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Construction Review

Reflecting activity to the end of April 2025

May 2025

- **51% increase in detailed planning approvals** compared to the previous quarter
- **29% decrease in main contract awards** over the same period
- **33% rise in project starts** compared to the prior three months

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

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

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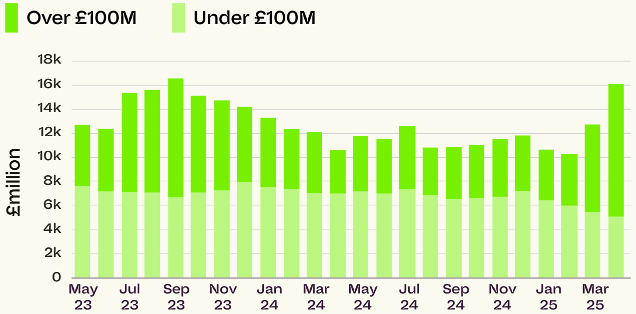
Executive Summary

- Detailed planning approvals **rose by 52%** compared to the previous year
- Main contract awards **declined by 10%** year-on-year
- Project **starts fell by 17%** compared to the same period last year.

A scarcity of major projects (over £100 million) led to a 17% decline in project starts against a year ago. This masked a tentative rise in underlying starts (under £100 million) against both the preceding three months and a year earlier. The upturn in project starts is yet to be mirrored in the development pipeline. Overall main contract awards were weak, despite a sharp rise in major projects. Whilst detailed planning approvals rose strongly, this was driven by the Lower Thames Crossing. Underlying project approvals fell against both the preceding three months and a year ago.

Faced with subdued economic growth and higher operational costs, UK construction clients are delaying investment decisions. US tariff policy has exacerbated this uncertainty. Steps to de-escalate trade tensions, including the US-UK tariff deal, may help to improve confidence over the coming months.

Detailed Planning Approvals

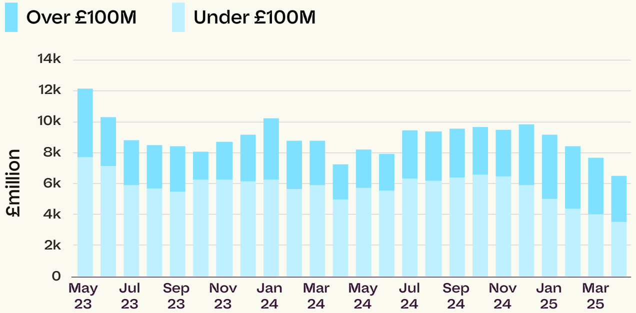


Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£million	15,196	33,130	**48,326**
YoY	-27%	206%	**52%**
Prev. 3 months	-21%	160%	**51%**
Prev. 3 months (SA)	-17%		

Source: Glenigan. Three month average

Main Contract Awards

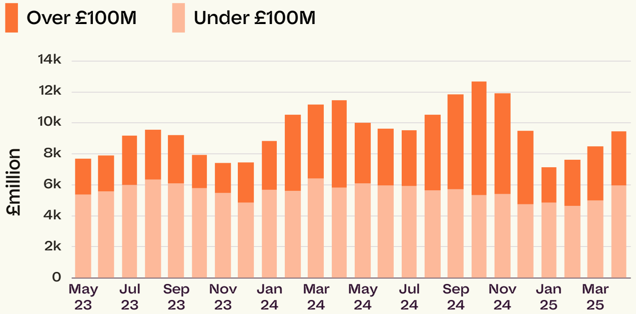


Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	10,536	8,942	**19,479**
YoY	-29%	31%	**-10%**
Prev. 3 months	-30%	-28%	**-29%**
Prev. 3 months (SA)	-30%		

Source: Glenigan. Three month average

Starts



Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	17,903	10,484	**28,387**
YoY	3%	-38%	**-17%**
Prev. 3 months	23%	54%	**33%**
Prev. 3 months (SA)	7%		

Source: Glenigan. Three month average

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

Economic Outlook

Domestic demand key to UK economic growth as US tariffs disrupt world trade

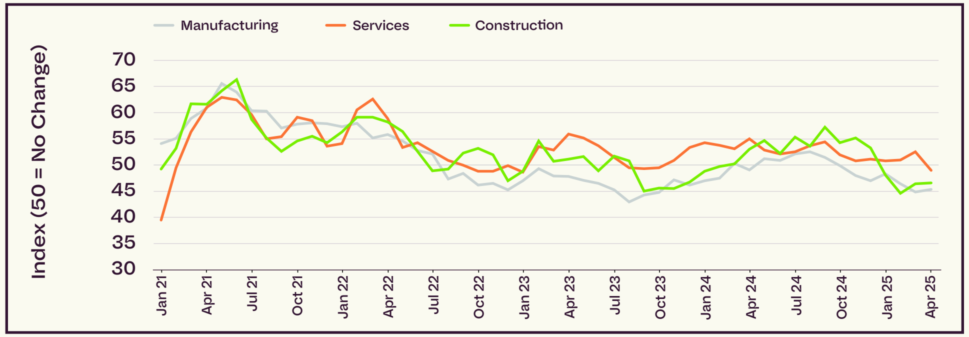
- US tariffs dent business confidence
- Increased consumer spending
- Rising earnings and falling interest rates to boost consumer confidence

Amid heightened uncertainty in global markets, improved consumer spending will help stabilise UK economic and construction activity over the coming months. UK economic growth picked up in February, rising by 0.5% against the previous month. However subsequent industry surveys have recorded a deterioration in business confidence as the US tariff war has generated uncertainty over global trade and growth prospects. The April CIPS manufacturing and services surveys both recorded a contraction in activity with overseas orders especially weak.

In contrast UK consumer confidence and spending have remained firm. Overall retail sales volumes strengthened in the first quarter and in March were 3.3% up on a year ago. Discretionary spending has been particularly strong with expenditure on household appliances and online purchases rising by 7% and 8% respectively.

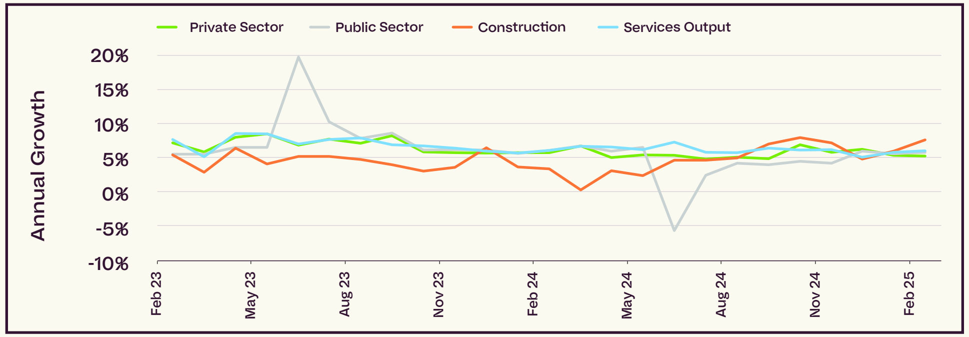
This points to improving consumer confidence. Whilst households responding to the latest GfK consumer survey are cautious about the general economic growth prospects, they're less concerned about their own financial position over the next 12 months. This combined with above inflation wage increases and an easing in interest rates should fuel further growth in consumer spending over the coming months, bolstering the prospects for related construction sectors such as private housing, logistics, and hotel & leisure.

CIPS Activity Surveys



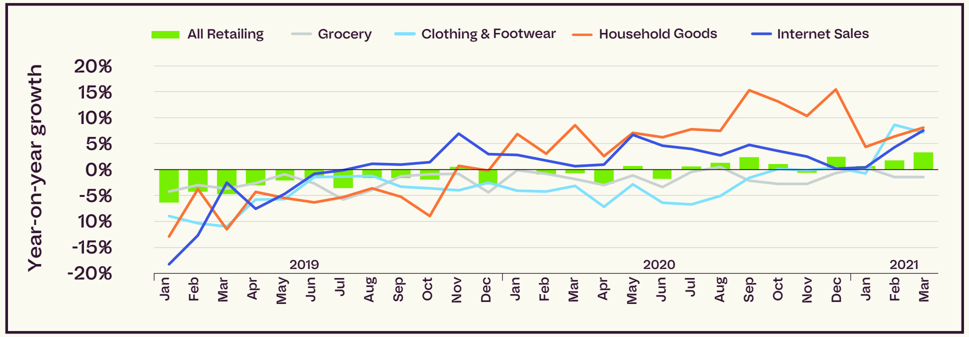
Source: S&P Global PMI

Average Earnings



Source: ONS

Retail Sales



Source: ONS

Top 50 Contractors

Last 12 month totals:	
975 projects	£35,838m

Last month totals:	
109 projects	£3,062m

May 2024 to April 2025

	Contractors	#	£m	★
1	Kier	111	3216	0
2	Royal BAM	40	2081	0
3	Morgan Sindall	214	1871	0
4	Mace	13	1734	0
5	Ferrovial	3	1617	1
6	Sir Robert McAlpine	4	1613	-1
7	Laing O'Rourke	6	1566	2
8	Ringway Group	4	1411	-1
9	Balfour Beatty	43	1298	2
10	Galliford Try	97	1284	0
11	Graham Construction	22	1118	3
12	Multiplex	4	1035	-4
13	McLaren	17	976	-1
14	M Group Services	15	909	-1
15	Bouygues	24	856	0
16	Wates	28	817	6
17	Willmott Dixon	46	724	14
18	Winvic	14	715	-2
19	Bowmer & Kirkland	29	697	-1
20	JRL Group	4	648	-3
21	TSL Projects	3	601	3
22	United Living	8	533	16
23	McAleer & Rushe Contracts	6	509	4
24	Hochtief Group	2	463	1
25	Costain	5	452	-6
26	Kanadevia Inova UK	2	450	NEW
27	John Sisk & Son	6	405	-7
28	G W Highways	1	400	0
29	Enka	2	356	0
30	VINCI	29	348	7
31	Spencer Group	4	327	-1
32	HG Construction	8	312	2
33	Bovis	3	311	NEW
34	VolkerWessels	12	309	-2
35	Bauer	1	300	1
36	Robertson	33	287	-13
37	Caddick Group	12	285	-4
38	RG Group Ltd	3	275	-17
39	Aecon	1	250	1
40	Glencar Construction	16	250	1
41	Tilbury Douglas	27	248	1
42	Skanska UK	4	247	NEW
43	Vistry	6	240	7
44	Hill Group	15	227	-5
45	PMC Cons. & Development	3	222	-1
46	G2 Design	1	216	1
47	Benniman Limited	10	214	NEW
48	Zhejiang Construction	1	210	0
49	Lowry Build. & Civil Engin.	3	209	0
50	Story Contracting	10	200	NEW

April 2025

	Contractors	#	£m	★
1	Willmott Dixon	4	453	35
2	Laing O'Rourke	2	301	NEW
3	United Living	1	250	NEW
4	Wates	4	225	NEW
5	Kier	10	152	1
6	Galliford Try	6	146	3
7	Bowmer & Kirkland	4	112	1
8	Skanska UK	2	110	NEW
9	McLaren	3	92	NEW
10	McAleer & Rushe Cont. UK	1	79	NEW
11	Morgan Sindall	18	61	6
12	Mears Group	1	60	NEW
13	VINCI	3	58	NEW
14	Balfour Beatty	2	54	NEW
15	Mott Macdonald Group	3	51	NEW
16	SWECO	1	50	NEW
17	Barhale	1	50	NEW
18	Anglian Water	1	50	NEW
19	Verdant Energy	1	50	NEW
20	Binnies UK	1	50	NEW
21	Mwh Treatment	1	50	NEW
22	Tilbury Douglas	5	39	NEW
23	Benniman Limited	2	35	NEW
24	Vistry	1	35	NEW
25	Glasgiven Constracts	1	35	NEW
26	TSL Projects	1	31	NEW
27	Heidelberg Materials	1	30	NEW
28	Keady Construction	1	30	NEW
29	Westshield	1	29	NEW
30	Greenvolt Next UK	1	29	NEW
31	Randalswood Construction	1	26	NEW
32	Deconstruct UK	1	25	NEW
33	Octavius Infrastructure	1	22	NEW
34	Speller Metcalfe	1	20	NEW
35	Assured CMS	1	14	NEW
36	CCG (Scotland)/Queens	1	14	NEW
37	Hill Group	1	13	NEW
38	Foxton Construction	1	13	NEW
39	Devon Contractors	1	13	NEW
40	Trojan Group	4	12	NEW
41	Warwick Burt Construction	1	12	NEW
42	Francis Contractors	1	11	NEW
43	Onsite Energy Projects	1	10	NEW
44	Solnet Group	1	10	NEW
45	Bray & Slaughter	1	10	NEW
46	McTear Contracts	1	9	NEW
47	Ashleigh Cons. (Scotland)	1	9	NEW
48	Brennan	2	7	NEW
49	Hall Construction Services	1	7	NEW
50	CTM Management	2	7	NEW

★ Change in ranking since the previous period

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Top 50 Clients

May 2024 to April 2025

	Clients	#	£m	★
1	Department for Transport	46	4330	0
2	Department of Health	181	1980	0
3	Tata Steel Group	1	1250	0
4	Hertfordshire County Council	1	1155	0
5	Oxfordshire County Council	9	900	0
6	Ministry of Defence	32	851	0
7	Department for Education	69	766	4
8	National Grid	8	725	0
9	Network Rail	39	693	1
10	Scottish Prison Service	3	685	-1
11	British Land	5	633	-4
12	Axa Insurance	2	584	0
13	Ministry of Justice	34	573	19
14	Amazon	5	544	-1
15	North Lanarkshire Council	8	519	-1
16	Kingsway Solar Farm	1	500	-1
17	GE Hitachi Nuclear Energy	1	500	-1
18	Tritax Group	4	423	0
19	Kent County Council	6	423	-2
20	Anglian Water Group	4	403	NEW
21	Dover District Council	4	399	NEW
22	Cons. and Procure. Delivery	10	398	-3
23	London Bor. of Havering	3	349	NEW
24	Peabody Trust	5	346	-4
25	Greystar Developments	5	343	-4
26	John Lewis Partnership	4	342	-4
27	Greater London Authority	6	334	-4
28	Scottish Government	5	323	-4
29	University of Glasgow	3	314	-4
30	BMW (GB)	2	304	NEW
31	MVV Environment Devonport	1	300	-4
32	Ardersier Port	1	300	-4
33	Mitsubishi Estate London	1	300	-4
34	Marriott International	1	300	-4
35	GLP	2	284	-4
36	Vivid Housing	5	277	NEW
37	Milton Keynes Bor. Council	5	254	-4
38	Liverpool Bay CCS	2	251	NEW
39	Anchor Housing	4	250	-5
40	Land Securities Group	4	249	-5
41	Home Office	23	229	-2
42	UK Parliament	2	221	NEW
43	Rolls-Royce	2	219	-3
44	Elements Green	1	216	-3
45	London & Quad. Hous. Trust	2	206	-3
46	Middlesbrough Bor. Council	4	205	-3
47	JTRE London	1	200	-3
48	Southwark Charities	1	200	-3
49	Havisham	1	200	-3
50	Ass. British Ports Holdings	3	196	-2

April 2025

	Clients	#	£m	★
1	Anglian Water Group	1	400	NEW
2	Dover District Council	1	350	NEW
3	Ministry of Justice	2	301	23
4	Liverpool Bay CCS	1	250	NEW
5	UK Parliament	2	221	NEW
6	Haleon UK	1	130	NEW
7	Sizewell C	2	68	NEW
8	Suffolk County Council	1	67	NEW
9	Shepway District Council	1	60	30
10	Department for Education	4	42	NEW
11	Department for Transport	3	42	NEW
12	Hub Residential	1	40	NEW
13	Sundial Properties	1	40	NEW
14	London Bor. of Tower Hamlets	1	35	NEW
15	St Helen Met. Bor. Council	2	35	NEW
16	South Glouc. Council	2	32	NEW
17	Atlantic Hub Property	1	31	NEW
18	Network Rail	2	30	NEW
19	Exeter/GIC Cannock 1 (UK)	1	30	NEW
20	Bedford Borough Council	1	30	NEW
21	Great Places Housing Group	1	29	NEW
22	Notts. County Council	1	28	NEW
23	Ashfield District Council	1	28	NEW
24	Great West House	1	26	NEW
25	Yalding Enterprise Park	1	26	NEW
26	Red Earth Bath	1	20	NEW
27	Mission Street	1	19	NEW
28	BGO Baronet Propco	1	19	NEW
29	GreenOak Real Estate	1	19	NEW
30	East Sussex County Council	2	19	NEW
31	Halton Borough Council	1	19	NEW
32	Education Authority N. Ireland	1	17	NEW
33	Accey Community College	1	17	NEW
34	Enso Energy	1	17	NEW
35	Bramford Green	1	17	NEW
36	Bramley Solar	1	17	NEW
37	Relay Suttieside	1	15	NEW
38	Epsilon Generation	1	15	NEW
39	Supreme Hotels	1	14	NEW
40	North Lanarkshire Council	1	14	NEW
41	Vale of Glamorgan Council	1	14	NEW
42	Plymouth City Council	2	13	NEW
43	Citizen Housing	1	13	NEW
44	Ferrovial	1	13	NEW
45	Aston Villa Football Club	1	13	NEW
46	Wolverhampton City Council	2	13	NEW
47	R. B.of Kensington & Chelsea	1	12	NEW
48	Homes England	1	12	NEW
49	Lidl UK	3	12	NEW
50	Loades Dynamics	1	12	NEW

★ Change in ranking since the previous period

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Glenigan Index

Construction starts improved in the three months to April. A strong performance in the residential sector offset a decline in non-residential construction starts.

- The value of underlying work (under £100 million) starting on-site during the three months to April **increased 7%** and was 3% above 2024 levels.
- Residential construction starts **increased 24%** on the preceding three months and rose 22% against 2024 figures.
- Non-residential project-starts **decreased 5%** against the preceding three months to stand 12% down on a year ago.
- Civils work starting on-site **declined 22%** against the preceding three months and decreased 22% against the previous year.

Sector Analysis

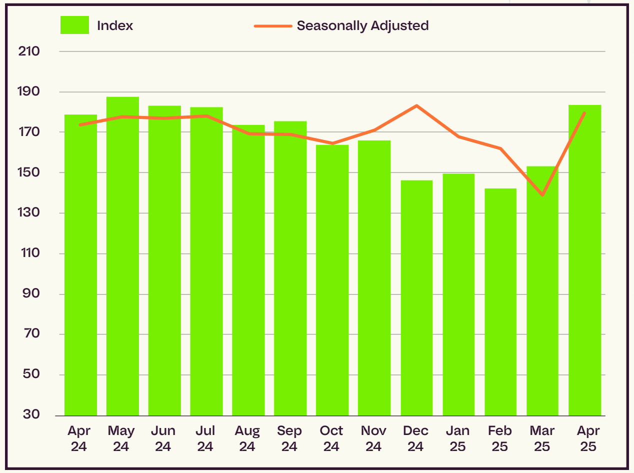
	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
Residential	10,084	33%	24%	22%
Industrial	1,313	26%	-14%	-6%
Offices	1,504	36%	31%	26%
Retail	339	8%	-19%	-33%
Hotel & Leisure	565	-30%	-26%	-25%
Education	727	-28%	-33%	-54%
Health	1,086	38%	12%	2%
Community & Amenity	622	24%	21%	19%
Civil Engineering	1,665	17%	-22%	-22%
Total	**17,903**	**23%**	**7%**	**3%**

Regional Analysis

	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
East of England	1,541	-26%	-20%	11%
East Midlands	1,669	29%	-3%	45%
London	2,202	51%	22%	-10%
North East	827	23%	-4%	11%
North West	1,685	38%	25%	-20%
Northern Ireland	434	-1%	-26%	0%
Scotland	1,423	-6%	-22%	-11%
South East	2,792	41%	32%	8%
South West	1,918	42%	15%	29%
Wales	651	13%	6%	-4%
West Midlands	1,388	37%	16%	-6%
Yorkshire & the Humber	1,373	36%	9%	5%

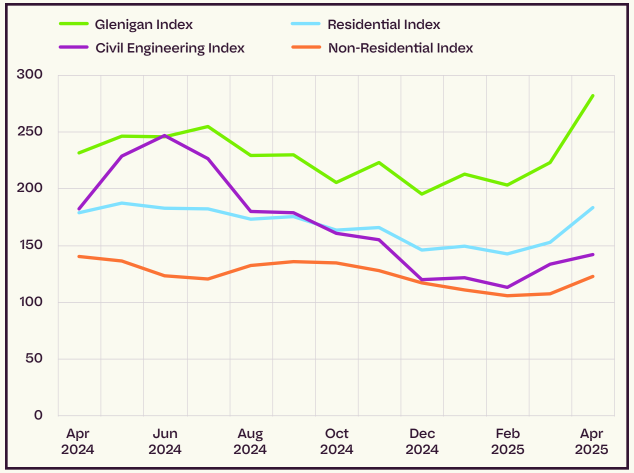
N.B. Index 2006 =100

Glenigan Index



Source: Glenigan

Indices Growth



Source: Glenigan

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Housing

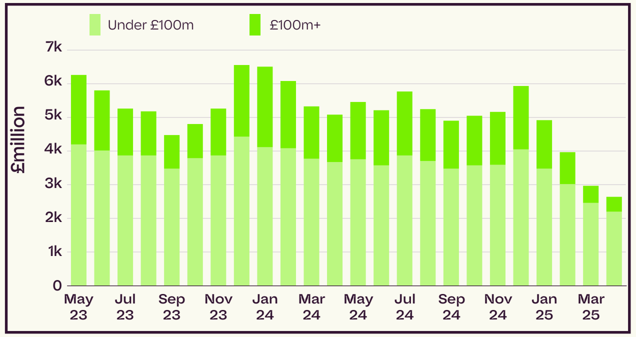
Overview

- **15% increase** in project starts year-on-year
- **2% decrease** in main contract awards from last year
- **48% decrease** in detailed planning approvals compared to 2024

Residential project starts performed strongly during the three months to April, increasing both year-on-year and quarter-on-quarter. Main contract awards and detailed planning approvals, in contrast, weakened against both periods.

The immediate outlook for the housing market is challenging. Activity during the first quarter was boosted by home buyers rushing to complete ahead of the higher stamp duty rates that came into effect in April. UK house prices subsequently dropped 0.6% last month accompanied by a decline in mortgage approvals. Alongside a weakened construction pipeline, the cooling market conditions may temper starts near term.

Detailed Planning Approvals

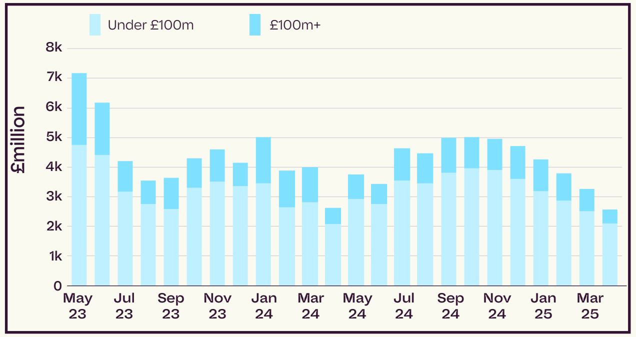


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	6,584	1,351	**7,935**
YoY	-40%	-68%	**-48%**
Prev. 3 months	-37%	-69%	**-46%**
Prev. 3 months (SA)	-33%		

Main Contract Awards

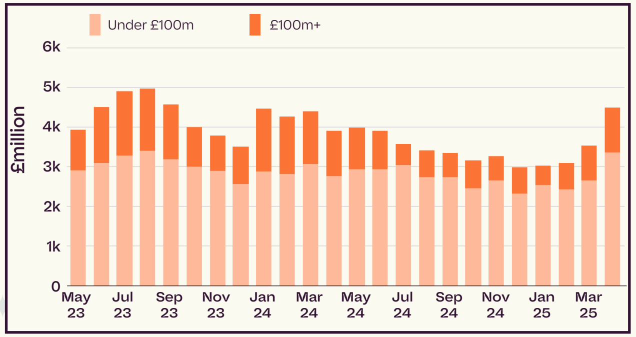


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	6,300	1,409	**7,709**
YoY	1%	-16%	**-2%**
Prev. 3 months	-34%	-56%	**-40%**
Prev. 3 months (SA)	-32%		

Housing Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	10,084	3,381	**13,464**
YoY	22%	-1%	**15%**
Prev. 3 months	33%	131%	**48%**
Prev. 3 months (SA)	24%		

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Housing

Types of projects started

Most categories in the residential sector had a strong quarter, but three categories faced a decline year-on-year.

- Private housing accounted for the largest share at 50%, rising 37% year-on-year to total £6,715 million.
- Private apartments rose 17% compared to a year ago, with project starts totalling £2,724 million.
- Social sector housing also increased 17% year-on-year, reaching a total of £1,977 million.

Project Spotlight

Manhattan Business Park

Detailed plans have been approved on the £385 million Manhattan Business Park development in London. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q2 2027.

PROJECT ID: 20493270

IMAGE SOURCE: SQUIRE AND PARTNERS

Types of Housing Projects Started

Three months to April 2025

	£ million	Percentage
Private Apartments	2,724	**20%**
Elderly Persons Homes	-	**0%**
Private Housing	6,715	**50%**
Private Sheltered Housing	449	**3%**
Social Sector Sheltered Housing	241	**2%**
Social Sector Apartments	640	**5%**
Social Sector Housing	1,977	**15%**
Homes, Hostels Etc.	9	**0%**
Student Accommodation	710	**5%**
Total	13,464	**100%**

Housing League Tables

May 2024 to April 2025

Contractors	Projects	£m
Persimmon	81	2,038
Barratt Redrow	80	1,991
Bloor Homes	41	1,658
Hill Group	27	1,494
Bellway	48	1,209
Vistry	30	1,204
Taylor Wimpey	35	938
Bouygues UK	10	838
Berkeley DeVeer	21	608
Wates	16	571

Clients	Projects	£m
Barratt Redrow	89	2,152
Persimmon Group	88	1,933
Taylor Wimpey	53	1,556
Vistry Group	58	1,548
Bloor Homes	41	1,460
Bellway	50	1,001
Hill Group	14	740
Berkeley DeVeer	22	637
Ferguson Bidco	36	515
Apollo Management	26	464

Housing

Regional

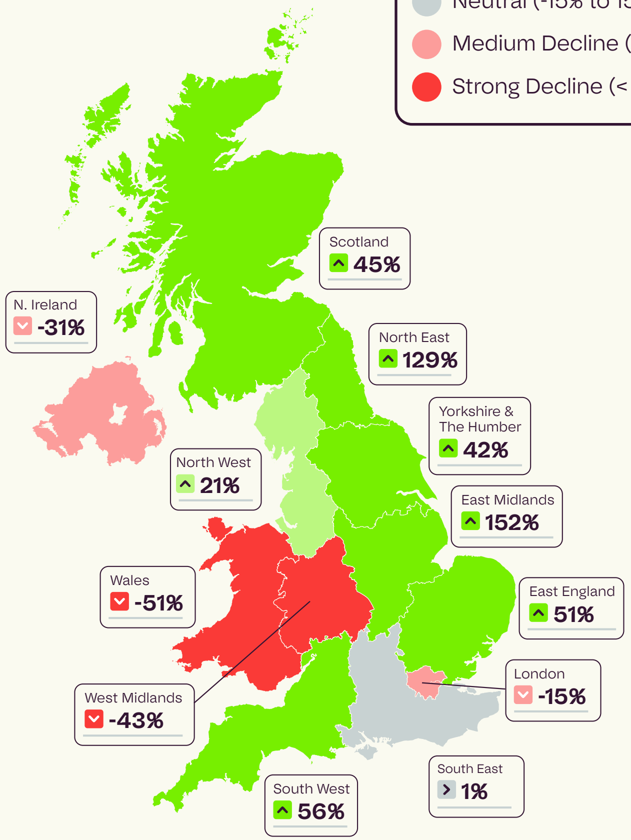
- Most regions experienced growth in project starts
- Regional performance was very weak for detailed planning approvals, with all regions slipping back year-on-year
- The East Midlands and the North East experienced the sharpest growth in project starts

London led residential project starts, despite a 15% decline to total £2,141 million. The South East, on the other hand, climbed 1% to total £1,741 million. The North West also grew 21% to total £1,635 million. Growth in the region was boosted by the £570 million Crown Street Phase 3 development in Manchester.

The Capital was also the most active region for detailed planning approvals, accounting for a 20% share, despite a 50% slump year-on-year. The South East accounted for 17%, having slipped back 39%. Further decline was prevented by the £230 million Southampton Town Quay development.

Changes in Housing Starts

on a Year Earlier

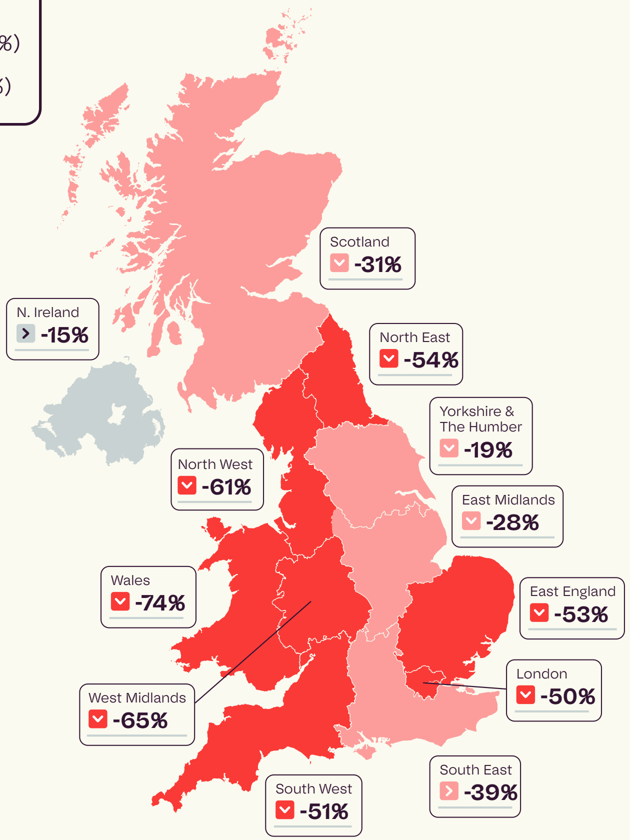


Growth or Decline

- 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

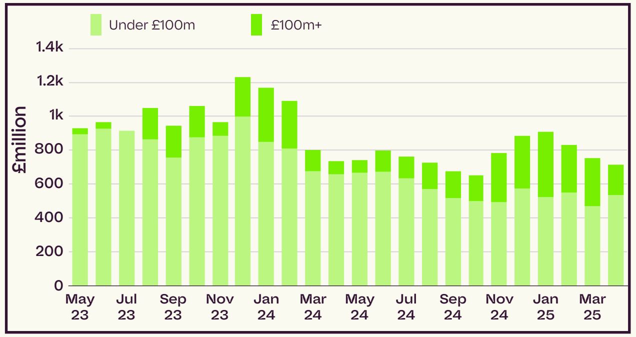
Overview

- **7% increase** in project starts year-on-year
- **72% decrease** in main contract awards from last year
- **3% decrease** in detailed planning approvals compared to 2024

Despite the gloomy economic outlook, industrial sector project starts grew against both the previous three months and a year ago, boosted by an increase in major projects. Main contract awards and detailed planning approvals, on the other hand, fell against both periods.

Declining UK manufacturing output and a contraction in manufacturers' confidence are reflected in a decline in underlying project starts (less than £100 million) and a softening in planning approvals. Whilst the sector has benefited from work starting on a major car manufacturing facility, the outlook is more subdued as recently imposed US tariffs disrupt global markets.

Detailed Planning Approvals

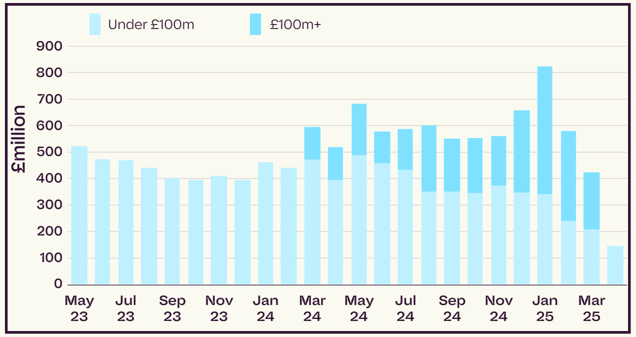


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,610	537	**2,147**
YoY	-18%	131%	**-3%**
Prev. 3 months	2%	-53%	**-21%**
Prev. 3 months (SA)	17%		

Main Contract Awards

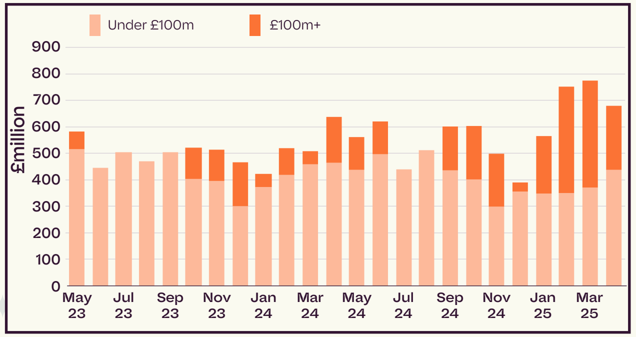


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	439	-	**439**
YoY	-63%	-100%	**-72%**
Prev. 3 months	-57%	-100%	**-82%**
Prev. 3 months (SA)	-50%		

Industrial Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,313	727	**2,040**
YoY	-6%	39%	**7%**
Prev. 3 months	26%	12%	**20%**
Prev. 3 months (SA)	-14%		

Industrial

Types of projects started

Starts in the industrial sector had a strong performance, with two out of three categories increasing year-on-year

- Manufacturing accounted for 59% of industrial starts, 8% up on a year ago to total £1.210 million
- Warehousing & logistics grew 10% year-on-year, totalling £806 million, a 40% share of the sector
- Totalling £24 million, other industrial projects accounted for the remaining 1%, a 59% decrease

Project Spotlight

Unit 1 Panattoni Park Swindon

Detailed plans have been approved for the £75 million Unit 1 Panattoni Park Swindon development in Wiltshire. A main contractor is yet to be appointed on the scheme with works due to be completed in Q2 2026

PROJECT ID: 25114994

IMAGE SOURCE: UMC ARCHITECTS

£75m

Types of Industrial Projects Started

Three months to April 2025

	£ million	Percentage
Manufacturing	1,210	**59%**
Other Industrial	24	**1%**
Warehousing & Logistics	806	**40%**
Total	2,040	**100%**

Industrial League Tables

May 2024 to April 2025

Contractors	Projects	£m
TSL Projects	2	570
McLaren	11	397
Winvic	7	365
Enka	2	356
Balfour Beatty	2	242
Kier Group	5	228
Glencar Cons.	12	194
Benniman	9	181
Marshall Holdings	1	171
Bowmer & Kirkland	3	165

Clients	Projects	£m
Tritax Group	5	514
Amazon UK	1	500
BMW (GB)	1	300
Rolls-Royce	2	219
Watts Solar	1	126
Progressive Energy	1	88
Essar Oil	1	88
Vertex Hydrogen	1	88
Johnson Matthey	1	88
St Francis Group	1	86

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Industrial

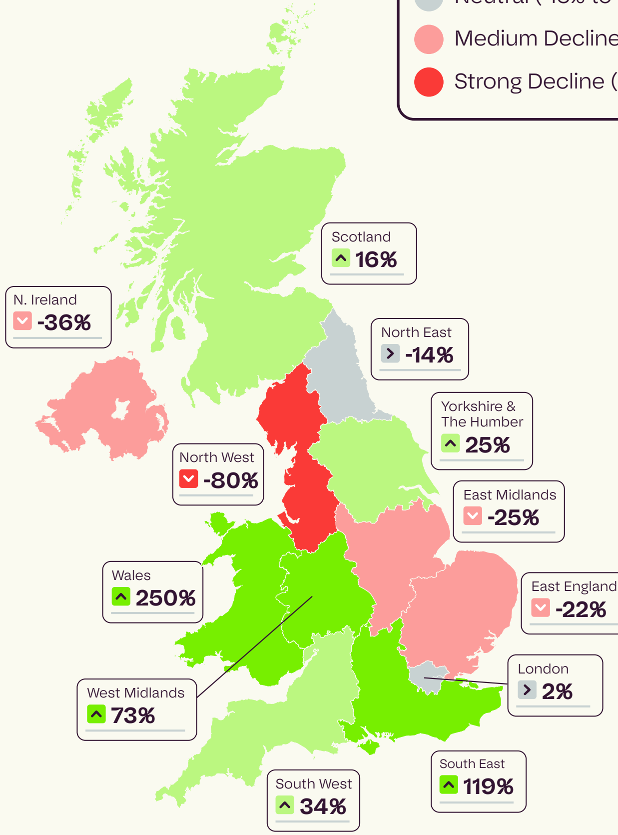
Regional

- Strong regional performance in project starts, with more than half of all regions experiencing growth
- Most regions faced a decline in detailed planning approvals
- The South West and Yorkshire & the Humber saw a strong performance in both project starts and approvals

The South East led project starts in the industrial sector, having doubled on a year ago, totalling £643 million. This growth was boosted by the £300 million Rolls-Royce Motor Cars Goodwood Extension development in Chichester. Yorkshire & the Humber also grew 25%, totalling £357 million. In contrast, accounting for 13% of industrial starts, the East Midlands fell 25% on a year ago. Further decline was prevented by the £121 million Symmetry Park Kettering Phase 4 Unit 03 EMA5 development.

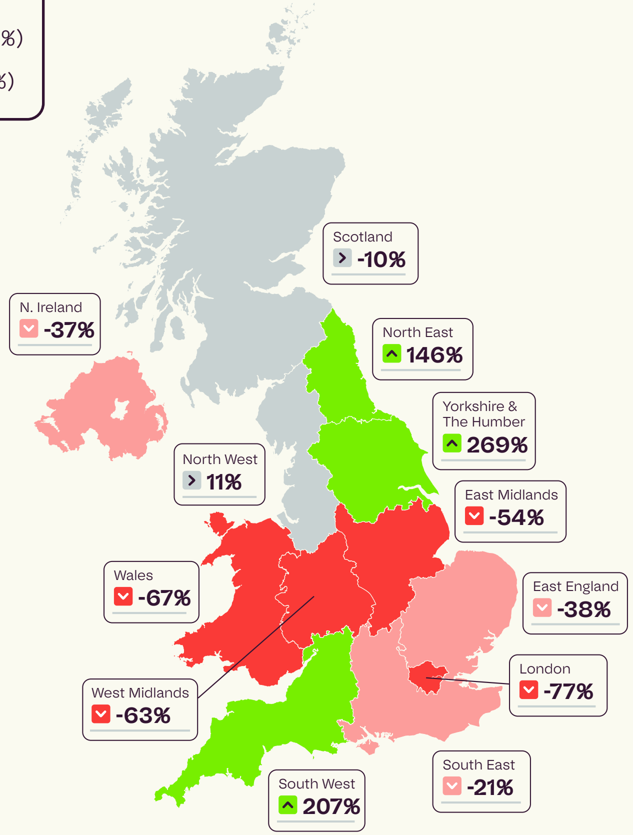
Yorkshire & the Humber dominated detailed planning approvals. Totalling £470 million, the region nearly quadrupled on a year ago, boosted by the £223 million Alexandra Dock, Hull Buildings Development.

Changes in Industrial Starts
on a Year Earlier



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

Changes in Industrial Planning Approvals
on a Year Earlier



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Expert Insights
Executive Summary
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Top 50 Contractors
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Sector Analysis
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Offices

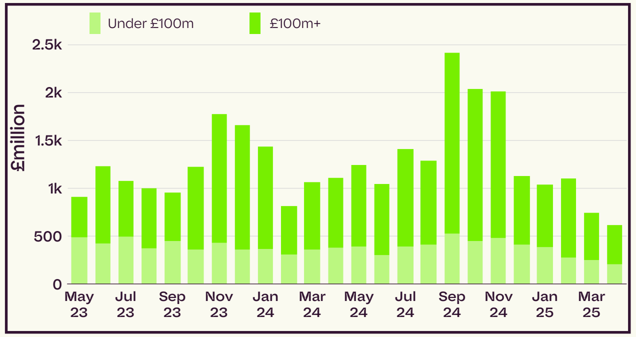
Overview

- **51% decrease** in project starts year-on-year
- **52% decrease** in main contract awards from last year
- **44% decrease** in detailed planning approvals compared to 2024

The office sector performed poorly during the three months to April, with declines in project starts, main contract awards and detailed planning approvals against both the previous three months and a year ago. More positively, underlying project starts (less than £100 million) rose against both the previous three months and 2024 levels.

Data centres are a relatively small but fast expanding segment of the office sector. The surge of investment in AI development, alongside rising demand from more established uses of processing capacity, is spurring investment in new data centres. This is expected to help drive sector growth over the next two years.

Detailed Planning Approvals

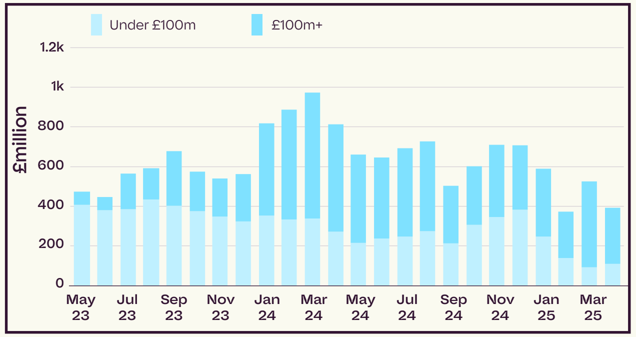


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	626	1,229	**1,855**
YoY	-46%	-44%	**-44%**
Prev. 3 months	-46%	-37%	**-40%**
Prev. 3 months (SA)	-41%		

Main Contract Awards

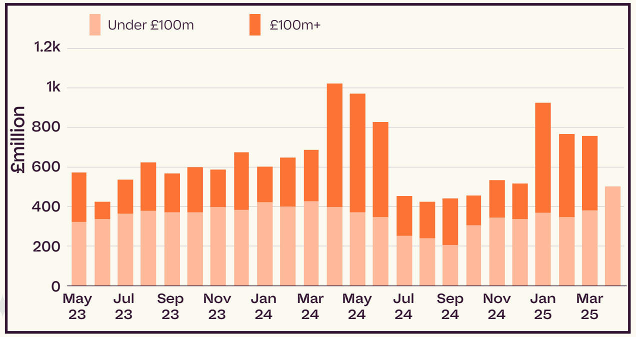


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	326	850	**1,176**
YoY	-60%	-48%	**-52%**
Prev. 3 months	-56%	-17%	**-33%**
Prev. 3 months (SA)	-45%		

Office Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,504	-	**1,504**
YoY	26%	-100%	**-51%**
Prev. 3 months	36%	-100%	**-46%**
Prev. 3 months (SA)	31%		

Offices

Types of projects started

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

- Project starts in the £50 million to £100 million value band totalled £796 million, having jumped 145% on a year ago
- The £20 million to £50 million value band faced a 12% decline year-on-year, totalling £379 million
- The up to £5 million value band fell 14% year-on-year, totalling £142 million

Project Spotlight

60 Gracechurch Street

Detailed plans have been approved for the £500 million 60 Gracechurch Street development in London. Works are due to complete in Q3 2029. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 24112367

IMAGE SOURCE: BUILDING PRESS

Types of Office Projects Started

Three months to April 2025

	£ million	Percentage
Up to £5 million	142	**9%**
£5 million up to £10 million	65	**4%**
£10 million up to £20 million	122	**8%**
£20 million up to £50 million	379	**25%**
£50 million up to £100 million	796	**53%**
Over £100 million	–	**0%**
Total	1504	**100%**

Office League Tables

May 2024 to April 2025

Contractors	Projects	£m
Mace Group	6	1,500
Morgan Sindall	125	861
Multiplex Cons.	2	730
McLaren Construc.	4	658
JRL	2	500
Kier	7	256
Wates	5	164
Faithdean	2	133
Laing O'Rourke	1	125
John Sisk & Son	1	125

Clients	Projects	£m
British Land	2	625
Axa Insurance	1	480
Mitsubishi Estate	1	300
Land Securities	2	246
Havisham	1	200
Southwark Charities	1	200
JTRE London	1	200
GLP	1	200
A & O Shearman	1	145
Lazari Investments	1	130

Offices

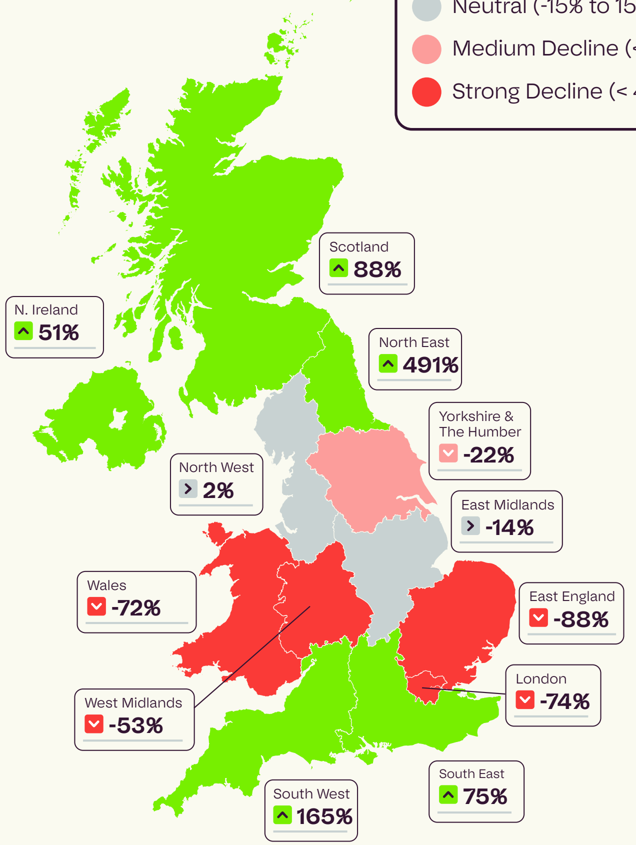
Regional

- Performance in project starts was mixed, while most regions faced a decline in detailed planning approvals
- The North East, Northern Ireland, the South East, the South West and Scotland experienced strong growth in project starts
- Detailed planning approvals grew in the North East, the North West, the South West and Scotland

The South East grew by 75% and had the highest share (29%) of project starts during the period. Totalling £228 million, starts in the South West jumped 165% on a year ago. London, on the other hand, fell 74% to total £342 million, despite accounting for the second largest share of office project-starts.

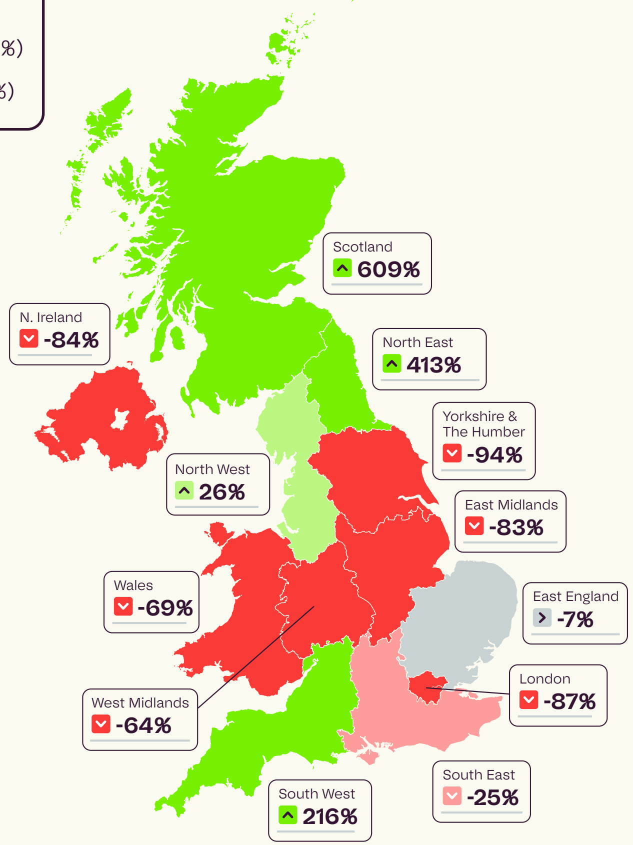
The South West led detailed planning approvals, having tripled year-on-year to total £377 million. Activity in the region was mainly driven by the £360 million Long Ashton office campus near Bristol for healthcare software company Epic development. The North West also grew 26% against 2024 to total £345 million.

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

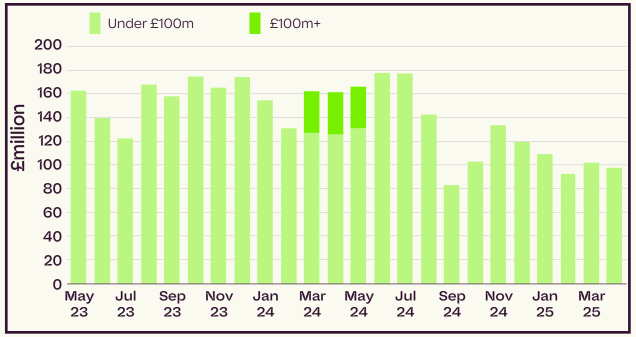
Overview

- **55% decrease** in project starts year-on-year
- **92% decrease** in main contract awards from last year
- **40% decrease** in detailed planning approvals compared to the previous year

The retail sector continued on a downward trajectory in the three months to April, with project starts, main contract awards and detailed planning approvals all down year-on-year. No major projects (over £100 million) reached any of the three stages in the development pipeline. More positively, there was 8% growth in project starts quarter-on-quarter.

The retail industry is facing increased cost pressures including higher labour costs and an overhang of vacant retail premises which is deterring investment in retail construction. These tough trading conditions and a weak development pipeline are set to constrain sector activity in the near term.

Detailed Planning Approvals

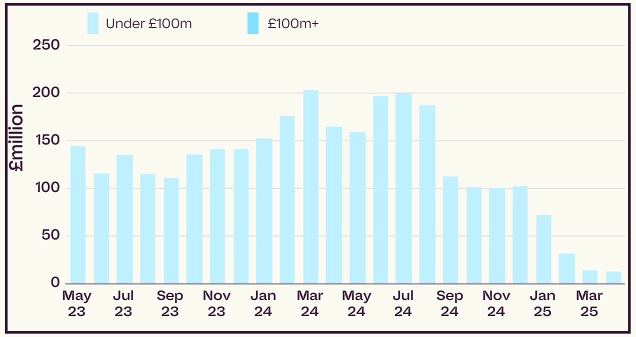


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	293	-	293
YoY	-23%	-100%	-40%
Prev. 3 months	-11%		-11%
Prev. 3 months (SA)	-1%		

Main Contract Awards

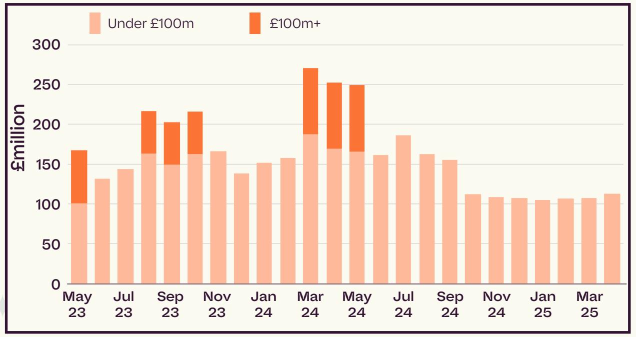


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	38	-	38
YoY	-92%		-92%
Prev. 3 months	-83%		-83%
Prev. 3 months (SA)	-77%		

Retail Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	339	-	339
YoY	-33%	-100%	-55%
Prev. 3 months	8%		8%
Prev. 3 months (SA)	-19%		

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Retail

Types of projects started

Performance in the retail sector was very weak, with all categories declining on a year ago.

- Supermarkets accounted for the largest share (57%) again, having decreased 13% year-on-year to total £193 million.
- Totalling £130 million, shop projects starting on site decreased 73% on a year ago.
- Totalling £10 million, petrol filling stations were 17% lower year-on-year

Project Spotlight

East Oxford Street Development

Detailed plans have been approved for the £90 million East Oxford Street development in London. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q2 2026.

PROJECT ID: 21538351

IMAGE SOURCE: CONSTRUCTION ENQUIRER

£90m

Types of Retail Projects Started

Three months to April 2025

	£ million	Percentage
Other Retail	6	**2%**
Petrol Filling Stations	10	**3%**
Retail Warehousing	-	**0%**
Shopping Centres	-	**0%**
Shops	130	**38%**
Supermarkets	193	**57%**
Total	339	**100%**

Retail League Tables

May 2024 to April 2025

Contractors	Projects	£m
Conamar Building	1	91
Kier	2	54
DSP Construction	11	37
G F Tomlinson	1	23
BibbEgan Demolition	1	21
VINCI Construction	1	20
One Group Cons.	1	20
Jem Build	1	18
Leck Construction	1	17
Robertson	2	17

Clients	Projects	£m
Aldi	58	105
Lidl UK	24	95
John Lewis	3	92
The Crown Estate	1	53
T J Morris	7	36
Tesco	46	35
Marks & Spencer	15	34
Scarborough Group	1	32
N.E Lincs. Council	1	18
J Sainsbury	14	16

Retail

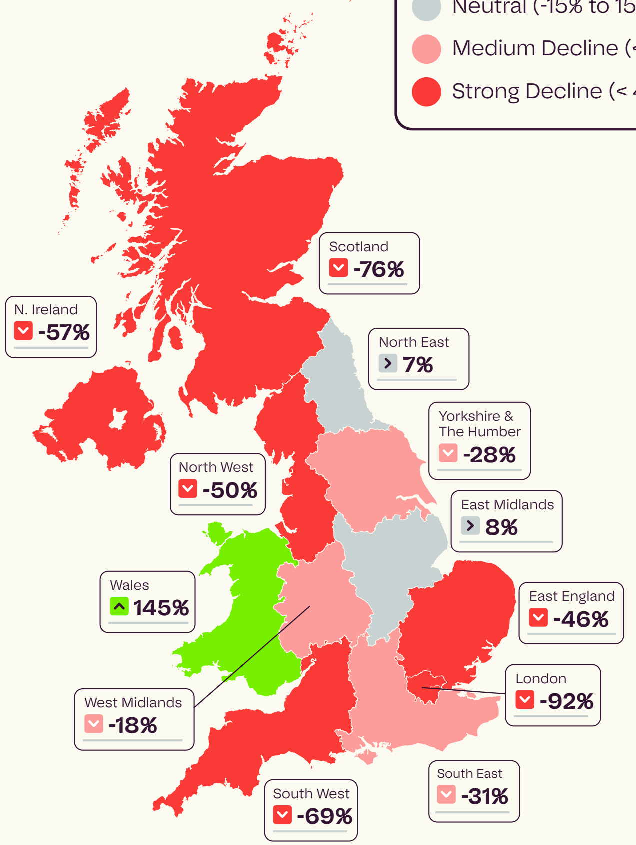
Regional

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

Wales dominated retail project starts, having more than doubled on a year ago. The region accounted for 14% at £46 million. The East Midlands also grew 8%, totalling £41 million. Totalling £27 million, the North East was the only other region to experience growth during the period, having climbed 8% year-on-year.

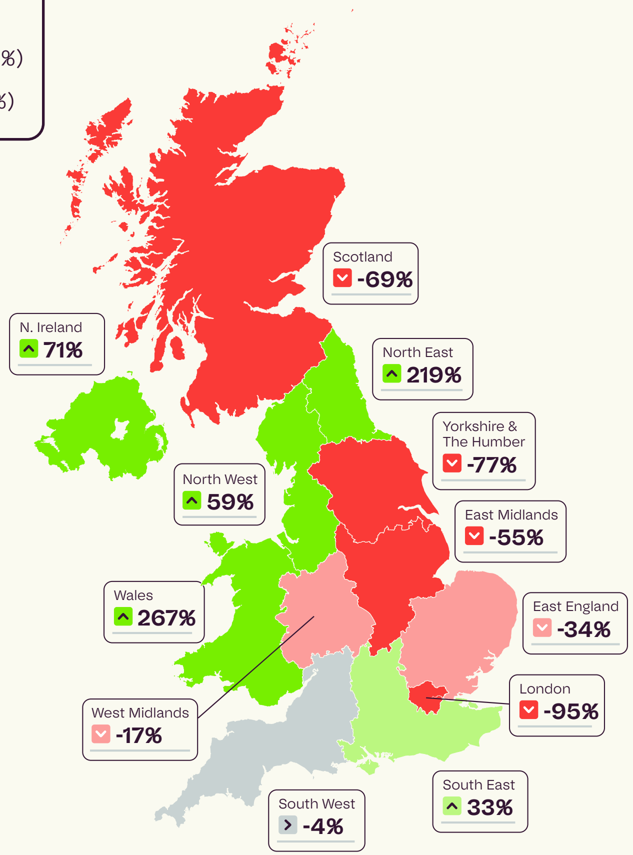
The South West led detailed planning approvals, despite a 4% decline to total £48 million, accounting for 17% of the sector. In contrast, accounting for 14%, the North West jumped 59% to total £41 million. The South East also grew 33% year-on-year to total £39 million.

Changes in Retail Starts
on a Year Earlier



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

Changes in Retail Planning Approvals
on a Year Earlier



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Hotel & Leisure

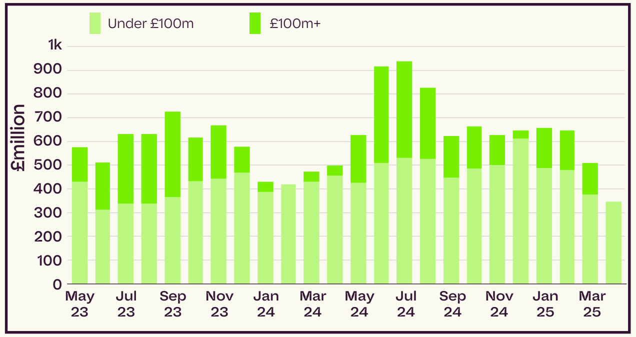
Overview

- **102% increase** in project starts year-on-year
- **40% decrease** in main contract awards from last year
- **31% decrease** in detailed planning approvals compared to a year ago

Project starts grew strongly against the previous three months and a year ago, boosted by a sharp increase in major (over £100 million) projects. However, most activity was driven by three high value projects and masks a decline in underlying starts (less than £100) against the previous three months and on 2024 levels.

Although 2024 saw a surge in hotel investment, hospitality faces renewed cost pressures including higher labour costs. Challenging economic conditions have led to a decline in the development pipeline, with contract awards and planning approvals down on the previous year and quarter. This is likely to constrain sector activity in the near term ahead of a sustained improvement in household incomes and discretionary spending.

Detailed Planning Approvals

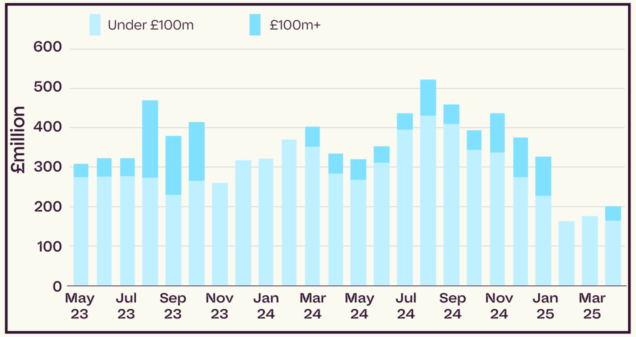


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,039	-	**1,039**
YoY	-24%	-100%	**-31%**
Prev. 3 months	-29%	-100%	**-47%**
Prev. 3 months (SA)	-33%		

Main Contract Awards

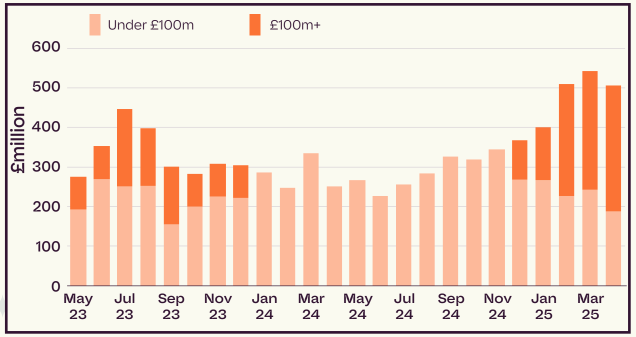


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	492	111	**603**
YoY	-42%	-29%	**-40%**
Prev. 3 months	-28%	-63%	**-39%**
Prev. 3 months (SA)	-17%		

Hotel & Leisure Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	565	955	**1,520**
YoY	-25%		**102%**
Prev. 3 months	-30%	139%	**26%**
Prev. 3 months (SA)	-26%		

Hotel & Leisure

Types of projects started

The hotel & leisure sector performed strongly, with most sub-sectors experiencing an increase.

- Hotels & guest houses accounted for the largest share (36%), having jumped 162% on a year ago to total £540 million.
- Other hotel & leisure grew 95% year-on-year, accounting for a third of sector starts
- Cinemas & theatres also jumped 233% against the previous year, accounting for a 13% share

Project Spotlight

Catterick Road Development

Detailed plans have been approved for the £50 million development of a motorway service area in Catterick Village, Richmond. A main contractor is yet to be appointed on the scheme, with works due to complete in Q2 2026.

PROJECT ID: 18267478

IMAGE SOURCE: PPL (NORTHAMPTON) LTD

Types of Hotel & Leisure Projects Started

Three months to April 2025

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	52	**3%**
Cinemas & Theatres	205	**13%**
Hotels, Guest Houses	540	**36%**
Indoor Leisure Facilities	185	**12%**
Other Hotel & Leisure	503	**33%**
Sport Facilities	35	**2%**
Total	1,520	**100%**

Hotel & Leisure League Tables

May 2024 to April 2025

Contractors	Projects	£m
Newarthill	2	313
Bovis	1	150
McAleer & Rushe	2	128
GMI Construction	3	115
Wates	1	111
Graham Construction	3	110
Robertson Group	7	109
Pellikaan Cons.	2	105
Galliford Try	6	95
Legendre UK	1	82

Clients	Projects	£m
Marriott Int.	1	300
Crystal Palace FC	1	150
Mrp Hammersmith	1	125
UK Parliament	1	111
Fc100 Ltd	1	82
R.B. of Kingston	1	80
Nat. Gal. of Scotland	1	75
Fermanagh DC	1	70
Lockwood 2002	1	58
Criterion Capital	2	55

Hotel & Leisure

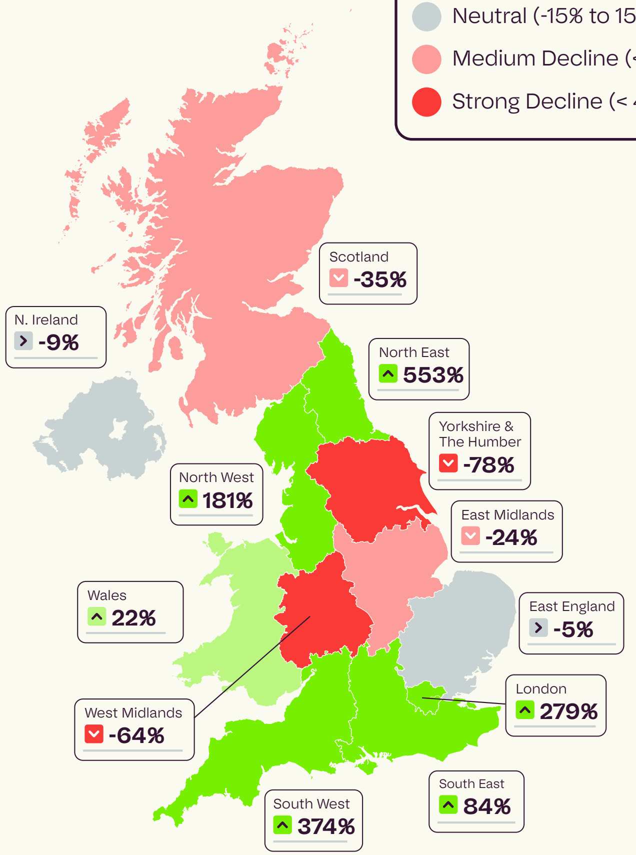
Regional

- Regional performance in project starts was mixed, with half of all regions up year-on-year
- Despite the overall decline in detailed planning approvals, most regions experienced growth
- London dominated both starts and approvals, but performance was mixed

London was the leader in hotel & leisure project starts, having nearly quadrupled year-on-year to total £479 million. This growth was driven by the £450 million 380 Kensington High Street London Hotel Development. The North East also jumped more than six times to total £375 million, mainly driven by The Sage International Conference Centre development worth £350 million.

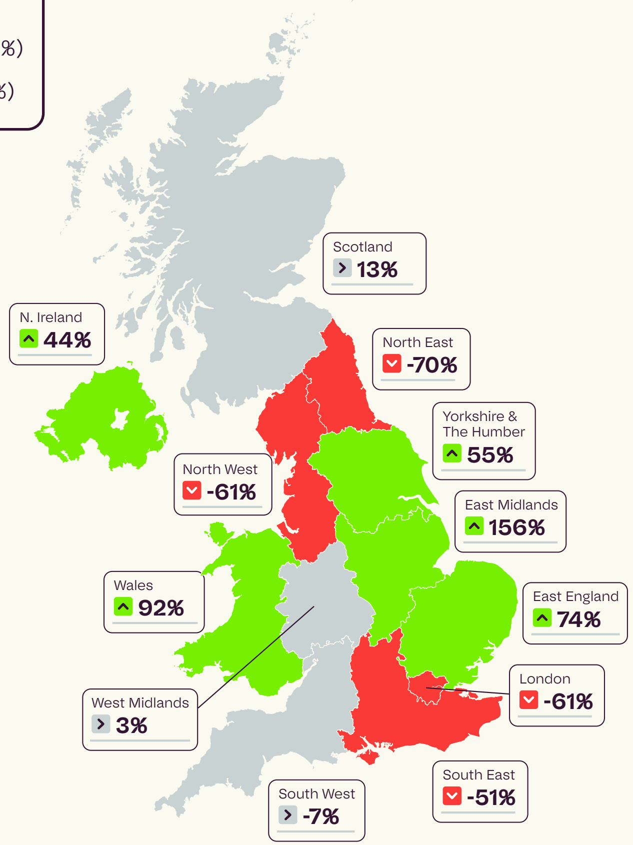
The Capital remained the leading region for detailed planning approvals, accounting for 16% of the total, despite a 61% year-on-year decline to £163 million. Accounting for 12% at £128 million, the South East also fell 51% against last year.

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



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Health

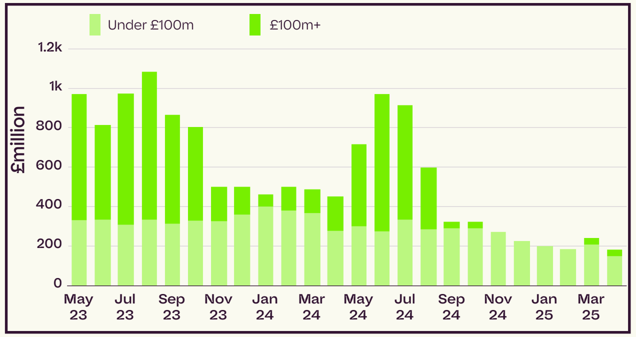
Overview

- Project starts **rose 87%** compared to the preceding three months
- Main contract awards **increased by 7%** over the same period
- Detailed planning approvals **declined by 9%** compared to the previous quarter

Health starts rebounded strongly during the three months to April, increasing by 87% to stand 12% higher than a year ago. The rise was accompanied by a strengthening in main contract awards. Less encouragingly the development pipeline continued to contract, with detailed planning approvals 60% down on a year ago.

Looking ahead, the outlook for the sector is cautiously optimistic, with a forecasted 1% growth in 2025 according to our most recent forecast data. However, the marked decline in detailed planning approvals since the general election highlights the rise of a potential gap in project starts as the NHS trusts' development programme is still in limbo ahead of the 10 Year Plan for the Health Service in the summer.

Detailed Planning Approvals

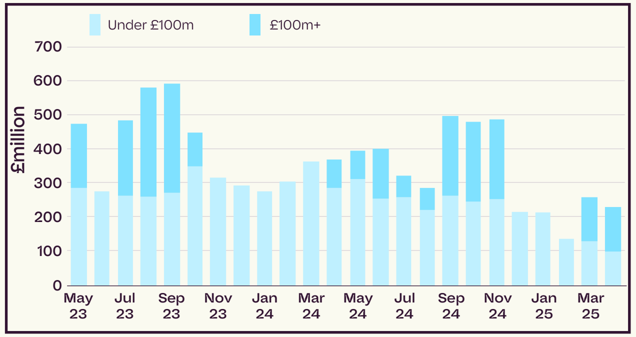


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	446	100	546
YoY	-46%	-81%	-60%
Prev. 3 months	-25%		-9%
Prev. 3 months (SA)	9%		

Main Contract Awards

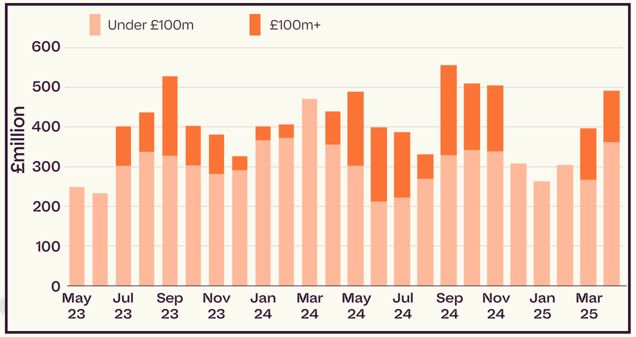


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	300	389	689
YoY	-65%	56%	-38%
Prev. 3 months	-53%		7%
Prev. 3 months (SA)	-57%		

Health Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,086	389	1,475
YoY	2%	56%	12%
Prev. 3 months	38%		87%
Prev. 3 months (SA)	12%		

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Health

Types of projects started

The health sector experienced a strong performance compared to the previous year, with three out of four segments experiencing increases.

- Hospitals accounted for the largest share (47%), having grown 11% year-on-year to total £689 million
- Totalling £318 million, the value of Dental, Health & Veterinary Centres/Surgeries starting on site increased 214% on a year ago to total £318 million
- Nursing Homes & Hospices experienced a 22% decline against the previous year to total £153 million

Project Spotlight

Rugby Theatre & Ward Complex

Detailed plans have been approved for the Rugby Theatre & Ward Complex development in Rugby, Warwickshire. A main contractor is yet to be appointed on the £29 million scheme, with works expected to be completed in Q3 2027.

PROJECT ID: 24124776

IMAGE SOURCE: FLEET ARCHITECTS

£29m

Types of Health Projects Started

Three months to April 2025

	£ million	Percentage
Day Centres	17	**1%**
Dental, Health & Veterinary Centres/ Surgeries	318	**22%**
Hospitals	689	**47%**
Nursing Homes & Hospices	153	**10%**
Other Health	297	**20%**
Total	1,475	**100%**

Health League Tables

May 2024 to April 2025

Contractors	Projects	£m
Laing O'Rourke	2	890
Graham Constr.	3	415
Morgan Sindall	13	197
Bowmer & Kirkland	4	120
Shepherd Building	6	108
Mace Group	2	108
SDC (Holdings)	3	103
Kier	9	80
Royal BAM	6	74
McLaughlin & Harvey	2	62

Clients	Projects	£m
Dep. of Health	161	1,950
Cons. and Proc. (CPD)	3	206
Cen.Lab. of Research	1	85
Welsh Government	6	59
Kadans Science Part.	1	59
Univ. of Birmingham	1	50
ARC Oxford	1	39
Harwell Sc. and Innov.	1	36
Oaktree Capital	1	33
Torsion	7	31

Health

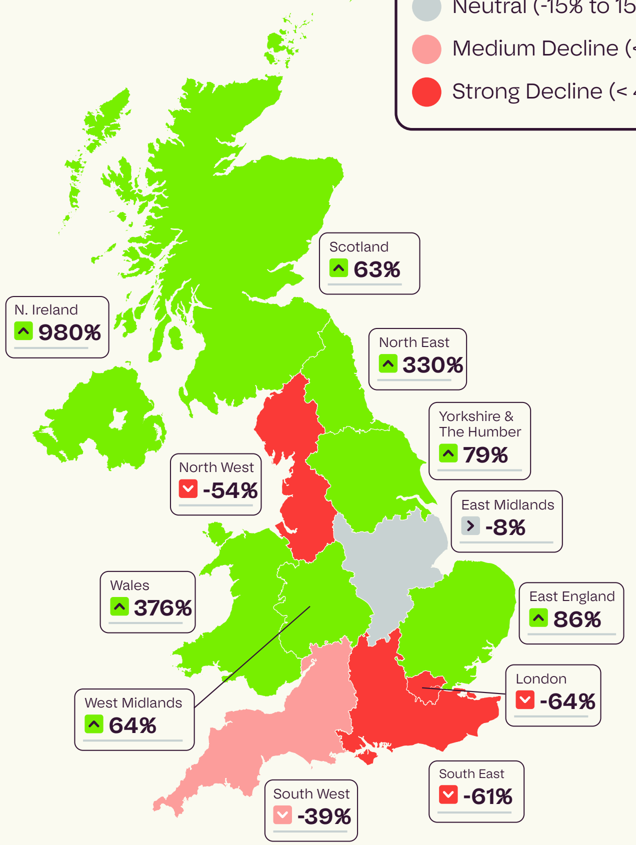
Regional

- Northern Ireland accounted for the largest share of project-starts and experienced the sharpest growth against the previous year
- The Capital experienced sharp growth in detailed planning approvals
- The South West accounted for the largest share of approvals and experienced moderate growth against the previous year

Northern Ireland at £501 million was the most active region for project starts, accounting for 34% of the total, with the region rising 980% against the previous year. Growth in the area was boosted by the £389 million Belfast Royal Victoria Hospital. The North East at £48 million also experienced a strong period, more than quadrupling against the previous year (+330%) to account for 3% of the total value.

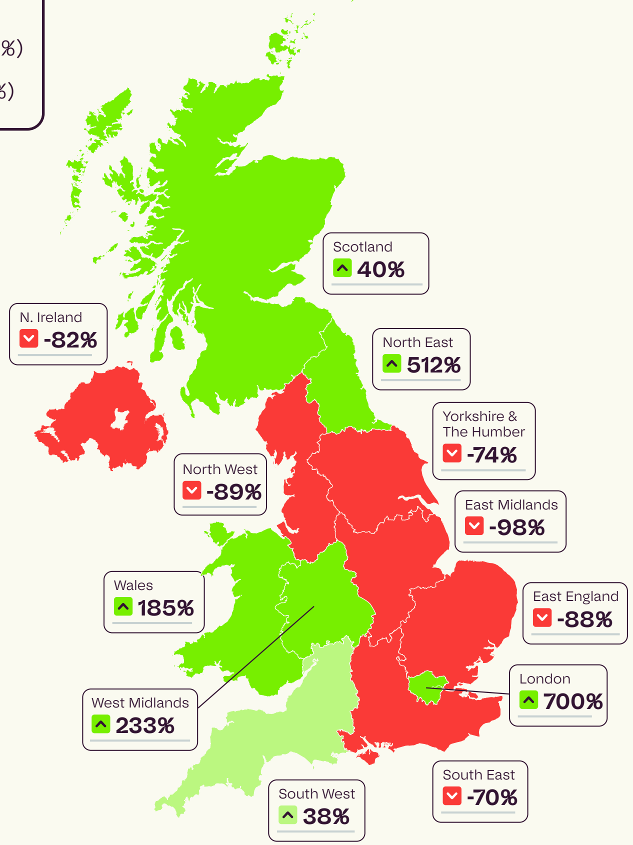
The South West accounted for the largest share of planning approvals (25%), with an increase of 38% against the previous year. London at £49 million experienced the sharpest growth for planning approvals, rising 700% against the previous year to account for 9% of the total value.

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



Education

Overview

47% decrease in project starts year-on-year

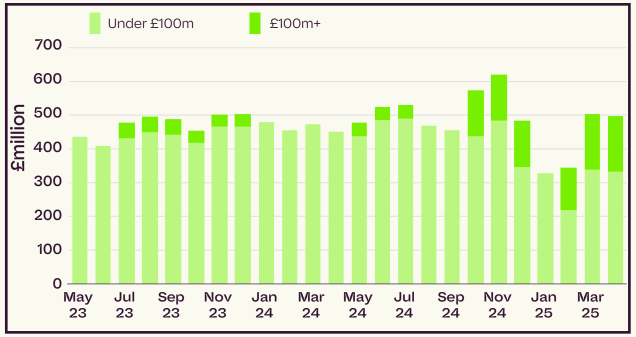
Main contract awards **unchanged** against the preceding three months

52% increase in detailed planning approvals compared to the preceding three months

Whilst education starts and main contract awards both declined during the three months to April, an upturn in the value of detailed planning approvals against the previous year and preceding three months points to a recovery in sector activity during 2025.

Looking ahead, the launch of the Department for Education's new £15.4 billion national Construction Framework will help drive the design and build of new and upgraded schools across England. This major initiative, set to launch in December, is expected to deliver large-scale education projects across the country.

Detailed Planning Approvals

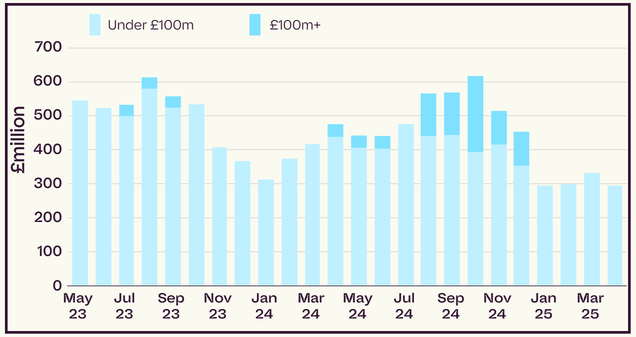


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	997	495	1,492
YoY	-26%		10%
Prev. 3 months	1%		52%
Prev. 3 months (SA)	7%		

Main Contract Awards

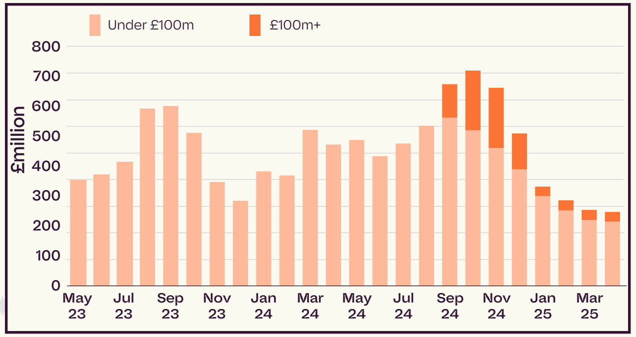


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	883	-	883
YoY	-33%	-100%	-38%
Prev. 3 months	0%		0%
Prev. 3 months (SA)	-17%		

Education Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	727	110	837
YoY	-54%		-47%
Prev. 3 months	-28%	0%	-25%
Prev. 3 months (SA)	-33%		

Education

Types of projects started

Project-starts in the education sector experienced a poor performance, however universities increased against the previous year.

- Schools accounted for the largest share of project starts at 68%, despite a 46% year-on-year decline to £572 million
- Universities made up the second-largest share at 21%, with starts rising 42% year-on-year to £180 million
- Colleges saw a 92% year-on-year decline, with starts totalling just £24 million

Project Spotlight

Ladybridge High School Expansion

Detailed plans have been approved for the Ladybridge High School Expansion development in Bolton. A main contractor is yet to be appointed on the £47 million scheme, with works due to be completed in Q1 2027.

PROJECT ID: 25052291

IMAGE SOURCE: GOOD & TILLOTSON LTD

Types of Education Projects Started

Three months to April 2025

	£ million	Percentage
Colleges	24	3%
Other Education	62	7%
Schools	572	68%
Universities	180	21%
Total	837	100%

Education League Tables

May 2024 to April 2025

Contractors	Projects	£m
Kier	31	574
Bowmer & Kirkland	21	375
Morgan Sindall	37	352
Multiplex Constr.	1	300
Galliford Try	18	254
Royal BAM	9	228
Willmott Dixon	14	203
Tilbury Douglas	15	191
Woodvale Construct.	3	189
Lowry Building	2	188

Clients	Projects	£m
Dep. for Education	82	914
Univ. of Glasgow	2	301
Cons. and Procur.	1	188
Education Auth. NI.	9	95
Bowmer & Kirkland	7	91
Univ. of East Anglia	1	88
Univ. of Cambridge	2	87
Univ. of London	7	80
Aberdeenshire Counc.	2	72
Renfrewshire Counc.	2	70

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Education

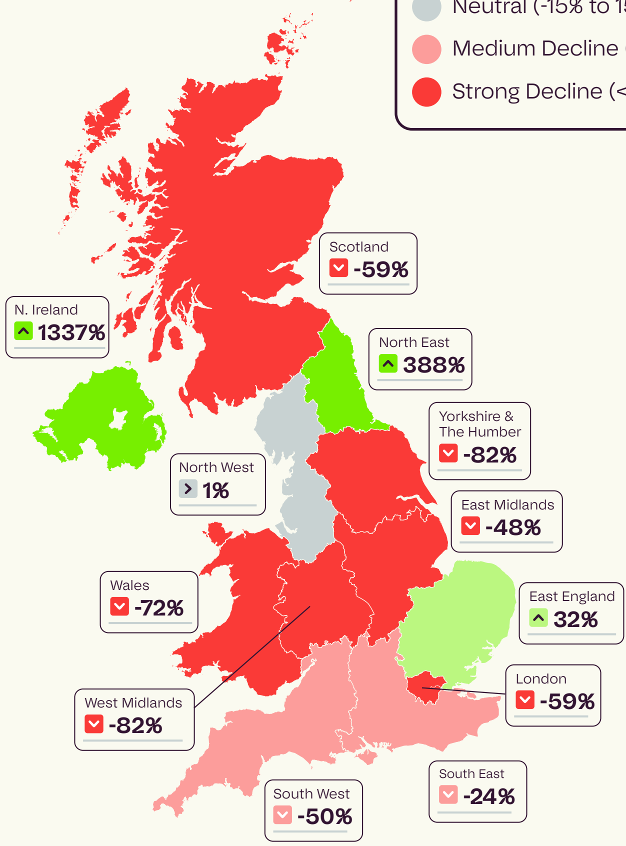
Regional

- Most regions experienced a poor performance for project-starts, with Northern Ireland a relative bright spot
- Northern Ireland experienced sharp growth for project-starts and detailed planning approvals against the previous year
- London experienced a poor period for both project starts and detailed planning approvals

The South East at £144 million was the most active region, accounting for 17% of the total value of starts. However, the region experienced a 24% decrease against the previous year. Starts in Northern Ireland were 14 times higher than a year ago and accounted for 4% of sector starts with a total value of £32 million.

Northern Ireland accounted for the largest share of approvals (31%), like project starts, approvals rose sharply, increasing by 378% against the previous year. Growth in the region was accelerated by the £375 million Strule Shared Education Campus development. Wales at £111 million also experienced triple digit growth, rising 111% against the previous year.

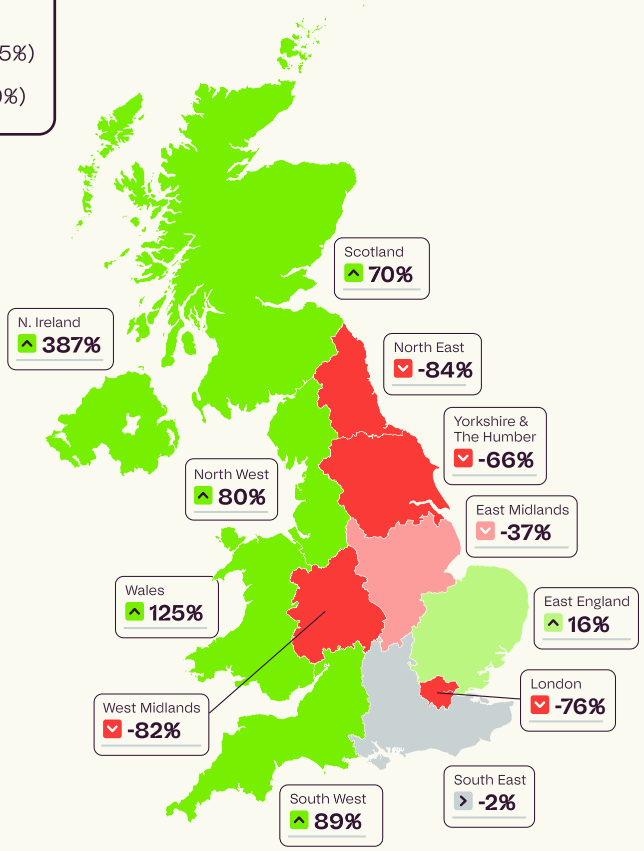
Changes in Education Starts
on a Year Earlier



Growth or Decline

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

Changes in Education Planning Approvals
on a Year Earlier



Community & Amenity

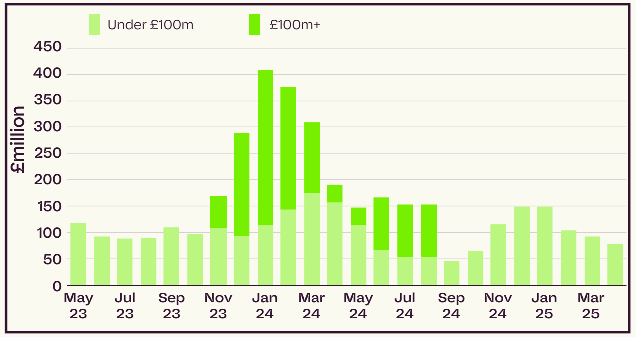
Overview

- **33% decrease** in project starts year-on-year
- **89% increase** in main contract awards from last year
- **59% decrease** in detailed planning approvals compared to 2024

Despite the overall decline in project starts, underlying starts (under £100 million) continued to strengthen during the three months to April. A strong upturn in awards for major (£100 million or more) projects points to further sector growth during the current year. However, a decline in detailed planning approvals against both the previous three months and a year ago, and no major projects approved in the three months to April this year, points to a shrinking development pipeline ahead of the next Spending Review.

Prison projects dominated sector starts during the three months to April and given the government's pledge to invest £2.3 billion in prisons buildings we expect the category to be an important driver for sector growth over the next two years. Increased defense funding should also help to drive sector activity over the medium term.

Detailed Planning Approvals

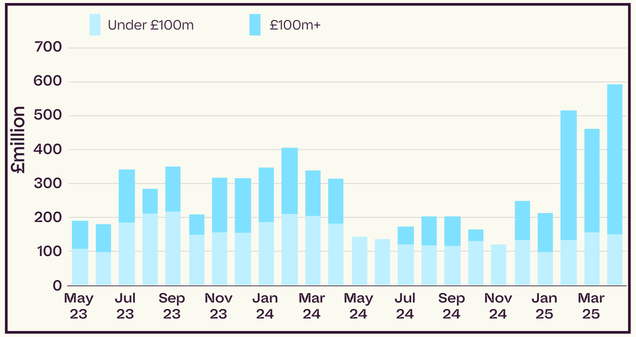


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	233	-	233
YoY	-51%	-100%	-59%
Prev. 3 months	-48%		-48%
Prev. 3 months (SA)	-62%		

Main Contract Awards

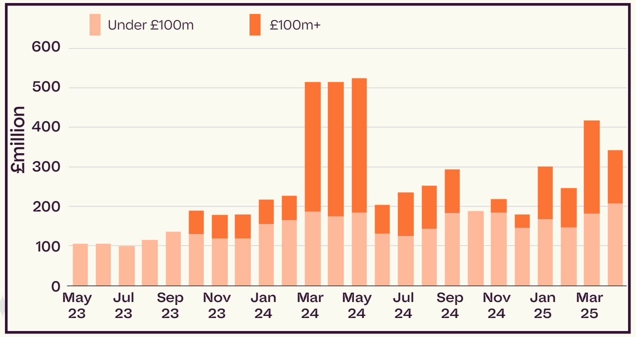


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	449	1,328	1,778
YoY	-17%	232%	89%
Prev. 3 months	56%	282%	180%
Prev. 3 months (SA)	25%		

Community & Amenity Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	622	405	1,027
YoY	19%	-60%	-33%
Prev. 3 months	24%	1%	14%
Prev. 3 months (SA)	21%		

Community & Amenity

Types of projects started

Performance in the community & amenity sector was weak, with only one sub-sector having grown year-on-year.

- Prison project starts accounted for the largest share (40%), despite a 55% decline
- Accounting for 17% of starts, local facilities totalled £177 million, 8% down year-on-year
- Government buildings grew 140% on a year ago, totalling £323 million

Project Spotlight

King Street Fire Station

Detailed plans have been approved for the King Street Fire Station development in Stockport. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q3 2026.

PROJECT ID: 23169900

IMAGE SOURCE: BRADSHAW GASS AND HOPE LLP

Types of Community & Amenity Projects Started

Three months to April 2025

	£ million	Percentage
Blue Light	27	**3%**
Government Buildings	323	**31%**
Law Courts	-	**0%**
Local Facilities	177	**17%**
Military	84	**8%**
Places of Worship	3	**0%**
Prisons	413	**40%**
Total	1,027	**100%**

Community & Amenity League Tables

May 2024 to April 2025

Contractors	Projects	£m
Kier	22	1,264
Laing O'Rourke	1	300
Galliford Try Plc	20	263
Wates	10	230
Bovis	1	159
John Sisk & Son	1	54
Morgan Sindall	7	35
Speller Metcalfe	4	29
Story Contracting	1	29
Neilcott Constr.	4	28

Clients	Projects	£m
Scottish Pris. Service	3	685
Ministry of Defence	17	650
Ministry of Justice	30	566
Home Office	19	112
UK Parliament	1	111
Gov. Property Agency	1	105
Sandwell Met B.C.	2	80
Lond. Bor. of Haringey	1	54
Gosport B.C.	1	51
Min.of Housing, Communities	9	37

Community & Amenity

Regional

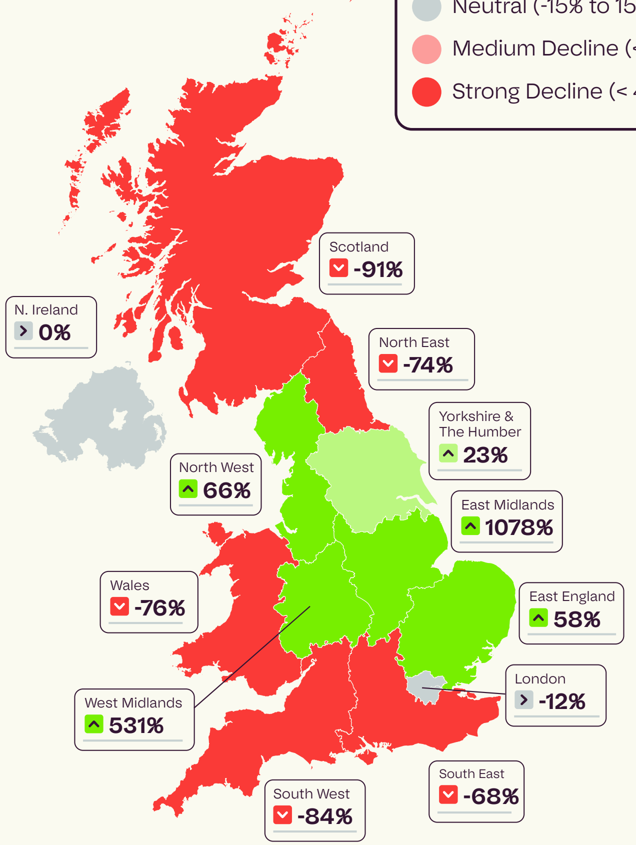
- Project starts were down in most regions, in line with the overall decline of the sector
- Reflecting the overall downward trend, detailed planning approvals grew in only five regions
- The East Midlands experienced growth in both starts and consents

The East of England accounted for the highest share of project starts, having grown 58% to total £361 million. Activity in the region was driven by the £300 million HMP Highpoint South project in Newmarket. Accounting for 14%, the North West grew 66% on a year ago, due to a £105 million government hub in Manchester.

The South East dominated detailed planning approvals, despite a 56% decline year-on-year to total £53 million. Accounting for 18% of the sector, Yorkshire & the Humber also fell 56% on a year ago to a total of £42 million.

Changes in Community & Amenity Starts

on a Year Earlier

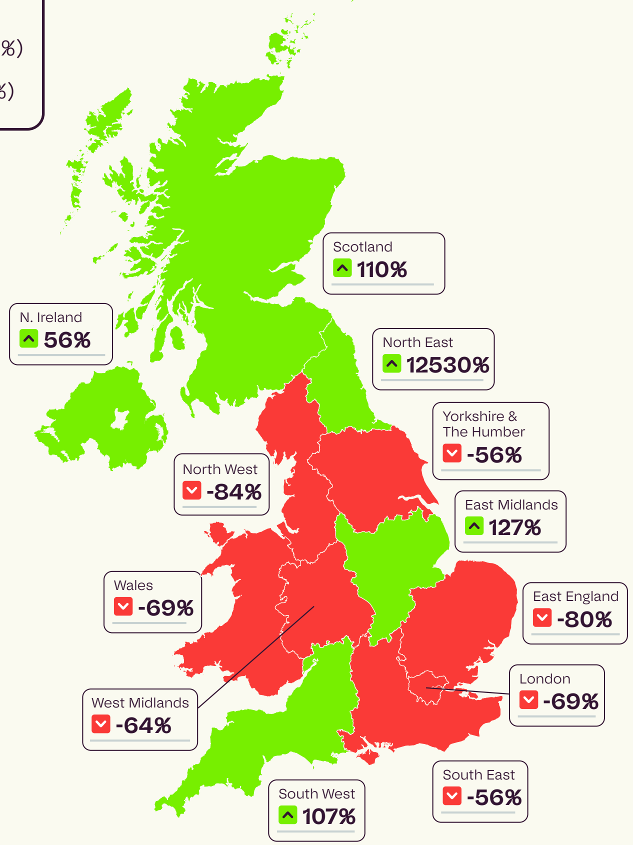


Growth or Decline

- 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



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Civil Engineering

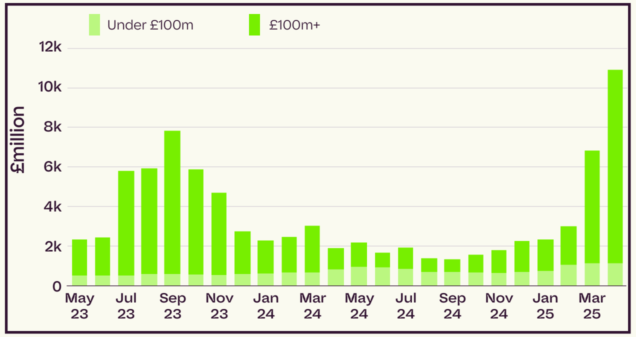
Overview

- **74% increase** in project starts against the preceding three months
- **27% increase** in main contract awards against the previous year
- **476% increase** in detailed planning approvals compared to the preceding three months

Civil Engineering project-starts picked up during the three months to April as the flow of major projects continued to recover. A strengthening in major projects being awarded since December points to growth in starts during 2025. The value of major projects (£100 million or more) awarded during the three months to April was 120% higher than a year ago.

The development pipeline was also boosted by a sharp rise in detailed planning approvals. This was primarily due to the approval of the £10.2 billion Lower Thames Crossing scheme.

Detailed Planning Approvals

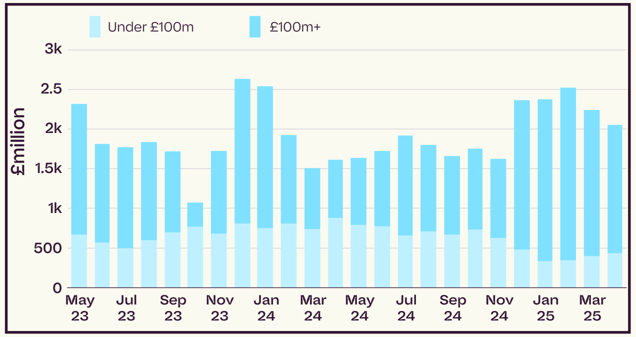


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	3,368	29,418	**32,787**
YoY	40%	795%	**476%**
Prev. 3 months	51%	518%	**369%**
Prev. 3 months (SA)	47%		

Main Contract Awards

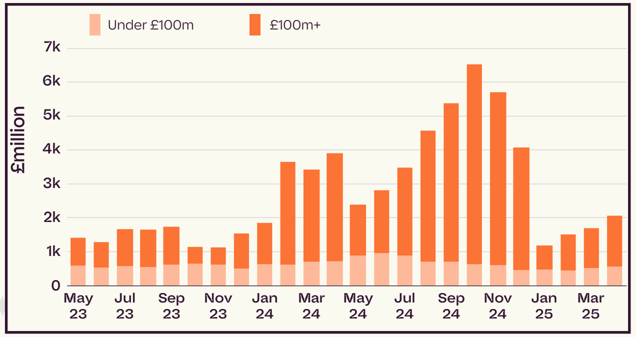


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	1,308	4,855	**6,164**
YoY	-50%	120%	**27%**
Prev. 3 months	30%	-21%	**-14%**
Prev. 3 months (SA)	7%		

Civil Engineering Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,665	4,517	**6,181**
YoY	-22%	-53%	**-47%**
Prev. 3 months	17%	112%	**74%**
Prev. 3 months (SA)	-22%		

Civil Engineering

Types of projects started

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

- Roads at £1,661 million accounted for the largest share of starts (27%), an increase of 50% compared to the previous year
- Energy accounted for the second largest share (10%), while declining 84% against the previous year
- Airports increased four digits against the previous year to total £150 million

Project Spotlight

London Luton Airport Expansion

Detailed plans have been approved for the £2.4 billion London Luton Airport Expansion development. A civil contractor is yet to be appointed on the project, with works expected to be completed in Q1 2029.

PROJECT ID: 21110220

IMAGE SOURCE: EXPRESS

Types of Civil Engineering Projects Started

Three months to April 2025

	£ million	Percentage
Airports	150	**2%**
Other Civils	3,154	**51%**
Rail	171	**3%**
Roads	1,661	**27%**
Harbours/Ports	185	**3%**
Energy	633	**10%**
Water Industry	104	**2%**
Waste	123	**2%**
Total	6,181	**100%**

Civil Engineering League Tables

May 2024 to April 2025

Contractors	Projects	£m
Statoil (U.K.)	1	4,033
Royal BAM	21	2,039
Ferrovial	3	1,617
Ringway	4	1,411
Downing	17	1,318
Newarthill	1	1,250
Balfour Beatty	40	1,021
M GROUP	12	903
Kier	26	611
Bouygues UK	11	510

Clients	Projects	£m
Dep. for Transport	46	4,318
Tata Steel Group	1	1,250
Herts. C. Council	1	1,155
SSEN Transmission	8	904
Oxfordshire C.C.	4	875
Downing LLP	10	813
National Grid	5	719
Network Rail	35	668
GE Hitachi Nuclear	1	500
Kingsway Solar Farm	1	500

Civil Engineering

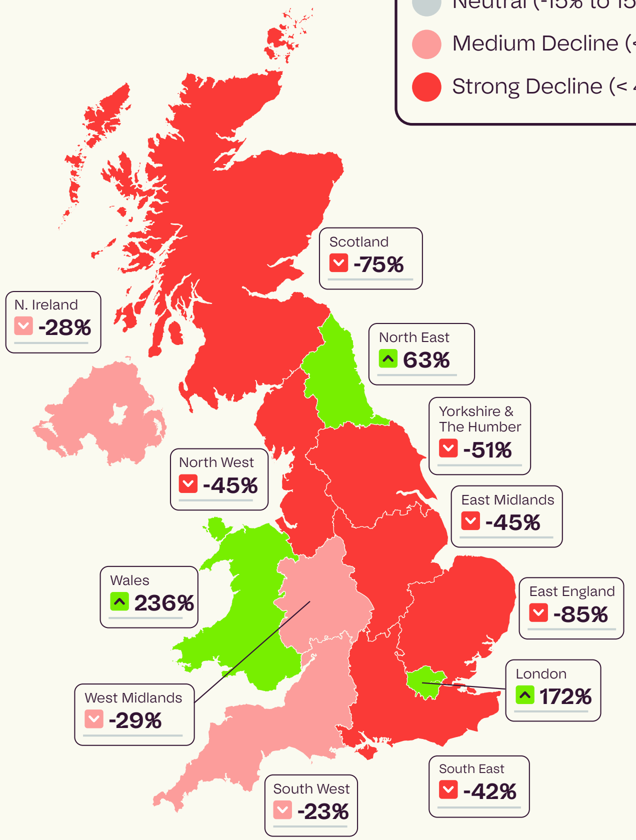
Regional

- Starts in Yorkshire & the Humber fell 51% against a year ago, but still accounted for the largest share of all regions
- The South East accounted for the largest share of sector approvals, experiencing sharp growth
- The East of England experienced the sharpest growth for planning approvals

Yorkshire & the Humber was the most active region for project starts, accounting for 43% of the total, valued at £2,662 million, despite a 51% year-on-year decline. London, in contrast, bucked the national trend, with project starts rising 172% year-on-year to £353 million.

In planning approvals, the South East accounted for the largest share of approvals (42%), with the area experiencing 774% growth against the previous year to total £13,911 million. Growth in the area was almost exclusively due to the £10.2 billion Lower Thames Crossing scheme. The East of England accounted for the second largest share of approvals (22%), with an increase of 969% against the previous year to total £7,210 million, the sharpest growth of any sector.

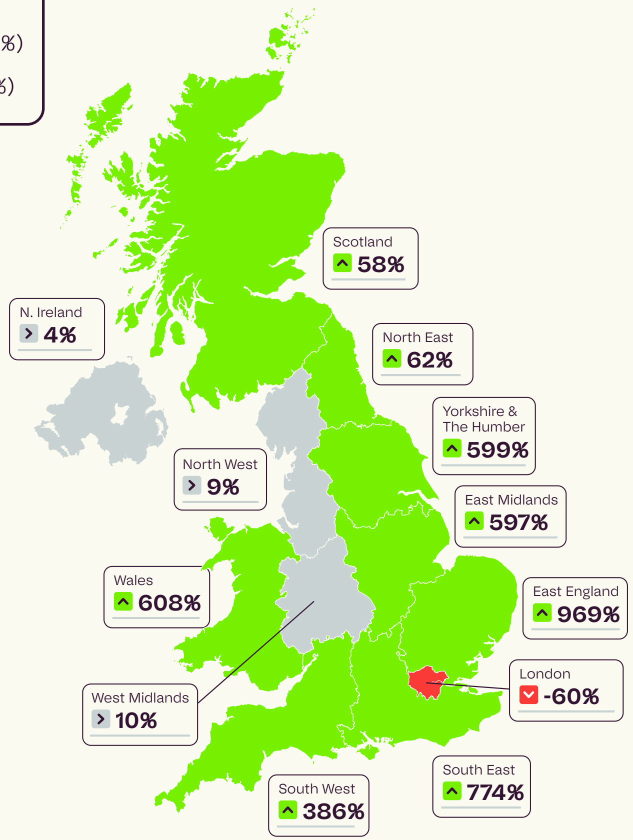
Changes in Civil Engineering Starts on a Year Earlier



Growth or Decline

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

Changes in Civil Engineering Planning Approvals on a Year Earlier



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