



Glenigan

A Hubexo Product

Construction Review

Reflecting activity to the end of February 2026

March 2026

- ✓ **15% decline in detailed planning approvals** compared to the preceding three months
- ✓ **17% decline in main contract awards** against the preceding three months
- ✓ **39% 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.

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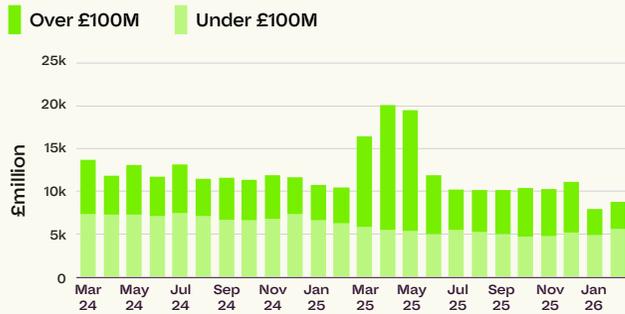
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- ▼ **16% decline** in detailed planning approvals compared to the previous year
- ▼ **36% decrease** in main contract awards against the previous year
- ▼ **29% decrease** in project starts against the previous year

Construction activity has weakened across all key metrics during the review period, with planning approvals, project starts, and contract awards each falling below both the preceding three months and the same period last year. Persistent affordability pressures, a subdued planning environment and low business confidence have contributed to the poor performance.

These domestic pressures are increasingly compounded by global instability. The war in the Middle East has driven up energy and fuel costs, adding further strain, while disruption across key maritime corridors is extending transit times and inflating import costs.

Detailed Planning Approvals

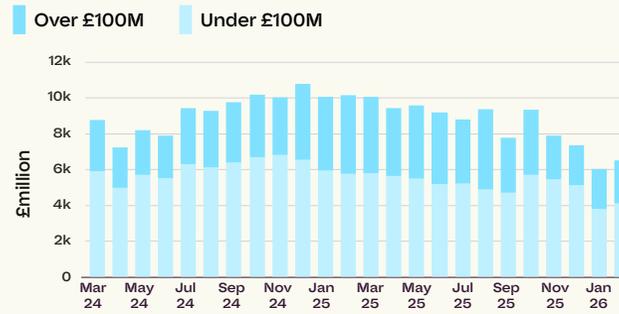


Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£million	16,840	9,469	26,309
YoY	-10%	-25%	-16%
Prev. 3 months	17%	-43%	-15%
Prev. 3 months (SA)	15%		

Source: Glenigan. Three month average

Main Contract Awards

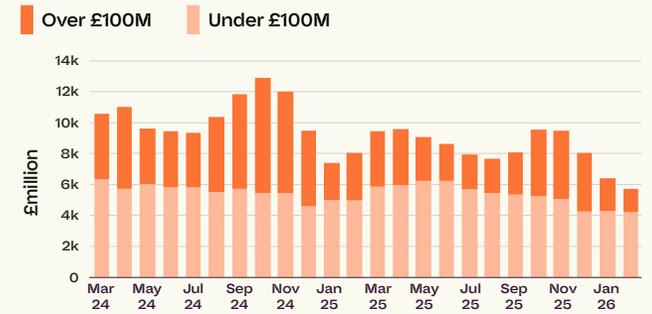


Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	12,333	7,232	19,565
YoY	-29%	-45%	-36%
Prev. 3 months	-25%	-1%	-17%
Prev. 3 months (SA)	-17%		

Source: Glenigan. Three month average

Starts



Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	12,624	4,569	17,193
YoY	-15%	-50%	-29%
Prev. 3 months	-17%	-65%	-39%
Prev. 3 months (SA)	-10%		

Source: Glenigan. Three month average

Economic Outlook

Geopolitical conflict darkens UK growth forecasts

- ▼ Weak finish to 2025
- ▲ Manufacturing and services have strengthened since the start of the year
- ▼ OBR trims growth forecast amid heightened geopolitical disruption

The UK economy lost momentum at the end of 2025, expanding by just 0.1% in the final quarter as an upturn in manufacturing was largely offset by flat service-sector output and a decline in construction. Reflecting this weaker finish, the OBR has trimmed its 2026 growth forecast to 1.1%, although increased government investment is expected to provide some support. The OBR also highlights significant risks to the outlook, including heightened geopolitical instability and uncertainty around future US tariff policy.

Since the start of the year, industry surveys point to improving conditions, with both the CIPS manufacturing and services indices reporting rising activity. However, the war in the Middle East threatens to interrupt this early-year momentum.

Energy markets have already reacted sharply. Spot oil and gas prices have surged as conflict-related disruption affects supply, raising the risk of renewed inflationary pressure and potentially delaying anticipated interest-rate cuts. Such a scenario would weigh on the wider economy, including the housing market. Meanwhile, elevated geopolitical uncertainty and the potential for broader supply-chain disruption risk undermining business confidence over the coming months.

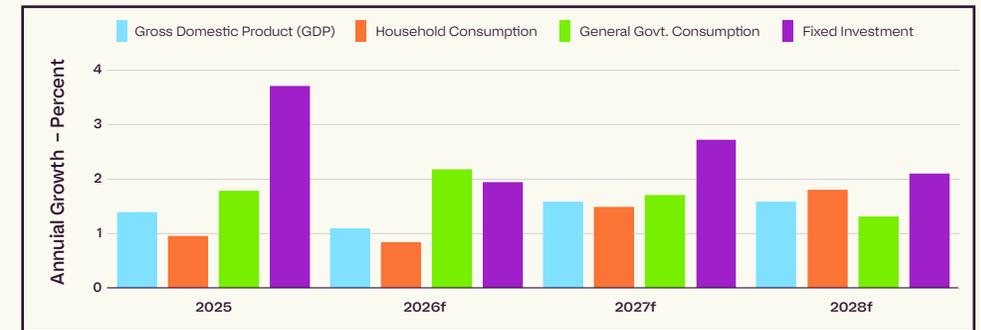
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Construction Activity & the Economy



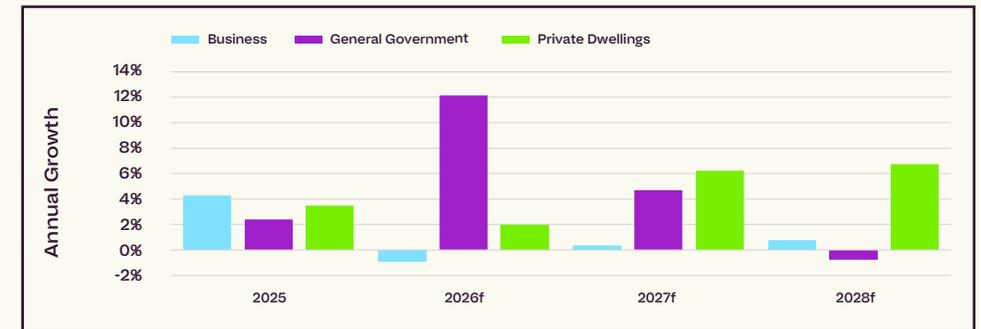
Sources: ONS, Glenigan. N.B. Output 3 months against a year earlier, starts 12 months against a year earlier

UK Economy



Source: OBR

UK Investment



Source: OBR

Top 50 Contractors

Last 12 month totals: **1007 projects**
£36,152m

Last month totals: **107 projects**
£3,356m

March 2025 to February 2026

Contractors	#	£m	★	Contractors	#	£m	★
1 STRABAG	7	2,636	0	26 McAleer & Rushe Contracts	8	417	-7
2 Morgan Sindall	207	2,515	0	27 Caddick Group	19	417	10
3 Mace	11	1,936	0	28 G W Highways	1	400	-7
4 Bowmer & Kirkland	33	1,930	1	29 ACCIONA	1	400	-7
5 Bovis	12	1,459	1	30 Robertson	26	383	NEW
6 Graham Construction	29	1,331	2	31 Hill Group	15	371	-4
7 Laing O'Rourke	10	1,277	0	32 Bouygues	21	366	-8
8 Costain	7	1,204	15	33 Tilbury Douglas	37	362	-8
9 Kier	83	1,151	-5	34 Structure Tone	4	344	7
10 Balfour Beatty	17	1,127	24	35 Marlborough Surfacing	3	335	0
11 Galliford Try	121	1,088	3	36 Equitix	1	332	-7
12 M Group Services	9	1,076	-1	37 Glencar Construction	20	331	-9
13 Willmott Dixon	59	1,015	-3	38 Corrigenda	4	324	-8
14 McLaren	14	959	-5	39 Skanska UK	2	323	NEW
15 Corinthia	1	800	NEW	40 Kanadevia Inova UK	2	319	-9
16 GE Vernova	1	800	NEW	41 TSL Projects	6	319	-9
17 Technip Energies	1	800	NEW	42 GMI Construction	20	303	0
18 Mears Group	4	787	-2	43 McLaughlin & Harvey	10	297	-5
19 Wates	50	767	-4	44 VINCI	23	253	-18
20 Winvic	19	720	-7	45 Bennett Construction	3	252	-6
21 Sisk	7	566	-3	46 Flynn	1	250	-6
22 Royal BAM	33	560	-5	47 Murphy	6	244	-11
23 Sir Robert McAlpine	6	556	-3	48 Benniman Limited	9	243	NEW
24 Jones Bros	3	548	-12	49 VolkerWessels	15	237	NEW
25 JRL Group	4	493	NEW	50 Domis Construction	2	229	-6

★ Change in ranking since the previous period

February 2026

Contractors	#	£m	★	Contractors	#	£m	★
1 Graham Construction	4	325	NEW	26 Char.gy	1	41	NEW
2 Skanska UK	1	273	NEW	27 McLaughlin & Harvey	1	34	NEW
3 M Group Services	2	208	NEW	28 Woodvale Construction	2	34	NEW
4 Caddick Group	6	164	NEW	29 Seddon Group	2	33	NEW
5 Robertson	3	159	NEW	30 Lowry Construction	1	26	NEW
6 Sir Robert McAlpine	2	155	NEW	31 CHAP Group	1	24	NEW
7 Kier	11	145	13	32 BMR Construction	1	23	NEW
8 Galliford Try	5	127	11	33 Tilbury Douglas	3	20	NEW
9 Bowmer & Kirkland	4	131	-8	34 Structeco	1	19	NEW
10 Tide Construction	1	117	NEW	35 Mandale Group	1	17	NEW
11 VolkerWessels	3	106	NEW	36 Liongate Construction	1	17	NEW
12 Murphy	2	105	NEW	37 CubicWorks	1	17	NEW
13 Mott Macdonald Group	2	105	NEW	38 Hollandale Projects	1	16	NEW
14 Jacobs	2	105	NEW	39 NK Joinery	1	16	NEW
15 Morgan Sindall	11	86	-11	40 Natta Building Company	1	16	NEW
16 Ferrovial	1	80	NEW	41 Boom Construction	1	15	NEW
17 Royal BAM	3	72	-4	42 Solar Style UK	1	15	NEW
18 JRL Group	1	68	NEW	43 Buxton Building Contract.	1	14	NEW
19 Statom Group	1	51	NEW	44 TotalEnergies	1	13	NEW
20 Marlborough Surfacing	1	50	NEW	45 Believ	1	13	NEW
21 Willmott Dixon	1	50	-5	46 McGoff Group Facilities	1	13	NEW
22 GMI Construction	5	50	-10	47 Red Construction Group	1	13	NEW
23 Balfour Beatty	2	46	NEW	48 Bugler Developments	1	13	NEW
24 Hill Group	1	45	NEW	49 Costain	2	12	-41
25 CCG	2	43	NEW	50 J W Muir Group	1	12	NEW

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Top 50 Clients

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Hotel & Leisure

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Education

Community & Amenity

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Top 50 Clients

March 2025 to February 2026

Clients	#	£m	★
1 United Utilities Group	7	3457	0
2 OGCI Climate Investments	1	2000	NEW
3 Net Zero Teesside Power	1	2000	NEW
4 Department of Health	166	1480	-2
5 Ministry of Justice	35	1105	-2
6 Dep. for Env., Food & Rural	10	955	-1
7 Department for Education	68	912	0
8 Oxfordshire County Council	6	856	-4
9 Ministry of Defence	42	833	-3
10 British Land	6	762	0
11 Mitsui Fudosan	1	700	-3
12 Sunderland City Council	8	601	NEW
13 Kemble Water	13	593	0
14 Community Wind Power	1	500	-3
15 Milton Keynes BC.	3	494	-3
16 Kent County Council	8	482	-2
17 Dover District Council	3	371	-1
18 Hampshire County Council	11	336	1
19 Prologis UK	5	318	9
20 MVV Environ. Devonport	1	300	0
21 R&F Properties QS	1	300	NEW
22 Highview Power	1	300	-1
23 SSEN Transmission	5	293	-1
24 Lidl UK	31	280	3
25 Hertfordshire CC	5	262	-1
26 Tribus Clean Energy	1	250	-1
27 Telehouse International	1	250	-1
28 Herefordshire Council	8	245	NEW
29 Department for Transport	26	237	-11
30 Westminster City Council	2	230	-1
31 Sanctuary Housing	3	229	-1
32 Unite Group	2	216	NEW
33 Echelon Consultancy	2	212	0
34 CPD	5	204	0
35 Natural History Museum	2	204	0
36 Great Portland Estates	5	202	0
37 Immersa	1	200	0
38 London Bor. of Havering	3	196	0
39 Urenco UK	1	196	0
40 Aldi	47	190	4
41 Orion Capital Managers	2	188	NEW
42 Cole Waterhouse	1	185	-2
43 Greater London Authority	9	179	-20
44 University of London	9	179	-3
45 Midlothian Council	5	178	-3
46 Obayashi	1	165	0
47 Sellar Property Group	1	165	0
48 The Crown Estate	5	161	0
49 Dep. for Infrastructure	4	159	0
50 Vita Meadows	1	158	0

February 2026

Clients	#	£m	★
1 United Utilities Group	2	527	NEW
2 Department of Health	12	337	7
3 Herefordshire Council	1	200	NEW
4 Manchester Met. University	1	143	NEW
5 Unite Group	1	143	NEW
6 GIC	1	137	NEW
7 British Land	1	137	NEW
8 Alvarez & Marsal	1	131	NEW
9 Ellison Inst. of Tech. Oxford	1	120	NEW
10 Aldau Development	1	117	NEW
11 Department for Education	6	108	4
12 Kemble Water	1	80	22
13 Ministry of Defence	4	62	NEW
14 English Cities Fund	2	55	NEW
15 Fancourt Group	1	51	NEW
16 Maidstone Borough Council	3	50	NEW
17 Lon. Bor. of Barking & Dag.	1	50	NEW
18 Strategic Estates Officer	1	50	NEW
19 Church Of J. Christ Of LDS	1	48	NEW
20 Glasgow Housing Assoc.	1	38	NEW
21 Farringdon Row SPV	1	37	NEW
22 Atomic Energy Authority	1	34	NEW
23 Clarion Housing Group	2	34	NEW
24 Aberdeenshire Council	2	31	NEW
25 Stoke on Trent City Council	1	31	NEW
26 Kelda Group	2	29	NEW
27 Wolverhampton CC.	1	28	NEW
28 Newry Mourne & Down Coun	1	26	NEW
29 William Grant & Sons Distill.	1	26	NEW
30 Apex Housing Association	1	26	NEW
31 Southern Water Services	6	26	NEW
32 W. Lothian District Council	1	26	NEW
33 Argenta House (Stone.Park)	1	23	NEW
34 Cervidae	1	23	NEW
35 E. Dunbartonshire DC.	1	22	NEW
36 Hallmark Care Homes	1	20	NEW
37 Malik Group Holdings	1	19	NEW
38 Ernst & Young	1	18	NEW
39 Hampshire County Council	5	18	-38
40 National Maritime Museum	1	18	NEW
41 Mandale Investments	1	17	NEW
42 Bruntwood Estates	1	17	NEW
43 London Bor. of Bromley	2	17	-4
44 PCS Property Solutions	1	16	NEW
45 Legal & General Group	1	16	NEW
46 Hadleigh High School	1	15	NEW
47 DFDS Seaways	1	14	NEW
48 Thurrock Borough Council	1	14	NEW
49 Aldi	3	14	NEW
50 East Bergholt High School	1	14	NEW

★ Change in ranking since the previous period

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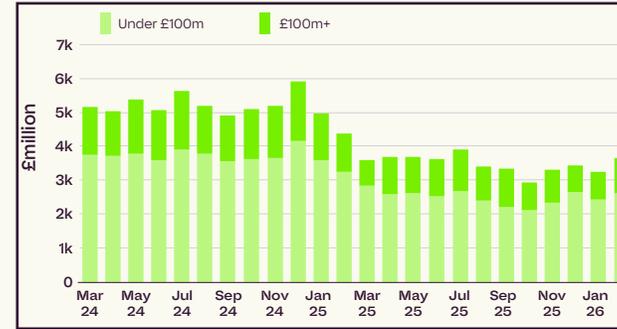
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- ▼ **36% decrease** in project starts year-on-year.
- ▼ **17% decrease** in main contract awards from last year.
- ▼ **16% decrease** in detailed planning approvals compared to 2024

Residential project starts and main contract awards fell both year-on-year and against the previous quarter. However, detailed planning approvals improved compared with the previous three months, and major contract awards over £100 million are beginning to show early signs of recovery.

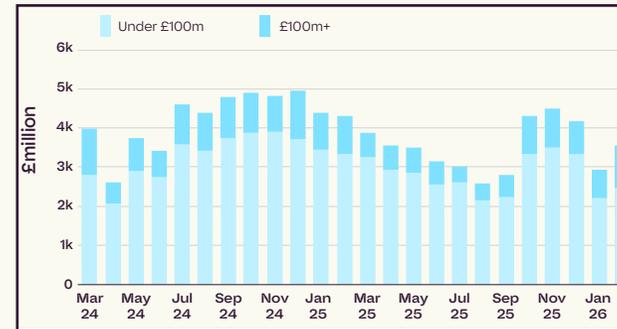
With Nationwide reporting a rise in UK house prices in February, the housing sector appears to be stabilising after a weak quarter. Even so, recent interest rate increases from banks and building societies risk slowing the pace of recovery. Higher borrowing costs may limit improvements in affordability and could weigh on buyer confidence.

Detailed Planning Approvals



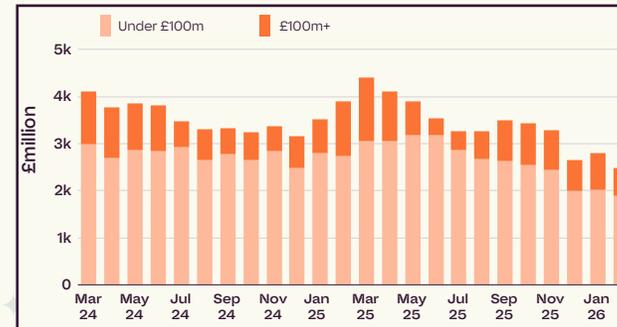
Source: Glenigan

Main Contract Awards



Source: Glenigan

Housing Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	7,903	3,067	10,971
YoY	-19%	-8%	-16%
Prev. 3 months	12%	8%	11%
Prev. 3 months (SA)	10%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	7,500	3,210	10,710
YoY	-25%	10%	-17%
Prev. 3 months	-29%	9%	-21%
Prev. 3 months (SA)	-18%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	5,651	1,819	7,470
YoY	-31%	-48%	-36%
Prev. 3 months	-23%	-28%	-24%
Prev. 3 months (SA)	-20%		

Housing

Types of projects started

Sub-sector performance was weak, with only four categories increasing on a year ago

- Private housing remained the largest segment at 43% of the total, although output fell 43% year on year to £3,205 million.
- Private apartments decreased 36% compared with the previous year, totalling £1,995 million.
- Student accommodation starting on site reached £772 million, representing 27% growth year on year.

Types of Housing Projects Started

Three months to February 2026

	£ million	Percentage
Private Apartments	1,995	27%
Elderly Persons Homes	8	0%
Private Housing	3,205	43%
Private Sheltered Housing	251	3%
Social Sector Sheltered Housing	35	0%
Social Sector Apartments	519	7%
Social Sector Housing	627	8%
Homes, Hostels Etc.	58	1%
Student Accommodation	772	10%
Total	7,470	100%

Project Spotlight

1 Trafford Wharf Road

Detailed plans have been approved on the £200 million 1 Trafford Wharf Road mixed-use development on Trafford Park, Manchester. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q2 2028.

PROJECT ID: 24147153

IMAGE SOURCE: CHAPMAN TAYLOR

£200m



Housing League Tables

February 2025 to March 2026

Contractors	Projects	£m
Bloor Homes	61	1,971
Barratt Redrow	58	1,875
Taylor Wimpey	39	1,353
Persimmon	54	1,218
Bellway	40	918
Graham Construction	7	904
Mears	4	787
Hill	22	653
Vistry	23	623
JRL	4	535

Clients	Projects	£m
Bloor Homes	65	2,098
Taylor Wimpey	53	1,864
Barratt Redrow	67	1,836
Persimmon	61	1,231
Bellway	43	1,044
Vistry	45	918
Milton Keynes BC.	3	716
Apollo Management	29	513
The Berkeley Group	10	429
Dover District Council	1	350

Housing

Regional

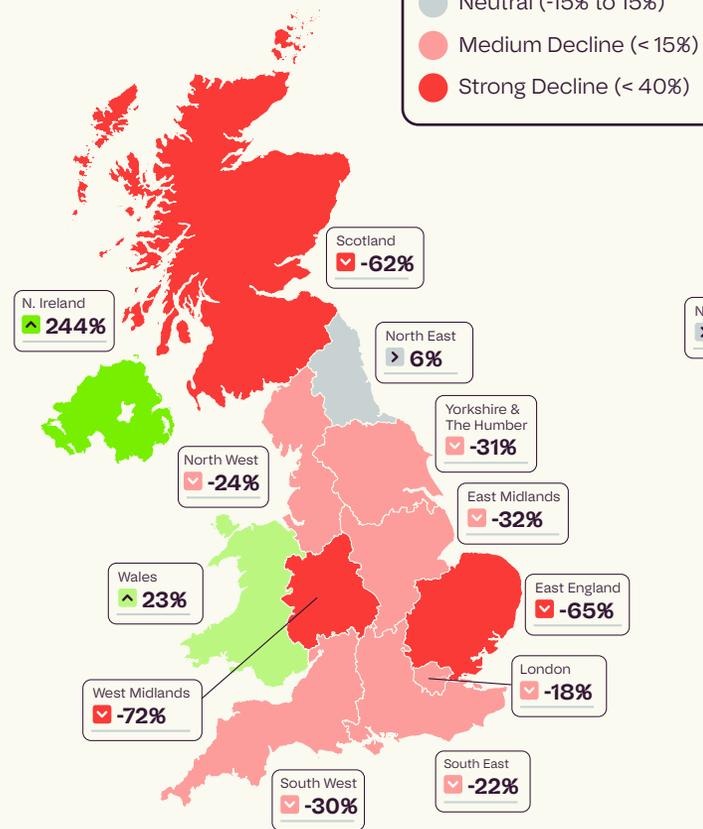
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- Most regions recorded weaker performance in both starts and approvals.
- Northern Ireland saw strong growth in project starts.
- The North West posted strong growth in approvals.

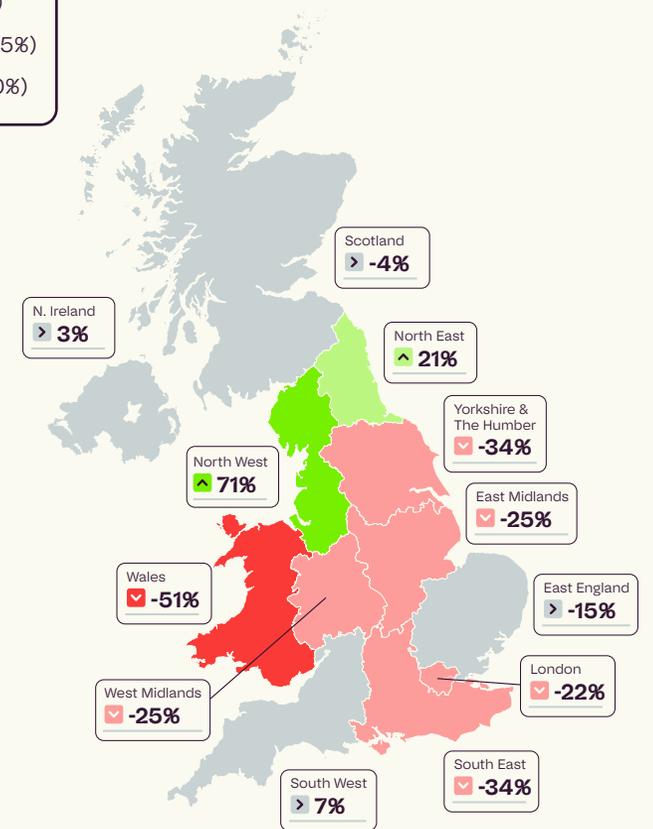
London remained the most active region for residential starts at £2,006 million, though activity slipped 18%. The South East also weakened, falling 22% to £730 million. The South West also weakened, falling 30% to £660 million. The North West decreased 24% to £654 million.

London also topped detailed planning approvals at £2,303 million despite a 22% fall, while the North West rose 71% to £1,312 million.

Changes in Housing Starts
on a Year Earlier



Changes in Housing Planning Approvals
on a Year Earlier



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- ▼ **30% decrease** in project starts year-on-year.
- ▼ **78% decrease** in main contract awards from last year.
- ▼ **58% decrease** in detailed planning approvals compared to 2024.

Industrial construction remained subdued, with starts, awards and approvals all falling on last year and the previous quarter. No major projects were approved or awarded, although underlying activity showed slight quarterly growth against the preceding three months on a seasonally adjusted (SA) basis.

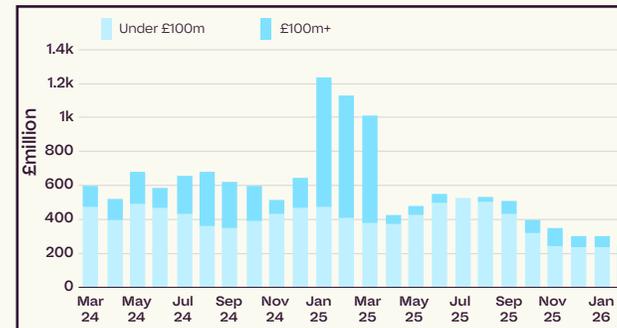
Latest S&P data shows manufacturing output has grown for five months, but current economic conditions may still slow any rebound in industrial construction.

Detailed Planning Approvals



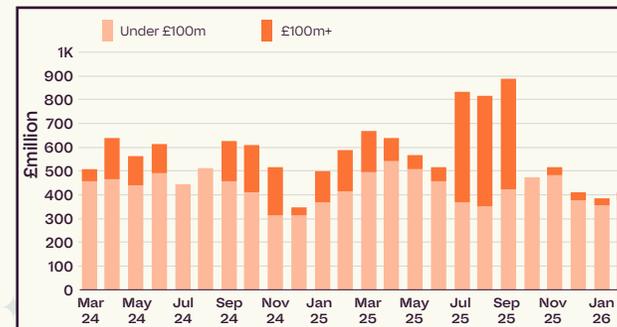
Source: Glenigan

Main Contract Awards



Source: Glenigan

Industrial Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,503	-	1,503
YoY	-11%	-100%	-58%
Prev. 3 months	9%	-100%	-32%
Prev. 3 months (SA)	2%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	751	-	751
YoY	-39%	-100%	-78%
Prev. 3 months	4%	-100%	-28%
Prev. 3 months (SA)	1%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,127	104	1,231
YoY	-10%	-80%	-30%
Prev. 3 months	-22%	4%	-21%
Prev. 3 months (SA)	-17%		

Industrial

Types of projects started

In line with the overall weak performance of the sector, project starts fell in all categories.

- Manufacturing accounted for 53% of starts, down 15% year-on-year to £648 million.
- Warehousing & logistics totalled £499 million, a 45% decrease.
- Other industrial projects fell 11% year-on-year to £84 million.

Types of Industrial Projects Started

Three months to February 2026

	£ million	Percentage
Manufacturing	648	53%
Other Industrial	84	7%
Warehousing & Logistics	499	41%
Total	1,231	100%

Project Spotlight

Cepac - Rotherham 2

Detailed plans have been approved for the £53 million Cepac - Rotherham 2 production facility development. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 25592695

IMAGE SOURCE: CEPAC LTD

£53m



Industrial League Tables

February 2025 to March 2026

Contractors	Projects	£m
Winvic	13	530
Glencar	16	298
TSL Projects	5	288
Benniman	10	261
Caddick Group	9	254
J W Muir Group	8	152
GMI Construction	6	146
Wilten Construction	10	121
Murphy Group	2	106
Robertson Group	4	97

Clients	Projects	£m
Prologis UK	6	334
Lidl UK	2	154
Panattoni UK	6	111
Howden Joinery	1	100
Aldi	1	84
Avonmouth Ind. Est.	2	83
Indurent	7	83
Waldens Wiltshire	1	74
Pulpex Ltd	2	71
Amazon UK	3	64

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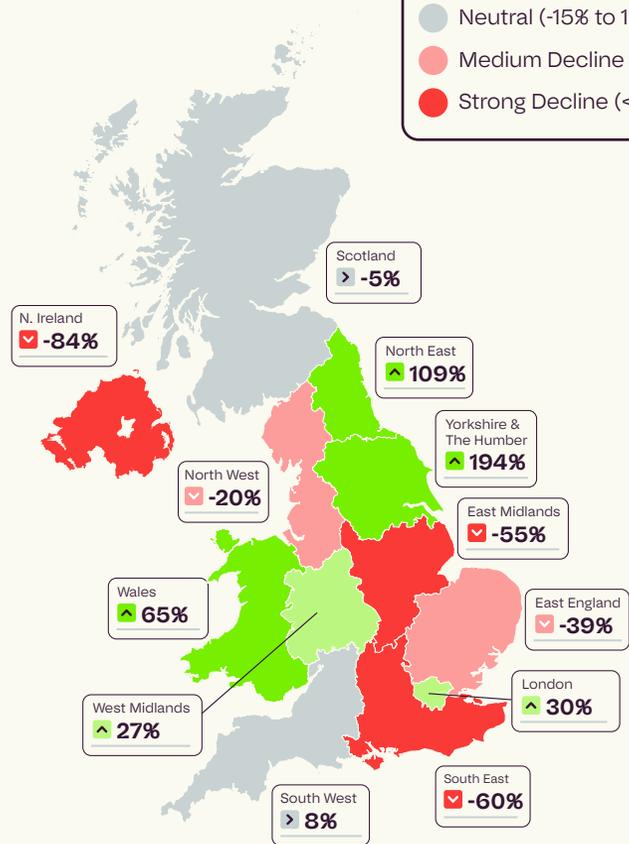
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 - Civil Engineering

- Half of regions saw increases in project starts year-on-year.
- Only three regions recorded growth in detailed planning approvals.
- London grew in both starts and approvals.

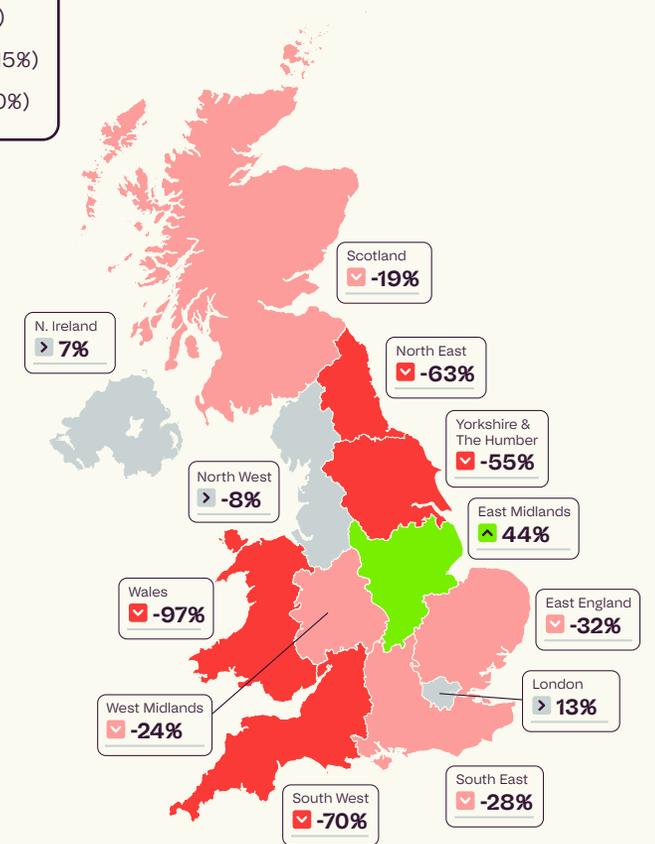
The East Midlands accounted for 22% of project starts at £267 million, although activity was down 55% on a year ago. The South East, representing 15% of starts, also fell sharply, decreasing 60% to £182 million. In contrast, the South West rose 8% year-on-year to £138 million.

The North West led detailed planning approvals at £275 million, despite an 8% annual decline. Yorkshire and the Humber fell 55% to £201 million, while the East Midlands recorded a 44% increase in approvals, reaching £166 million.

Changes in Industrial Starts
on a Year Earlier



Changes in Industrial Planning Approvals
on a Year Earlier



Offices

Overview

- ▲ **54% increase** in project starts year-on-year.
- ▼ **14% decrease** in main contract awards from last year.
- ▼ **28% decrease** in detailed planning approvals compared to a year ago.

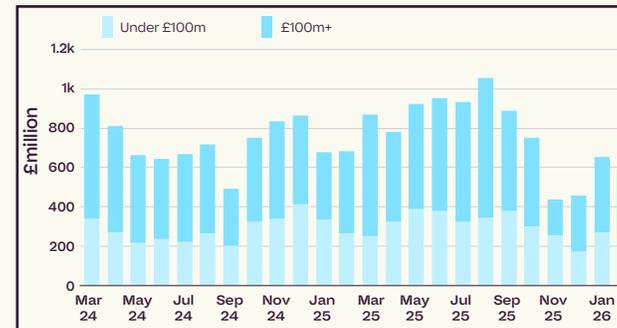
Office starts grew strongly year-on-year and quarter-on-quarter. However, the pipeline weakened, with both awards and approvals falling over both periods.

Detailed Planning Approvals



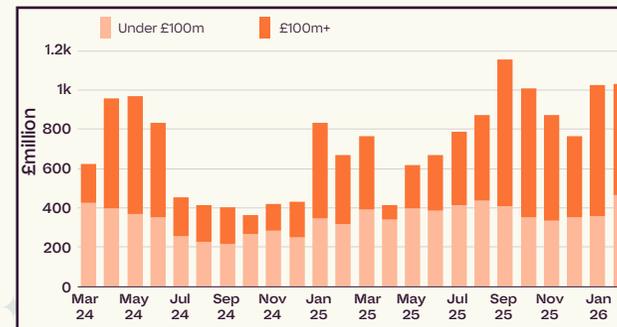
Source: Glenigan

Main Contract Awards



Source: Glenigan

Office Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	649	1,019	1,667
YoY	-32%	-25%	-28%
Prev. 3 months	-8%	-89%	-83%
Prev. 3 months (SA)	10%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	774	993	1,767
YoY	-3%	-20%	-14%
Prev. 3 months	1%	81%	34%
Prev. 3 months (SA)	-2%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,392	1,703	3,095
YoY	45%	62%	54%
Prev. 3 months	40%	5%	19%
Prev. 3 months (SA)	40%		

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Types of projects started

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

- Projects over £100 million rose 62% to £1,703 million.
- Schemes between £50 million and £100 million grew 27% to £460 million.
- Projects between £20 million and £50 million rose 40% to £321 million.

Types of Office Projects Started

Three months to February 2026

	£ million	Percentage
Up to £5 million	115	4%
£5 million up to £10 million	266	9%
£10 million up to £20 million	229	7%
£20 million up to £50 million	321	10%
£50 million up to £100 million	460	15%
Over £100 million	1,703	55%
Total	3095	100%

Project Spotlight

Euston Tower Science Innovation Hub

Detailed plans have been approved for the £600 million Euston Tower Science Innovation Hub in Camden, London. Works are due to complete in Q3 2031, with Mace appointed as main contractor on the scheme.

PROJECT ID: 23220803

IMAGE SOURCE: CONSTRUCTION NEWS

£600m



Office League Tables

February 2025 to March 2026

Contractors	Projects	£m
Mace	7	1,636
Morgan Sindall	114	1,092
Bowmer & Kirkland	5	722
Bovis	3	540
Multiplex Cons. Eur.	2	358
McLaren	4	346
Structure Tone	4	344
Skanska UK	1	273
Newarthill	2	270
Flynn	1	250

Clients	Projects	£m
British Land	3	745
Mitsui Fudosan UK	1	700
Sunderland CC.	1	450
Endurance Land	1	300
Telehouse Int.	1	250
Great Portland	5	202
Obayashi	1	165
Sellar Prop. Group	1	165
The Crown Estate	5	162
Barclays Bank	2	151

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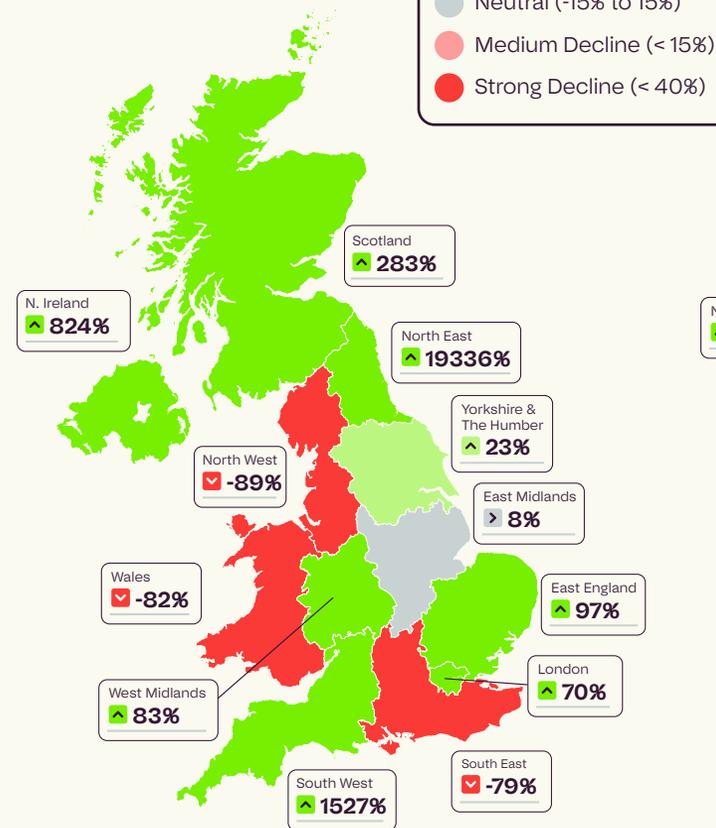
Civil Engineering

- Most regions saw strong growth in projects commencing on-site, with only three showing a decline.
- Planning approvals weakened overall.
- The North East and Northern Ireland experienced strong growth in both project starts and planning approvals.

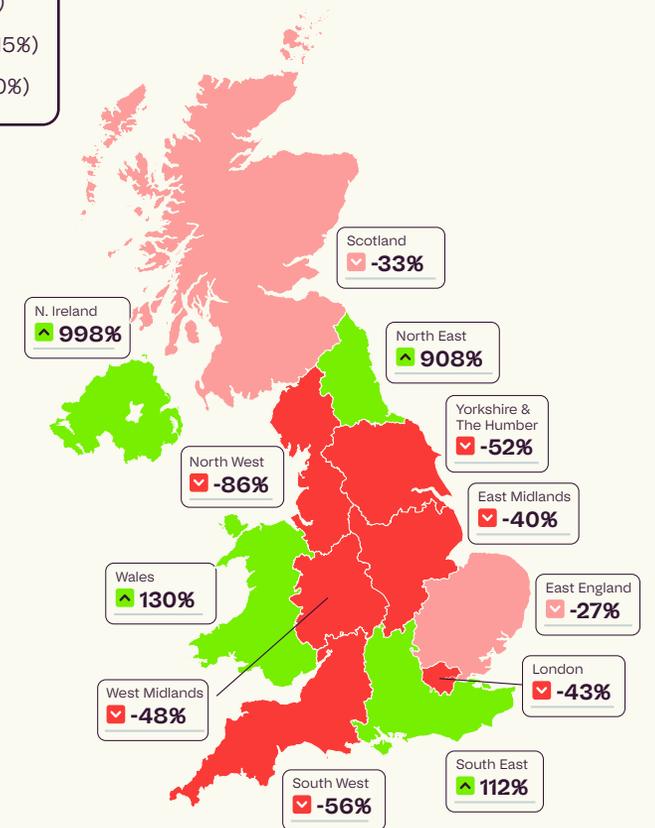
London dominated office project starts, accounting for 63% of activity after a 70% rise to £1,947 million. Growth in the Capital was supported by major schemes, including the £450 million Row One development at Red Lion Court in Southwark. The South West also recorded a sharp uplift, with starts rising to £432 million, sixteen times higher than a year ago, driven by the £360 million, 90-acre technology campus for US healthcare software company Epic, between Long Ashton and Bristol.

London also led detailed planning approvals, totalling £557 million despite a 43% annual decline. The South East performed more strongly, rising 112% year-on-year to £321 million, boosted by the £263 million Wexham Road Data Centre Campus in Slough. The North East saw exceptional growth, climbing tenfold to £244 million, supported by the £240 million Cambois Data Centre Campus Phase 1 development.

Changes in Office Starts
on a Year Earlier



Changes in Office Planning Approvals
on a Year Earlier



Retail

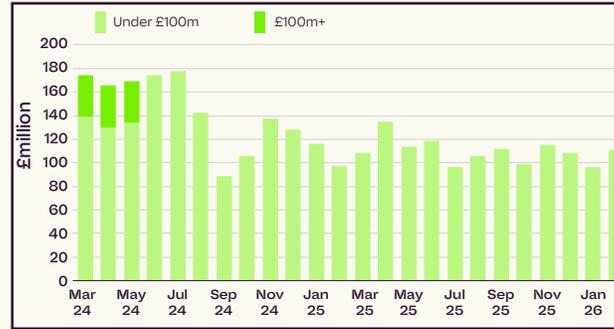
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- ▼ **15% decrease** in project starts year-on-year.
- ▼ **59% decrease** in main contract awards from last year.
- ▲ **14% increase** in detailed planning approvals compared to the previous year.

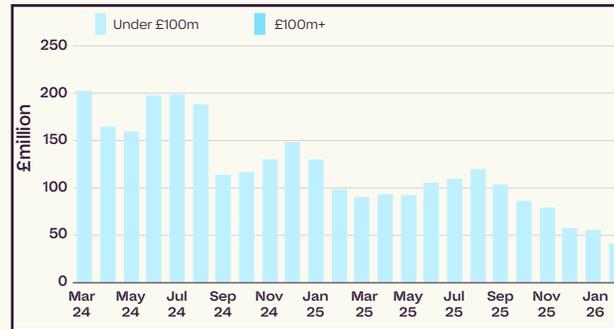
Main contract awards remained very weak in the three months to February, declining on both a quarterly and annual basis. Project starts also fell year-on-year but did manage a 20% uplift compared with the previous quarter. No major schemes over £100 million progressed at any stage of the pipeline during the period. However, underlying detailed planning approvals for sub-£100 million projects increased against both comparison periods.

Detailed Planning Approvals



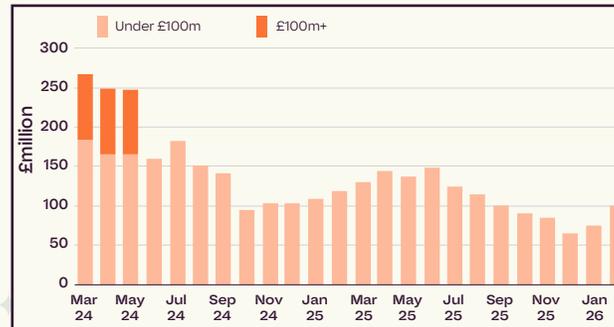
Source: Glenigan

Main Contract Awards



Source: Glenigan

Retail Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	333	-	333
YoY	14%		14%
Prev. 3 months	-4%		-4%
Prev. 3 months (SA)	16%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	122	-	122
YoY	-59%		-59%
Prev. 3 months	-49%		-49%
Prev. 3 months (SA)	-49%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	302	-0	302
YoY	-15%		-15%
Prev. 3 months	20%		20%
Prev. 3 months (SA)	13%		

Retail

Types of projects started

Performance across the retail sector remained weak overall, with only two categories managing year-on-year growth.

- Supermarkets increased 28% year-on-year to £196 million.
- Petrol filling stations grew 32% year-on-year to £10 million.
- Shop projects fell 36% year-on-year to £93 million.

Types of Retail Projects Started

Three months to February 2026

	£ million	Percentage
Other Retail	-	0%
Petrol Filling Stations	10	3%
Retail Warehousing	-	0%
Shopping Centres	2	1%
Shops	93	31%
Supermarkets	196	65%
Total	302	100%

Project Spotlight

Aldi Dorset

Detailed plans have been approved for a £7 million Aldi in Wimborne, Dorset. A main contractor is yet to be appointed on the scheme with works due to complete in Q1 2027.

PROJECT ID: 24166586

IMAGE SOURCE: KENDALL KINGSCOTT PARTNERSHIP

£7m



Retail League Tables

February 2025 to March 2026

Contractors	Projects	£m
Kier Group	1	41
McPhillips Wellington	1	37
Mildren Cons.	3	32
DSP Cons. Mngmt.	8	29
VINCI	1	20
The Barnfield Group	1	20
Audas Proj. Mngmt.	1	17
Red Construction	1	17
Neilcott Constr.	1	14
Toureen	2	13

Clients	Projects	£m
Lidl UK	26	122
Aldi	45	102
T J Morris	14	48
Walsall Met. BC.	1	41
Marks & Spencer Grp.	18	38
McPhillips Wellington	1	37
Tesco	42	25
Blackburn/Darwen BC.	1	20
Watford Health	1	17
J Sainsbury	13	13

Retail

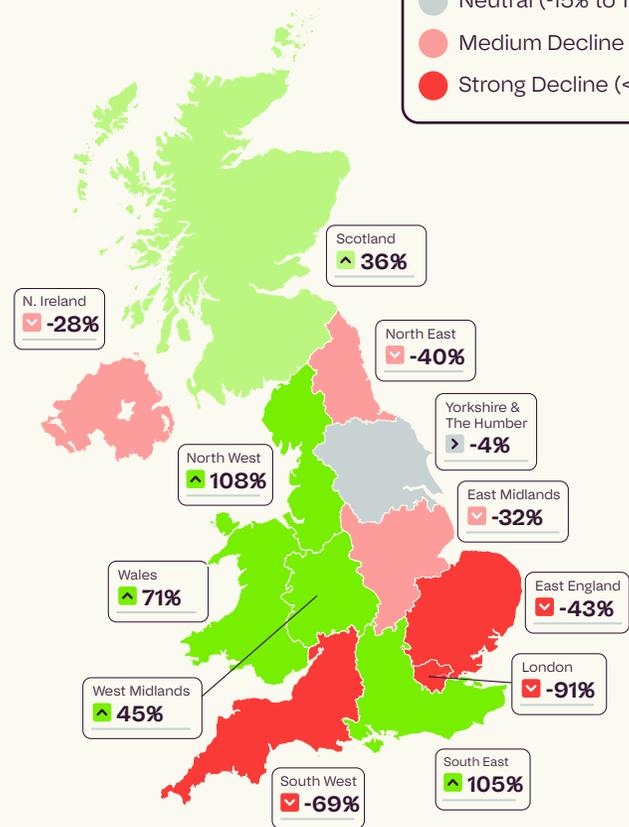
Regional

- Project starts and detailed planning approvals were down in most regions.
- The North West, South East, West Midlands and Wales recorded strong growth in project starts.
- Detailed planning approvals grew strongly in the East of England, North East, North West, South East and Yorkshire & the Humber.

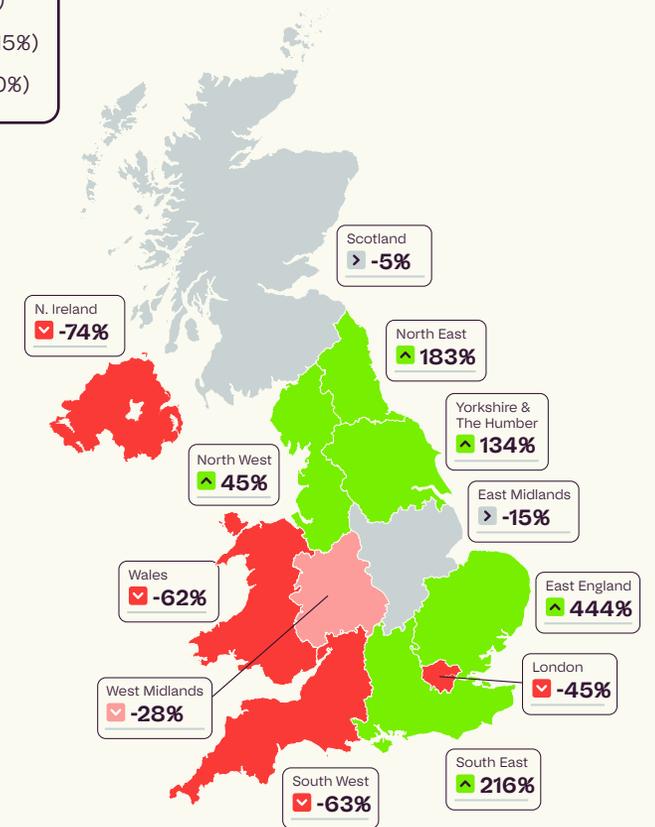
The South East recorded the highest value of retail project starts, rising 105% year-on-year to £82 million. The North West also performed strongly, increasing 108% to £68 million, while Wales grew 71% to £26 million. In contrast, Yorkshire and the Humber slipped 4% on last year to £20 million.

In detailed planning approvals, the East of England led the way with £79 million after rising more than fivefold year-on-year. The South East also saw a significant uplift, with approvals up 216% to £56 million. The North West grew 45% to £48 million, while the South West moved in the opposite direction, falling 63% year-on-year to £27 million.

Changes in Retail Starts
on a Year Earlier



Changes in Retail Planning Approvals
on a Year Earlier



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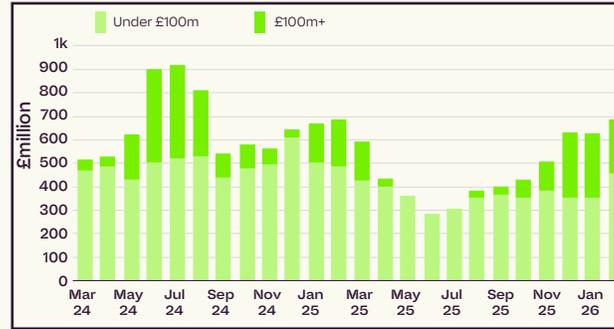
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- ▲ **14% increase** in project starts year-on-year.
- ▼ **24% decrease** in main contract awards from last year.
- **0% increase** in detailed planning approvals compared to a year ago.

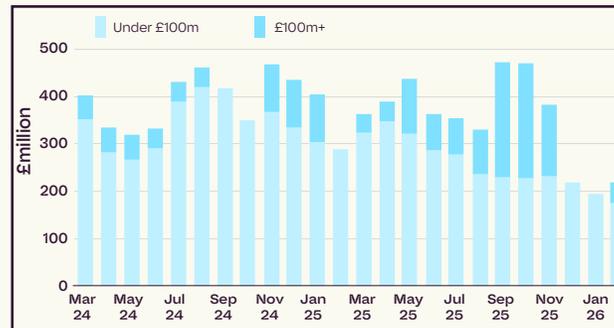
Main contract awards weakened over the period, falling on both an annual and quarterly basis. Project starts were higher than a year ago but dipped 18% on the previous quarter due to fewer major schemes over £100 million. Detailed planning approvals improved quarter-on-quarter, with major projects increasing across both comparisons.

Detailed Planning Approvals



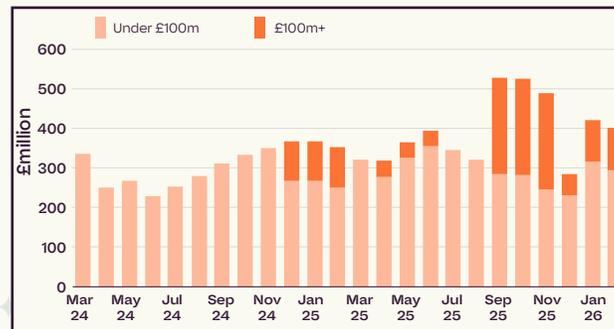
Source: Glenigan

Main Contract Awards



Source: Glenigan

Hotel & Leisure Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,369	691	2,060
YoY	-6%	14%	0%
Prev. 3 months	20%	82%	35%
Prev. 3 months (SA)	16%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	523	131	654
YoY	-40%		-24%
Prev. 3 months	-25%	-71%	-43%
Prev. 3 months (SA)	-25%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	884	317	1,201
YoY	17%	6%	14%
Prev. 3 months	20%	-57%	-18%
Prev. 3 months (SA)	28%		

Hotel & Leisure

Types of projects started

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

- Cinemas and theatres rose 472% year-on-year, accounting for 38% of activity.
- Other hotel and leisure projects increased 16% to £207 million.
- Hotels and guest houses declined 53% year-on-year, representing a 20% share.

Types of Hotel & Leisure Projects Started

Three months to February 2026

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	29	2%
Cinemas & Theatres	457	38%
Hotels, Guest Houses	237	20%
Indoor Leisure Facilities	120	10%
Other Hotel & Leisure	207	17%
Sport Facilities	150	12%
Total	1,201	100%

Project Spotlight

Oxford United Football Stadium

Plans have been approved for the Oxford United Football Stadium development in Kidlington, Oxfordshire. A main contractor is yet to be appointed on the scheme, with works expected to be completed in Q2 2028.

PROJECT ID: 22018448

IMAGE SOURCE: OXFORD UNITED

£150m



Hotel & Leisure League Tables

February 2025 to March 2026

Contractors	Projects	£m
Newarthill	3	266
Morgan Sindall	5	216
McLaren	2	153
Robertson	2	139
Gilbert Ash	1	120
Bovis	1	100
Walter Lilly & Co	1	90
Willmott Dixon	8	87
Limak	1	84
Legendre UK	1	82

Clients	Projects	£m
Great. London Auth.	2	135
Alvarez & Marsal	1	131
Whitbread	23	103
Crystal Palace FC.	1	100
Rayners Penn	1	90
Peel Holdings	2	86
Fc100	1	82
L. Borough of Hackney	3	75
The Property Trust	1	60
Stacycity	1	60

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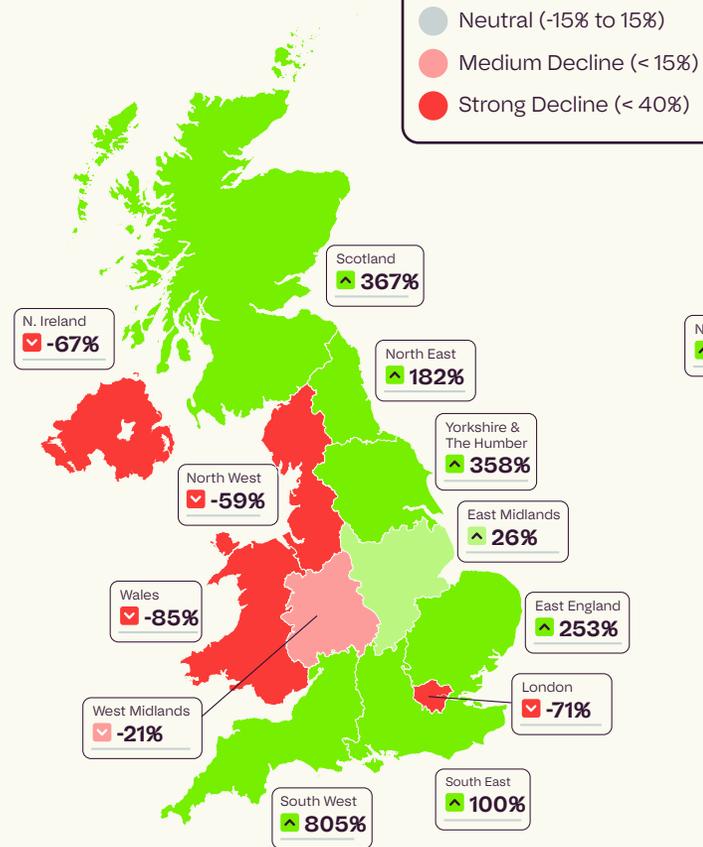
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- Most regions recorded growth in project starts.
- Regional performance in detailed planning approvals was generally weak.
- Scotland posted strong gains in both starts and approvals.

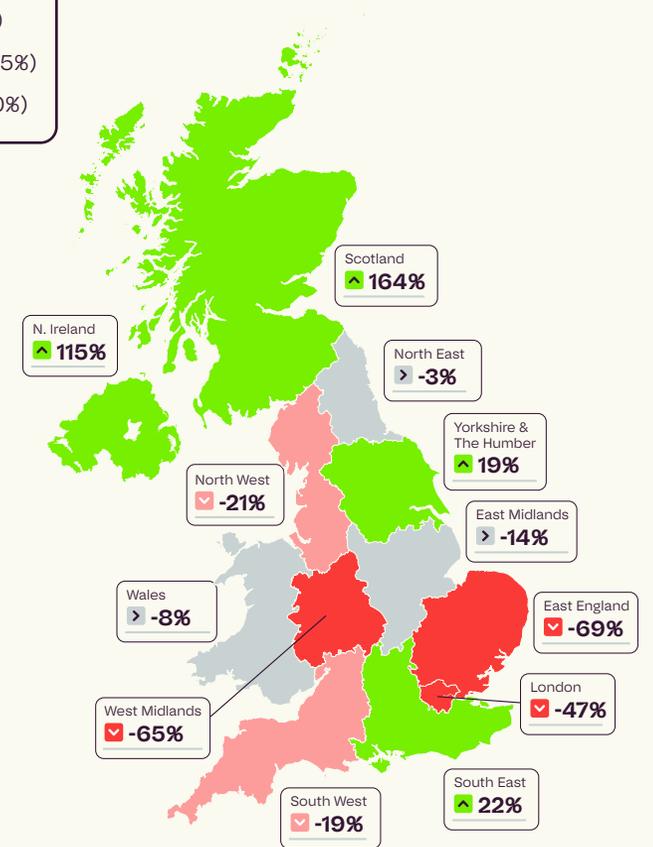
Scotland led project starts, rising 367% year-on-year to £297 million, supported by the £162 million Dunard Centre in Edinburgh. The South West also saw exceptional growth, increasing ninefold to £210 million due to the £155 million YTL Arena Bristol Brabazon development.

Scotland dominated approvals as well, rising 164% year-on-year to £862 million, driven by the £450 million Center Parcs Scottish Borders project. London fell 47% to £421 million.

Changes in Hotel & Leisure Starts
on a Year Earlier



Changes in Hotel & Leisure Planning Approvals
on a Year Earlier



Health

Overview

- ▼ **3% decline** in project starts compared with the previous quarter.
- ▲ **5% rise** in main contract awards year-on-year.
- ▼ **7% decrease** in detailed planning approvals year-on-year.

The health sector recorded a mixed period. Starts and approvals fell against last year and the previous quarter, while contract awards edged up year-on-year.

Despite the weak start to the year, high-profile programmes such as the New Hospital Programme, alongside planned investment in NHS technology and increased funding for core services, offer reasons for optimism. These measures are expected to feed through into higher healthcare project starts over time, with additional funding likely to support a gradual recovery in sector workloads.

Detailed Planning Approvals



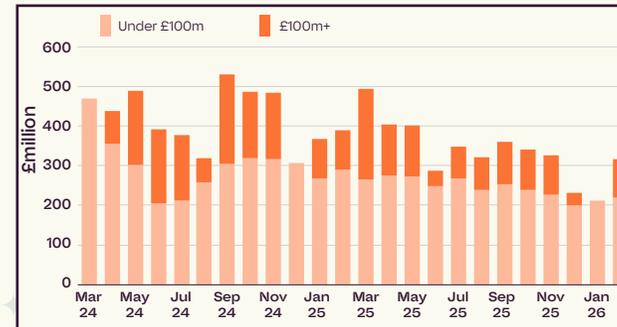
Source: Glenigan

Main Contract Awards



Source: Glenigan

Health Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	530	-	530
YoY	-7%		-7%
Prev. 3 months	-7%	-100%	-52%
Prev. 3 months (SA)	21%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	394	296	690
YoY	-40%		5%
Prev. 3 months	2%	-1%	0%
Prev. 3 months (SA)	-9%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	656	296	952
YoY	-24%	-1%	-19%
Prev. 3 months	-3%	-2%	-3%
Prev. 3 months (SA)	3%		

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Types of projects started

The health sector performed poorly compared with the previous year, although day centres provided a rare bright spot.

- Hospitals accounted for the largest share at 53%, declining 13% year-on-year to £507 million.
- Nursing Homes & Hospices totalled £180 million, falling 17% compared with a year ago.
- Day Centres increased 351% year-on-year to £45 million.

Types of Health Projects Started

Three months to February 2026

	£ million	Percentage
Day Centres	45	5%
Dental, Health & Veterinary Centres/ Surgeries	116	12%
Hospitals	507	53%
Nursing Homes & Hospices	180	19%
Other Health	104	11%
Total	952	100%

Project Spotlight

Wellbeing Hub - Park View

Detailed plans have been approved for a Wellbeing Hub at Park View Health Centre in Cardiff. Kier has been appointed as the main contractor on the £16 million scheme. Work is expected to be completed in Q1 2028.

PROJECT ID: 19307606

IMAGE SOURCE: IBI

£16m



Health League Tables

February 2025 to March 2026

Contractors	Projects	£m
Laing O'Rourke	3	942
Graham Construction	3	397
Mace Group	2	286
Bouygues UK	1	215
McLaughlin & Harvey	3	166
VINCI	4	159
Morgan Sindall	7	122
MTX Contracts	3	88
Kori Construction	6	87
W W Martin (Thanet)	2	72

Clients	Projects	£m
Dep. of Health	152	1,399
Dep. for Environ., Food & Rural Affairs	3	927
Nat. History Museum	1	201
CPD	1	195
Kadans Science	1	100
Gen. Lab. of Research	1	85
Univ. of Cambridge	1	72
LNT Group	9	70
Welbeck Health	2	44
Hallmark Care Homes	2	43

Health

Regional

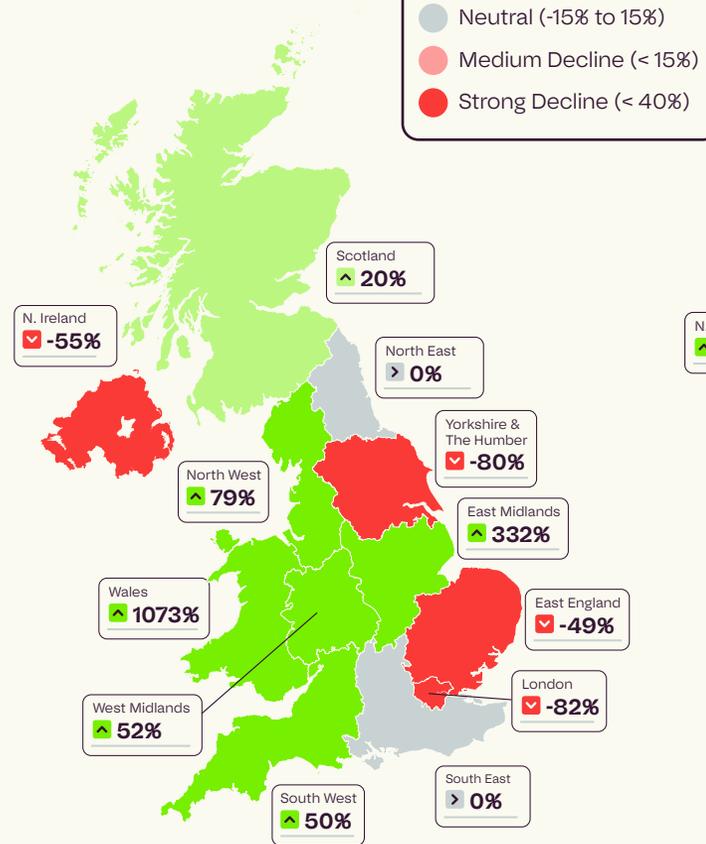
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- The East Midlands accounted for the largest share of project starts and performed strongly year-on-year.
- The North East recorded sharp growth in approvals.
- London accounted for the largest share of approvals, rising modestly on the previous year.

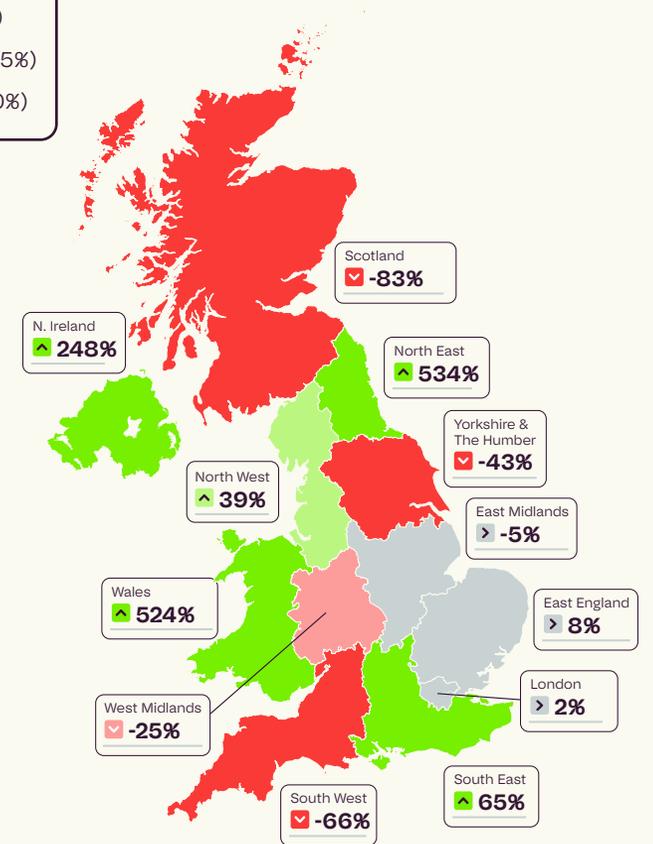
The East Midlands was the most active region for project starts, reaching £378 million and accounting for 40% of all activity. The North West also recorded solid growth, with starts increasing 79% to £63 million, representing 7% of the total.

In planning approvals, London held the largest share at 19%, rising 2% year-on-year to £99 million. The North East and Wales experienced the sharpest growth, up 534% and 524% respectively, totalling £29 million and £33 million.

Changes in Health Starts
on a Year Earlier



Changes in Health Planning Approvals
on a Year Earlier



Education

Overview

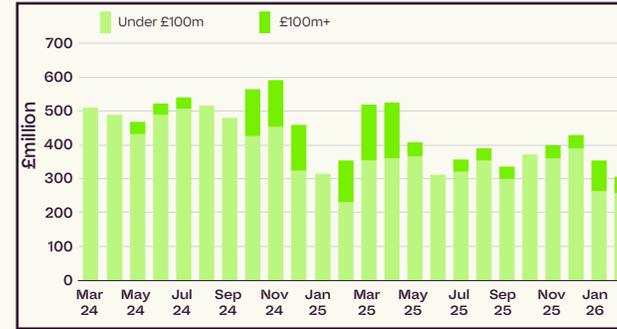
- ▲ **23% rise** in project starts compared with the previous year.
- ▼ **21% decline** in main contract awards year-on-year.
- ▼ **14% decline** in detailed planning approvals compared with the previous year.

The education sector experienced a mixed period in the three months to February. Project starts were higher than during the same period last year but slipped back compared with the previous quarter, while both approvals and main contract awards declined on an annual and quarterly basis.

Even so, the outlook remains more positive. Ongoing policy commitments to address the ageing school estate and improve the quality and safety of learning environments continue to support future activity. The school rebuilding programme, in particular, is expected to be a key driver in the coming years, with large-scale refurbishments and whole-school replacements likely to underpin sector performance.

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Detailed Planning Approvals



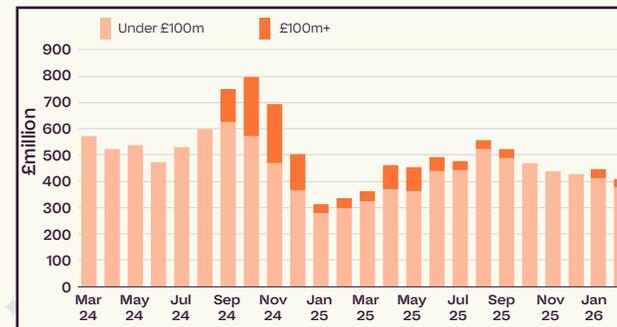
Source: Glenigan

Main Contract Awards



Source: Glenigan

Education Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	778	142	920
YoY	12%	-62%	-14%
Prev. 3 months	-28%	18%	-24%
Prev. 3 months (SA)	5%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	848	-	848
YoY	-21%		-21%
Prev. 3 months	-25%		-25%
Prev. 3 months (SA)	-3%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,129	100	1,229
YoY	27%	-9%	23%
Prev. 3 months	-15%		-7%
Prev. 3 months (SA)	-9%		

Education

Types of projects started

Project-start performance was weak across most parts of the sector, with schools providing one of the few bright spots.

- Schools accounted for the largest share of starts at £990 million (81%), rising 51% year-on-year.
- Universities totalled £132 million (11% of starts), declining 24% on the previous year.
- Colleges fell 39% year-on-year to £77 million.

Types of Education Projects Started

Three months to February 2026

	£ million	Percentage
Colleges	77	6%
Other Education	29	2%
Schools	990	81%
Universities	132	11%
Total	1,229	100%

Project Spotlight

Peterhead Academy Community Campus

Plans have been approved for the Peterhead Academy Community Campus in Peterhead, Grampian. Robertson has been appointed as main contractor on the £71 million scheme, with works due to be completed in Q3 2028.

PROJECT ID: 16423750

IMAGE SOURCE: SORA

£71m



Education League Tables

February 2025 to March 2026

Contractors	Projects	£m
Morgan Sindall	36	498
Bowmer & Kirkland	15	398
Royal BAM	11	371
Willmott Dixon	18	259
Tilbury Douglas	17	200
Kier Group	9	185
Galliford Try	22	180
Graham Constr.	5	132
McLaren	2	112
Robertson Group	7	90

Clients	Projects	£m
Dep. for Education	71	965
Midlothian Council	4	165
University of London	7	109
Univ. of Portsmouth	3	101
Swansea City Council	3	80
Educ.Auth. N. Ireland	12	59
WEPco	2	58
Scot. Borders Council	2	58
Kent CC.	4	51
Queens Univ. Belfast	4	51

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Top 50 Clients

Sector Analysis

Housing

Industrial

Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Education

Regional

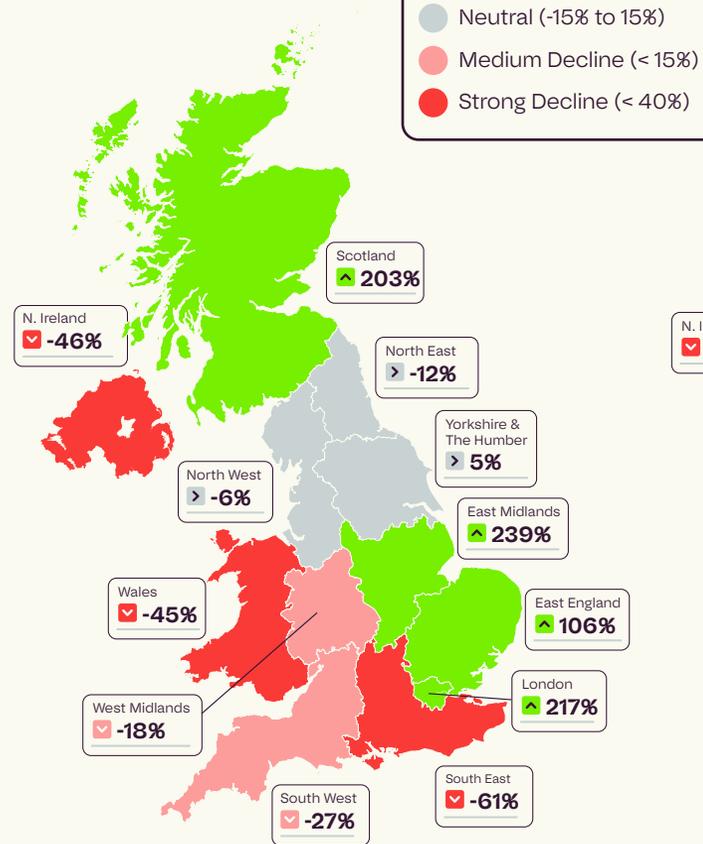
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- London accounted for the largest share of sector starts, with the Capital recording a sharp rise on the previous year.
- Scotland held the largest share of sector approvals, also seeing a strong year-on-year increase.
- Several UK regions recorded triple-digit growth in both project starts and approvals.

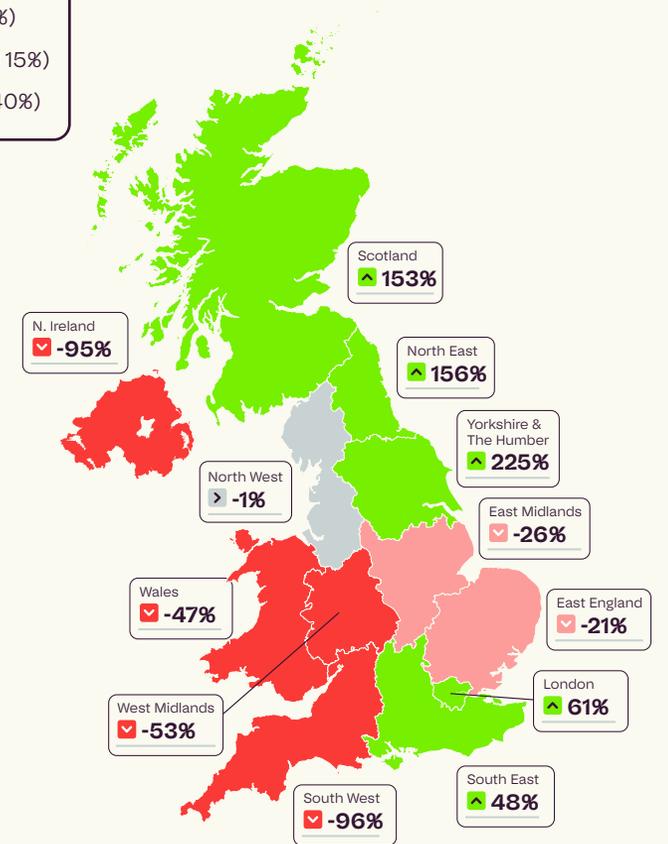
London was the most active region for project starts, reaching £274 million and accounting for 22% of total activity after a 217% year-on-year rise. Scotland followed with £182 million, representing 15% of starts and recording strong growth of 203% compared with the previous year.

In planning approvals, Scotland held the largest share at 34%, increasing 153% year-on-year to £314 million. The North East and Yorkshire & the Humber also delivered significant uplifts, rising 156% and 225% respectively.

Changes in Education Starts
on a Year Earlier



Changes in Education Planning Approvals
on a Year Earlier



Community & Amenity

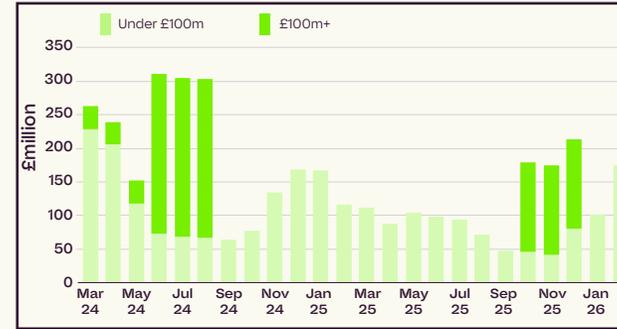
Overview

- ▲ **21% increase** in project starts year-on-year.
- ▼ **39% decrease** in main contract awards compared with last year.
- ▲ **49% increase** in detailed planning approvals compared with 2024.

The sector delivered a mixed performance. Project starts and detailed planning approvals rose year-on-year, driven by increased activity in underlying projects under £100 million. No major schemes over £100 million moved forward during the period. Main contract awards fell compared with last year but improved on the previous quarter, supported by stronger activity in major awards.

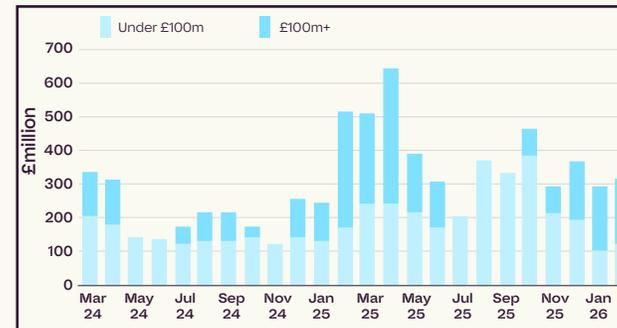
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Detailed Planning Approvals



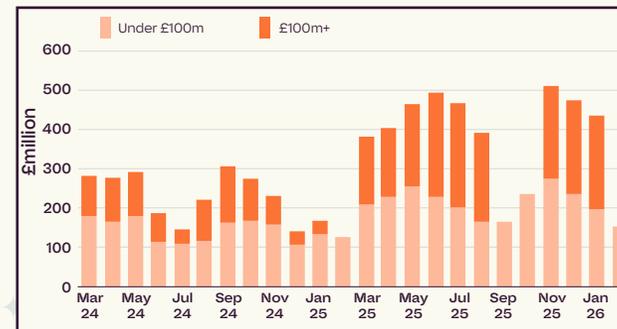
Source: Glenigan

Main Contract Awards



Source: Glenigan

Community & Amenity Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	521	-	521
YoY	49%		49%
Prev. 3 months	327%	-100%	0%
Prev. 3 months (SA)	347%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	367	579	946
YoY	-29%	-44%	-39%
Prev. 3 months	-43%	145%	8%
Prev. 3 months (SA)	-52%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	456	-	456
YoY	21%		21%
Prev. 3 months	-44%	-100%	-70%
Prev. 3 months (SA)	-31%		

Community & Amenity

Types of projects started

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

- Government buildings accounted for the largest share at 61%, rising 536% year-on-year to £279 million.
- Blue light projects increased 46% on last year, totalling £46 million.
- Local facilities totalled £92 million, representing a 25% year-on-year decline.

Types of Community & Amenity Projects Started

Three months to February 2026

	£ million	Percentage
Blue Light	46	10%
Government Buildings	279	61%
Law Courts	-	0%
Local Facilities	92	20%
Military	3	1%
Places of Worship	19	4%
Prisons	18	4%
Total	456	100%

Project Spotlight

The Staithe Visitors Centre

Detailed plans have been approved for The Staithe Visitors Centre development in Norwich. A main contractor is yet to be appointed on the £32 million development, with works due to be completed in Q2 2028.

PROJECT ID: 23383727

IMAGE SOURCE: PAUL ROBINSON PARTNERSHIP

£32m



Community & Amenity League Tables

February 2025 to March 2026

Contractors	Projects	£m
Laing O'Rourke	3	329
Corrigenda	4	324
Bowmer & Kirkland	8	262
Wates	14	237
Kier	14	231
Galliford Try	8	204
Willmott Dixon	10	124
Morgan Sindall	10	103
Goldbeck Bower	1	78
Tilbury Douglas	1	65

Clients	Projects	£m
Ministry of Justice	31	1,045
Ministry of Defence	31	788
Hampshire CC.	2	302
UK Parliament	1	111
Sandwell Met. BC.	3	81
Cardiff CC	1	78
Home Office	21	78
Liverpool City	2	65
Min. of Housing, Comm. and Local Gov	12	54
Sizewell C	1	50

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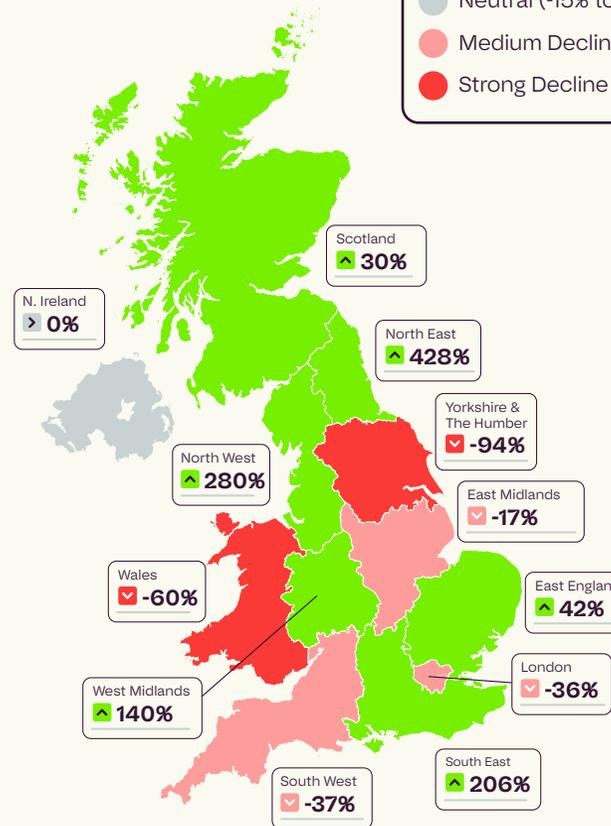
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- Project starts were up year-on-year in most regions, reflecting the sector's overall growth.
- Detailed planning approvals also performed strongly across the majority of regions.
- The East of England, North West and West Midlands recorded strong growth in both starts and approvals.

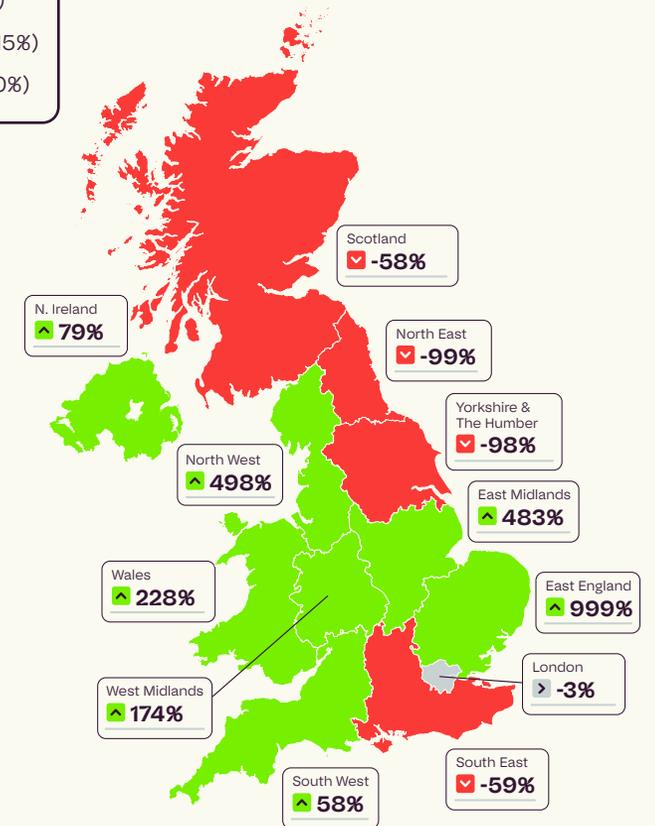
The North East recorded the highest value of project starts, rising more than fivefold year-on-year to £109 million. The North West also delivered strong growth, increasing nearly fourfold to £93 million and representing 20% of activity. In the South East, project starts rose 206%, reaching £47 million.

In detailed planning approvals, the East of England led the sector with £182 million, accounting for 35% of the total after a tenfold year-on-year increase. The North West also performed strongly, with approvals rising almost sixfold to £104 million and representing 20% of activity. Wales saw a threefold rise, reaching £69 million.

Changes in Community & Amenity Starts on a Year Earlier



Changes in Community & Amenity Planning Approvals on a Year Earlier



Growth or Decline

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

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- ▼ **86% decline** in project starts compared with the preceding three months.
- ▼ **18% decline** in main contract awards over the same period.
- ▲ **92% rise** in detailed planning approvals compared with the previous quarter.

Civil engineering experienced a challenging three months to February, with project starts, main contract awards and detailed planning approvals all falling on a year-on-year basis. Although approvals rebounded sharply compared with the previous quarter, this improvement did not extend to starts or awards, both of which continued to decline.

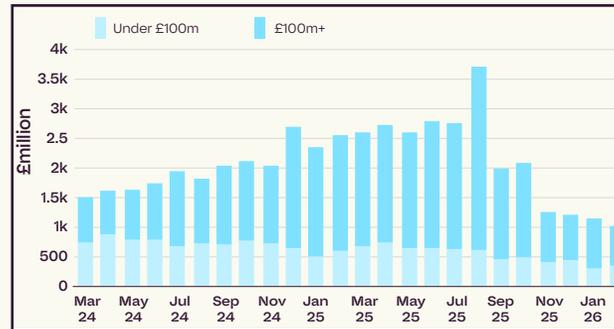
Despite the weak start, the outlook is more encouraging. Infrastructure workloads are expected to strengthen gradually, supported by increased road and rail investment committed through the latest Spending Review from 2026/27 onwards. In the near term, utilities output is also set to improve, driven by higher spending on electricity generation, grid reinforcement aligned with the UK's net-zero objectives, and expanded capital programmes across the water industry.

Detailed Planning Approvals



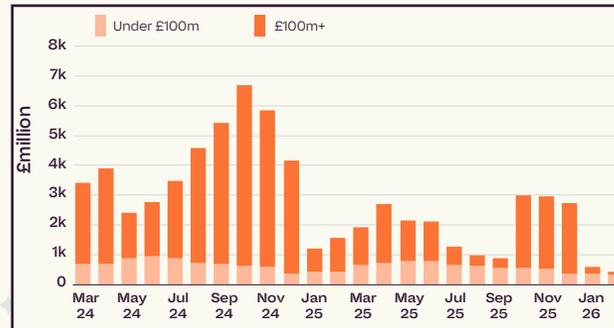
Source: Glenigan

Main Contract Awards



Source: Glenigan

Civil Engineering Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	3,255	4,550	7,805
YoY	12%	-10%	-2%
Prev. 3 months	68%	115%	92%
Prev. 3 months (SA)	28%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	1,054	2,023	3,076
YoY	-42%	-65%	-60%
Prev. 3 months	-16%	-20%	-18%
Prev. 3 months (SA)	-17%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,028	230	1,258
YoY	-20%	-93%	-73%
Prev. 3 months	-35%	-97%	-86%
Prev. 3 months (SA)	-9%		

Civil Engineering

Types of projects started

Performance across the sector's segments was weak overall, with only two areas recording growth.

- Energy accounted for the largest share of starts at £438 million (35%), although activity in the segment fell 40% year-on-year.
- Roads represented 14% of project starts, declining 54% from the previous year to £171 million.
- Airports recorded the only major uplift, rising 703% year-on-year to £109 million.

Types of Civil Engineering Projects Started

Three months to February 2026

	£ million	Percentage
Airports	109	9%
Other Civils	436	35%
Rail	4	0%
Roads	171	14%
Harbours/Ports	31	2%
Energy	438	35%
Water Industry	65	5%
Waste	5	0%
Total	1,258	100%

Project Spotlight

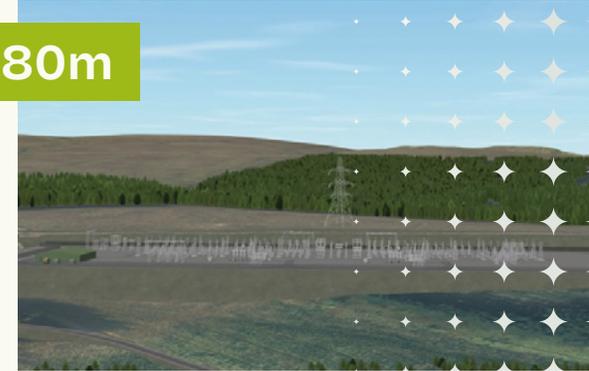
Cambushinnie 400kV Substation

Detailed plans have been approved for the £80 million Cambushinnie 400kV Substation in Dunblane, Tayside. Balfour Beatty has been appointed as main contractor on the scheme, with works expected to complete in Q1 2028.

PROJECT ID: 25294238

IMAGE SOURCE: SSEN TRANSMISSION

£80m



Civil Engineering League Tables

February 2025 to March 2026

Contractors	Projects	£m
STRABAG	6	2,598
Costain Group	7	1,204
Balfour Beatty	16	1,103
M GROUP Services	7	1,074
GE Vernova	1	800
Corinthia	1	800
Technip Energies	1	800
Jones Bros	3	548
G W Highways	1	400
ACCIONA	1	400

Clients	Projects	£m
United Utilities	7	3,457
OGCI Climate Inv.	1	2,000
Net Zero Teesside	1	2,000
Oxfordshire CC.	4	855
Kemble Water	13	593
Comm. Wind Power	1	500
Kent CC.	6	435
MVV Env. Devonport	1	300
Highview Power	1	300
SSEN Transmission	5	293

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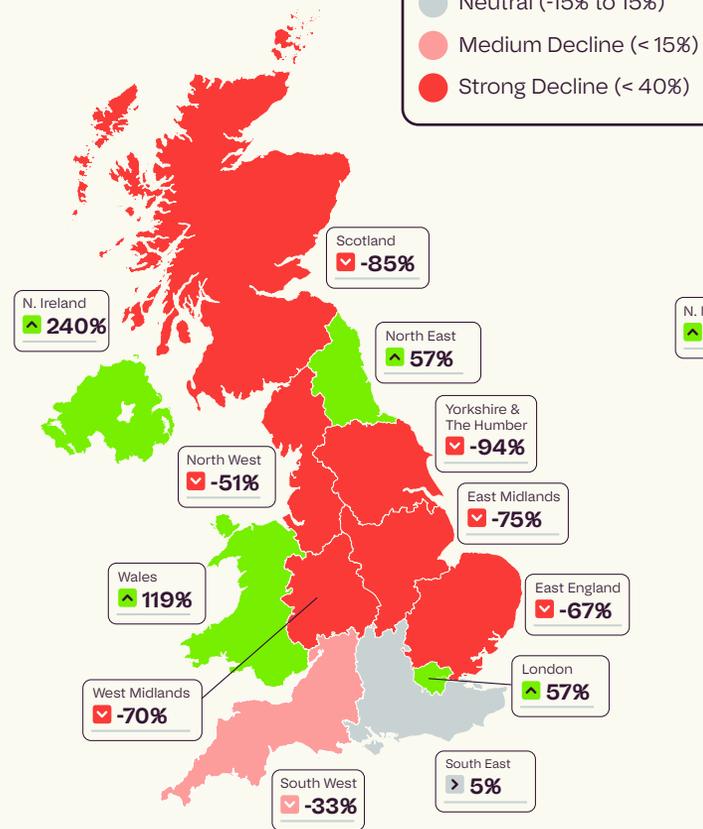
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- The North East accounted for the largest share of sector starts, with activity rising year-on-year.
- The North West held the largest share of sector approvals and recorded a strong increase.
- Northern Ireland performed strongly in both project starts and approvals.

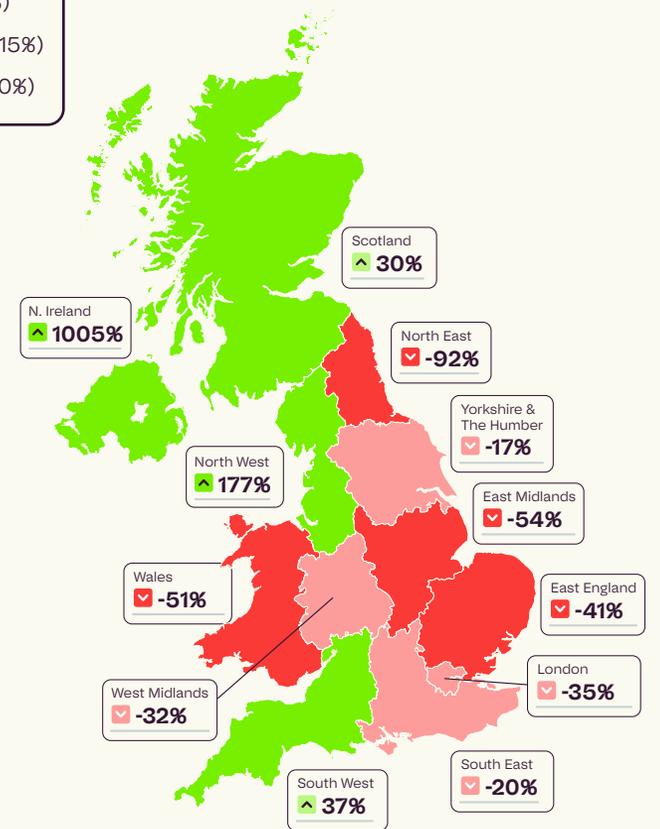
The North East was the most active region for project starts, reaching £211 million and accounting for 17% of total activity after a 57% year-on-year increase. London recorded the second-largest share at 12%, with starts also rising 57% on the previous year.

In planning approvals, the North West led the sector with 27% of total approvals, increasing 177% year-on-year to £2,129 million. Scotland held the second-largest share at 24%, performing strongly with a 30% annual rise to £1,840 million.

Changes in Civil Engineering Starts
on a Year Earlier



Changes in Civil Engineering Planning Approvals
on a Year Earlier





Glenigan

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