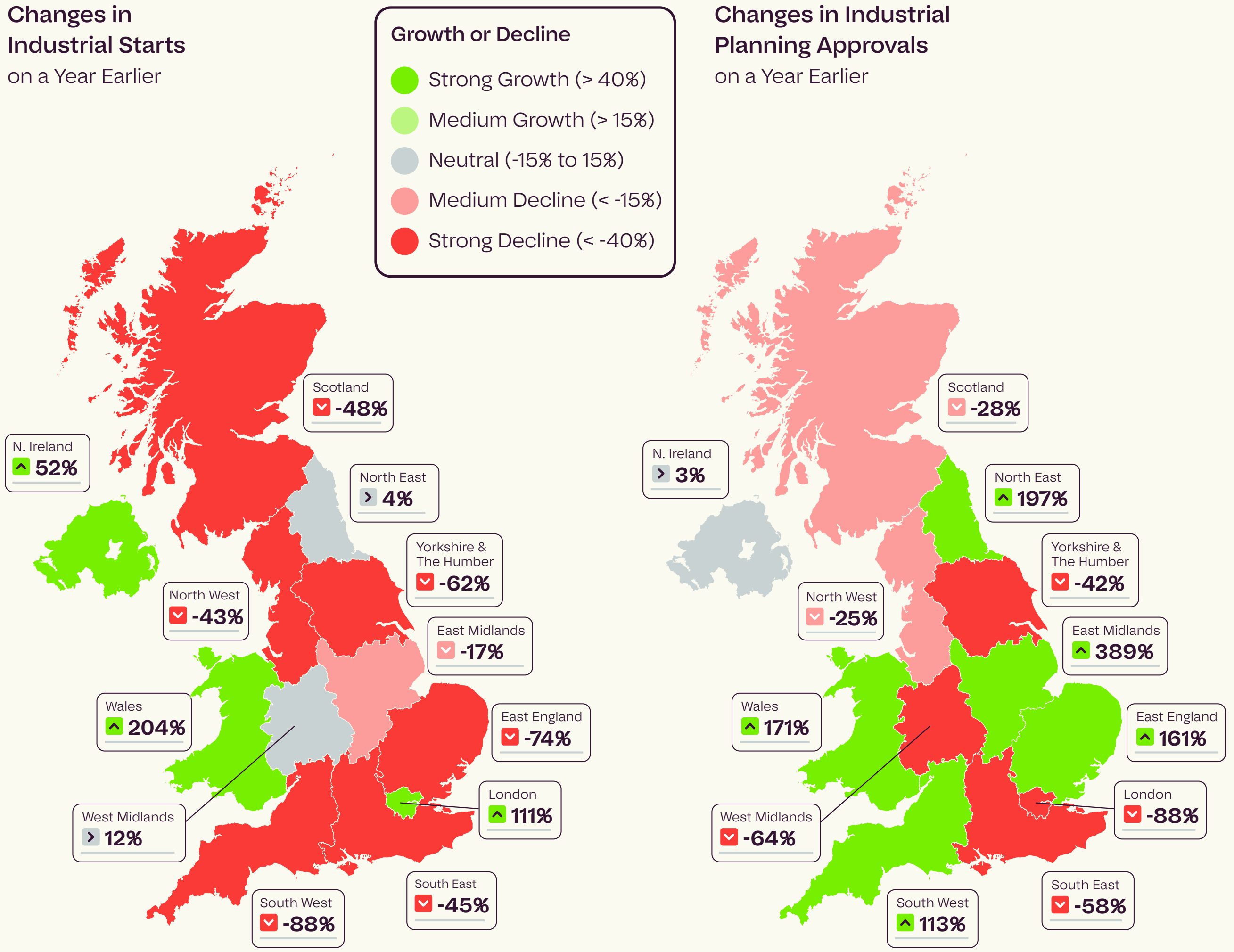
Industrial

Regional

- The East Midlands recorded the highest level of industrial project starts.
- Wales and London experienced strong growth.
- Several regions recorded substantial declines in activity.

The East Midlands led industrial project starts at £215 million despite a modest decline against the previous year. Wales and London both recorded strong growth, while activity weakened significantly across the South West, East of England and Yorkshire & the Humber.

The East Midlands also accounted for the largest share of sector approvals (38%), with the region experiencing sharp growth, rising by 389% against the previous year.



Offices

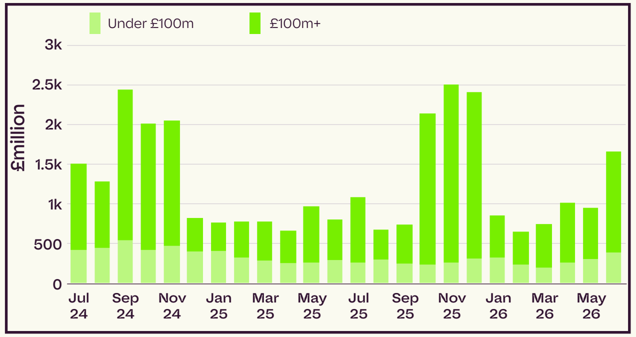
Overview

- **11% decline** in project starts against the previous year.
- **56% fall** in main contract awards compared with the previous year.
- **107% increase** in detailed planning approvals compared with the previous year.

Office construction activity weakened overall, with project starts and contract awards falling compared with the previous year. In contrast, detailed planning approvals more than doubled, signalling a substantial increase in proposed future development activity.

The outlook for the sector is supported by continued demand for high-quality office space in key urban centres. Strong planning activity suggests developers remain committed to bringing forward projects despite ongoing market uncertainty.

Detailed Planning Approvals

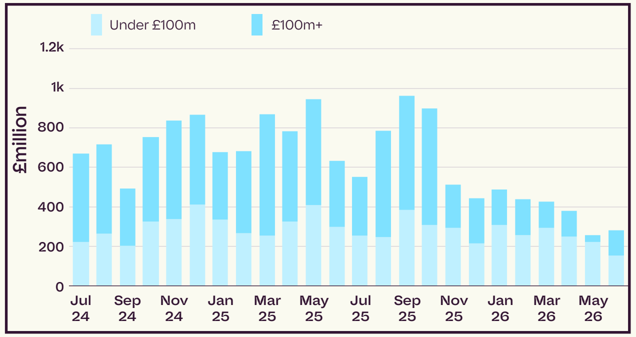


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,143	3,831	**4,974**
YoY	32%	149%	**107%**
Prev. 3 months	97%	134%	**124%**
Prev. 3 months (SA)	-43%		

Main Contract Awards

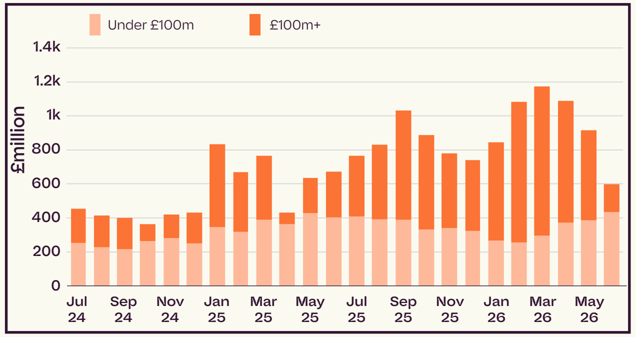


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	459	382	**841**
YoY	-49%	-62%	**-56%**
Prev. 3 months	-48%	-3%	**-34%**
Prev. 3 months (SA)	-44%		

Office Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,303	489	**1,793**
YoY	8%	-39%	**-11%**
Prev. 3 months	47%	-81%	**-49%**
Prev. 3 months (SA)	51%		

Glenigan
A Hubexo Product

Offices

Types of projects started

- Large projects valued above £100 million accounted for a significant share of activity.
- Schemes between £50 million and £100 million recorded strong growth.
- Smaller projects contributed steadily to overall workloads.

Project Spotlight

AI Data Centre

Detailed plans have been approved for the £2 billion AI Data Centre development in Loughton, Essex. Works are due to complete in Q2 2031, with a main contractor yet to be appointed on the scheme.

PROJECT ID: 19147557

IMAGE SOURCE: DATA DYNAMICS

Types of Office Projects Started

Three months to July 2026

	£ million	Percentage
Up to £5 million	79	**4%**
£5 million up to £10 million	196	**11%**
£10 million up to £20 million	200	**11%**
£20 million up to £50 million	355	**20%**
£50 million up to £100 million	473	**26%**
Over £100 million	489	**27%**
Total	1793	**100%**

Office League Tables

June 2025 to July 2026

Contractors	Projects	£m
Mace	2	1,170
Morgan Sindall	88	794
Skanska	2	555
McLaren	3	279
Newarthill	2	270
Flynn	1	250
Structure Tone	2	247
Bovis	2	210
Collins Construction	7	154
Kier	2	126

Clients	Projects	£m
Mitsui Fudosan UK	1	1,100
Land Securities	2	283
Telehouse Int.	1	250
Great Portland Est.	6	213
Barclays Bank	5	181
British Land	3	178
IJM Corporation	1	150
GIC	1	137
Clifford Chance	1	130
Ellison Inst. of Tech.	1	120

Glenigan
A Hubexo Product

Offices

Regional

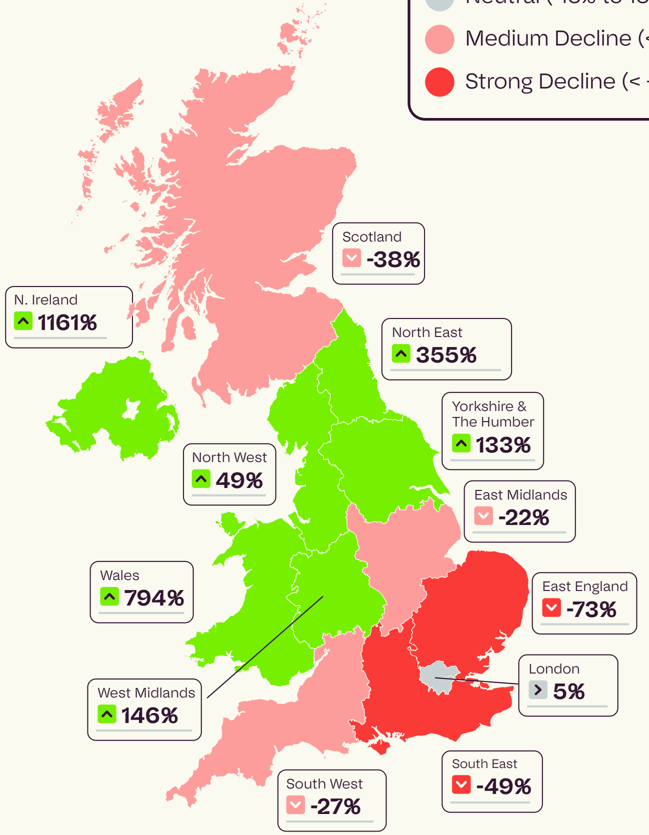
- London remained the dominant market for office project starts.
- The West Midlands and the North West both recorded strong growth.
- Several southern regions experienced notable declines.

London accounted for the largest share of office project starts at £867 million, maintaining its position as the UK's principal office development market. The West Midlands and North West also recorded strong growth.

The East of England accounted for the largest share of approvals, with the region rising 36 times against the previous year to account for 41% of the total value.

Changes in Office Starts

on a Year Earlier

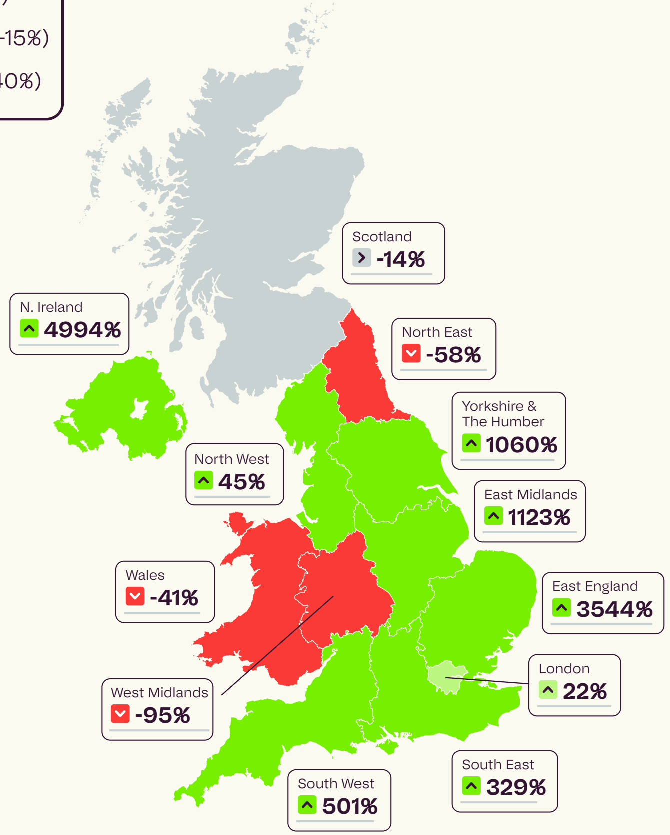


Growth or Decline

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

Changes in Office Planning Approvals

on a Year Earlier



Retail

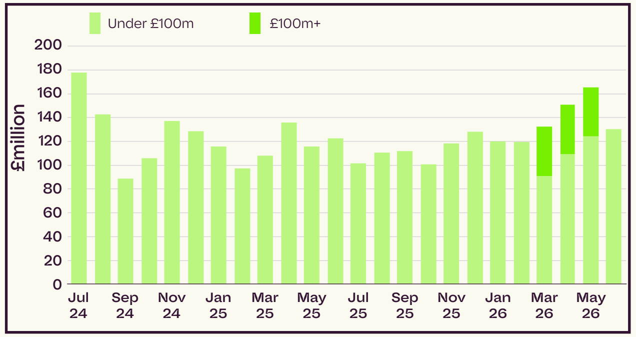
Overview

- **9% decline** in project starts against the previous year.
- **6% fall** in main contract awards compared to the previous year.
- **6% rise** in detailed planning approvals against the previous year.

Retail construction activity remained subdued during the period, with project starts and contract awards declining compared with the previous year. However, detailed planning approvals recorded modest growth, suggesting that conditions within the development pipeline have begun to stabilise.

Looking ahead, the sector is expected to remain driven by investment in convenience retail, grocery stores and mixed-use developments. While wider consumer uncertainty continues to influence development decisions, growth in planning approvals provides some encouragement for future workloads.

Detailed Planning Approvals

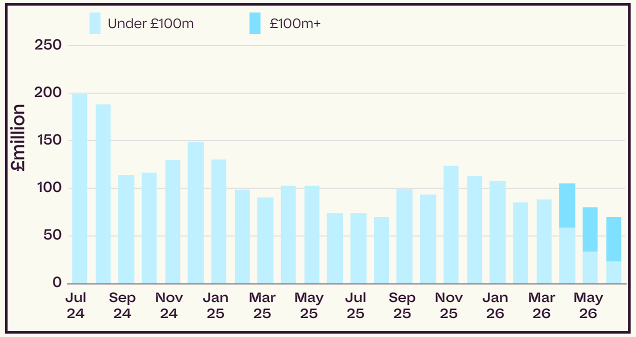


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	390	-	**390**
YoY	6%		**6%**
Prev. 3 months	43%	-100%	**-2%**
Prev. 3 months (SA)	-55%		

Main Contract Awards

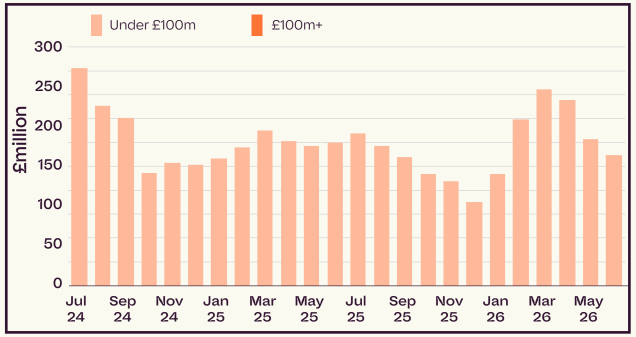


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	69	140	**209**
YoY	-69%		**-6%**
Prev. 3 months	-74%		**-21%**
Prev. 3 months (SA)	-65%		

Retail Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	328	0	**328**
YoY	-9%		**-9%**
Prev. 3 months	-34%		**-34%**
Prev. 3 months (SA)	-27%		

Retail

Types of projects started

- Supermarkets accounted for the largest share of activity and recorded growth compared with the previous year.
- Shops remained a significant contributor to activity despite a notable decline year-on-year.
- Shopping centre developments increased strongly, albeit from a relatively low base.

Project Spotlight

Market Refurbishment

Detailed plans have been approved for a £16 million market refurbishment development in Huddersfield. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 25453472

IMAGE SOURCE: KIRKLEES COUNCIL

Types of Retail Projects Started

Three months to July 2026

	£ million	Percentage
Other Retail	1	**0%**
Petrol Filling Stations	12	**4%**
Retail Warehousing	1	**0%**
Shopping Centres	7	**2%**
Shops	67	**20%**
Supermarkets	239	**73%**
Total	328	**100%**

Retail League Tables

June 2025 to July 2026

Contractors	Projects	£m
McLaren	1	140
DSP Construction	11	40
McPhillips Wellington	1	37
Mildren Cons.	2	25
Willmott Dixon	1	20
The Barnfield Group	1	20
VINCI Cons. UK	1	20
FDT Construction	4	20
Braithwaite	6	19
Stainforth Cons.	4	19

Clients	Projects	£m
Lidl UK	26	126
Aldi	29	101
Rioja Developments	1	70
Buckminster Estate	1	70
Marks & Spencer	10	47
McPhillips Wellington	1	37
Sovereign Centros	1	35
Metrocentre Partners.	1	35
T J Morris	10	31
Blackburn /Darwen BC	1	20

Retail

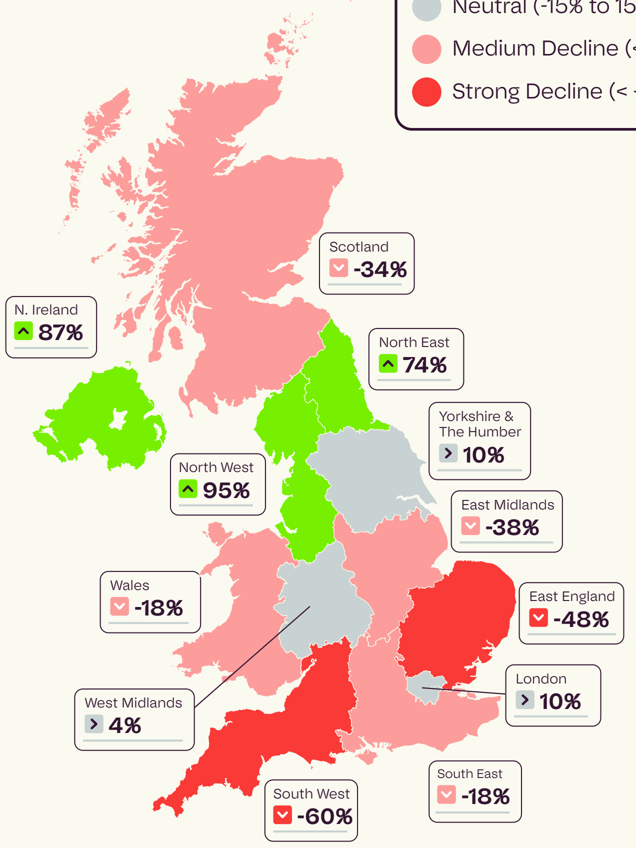
Regional

- The North West emerged as the most active region for retail project starts.
- Northern Ireland and the North East both recorded strong growth in activity.
- Detailed planning approvals increased strongly in London and the South East.

The North West led retail project-start activity, rising 95% year-on-year to £58 million. Northern Ireland and the North East also recorded strong growth, supported by investment in supermarket and convenience retail developments.

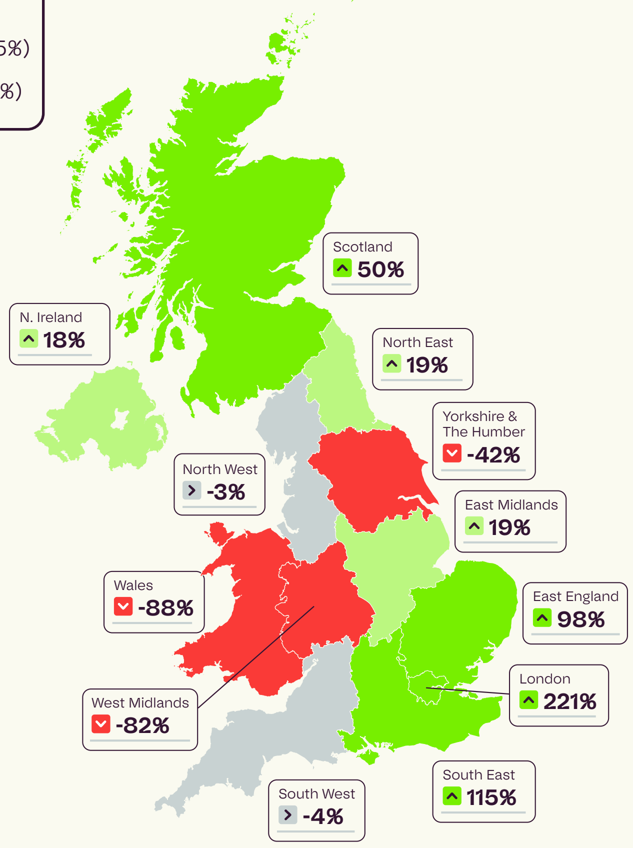
Planning approvals were particularly strong in London and the South East, indicating improving pipeline conditions. London (+221%), the East of England (+98%) and the South East (+115%) all experienced strong periods for approvals.

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

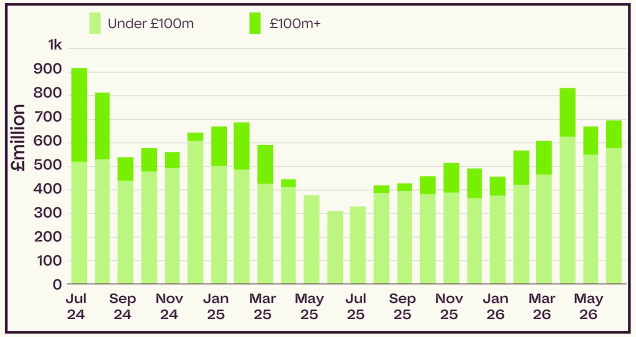
Overview

- **47% decline** in project starts against the previous year.
- **23% fall** in main contract awards compared to the previous year.
- **125% increase** in detailed planning approvals compared to the previous year

Hotel and leisure activity weakened during the period, with both project starts and contract awards falling noticeably against the previous year. In contrast, detailed planning approvals increased sharply, indicating that confidence in future development opportunities remains intact despite softer current activity.

The sector's outlook remains supported by investment in tourism, hospitality and leisure facilities. Growth in planning approvals suggests developers are continuing to progress schemes, providing grounds for a stronger recovery in workloads once economic conditions become more favourable.

Detailed Planning Approvals

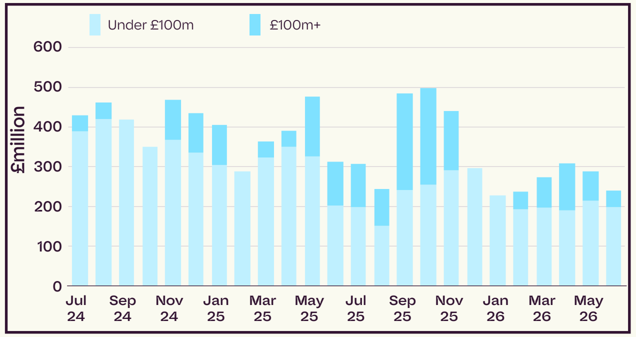


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,735	356	2,090
YoY	87%		125%
Prev. 3 months	25%	-18%	15%
Prev. 3 months (SA)	-21%		

Main Contract Awards

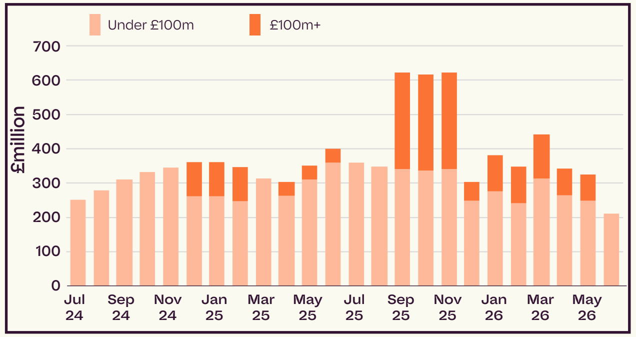


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	594	125	719
YoY	-2%	-62%	-23%
Prev. 3 months	1%	-46%	-12%
Prev. 3 months (SA)	-1%		

Hotel & Leisure Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	631	-	631
YoY	-42%	-100%	-47%
Prev. 3 months	-33%	-100%	-52%
Prev. 3 months (SA)	-14%		

Hotel & Leisure

Types of projects started

- Indoor leisure facilities accounted for the largest share of activity despite a decline against the previous year.
- Hotels and guest houses remained a significant component of sector workloads.
- Sports facilities continued to attract investment across a range of regions.

Project Spotlight

Luton Hoo Hotel Golf And Spa Extension

Plans have been approved for the £170 million Luton Hoo Hotel, Golf And Spa Extension. A main contractor is yet to be appointed on the scheme, with works expected to be completed in Q1 2027.

PROJECT ID: 22346403

IMAGE SOURCE: CLAGUE ARCHITECTS

Types of Hotel & Leisure Projects Started

Three months to July 2026

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	22	**3%**
Cinemas & Theatres	63	**10%**
Hotels, Guest Houses	127	**20%**
Indoor Leisure Facilities	197	**31%**
Other Hotel & Leisure	95	**15%**
Sport Facilities	128	**20%**
Total	631	**100%**

Hotel & Leisure League Tables

June 2025 to July 2026

Contractors	Projects	£m
Newarthill	5	317
Willmott Dixon	12	157
McLaren	2	153
Robertson Group	4	144
VINCI Construction	2	127
Morrisroe	1	100
Walter Lilly & Co	1	90
Galliford Try	8	85
Glencar Construction	2	85
Watkin Jones Group	2	78

Clients	Projects	£m
Alvarez & Marsal	1	131
Aston Villa FC	1	100
Rayners Penn	1	90
Peel Holdings	2	86
Whitbread	14	85
Extra Motorway Serv.	1	75
Kirklees Met. Council	2	55
British Museum	1	51
Marick	1	49
Lancaster CC.	3	46

Glenigan
A Hubexo Product

Hotel & Leisure

Regional

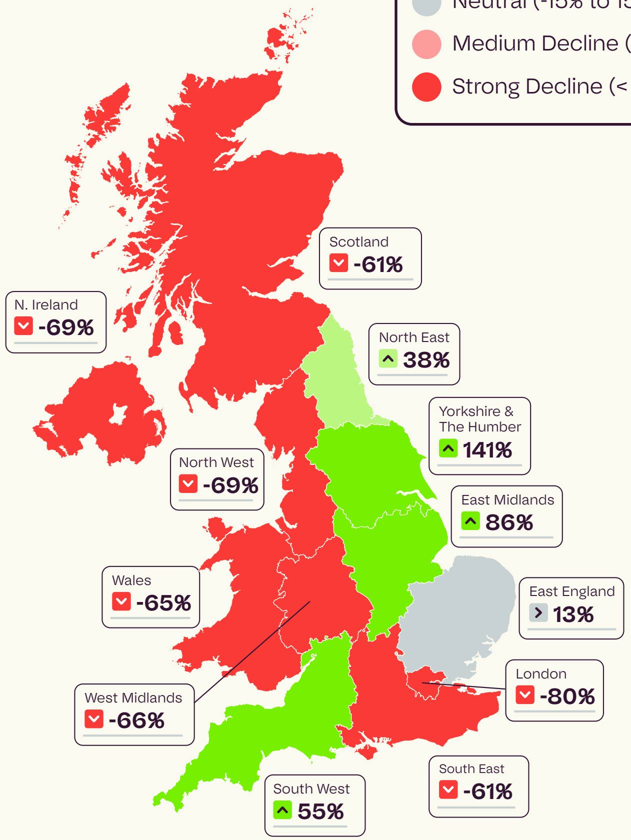
- Yorkshire & the Humber recorded the highest level of project-start activity.
- The South West experienced strong growth in starts.
- London and the South East both reported substantial declines.

Yorkshire & the Humber emerged as the most active region for hotel and leisure project starts, rising 141% year-on-year to £135 million. The South West also recorded strong growth, supported by investment in tourism and leisure developments. In contrast, London and the South East experienced significant declines.

The East of England experienced strong growth for approvals, with the region rising 373% against the previous year to account for one quarter of the total value. The South West, the South East and Wales all experienced sharp growth for approvals.

Changes in Hotel & Leisure Starts

on a Year Earlier

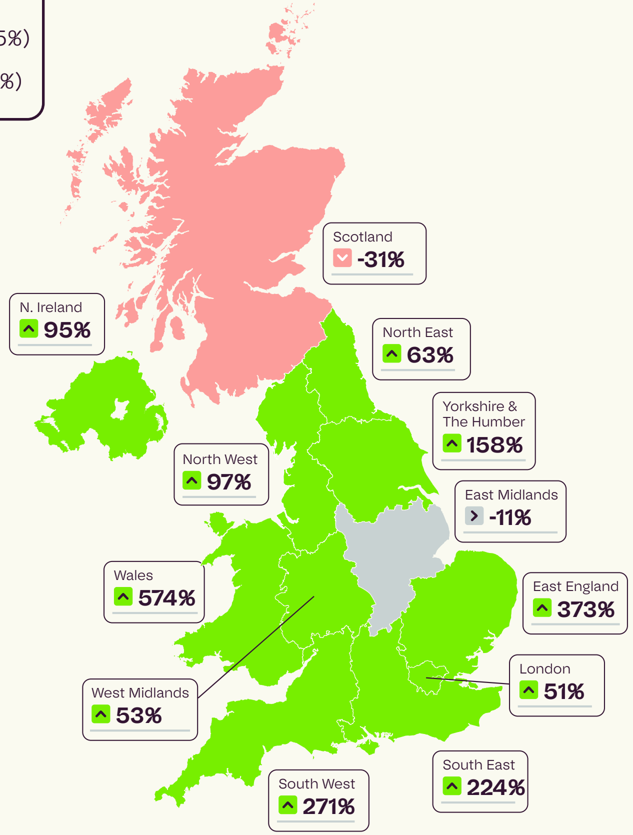


Growth or Decline

- 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

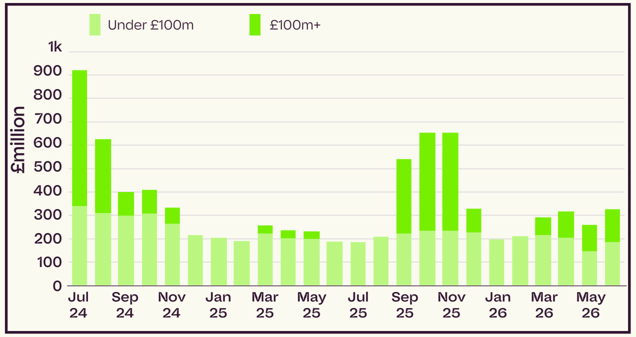
Overview

- **5% decline** in project starts against the previous year.
- **26% fall** in main contract awards compared to the previous year.
- **74% rise** in detailed planning approvals against the previous year.

Health sector activity remained mixed during the period. Project starts and main contract awards both declined compared with the previous year, although the fall in starts was relatively modest. Detailed planning approvals, however, increased significantly, indicating stronger development activity further back in the pipeline.

Prospects for the sector remain supported by investment in healthcare infrastructure, hospital upgrades, and long-term public-sector spending commitments. The substantial increase in planning approvals provides a positive indicator that future workloads could strengthen over the coming periods.

Detailed Planning Approvals

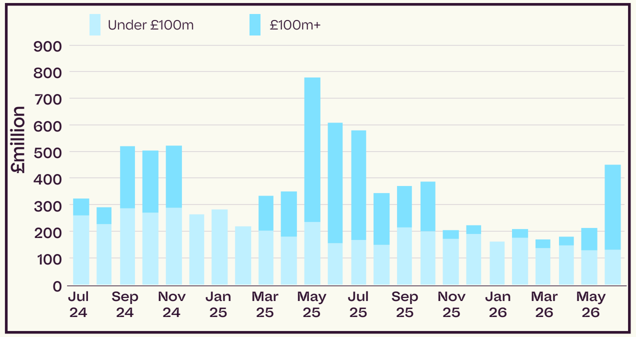


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	559	420	979
YoY	-1%		74%
Prev. 3 months	-13%	87%	12%
Prev. 3 months (SA)	-65%		

Main Contract Awards

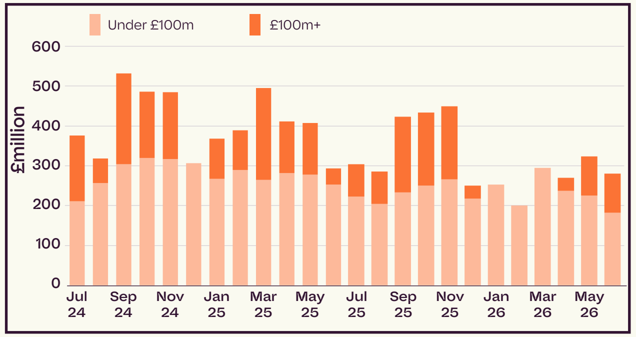


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	388	960	1,348
YoY	-17%	-29%	-26%
Prev. 3 months	-6%	860%	164%
Prev. 3 months (SA)	9%		

Health Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	545	297	841
YoY	-28%	142%	-5%
Prev. 3 months	-38%	-	-5%
Prev. 3 months (SA)	2%		

Health

Types of projects started

- Hospitals accounted for the largest share of project starts and recorded strong growth year-on-year.
- Dental, health, and veterinary facilities also increased compared with the previous year.

Project Spotlight

Lochaber Hospital

Detailed plans have been approved for the Lochaber Hospital development in Fort William, Scotland. A main contractor is yet to be appointed on the £137 million scheme, with works expected to be completed in Q3 2028.

PROJECT ID: 17411549

IMAGE SOURCE: KEPPIE DESIGN

£137m

Types of Health Projects Started

Three months to July 2026

	£ million	Percentage
Day Centres	-	**0%**
Dental, Health & Veterinary Centres/ Surgeries	115	**14%**
Hospitals	498	**59%**
Nursing Homes & Hospices	94	**11%**
Other Health	134	**16%**
Total	841	**100%**

Health League Tables

June 2025 to July 2026

Contractors	Projects	£m
Bouygues UK	3	999
John Sisk & Son	1	250
Mace Group	1	250
MTX Contracts	4	177
Morgan Sindall	10	134
Walter Lilly & Co	1	100
Kori Construction	5	86
Tilbury Douglas	6	84
Robertson	11	81
McLaughlin & Harvey	2	66

Clients	Projects	£m
Department of Health	188	943
The Sainsbury Laboratory	1	125
Evelina Childr. Hosp.	1	125
John Innes Centre	1	125
Syngenta	1	100
Kadans Science	1	100
Univ. of Cambridge	1	72
Welsh Government	11	51
Elysian Residences	1	43
LNT Group	6	42

Health

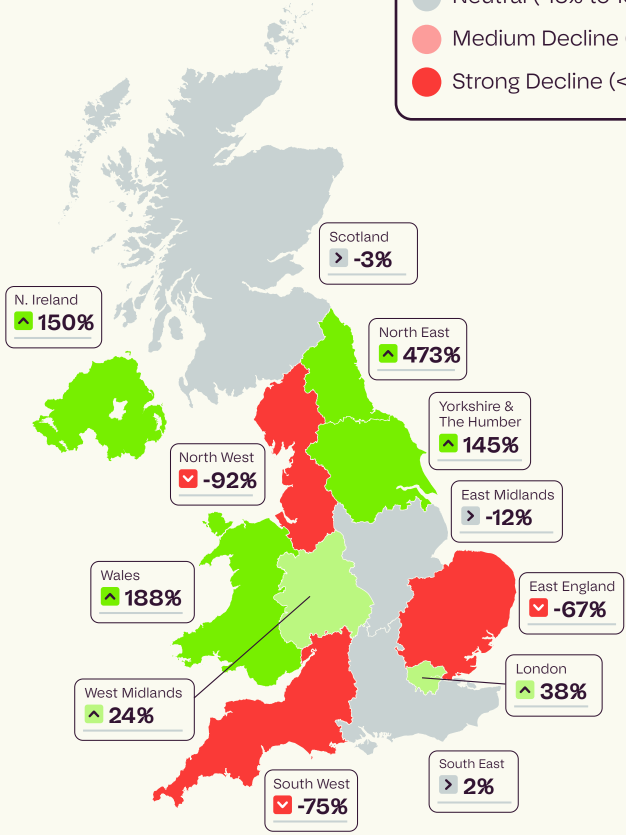
Regional

- Yorkshire & the Humber recorded the highest value of health project starts.
- The South East remained a major contributor to sector activity.
- Wales and the North East experienced particularly strong growth.

Yorkshire & the Humber led health project-start activity at £309 million, supported by several major healthcare schemes. The South East also remained an important market, accounting for a substantial share of overall workload. Strong growth was recorded in Wales and the North East, while London and the West Midlands also achieved gains.

Wales, at £192 million, experienced sharp growth in planning approvals, with the area rising 19 times against the previous year to account for one fifth of the total value. Scotland at £155 million followed a similar trend, with the area rising 20 times against the previous year to account for 16% of the total value.

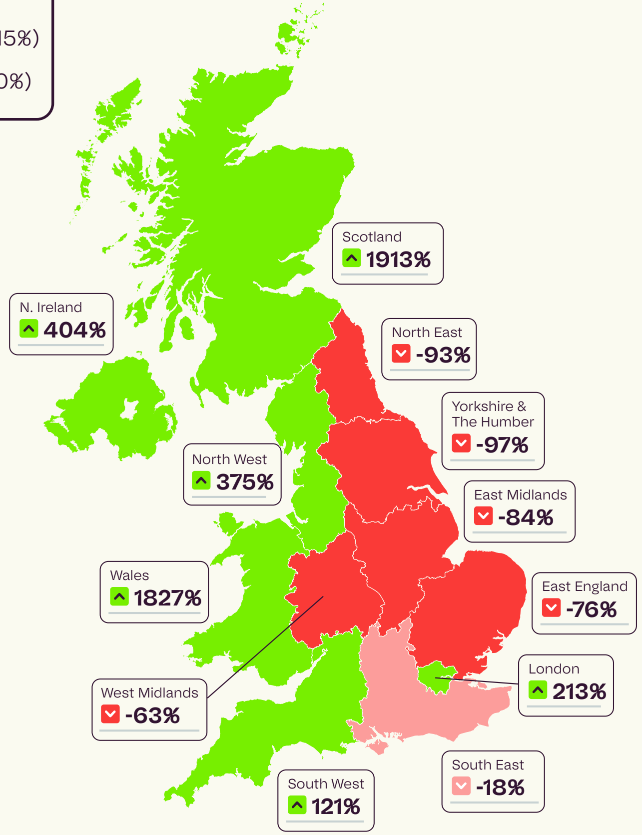
Changes in Health Starts
on a Year Earlier



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

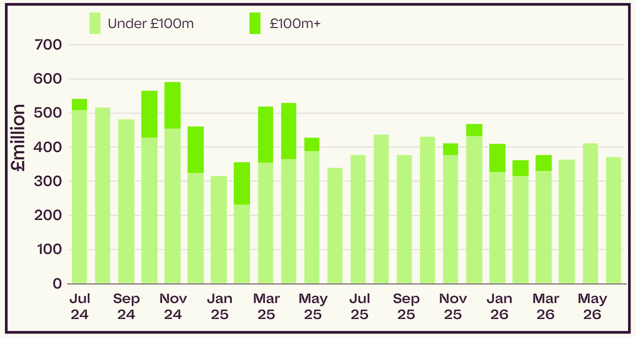
Overview

- **2% rise** in project starts against the previous year.
- **25% increase** in main contract awards year-on-year.
- **9% rise** in detailed planning approvals compared to the previous year.

The education sector delivered a stable performance during the period, with modest growth in project starts, main contract awards, and planning approvals compared with the previous year. Project starts also strengthened on a quarter-on-quarter basis, indicating continued momentum despite mixed regional conditions.

Looking ahead, the sector's prospects remain favourable. Ongoing commitments to improving the condition of the school estate, alongside major programmes such as the Schools Rebuilding Programme, are expected to underpin activity levels and support workload growth across the education sector over future periods.

Detailed Planning Approvals

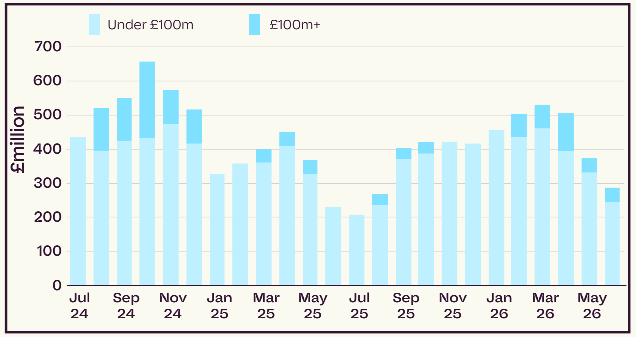


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,113	-	**1,113**
YoY	9%		**9%**
Prev. 3 months	13%	-100%	**-2%**
Prev. 3 months (SA)	-60%		

Main Contract Awards

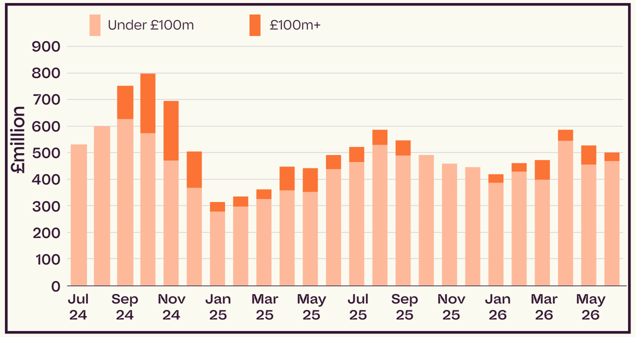


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	734	125	**859**
YoY	7%		**25%**
Prev. 3 months	-47%	-39%	**-46%**
Prev. 3 months (SA)	-42%		

Education Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,402	100	**1,502**
YoY	7%	-37%	**2%**
Prev. 3 months	17%	-55%	**6%**
Prev. 3 months (SA)	17%		

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

Education

Types of projects started

- Schools dominated activity, accounting for the majority of project starts and recording strong year-on-year growth.
- University and college schemes both declined compared with the previous year.

Project Spotlight

Fort Hill IC & IPS

Plans have been approved for the Fort Hill Integrated College & Integrated Primary School development. A main contractor is yet to be appointed on the £60 million scheme, with works due to complete in Q4 2031.

PROJECT ID: 18248393

IMAGE SOURCE: ISHERWOOD AND ELLIS ARCHITECTS

£60m

Types of Education Projects Started

Three months to July 2026

	£ million	Percentage
Colleges	110	**7%**
Other Education	102	**7%**
Schools	1,195	**80%**
Universities	95	**6%**
Total	1,502	**100%**

Education League Tables

June 2025 to July 2026

Contractors	Projects	£m
Royal BAM	14	462
Morgan Sindall	31	460
Willmott Dixon	33	450
Bowmer & Kirkland	13	368
Graham Construc.	6	287
Robertson Group	7	259
Kier	14	209
Galliford Try	13	185
Tilbury Douglas	14	164
McLaren	1	100

Clients	Projects	£m
Dep. for Education	66	1,010
London Met. Univ.	2	126
Aberdeen CC.	3	113
University of London	4	107
Univ. of Portsmouth	2	98
Swansea CC	4	82
WEPco	2	57
Education Auth. NI.	8	54
Renfrewshire Council	2	51
Midlothian Council	2	48

Education

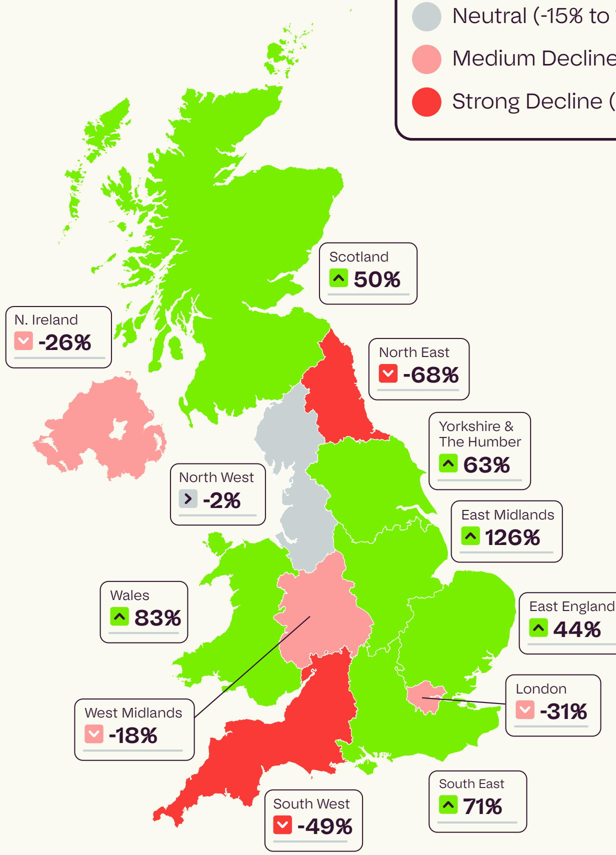
Regional

- London accounted for the largest share of education project starts.
- The East of England and Scotland both recorded strong growth in activity.
- Wales and the South East also experienced notable year-on-year increases.

London was the most active region for education project starts, totalling £259 million despite a 31% decline against the previous year. The East of England also performed strongly, rising 44% to £254 million, while Scotland recorded growth of 50% to reach £218 million.

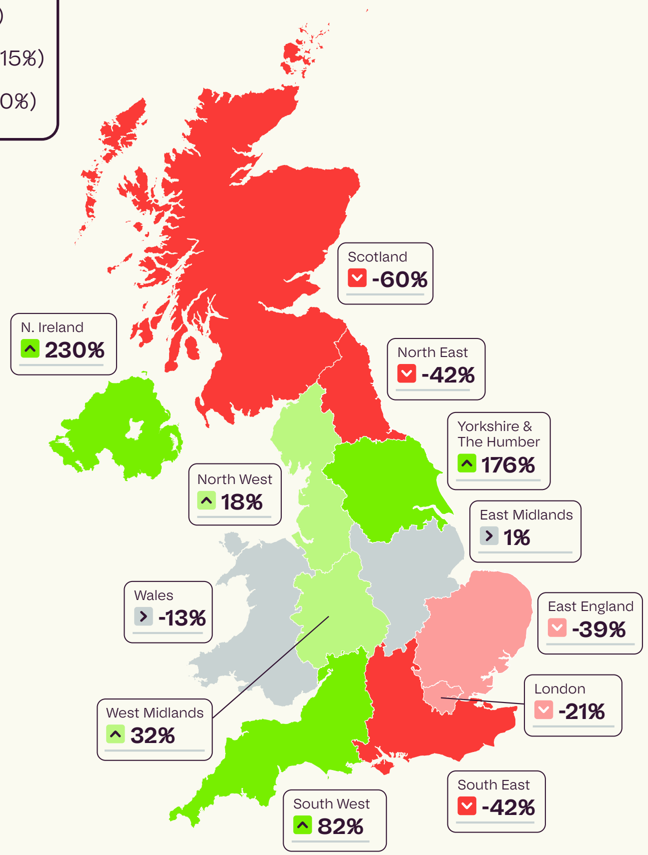
Yorkshire & the Humber accounted for the largest share of sector approvals, representing 23% of the total value. The region also saw strong year-on-year growth, with approvals rising 176% to £251 million. Northern Ireland recorded £124 million of approvals and the strongest growth rate, up 230% year on year, accounting for 11% of the total value.

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



Glenigan
A Hubexo Product

Community & Amenity

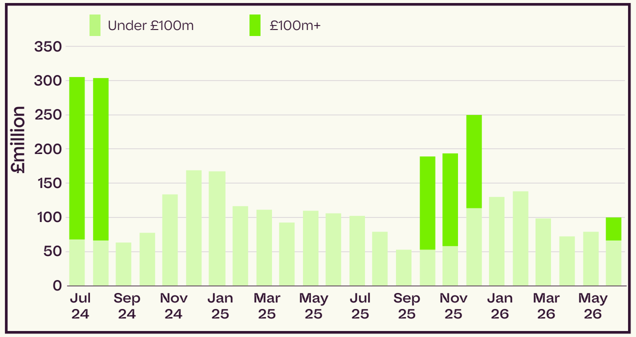
Overview

- **75% decline** in project starts against the previous year.
- **64% fall** in main contract awards compared to the previous year.
- **6% decrease** in detailed planning approvals compared to the previous year.

The community and amenity sector recorded a weak performance, with project starts and contract awards falling sharply compared with the previous year. Detailed planning approvals also declined, indicating subdued conditions across much of the development pipeline.

Despite current weakness, activity continues to be supported by selected public-sector investment programmes, particularly in defence, emergency services, and civic infrastructure. These areas are likely to provide the main sources of workload growth over the coming quarters.

Detailed Planning Approvals

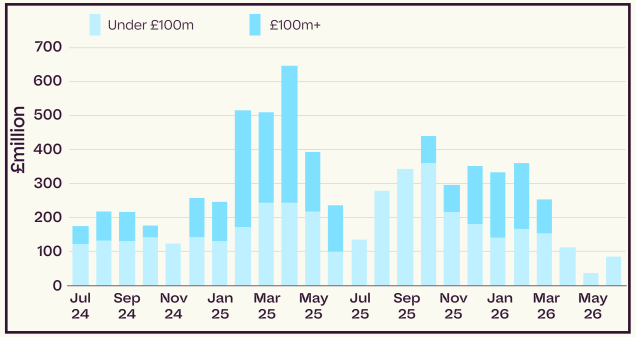


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	199	100	**299**
YoY	-37%		**-6%**
Prev. 3 months	-32%		**1%**
Prev. 3 months (SA)	-86%		

Main Contract Awards

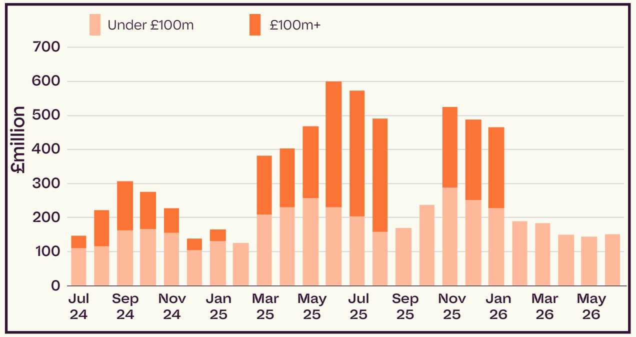


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	256	-	**256**
YoY	-14%	-100%	**-64%**
Prev. 3 months	-44%	-100%	**-66%**
Prev. 3 months (SA)	-19%		

Community & Amenity Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	452	-	**452**
YoY	-35%	-100%	**-75%**
Prev. 3 months	-18%		**-18%**
Prev. 3 months (SA)	-11%		

Glenigan
A Hubexo Product

Community & Amenity

Types of projects started

- Military projects accounted for the largest share of activity and recorded very strong year-on-year growth.
- Blue light developments also increased significantly compared with the previous year.
- Local facilities and prison projects both declined sharply from elevated levels a year earlier.

Project Spotlight

All Saints Library

Detailed plans have been approved for the new All Saints Library at Manchester Metropolitan University. A main contractor is yet to be appointed on the £90 million development, with works due to be completed in Q4 2027.

PROJECT ID: 23351415

IMAGE SOURCE: HAWKINS

Types of Community & Amenity Projects Started

Three months to July 2026

	£ million	Percentage
Blue Light	134	**30%**
Government Buildings	28	**6%**
Law Courts	-	**0%**
Local Facilities	50	**11%**
Military	205	**45%**
Places of Worship	11	**2%**
Prisons	23	**5%**
Total	452	**100%**

Community & Amenity League Tables

June 2025 to July 2026

Contractors	Projects	£m
Corrigenda	2	316
Bowmer & Kirkland	6	193
Galliford Try	5	128
Morgan Sindall	11	127
Willmott Dixon	7	110
Wates	13	84
Goldbeck Bower	1	78
Graham Construction	2	56
Kier	4	41
Reds10 (UK)	1	36

Clients	Projects	£m
Ministry of Defence	17	605
Ministry of Justice	27	468
Hampshire CC.	1	300
Cardiff CC.	1	78
Home Office	36	74
Liverpool City RCA	2	65
UK Parliament	1	59
Church of JCoLDS	1	48
Reuben Brothers	1	46
HMRC	1	46

Community & Amenity

Regional

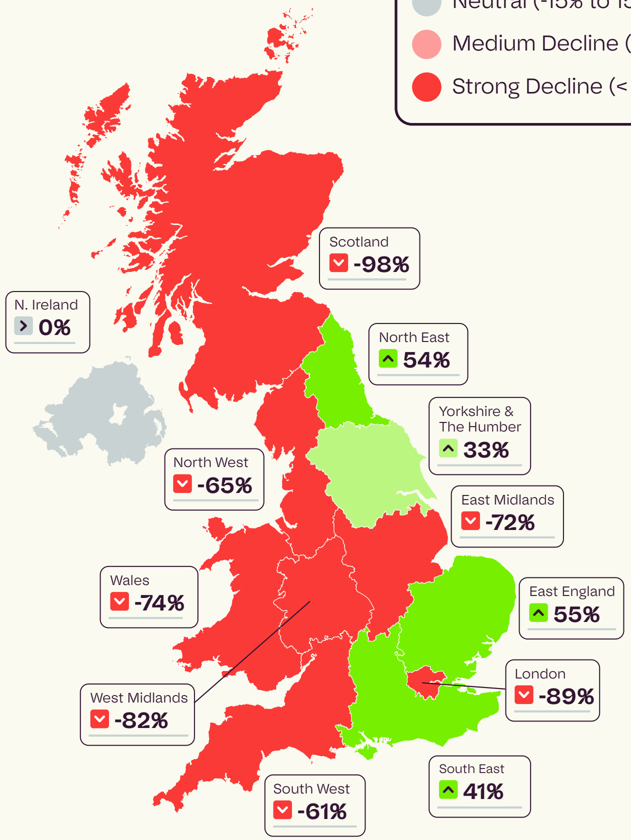
- Yorkshire & the Humber recorded the highest level of project-start activity.
- Northern Ireland remained a significant contributor to overall workload.
- The East of England and the South East both experienced growth in project starts.

Yorkshire & the Humber led community and amenity project starts, rising 33% year-on-year to £117 million. Northern Ireland also recorded strong activity, totalling £99 million, while the East of England and South East saw starts increase by 55% and 41% respectively.

The South East accounted for the largest share of approvals at £119 million (40%), up 83% on the previous year. The North West also performed strongly, with approvals rising 98% to £110 million.

Changes in Community & Amenity Starts

on a Year Earlier

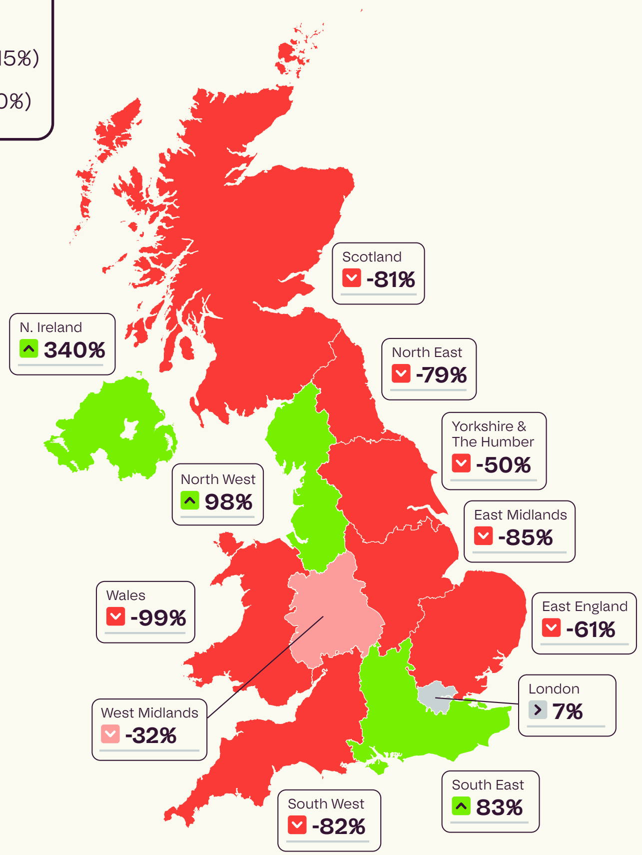


Growth or Decline

- 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



Glenigan
A Hubexo Product

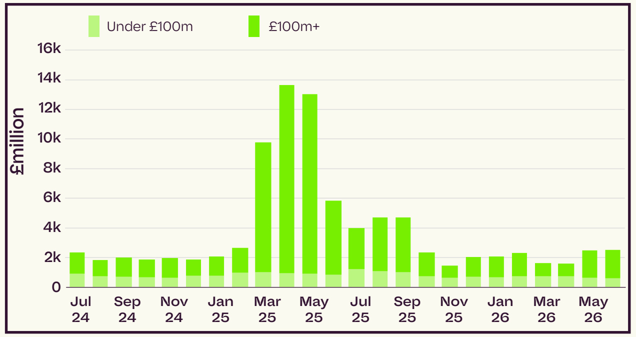
Civil Engineering
Overview

- **73% rise** in project starts against the previous year.
- **16% increase** in main contract awards year-on-year.
- **57% fall** in detailed planning approvals compared to the previous year.

Civil engineering activity strengthened considerably during the period, driven by a significant increase in major project starts. Main contract awards also rose compared with the previous year, although detailed planning approvals declined sharply, signalling weaker future pipeline activity.

The wider outlook for the sector remains supported by anticipated investment in transport, energy, and utility infrastructure. Increased expenditure on electricity networks, renewable energy infrastructure and major transport projects is expected to provide ongoing support to workload levels in the future.

Detailed Planning Approvals

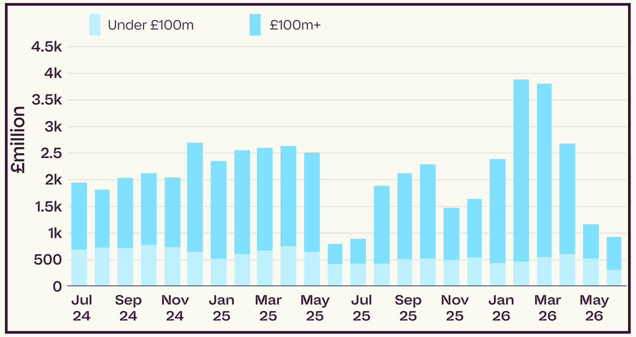


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,731	5,803	7,534
YoY	-30%	-61%	-57%
Prev. 3 months	-22%	120%	55%
Prev. 3 months (SA)	-66%		

Main Contract Awards

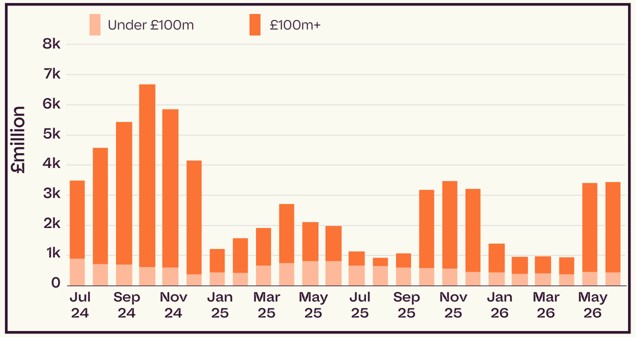


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	903	1,873	2,776
YoY	-28%	65%	16%
Prev. 3 months	-45%	-81%	-76%
Prev. 3 months (SA)	-36%		

Civil Engineering Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,335	8,954	10,289
YoY	-45%	154%	73%
Prev. 3 months	8%	434%	252%
Prev. 3 months (SA)	-19%		

Civil Engineering

Types of projects started

- Roads schemes remained a major contributor to sector activity and increased compared with the previous year.
- Harbour and ports projects also recorded growth, while energy-related work declined sharply.

Project Spotlight

A40 Bus Lanes & Active Travel

Detailed plans have been approved for the £126 million A40 Bus Lanes & Active Travel development in Oxfordshire.
A main contractor is yet to be appointed on the scheme, with works expected to complete in Q4 2030.

PROJECT ID: 24341651

IMAGE SOURCE: OXFORD MAIL

Types of Civil Engineering Projects Started

Three months to July 2026

	£ million	Percentage
Airports	-	**0%**
Other Civils	5,656	**55%**
Rail	218	**2%**
Roads	3,403	**33%**
Harbours/Ports	367	**4%**
Energy	523	**5%**
Water Industry	118	**1%**
Waste	5	**0%**
Total	10,289	**100%**

Civil Engineering League Tables

June 2025 to July 2026

Contractors	Projects	£m
STRABAG	7	2,437
Vital Energi Utilities	12	1,385
Marlborough Surf.	4	515
Jones Bros	1	500
Worley Europe	1	500
Equitix	1	498
Balfour Beatty	13	495
Kier	67	422
Galliford Try	80	356
M GROUP Services	7	348

Clients	Projects	£m
United Utilities	15	3,478
SSEN Transmission	8	1,809
Trafford Met BC.	1	1,330
Com. Wind Power	1	500
Cadent Gas	1	500
Manby BGE	1	300
Network Rail	17	286
Tribus Clean Energy	1	250
Dep. for Transport	21	244
Hertfordshire CC.	2	241

Glenigan
A Hubexo Product

Civil Engineering

Regional

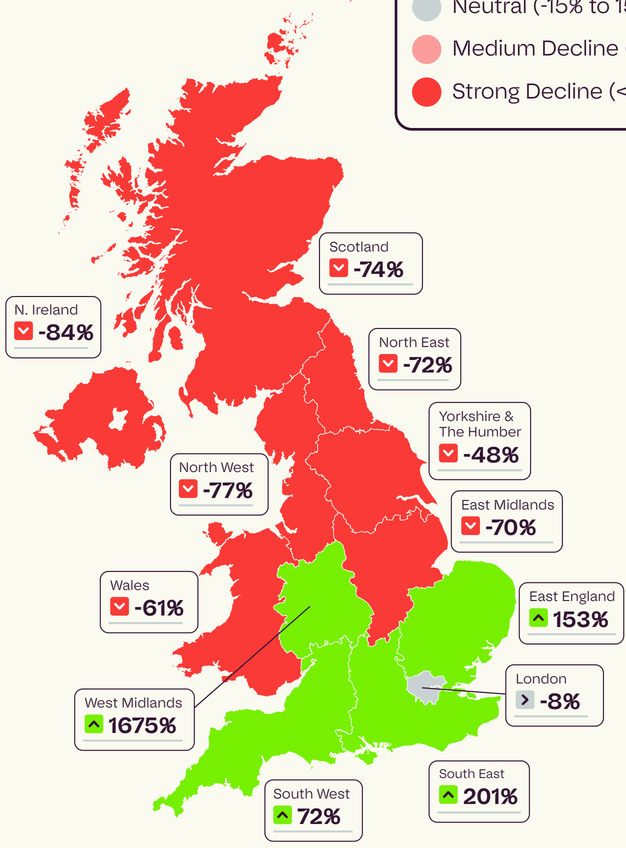
- The South East emerged as the most active region for civil engineering project starts.
- The West Midlands and the East of England also recorded substantial growth in activity.
- Most other regions experienced year-on-year declines.

The South East dominated sector activity, accounting for £6.2 billion of project starts following growth of 201% against the previous year. The West Midlands also recorded exceptional growth, increasing more than sixteen-fold, while the East of England rose 153%. Together, these three regions accounted for most of the project-start activity during the period.

In contrast, most other parts of the UK experienced significant declines, with Scotland, the North West, the North East, and Wales all recording falls of more than 60%.

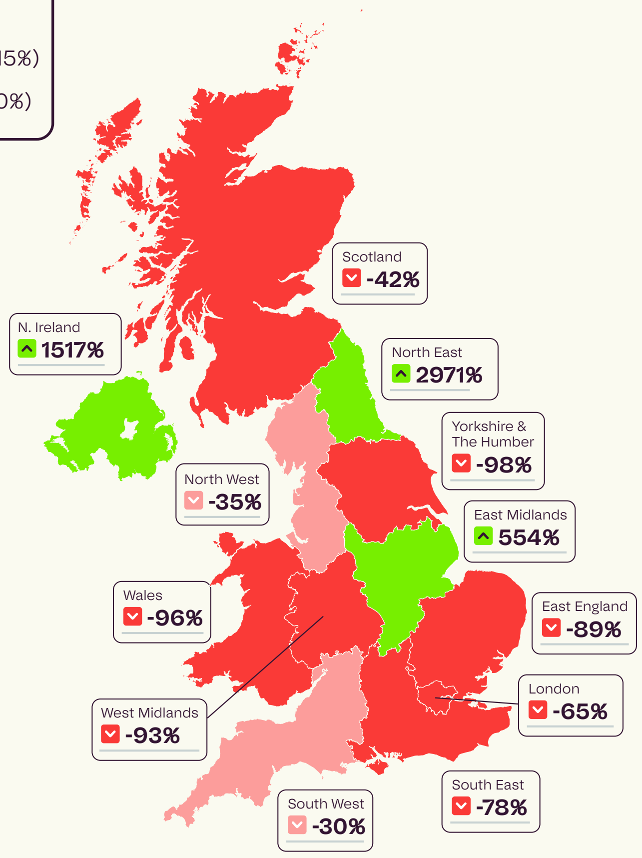
The North East experienced a strong period for approvals, with the value of approvals rising 36 times against the previous year to total £3.084 billion. The region accounted for the largest share of approvals (44%). The East Midlands also performed well, with the value of approvals rising 554%, a 21% share of the total value.

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
A Hubexo Product

Call **0800 060 8698**
Email **info@Glenigan.com**
Visit **www.Glenigan.com**

80 Holdenhurst Road,
Bournemouth BH8 8AQ