



Glenigan

A Hubexo Product

Construction Review

Reflecting activity to the end of April 2026

May 2026

- ▲ **8% rise in detailed planning approvals** against the preceding three months
- ▲ **29% rise in main contract awards** against the preceding three months
- ▲ **22% rise in project starts** against the preceding three months



Expert insights

to support your construction strategy

Expert Insights

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Education

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Civil Engineering

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

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

Unlock targeted insights with Glenigan's bespoke research. Learn more: [Glenigan.com/bspoke](https://www.glenigan.com/bspoke)

Methodology

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

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

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

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

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Executive Summary

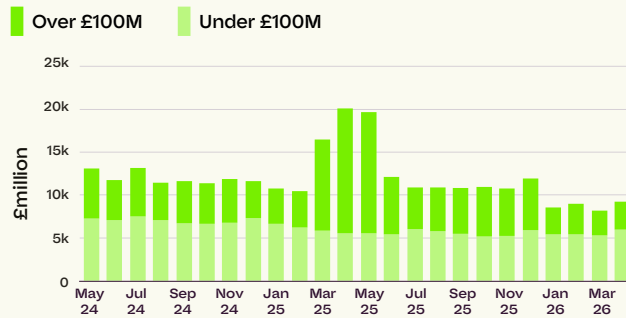
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- ▼ **54% decline** in detailed planning approvals against the previous year
- ▼ **11% decline** in main contract awards against the previous year
- ▼ **17% decrease** in project starts against the previous year

UK construction activity showed a notable short-term uptick in the latest period, with detailed planning approvals rising by 8% against the preceding three months, complemented by a stronger 29% increase in main contract awards and a 22% uplift in project starts. However, the trend remains subdued when viewed on an annual basis: detailed approvals are down sharply by 54% compared with a year earlier, while main contract awards have slipped 11% and project starts are 17% lower.

Looking ahead, the industry's trajectory will continue to be shaped by wider economic and policy developments. Elevated borrowing costs, ongoing viability challenges and cautious investor sentiment have constrained activity over the past year. At the same time, renewed public sector infrastructure commitments could begin to support a firmer recovery in approvals and starts.

Detailed Planning Approvals

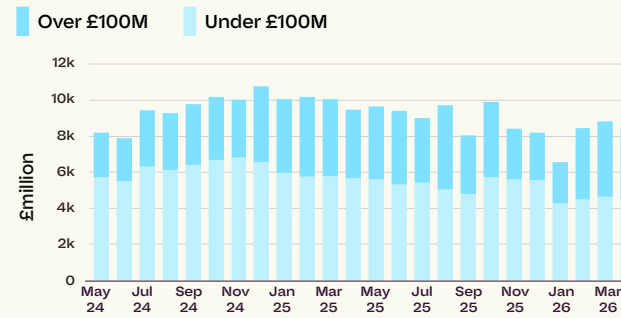


Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	17,900	9,746	27,646
YoY	8%	-78%	-54%
Prev. 3 months	10%	3%	8%
Prev. 3 months (SA)	21%		

Source: Glenigan. Three month average

Main Contract Awards

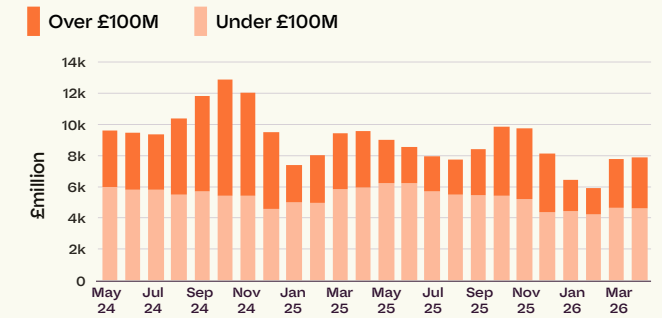


Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	13,574	11,799	25,374
YoY	-20%	4%	-11%
Prev. 3 months	6%	72%	29%
Prev. 3 months (SA)	3%		

Source: Glenigan. Three month average

Starts



Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	13,883	9,784	23,667
YoY	-22%	-10%	-17%
Prev. 3 months	5%	61%	22%
Prev. 3 months (SA)	-9%		

Source: Glenigan. Three month average

Economic Outlook

Higher energy costs and supply chain disruption damage confidence

- ✔ Rising inflation
- ✔ Business activity improves in April
- ✔ But business and consumer confidence fades

The war in Iran is beginning to weigh on the UK economy, pushing up inflation and denting confidence.

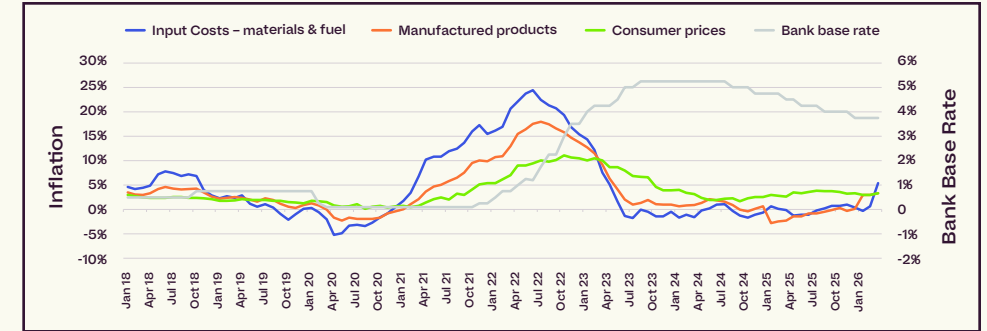
Rising energy prices and disrupted supply chains are driving up production costs, with material and fuel expenses jumping 4.4% in March. Firms are starting to pass these increases on: factory-gate prices rose 0.6% in the month and are 3.3% higher than a year ago. Consumer inflation has also ticked up to 3.4%, drifting further above the Bank of England's 2% target, prompting it to hold interest rates at 3.75%.

The CIPS manufacturers and service sector surveys report that business activity showed some resilience in April, rebounding after the initial shock of the war. But this masks growing unease: manufacturers' optimism has fallen to a one-year low, with firms citing mounting cost pressures.

Consumers are becoming more cautious too. Confidence has dropped sharply, with the GfK index falling to -25, its weakest level in nearly three years.

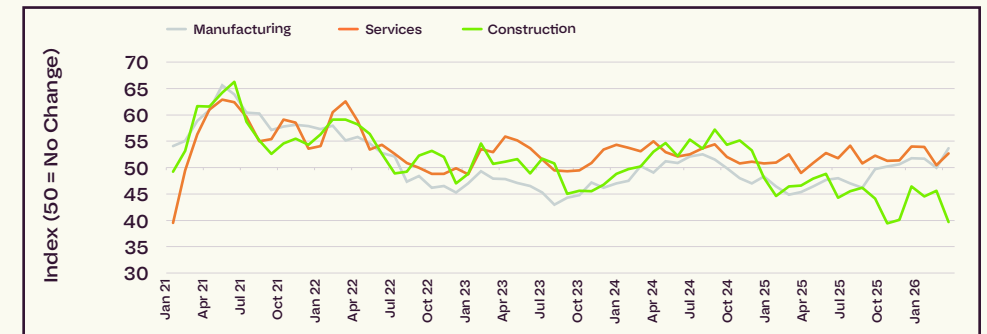
Households are increasingly pessimistic about both the wider economy and their own financial outlook. Overall, the picture is one of an economy under strain: rising costs are feeding inflation, while weakening confidence threatens to slow growth.

Inflationary Pressures



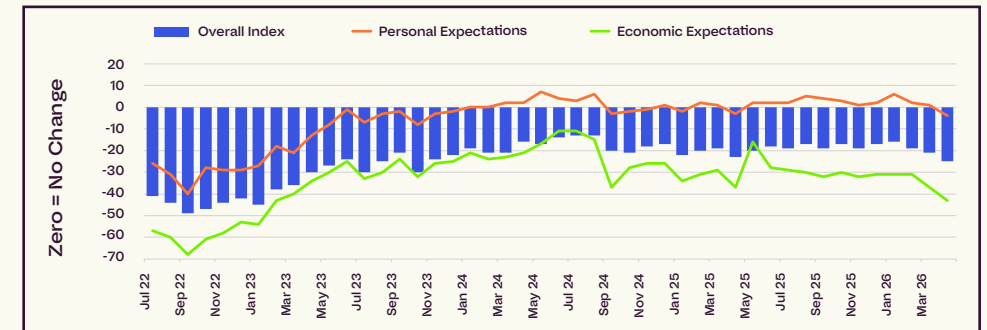
Source: National Statistics

CIPS Activity Surveys



Sources: IHS Markit/CIPS

Consumer Confidence



Source: GfK Consumer Confidence Barometer

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Top 50 Contractors

Last 12 month totals: **740 projects**
£21,583m

Last month totals: **98 projects**
£2,578m

May 2025 to April 2026

Contractors	#	£m	★	Contractors	#	£m	★
1 Bowmer & Kirkland	20	1,875	2	26 Axis Group UK	11	329	NEW
2 Morgan Sindall	146	1,757	-1	27 Tusker Construction Group	1	300	15
3 Mace	3	1,302	2	28 Skanska UK	2	274	17
4 Galliford Try	112	901	7	29 Balfour Beatty	8	262	-20
5 Winvic	18	697	13	30 Flynn	1	250	18
6 Willmott Dixon	55	694	2	31 Hill Group	8	248	0
7 McLaren	10	664	0	32 Tilbury Douglas	31	237	7
8 Kier	62	660	2	33 Glencar Construction	11	228	8
9 Bovis	5	607	-5	34 GMI Construction	13	223	10
10 STRABAG	2	536	-8	35 JSSH	5	220	NEW
11 Jones Bros	2	532	12	36 McLaughlin & Harvey	8	212	-6
12 Equitix	1	498	25	37 VINCI	11	210	-5
13 JRL Group	4	493	14	38 Fortem Solutions	2	209	12
14 Wates	35	485	-1	39 Benniman Limited	7	208	7
15 Mears Group	1	475	4	40 VolkerWessels	12	208	0
16 Sisk	4	465	4	41 Mitsubishi Heavy Industries	1	203	NEW
17 Robertson	23	458	9	42 Worley Parsons	1	203	NEW
18 Caddick Group	17	448	6	43 Renbat 1	1	200	NEW
19 Graham Construction	14	407	-5	44 Walter Lilly & Co	2	190	NEW
20 ACCIONA	1	400	9	45 Domis Construction	1	185	NEW
21 Royal BAM	21	381	1	46 McAleer & Rushe Contracts	4	179	-10
22 Marlborough Surfacing	3	365	NEW	47 METLEN Energy & Metals	3	176	NEW
23 UI Social Infrastructure	3	343	12	48 Laing O'Rourke	2	173	-42
24 M Group Services	6	342	NEW	49 MCS Group	8	167	NEW
25 Sir Robert McAlpine	6	337	-4	50 RE: GEN Group	12	167	NEW

★ Change in ranking since the previous period

April 2026

Contractors	#	£m	★	Contractors	#	£m	★
1 Winvic	5	256	32	26 C.Wynne & Sons	1	26	NEW
2 Bovis	2	206	NEW	27 Kind & Company	1	26	NEW
3 Bowmer & Kirkland	3	203	23	28 Wates	3	22	-22
4 Mitsubishi Heavy Industries	1	203	NEW	29 MCS Group	1	21	12
5 Worley Parsons	1	203	NEW	30 Andrew Scott	2	20	NEW
6 VINCI	1	122	3	31 GMI Construction	1	20	NEW
7 MD Building Services	1	113	NEW	32 Keepmoat	1	20	11
8 Morgan Sindall	13	82	-7	33 Beale Halai	1	19	NEW
9 RG Group Ltd	1	75	4	34 Construction Prop. Solut.	1	19	NEW
10 Costain	1	72	15	35 Structeco	1	19	NEW
11 Kier	17	58	-3	36 A.J. Developments Ltd.	1	18	NEW
12 Caddick Group	2	54	-2	37 Stepnell	1	18	NEW
13 Willmott Dixon	2	54	34	38 IHP Integrated Health	1	18	NEW
14 HG Construction	1	50	NEW	39 Bus Shelters Ltd	1	17	NEW
15 Green Cat Contracting	1	50	NEW	40 McLaren	1	17	-33
16 Galliford Try	2	46	-1	41 Boom Construction	3	17	NEW
17 Hill Group	1	37	NEW	42 Mandale Group	1	17	NEW
18 Sir Robert McAlpine	2	35	NEW	43 Hollandale Proj. & Nevin Irene	1	16	NEW
19 Balfour Beatty	3	35	NEW	44 Thakeham Group	1	16	-9
20 Esh Group	2	33	NEW	45 Felix O'Hare & Co	1	15	NEW
21 Murphy	1	32	NEW	46 Buxton Building Cont.	1	14	NEW
22 Keady Construction	1	30	NEW	47 Beba Energy UK Ltd	1	14	NEW
23 Vistry	1	28	21	48 Qube Structures	1	14	NEW
24 Gilbert Ash	1	27	NEW	49 Byrne Group	1	13	NEW
25 McCory Brickwork Limited	2	26	NEW	50 Marcon Construction Ltd	1	13	NEW

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Top 50 Contractors

Top 50 Clients

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Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Top 50 Clients

May 2025 to April 2026

Clients	#	£m	★
1 Mitsui Fudosan	1	1100	7
2 Department of Health	178	1062	3
3 United Utilities Group	5	1014	-2
4 Department for Education	44	657	3
5 Milton Keynes City Council	7	554	7
6 Kemble Water	19	505	5
7 Community Wind Power	1	500	6
8 Ministry of Justice	23	435	-4
9 Manby BGE	1	300	10
10 R&F Properties QS	1	300	10
11 Prologis UK	5	280	5
12 Hertfordshire CC.	6	263	10
13 Tribus Clean Energy	1	250	11
14 Telehouse International	1	250	11
15 Sanctuary Housing	2	228	13
16 Herefordshire Council	5	213	10
17 Natural History Museum	2	204	16
18 Southend On Sea BC.	3	203	NEW
19 Heidelberg Materials	1	203	NEW
20 Great Portland Estates	5	202	15
21 Crystal Palace Football Club	2	201	NEW
22 Immersa	1	200	14
23 Cole Waterhouse	1	185	17
24 Aberdeen City Council	19	183	14
25 Legal & General Group	4	183	9

April 2026

Clients	#	£m	★
1 Heidelberg Materials	1	203	NEW
2 Great Portland Estates	1	150	NEW
3 Cheltenham BC.	1	115	NEW
4 Lewes Dis & Eastbourne BC.	1	113	NEW
5 Jeeran UK	1	101	NEW
6 Q Developments Ltd	1	101	NEW
7 Ministry of Justice	1	56	NEW
8 Donard (Bristol)	1	50	NEW
9 Gigabox Developments	1	50	NEW
10 Midlothian Council	1	45	-2
11 Department of Health	18	43	37
12 Oasis Southside	1	43	NEW
13 Heim Global Investor UK	1	43	NEW
14 Birmingham Properties	1	43	NEW
15 J G Pears (Newark)	1	43	NEW
16 Watkin Jones	1	40	NEW
17 Lacuna Holdings	1	40	NEW
18 IM Properties	1	39	NEW
19 Clarion Housing Group	1	37	21
20 Sellafield	1	36	NEW
21 Nuclear Restoration Serv.	1	36	NEW
22 GLP UK	1	32	-3
23 London Borough of Ealing	1	29	NEW
24 Homes for Lambeth	1	28	NEW
25 Sherrif Way Nottingham	1	28	NEW

★ Change in ranking since the previous period

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Overview

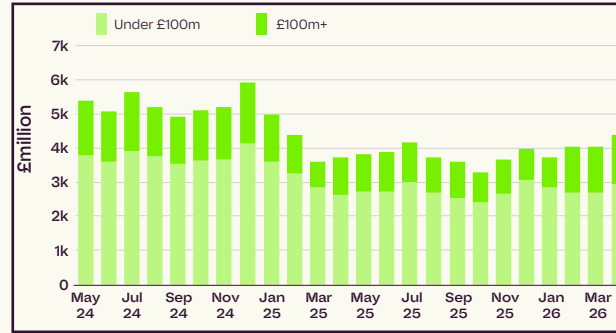
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- ▼ **2% decrease** in project starts year-on-year.
- ▲ **9% increase** in main contract awards from last year.
- ▲ **17% increase** in detailed planning approvals compared to 2025.

Residential activity remained relatively stable year-on-year, with growth in both awards and approvals despite a marginal decline in starts. Quarter-on-quarter comparisons were stronger, particularly for major projects, which drove increases in both starts and contract awards.

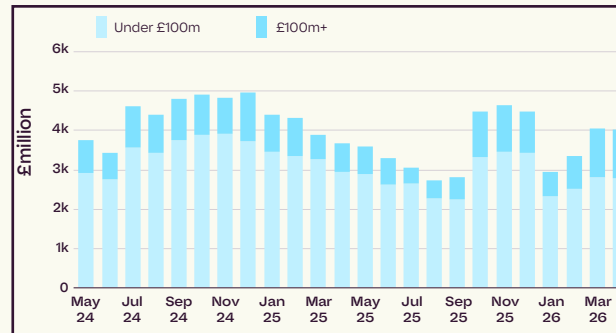
This growth comes amid the reports of a 3% increase in house prices from Nationwide. However, Halifax is already reporting a fall in UK house prices as a result of geopolitical volatility, which is likely to eventually affect residential construction.

Detailed Planning Approvals



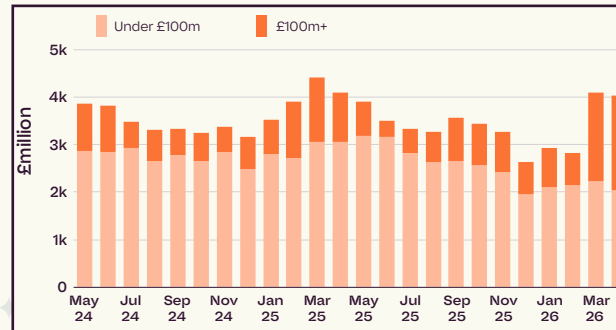
Source: Glenigan

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	8,784	4,310	13,094
YoY	12%	30%	17%
Prev. 3 months	3%	65%	17%
Prev. 3 months (SA)	22%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	8,380	3,714	12,094
YoY	-5%	67%	9%
Prev. 3 months	20%	94%	36%
Prev. 3 months (SA)	19%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	6,117	5,976	12,094
YoY	-33%	89%	-2%
Prev. 3 months	-3%	143%	38%
Prev. 3 months (SA)	-8%		

Housing

Types of projects started

Sub-sector performance was weak, with only two increasing on a year ago.

- Social Sector Housing accounted for the largest share (51%), having risen 236% year-on-year to total £6,209 million.
- Private Housing fell 45% against the previous year, totalling £3,308 million.
- Private Apartments decreased 56% year-on-year to total £1,422 million.

Types of Housing Projects Started

Three months to April 2026

	£ million	Percentage
Private Apartments	1,422	12%
Elderly Persons Homes	-	0%
Private Housing	3,308	27%
Private Sheltered Housing	253	2%
Social Sector Sheltered Housing	29	0%
Social Sector Apartments	469	4%
Social Sector Housing	6,209	51%
Homes, Hostels Etc.	-	0%
Student Accommodation	403	3%
Total	12,094	100%

Project Spotlight

College Gardens BTR and Student Accommodation

Detailed plans have been approved on the £200 million College Gardens BTR and student accommodation development in Glasgow. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q3 2029.

PROJECT ID: 14334508

IMAGE SOURCE: STALLAN-BRAND ARCHITECTURE AND DESIGN LTD

£200m



Housing League Tables

May 2025 to April 2026

Contractors	Projects	£m
Barratt Redrow	20	563
Morgan Sindall	19	558
JRL	4	535
Graham Cons.	3	476
Mears	1	475
Taylor Wimpey	17	451
Hill	15	449
Bellway	17	425
Persimmon	18	383
Wates	11	366

Clients	Projects	£m
The Guinness Prtnsh.	6	1,080
Vistry	29	584
Taylor Wimpey	19	523
Milton Keynes CC.	3	516
Barratt Redrow	21	448
Bellway	16	430
Persimmon Group	21	355
R&F Properties QS	1	300
Sanctuary Housing	3	235
The Berkeley Group	6	226

Housing

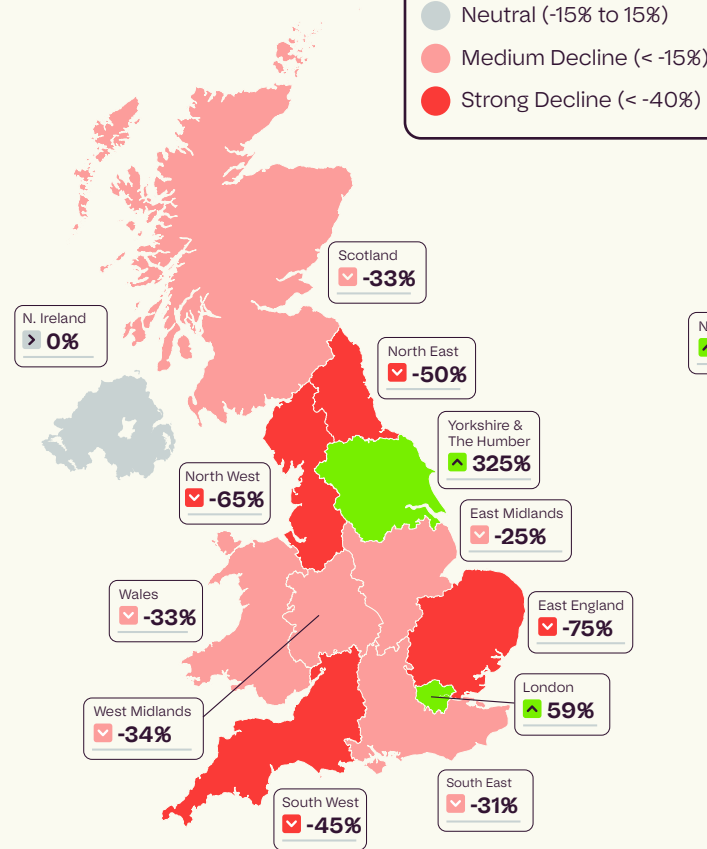
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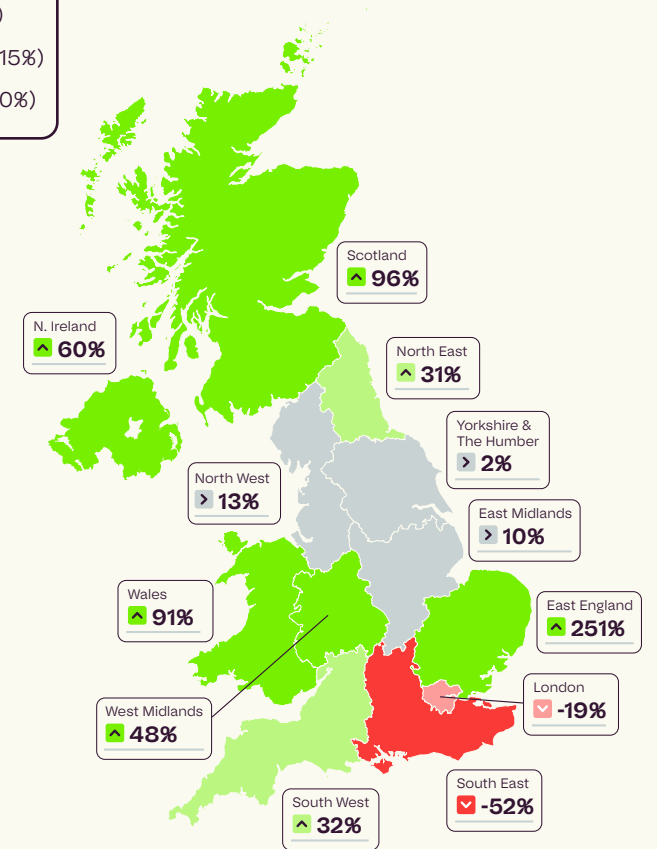
- Regional performance was weak for project starts.
- Approvals grew in most regions.
- Yorkshire & the Humber experienced growth in both starts and approvals.

Yorkshire & the Humber led activity with starts rising sharply to £4,368 million, driven by £4,086 million social housing heating works in Leeds. London also saw strong growth, increasing to £2,591 million. In contrast, regions including the South East, the East Midlands and Scotland recorded significant declines compared with last year.

Changes in Housing Starts
on a Year Earlier



Changes in Housing Planning Approvals
on a Year Earlier



Industrial Overview

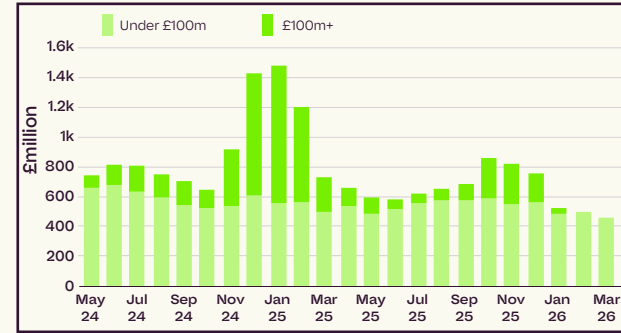
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- ▼ **28% decrease** in project starts year-on-year.
- ▼ **55% decrease** in main contract awards from last year.
- ▼ **18% decrease** in detailed planning approvals compared to 2025.

Industrial activity weakened across the pipeline, with project starts, awards and approvals all falling on an annual basis. However, quarter-on-quarter data showed some improvement in starts, supported by strong growth in major projects. Approvals also edged up compared with the previous three months.

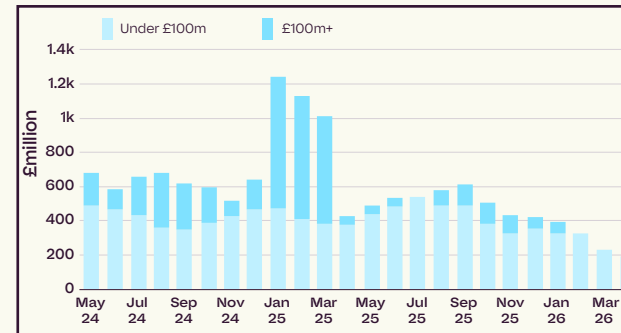
The UK manufacturing industry is showing signs of stabilisation, with S&P reporting a PMI increase in April alongside growth in output. However, S&P Global Market Intelligence's Rob Dobson warned that this rise is partly driven by clients bringing forward purchases to mitigate expected price increases and supply disruption, meaning growth could cool later in the year as this effect unwinds and business optimism declines, while inflationary pressures remain elevated.

Detailed Planning Approvals



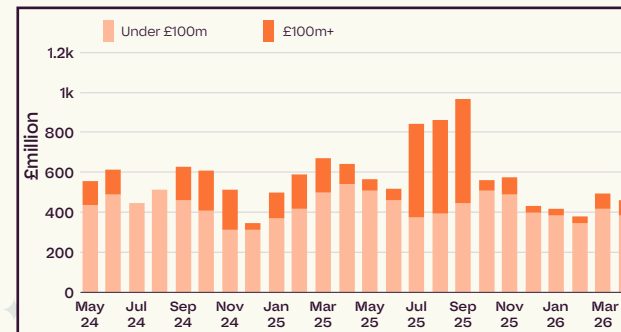
Source: Glenigan

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	1,519	105	1,624
YoY	-5%	-72%	-18%
Prev. 3 months	4%	1%	4%
Prev. 3 months (SA)	7%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	571	-	571
YoY	-49%	-100%	-55%
Prev. 3 months	-42%	-100%	-52%
Prev. 3 months (SA)	-39%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,148	226	1,374
YoY	-29%	-23%	-28%
Prev. 3 months	0%	126%	10%
Prev. 3 months (SA)	-23%		

Industrial

Types of projects started

Performance was weak, with all categories down year-on-year.

- Warehousing & logistics accounted for the largest share (59%), having declined 3% year-on-year to total £805 million.
- Manufacturing fell 50% against the previous year, totalling £487 million.
- Other industrial projects decreased 31% year-on-year to total £82 million.

Types of Industrial Projects Started

Three months to April 2026

	£ million	Percentage
Manufacturing	487	35%
Other Industrial	82	6%
Warehousing & Logistics	805	59%
Total	1,374	100%

Project Spotlight

Rivenhall Greenhouse

Detailed plans have been approved for the £150 million Rivenhall Greenhouse development. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 23348968

IMAGE SOURCE: RIVENHALL GREENHOUSE

£150m



Industrial League Tables

May 2025 to April 2026

Contractors	Projects	£m
Winvic	11	454
Benniman	8	226
Glencar Cons.	11	213
MCS Group	7	159
Caddick	7	154
GMI Construction	5	115
A & H Construction	5	110
Robertson	3	97
Bowmer & Kirkland	3	94
TSL Projects	2	92

Clients	Projects	£m
Prologis UK	6	296
Sadel	1	161
DP World	3	119
Howden Joinery	1	100
Amazon UK	3	95
Whyte & MacKay	1	85
Aldi	1	84
Indurent	6	79
Pulpex	2	71
Arvato c/o CBRE	1	52

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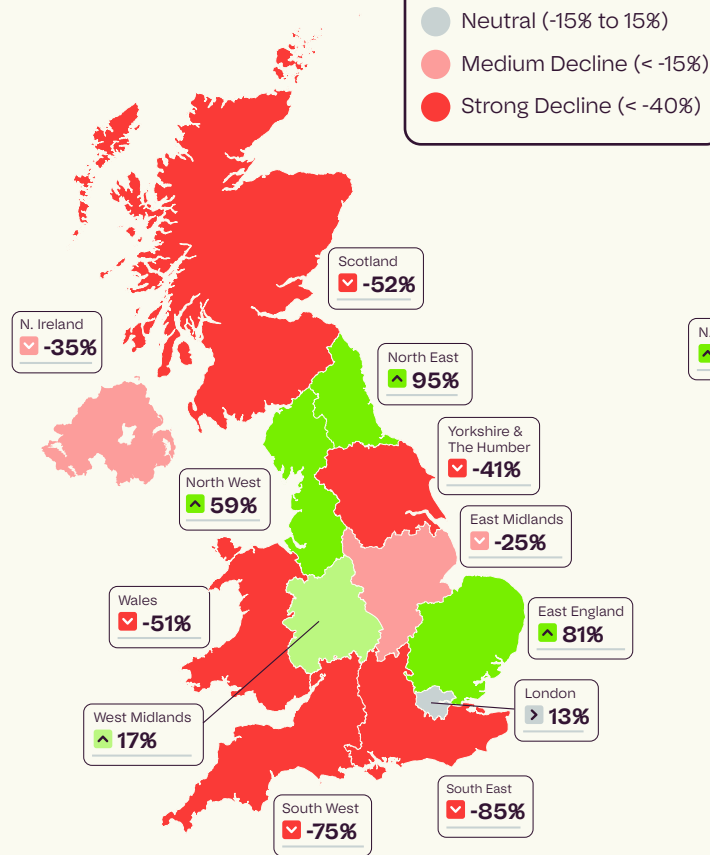
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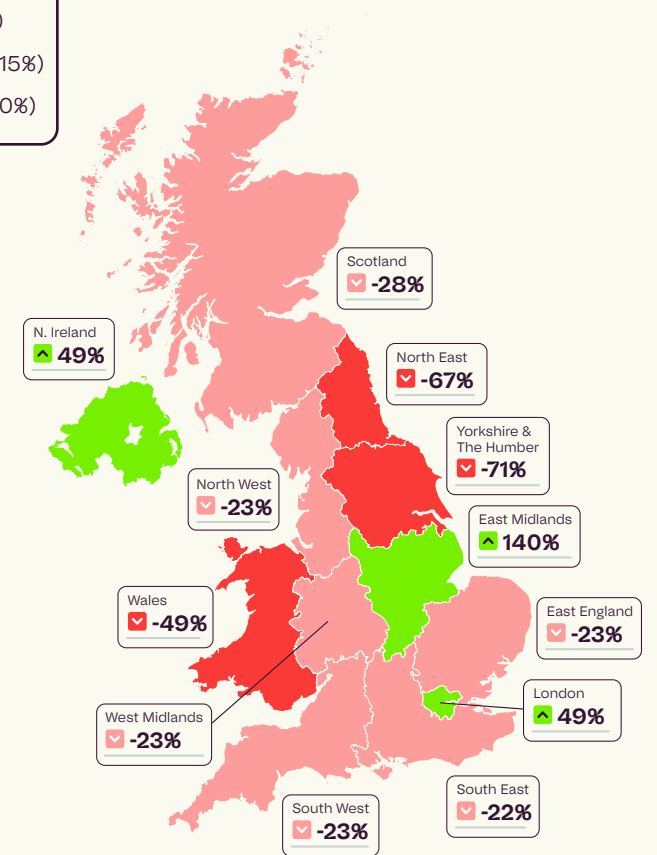
- Project starts and detailed planning approvals were down in most regions.
- Strong growth in project starts in the East of England, the North West and the North East.
- Consents only increased in the East Midlands, London, and Northern Ireland.

The East Midlands led industrial starts at £299 million, despite falling 25% on a year ago. The South East and the South West also recorded steep declines, highlighting weak regional performance. In contrast, the East of England and the North West saw strong growth, rising to £199 million and £144 million respectively.

Changes in Industrial Starts
on a Year Earlier



Changes in Industrial Planning Approvals
on a Year Earlier



Offices

Overview

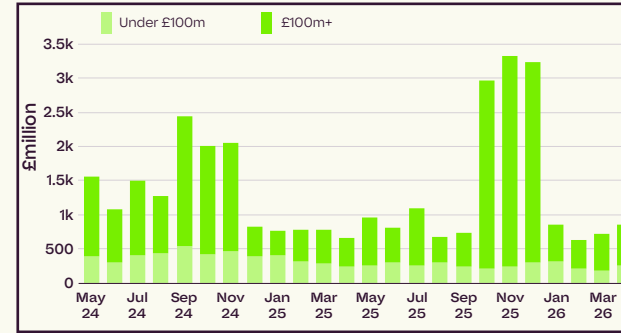
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- ▲ **217% increase** in project starts year-on-year.
- ▼ **57% decrease** in main contract awards from last year.
- ▲ **30% increase** in detailed planning approvals compared to a year ago.

Office starts surged year-on-year, driven by a significant increase in major schemes. Quarter-on-quarter growth was also strong, reflecting a sharp uplift in project activity. Despite this, the pipeline remains mixed, with contract awards falling sharply, even as planning approvals strengthened.

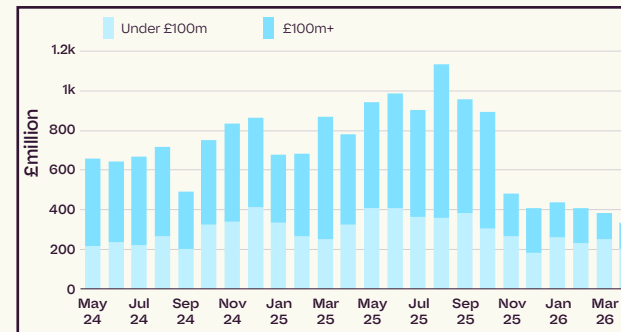
Although there was growth in underlying projects (under £100 million), growth in the three months to April was largely driven by a few high-value projects in London.

Detailed Planning Approvals



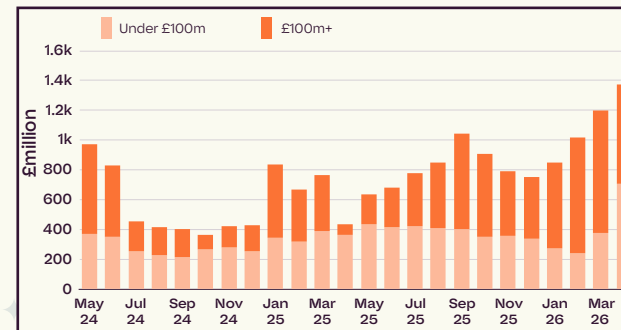
Source: Glenigan

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	787	1,784	2,572
YoY	7%	45%	30%
Prev. 3 months	-17%	11%	1%
Prev. 3 months (SA)	5%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	607	393	1,000
YoY	-38%	-71%	-57%
Prev. 3 months	-23%	-27%	-24%
Prev. 3 months (SA)	-11%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	2,116	2,003	4,119
YoY	94%	868%	217%
Prev. 3 months	159%	16%	62%
Prev. 3 months (SA)	99%		

Offices

Types of projects started

Strong performance across most value bands, with only two down year-on-year.

- Project starts in the over £100 million value band totalled £2,003 million, having increased 868% on a year ago.
- The £50 million to £100 million value band grew 402% year-on-year, totalling £1,087 million.
- The £20 million to £50 million value band fell 10% year-on-year, totalling £349 million.

Types of Office Projects Started

Three months to April 2026

	£ million	Percentage
Up to £5 million	190	5%
£5 million up to £10 million	165	4%
£10 million up to £20 million	325	8%
£20 million up to £50 million	349	8%
£50 million up to £100 million	1,087	26%
Over £100 million	2,003	49%
Total	4119	100%

Project Spotlight

Redhill Data Centre

Detailed plans have been approved for the £500 million Redhill Data Centre development. Works are due to complete in Q4 2029, with a main contractor yet to be appointed on the scheme.

PROJECT ID: 25007731

IMAGE SOURCE: CASTLEFORGE

£500m



Office League Tables

May 2025 to April 2026

Contractors	Projects	£m
Mace	1	1,100
Morgan Sindall	72	676
McLaren	4	379
Skanska UK	1	273
Flynn	1	250
Bovis	1	150
Collins Construction	6	134
Kier	2	121
Structure Tone	2	119
John Sisk & Son	1	110

Clients	Projects	£m
Mitsui Fudosan UK	1	1,100
Telehouse INT.	1	250
Great Portland	5	202
British Land	3	170
Iron Mountain	1	150
IJM Corporation	1	150
GIC	1	137
Clifford Chance	1	130
Government Prop.	1	120
Gardiner & Theobald	2	102

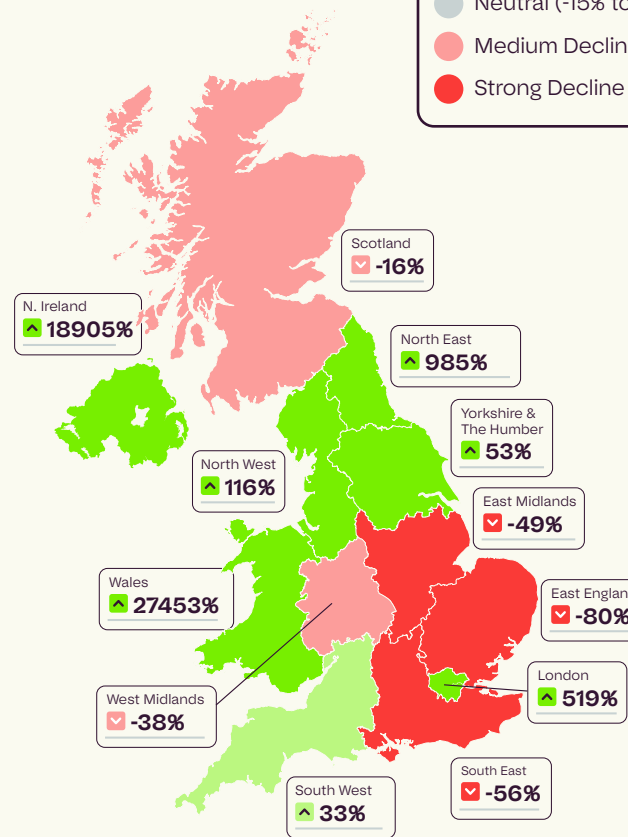
Offices

Regional

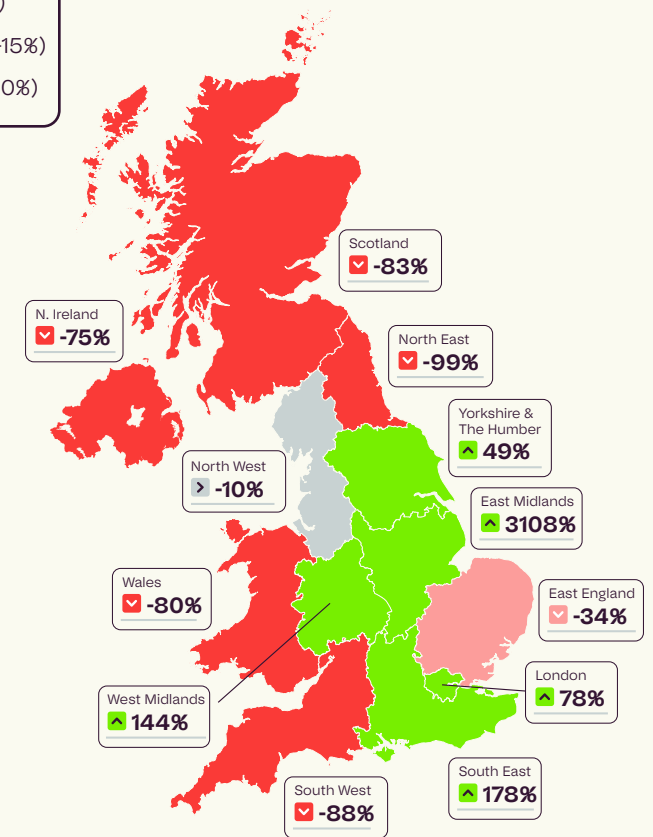
- London dominated activity, accounting for the vast majority of starts and approvals.
- Strong growth recorded across several regions.
- Weak performance in planning approvals.

London led office starts by a significant margin, surging to £3,474 million following strong year-on-year growth. This growth was boosted by the £1,100 million British Library Extension development which mainly consists of office space. The North West and Yorkshire & the Humber also recorded notable increases. In contrast, regions such as the South East and the East of England experienced declines.

Changes in Office Starts
on a Year Earlier



Changes in Office Planning Approvals
on a Year Earlier



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Retail

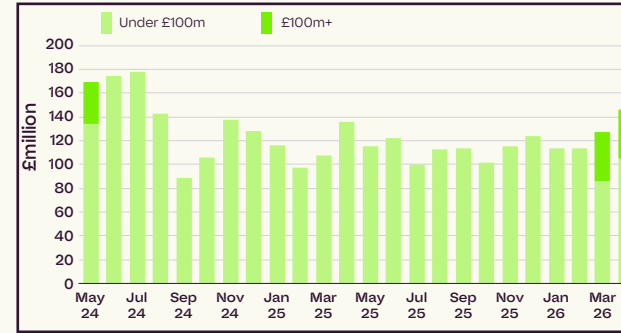
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- ▼ **9% decrease** in project starts year-on-year.
- ▼ **10% decrease** in main contract awards from last year.
- ▲ **7% increase** in detailed planning approvals compared to 2025.

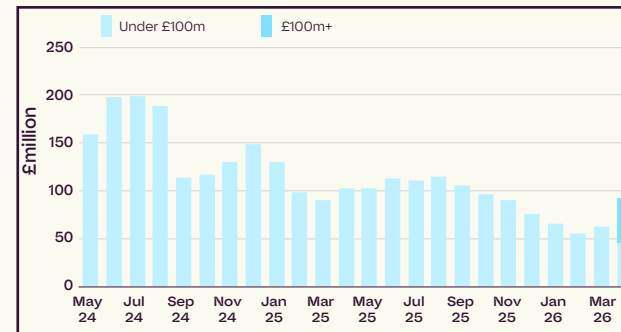
Retail activity remained mostly weak, with starts and contract awards declining on an annual basis. Quarter-on-quarter data showed some recovery in starts driven by an increase in underlying projects. Main contract awards and approvals also increased, supported by growth in larger projects.

Detailed Planning Approvals



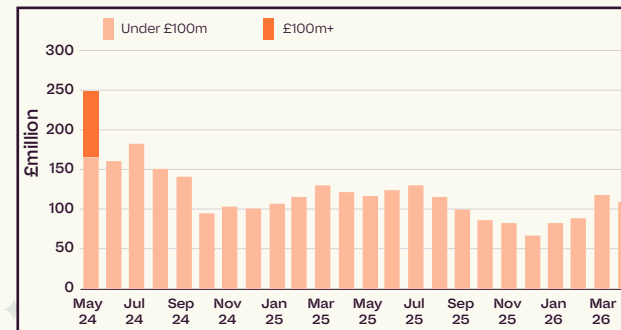
Source: Glenigan

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	314	124	438
YoY	-23%		7%
Prev. 3 months	-8%		29%
Prev. 3 months (SA)	-14%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	138	140	278
YoY	-55%		-10%
Prev. 3 months	-30%		41%
Prev. 3 months (SA)	-22%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	329	-	329
YoY	-9%	-100%	-9%
Prev. 3 months	34%		34%
Prev. 3 months (SA)	13%		

Retail

Types of projects started

Mixed performance, with three sub-sectors up on a year ago.

- Supermarkets accounted for the largest share (59%), having increased 7% year-on-year to total £195 million.
- Retail warehousing increased year-on-year to total £14 million.
- Shops fell 25% against the previous year, totalling £115 million.

Types of Retail Projects Started

Three months to April 2026

	£ million	Percentage
Other Retail	-	0%
Petrol Filling Stations	-	0%
Retail Warehousing	14	4%
Shopping Centres	4	1%
Shops	115	35%
Supermarkets	195	59%
Total	329	100%

Project Spotlight

Huddersfield Market Refurbishment

Detailed plans have been approved for the £16.5 million refurbishment of Huddersfield's historic Grade II listed market. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 25453472

IMAGE SOURCE: KIRKLEES COUNCIL

£16.5m



Retail League Tables

May 2025 to April 2026

Contractors	Projects	£m
Kier Group	1	41
McPhillips Wellington	1	37
DSP Construction	6	21
The Barnfield Group	1	20
Stonedale Cons.	2	17
Red Construction	1	17
Toureen Group	2	13
Connolly & Fee	1	12
OB Construction	1	11
Andrew Scott	1	10

Clients	Projects	£m
Aldi	35	90
Lidl UK	19	88
Walsall Metropolitan	1	41
McPhillips Wellington	1	37
T J Morris	10	24
Marks & Spencer	13	21
Blackburn With Darwen Borough C.	1	20
Watford Health	1	17
J Sainsbury	13	15
Tesco	25	14

Retail

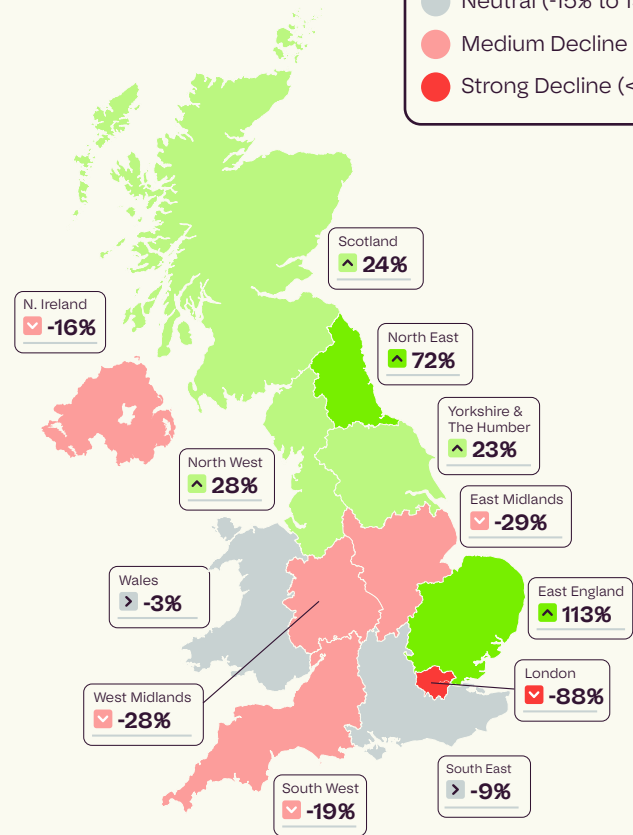
Regional

- Regional performance in project starts and detailed planning approvals was weak.
- Strong growth in starts in the East of England and the North East.
- Detailed planning approvals grew sharply in the East of England, the East Midlands and the South East.

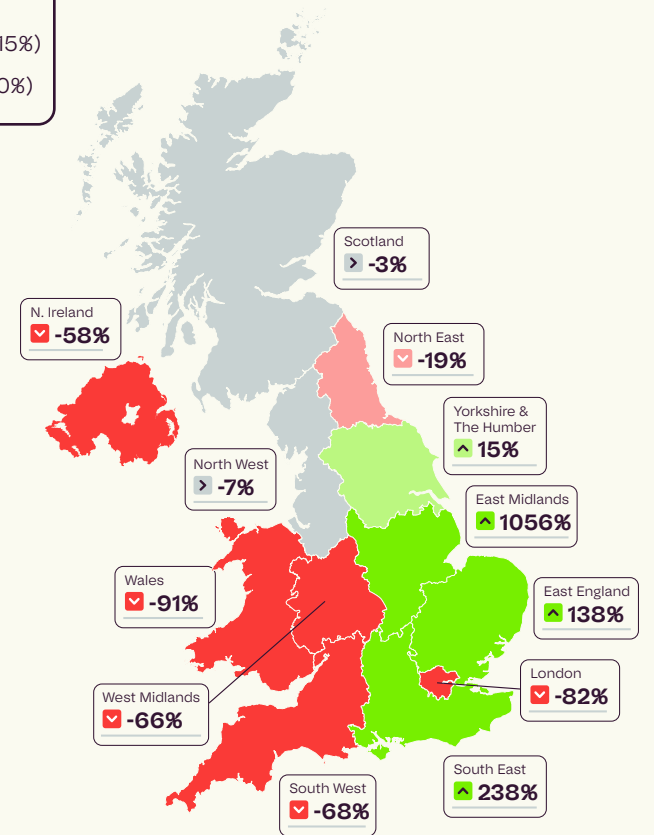
The North West remained the most active region for project starts at £75 million, rising modestly year-on-year. The East of England also saw strong growth, reaching £38 million. In contrast, London declined sharply to £10 million, reflecting weaker retail development in the capital.



Changes in Retail Starts
on a Year Earlier



Changes in Retail Planning Approvals
on a Year Earlier



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Hotel & Leisure

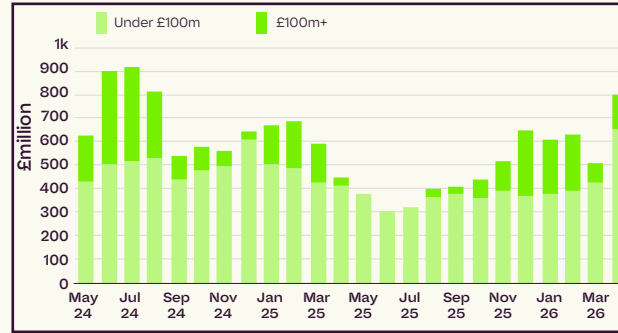
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- ▼ **3% decrease** in project starts year-on-year.
- ▼ **29% decrease** in main contract awards from last year.
- ▲ **80% increase** in detailed planning approvals compared to 2025.

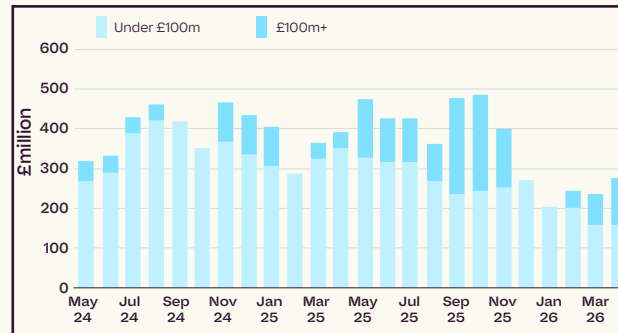
Hotel & leisure activity was weak on an annual basis, with a decline in starts and contract awards despite a strong growth in planning approvals. Quarter-on-quarter comparisons were stronger: although there was a decline in starts, the pipeline strengthened.

Detailed Planning Approvals



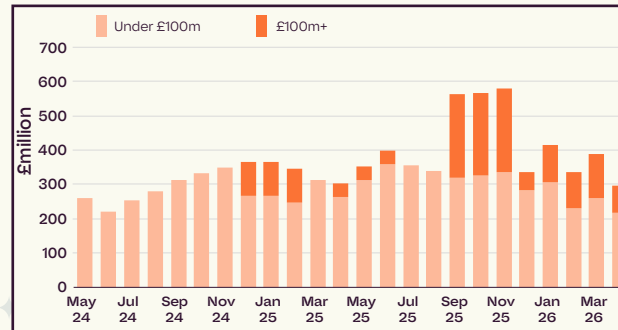
Source: Glenigan

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	1,955	445	2,400
YoY	58%	345%	80%
Prev. 3 months	73%	-36%	31%
Prev. 3 months (SA)	85%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	472	356	828
YoY	-55%	197%	-29%
Prev. 3 months	-22%		36%
Prev. 3 months (SA)	-26%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	654	231	885
YoY	-17%	92%	-3%
Prev. 3 months	-29%	-27%	-29%
Prev. 3 months (SA)	-32%		

Hotel & Leisure

Types of projects started

Performance was weak across sub-sectors, with only two categories up on a year ago.

- Indoor leisure facilities accounted for the largest share (48%), having increased 112% year-on-year to total £427 million.
- Sport facilities rose 51% on a year ago, totalling £180 million.
- Hotels & guest houses fell 58% year-on-year to total £98 million.

Types of Hotel & Leisure Projects Started

Three months to April 2026

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	11	1%
Cinemas & Theatres	28	3%
Hotels, Guest Houses	98	11%
Indoor Leisure Facilities	427	48%
Other Hotel & Leisure	142	16%
Sport Facilities	180	20%
Total	885	100%

Project Spotlight

Stockport County Football Club Stadium Expansion

£50m

Plans have been approved for a stadium expansion at Stockport County Football Club. A main contractor is yet to be appointed on the £50 million scheme, with works expected to be completed in Q4 2027.

PROJECT ID: 22359182

IMAGE SOURCE: STOCKPORT COUNTY FC



Hotel & Leisure League Tables

May 2025 to April 2026

Contractors	Projects	£m
Newarthill	5	317
Bovis	1	200
McLaren Cons.	2	148
Robertson	2	147
Morrisroe Group	1	100
Walter Lilly & Co	1	90
Willmott Dixon	10	83
Graham Cons.	1	71
Galliford Try	6	56
Speller Metcalfe	3	51

Clients	Projects	£m
Crystal Palace FC.	1	200
Alvarez & Marsal	1	131
Aston Villa FC.	1	100
Rayners Penn	1	90
Whitbread	18	84
Peel Holdings	1	71
British Museum	1	51
Warwickshire C. CC.	1	46
Calderdale BC.	2	35
Asda	1	33

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Regional

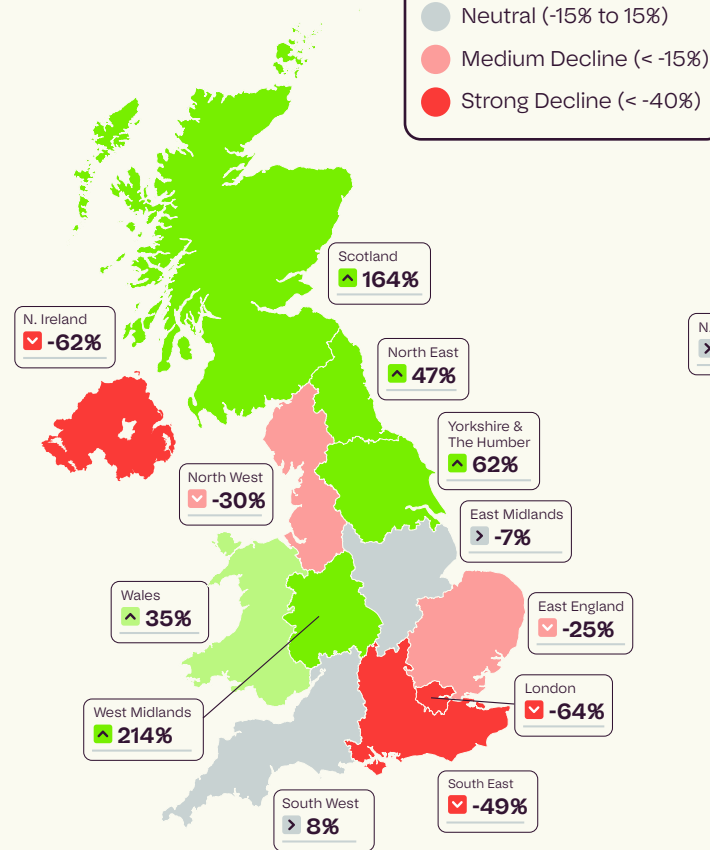
- Mixed regional performance in project starts.
- Detailed planning approvals grew in most regions.
- Strong growth in both starts and approvals in Scotland.

Scotland led project starts at £245 million following strong year-on-year growth. The West Midlands also saw substantial gains, rising to £119 million. In contrast, London fell sharply to £98 million, while the South East also declined, reflecting uneven demand across regions.

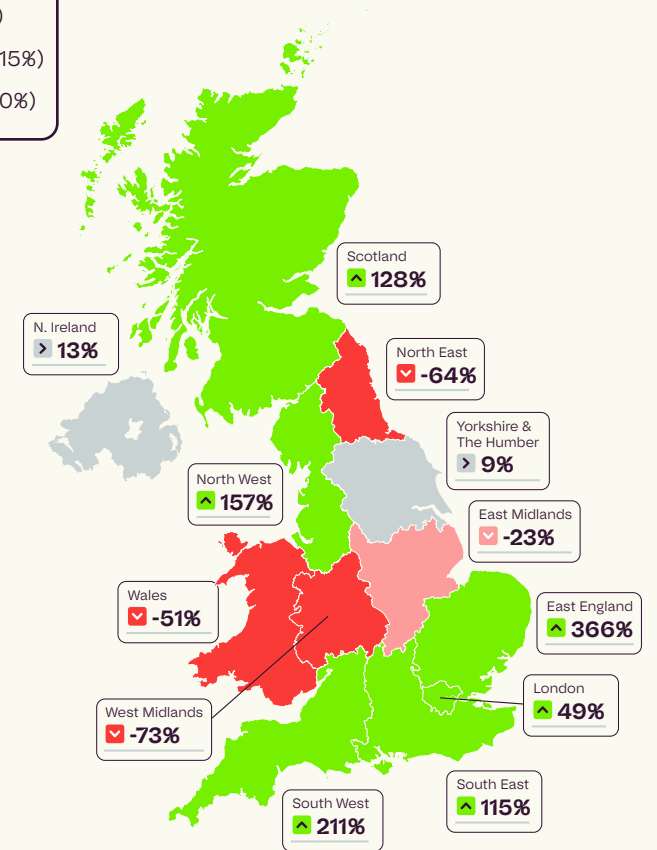


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Changes in Hotel & Leisure Starts
on a Year Earlier



Changes in Hotel & Leisure Planning Approvals
on a Year Earlier



Health

Overview

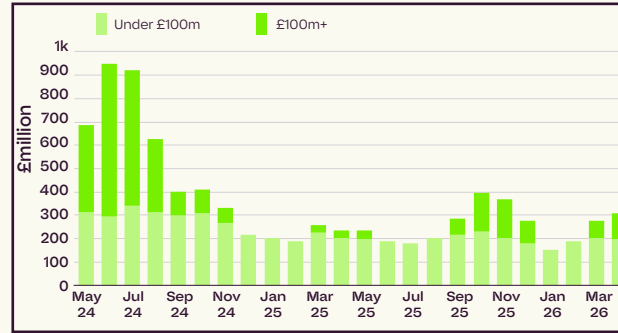
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- ▼ **39% decline** in project starts against the previous year.
- ▲ **1% rise** in main contract awards year-on-year.
- ▲ **32% increase** in detailed planning approvals compared to the previous year.

The sector recorded a weak performance in terms of activity on site, with project starts falling sharply year-on-year. However, modest growth in contract awards alongside a strong rise in planning approvals suggests that demand is improving. This points to a strengthening pipeline that could support a gradual recovery in workloads over the coming quarters.

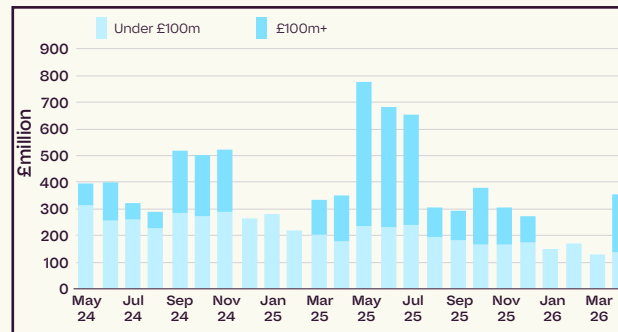
The sector's outlook is further bolstered by a pipeline of major schemes, particularly the New Hospital Programme, alongside planned investment in NHS technology and increased public funding commitments announced in the Budget. Collectively, these measures are expected to support a gradual uplift in healthcare construction activity over the coming period, even though current levels of on-site delivery remain relatively subdued.

Detailed Planning Approvals



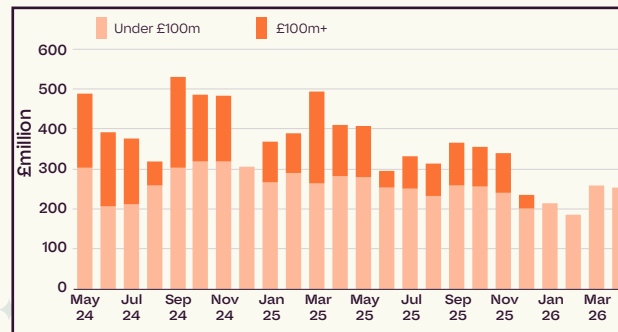
Source: Glenigan

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	590	340	930
YoY	-3%	240%	32%
Prev. 3 months	29%		103%
Prev. 3 months (SA)	41%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	411	650	1,061
YoY	-24%	28%	1%
Prev. 3 months	-8%		136%
Prev. 3 months (SA)	-3%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	757	-	757
YoY	-10%	-100%	-39%
Prev. 3 months	18%		18%
Prev. 3 months (SA)	12%		

Health

Types of projects started

- Hospitals accounted for over half of total starts despite a marked year-on-year decline.
- Dental and primary care facilities recorded strong growth, accounting for a 35% share of the total value.

Types of Health Projects Started

Three months to April 2026

	£ million	Percentage
Day Centres	-	0%
Dental, Health & Veterinary Centres/ Surgeries	267	35%
Hospitals	383	51%
Nursing Homes & Hospices	31	4%
Other Health	77	10%
Total	757	100%

Project Spotlight

Whitechapel Life Sciences Cluster

Detailed plans have been approved for the Whitechapel Life Sciences Cluster development in London. A main contractor is yet to be appointed on the £100 million scheme, with works expected to be completed in Q2 2029.

PROJECT ID: 15411493

IMAGE SOURCE: ALLFORD HALL MONAGHAN MORRIS

£100m



Health League Tables

May 2025 to April 2026

Contractors	Projects	£m
John Sisk & Son	1	250
Mace Group	1	201
MTX Contracts	4	163
Morgan Sindall	9	131
Bowmer & Kirkland	1	115
Walter Lilly & Co	1	100
Kori Construction	5	76
W W Martin (Thanet)	2	72
Amdell Building Serv.	1	67
Bauvill Construction	1	67

Clients	Projects	£m
Dep.of Health	164	992
Nat. History Museum	1	201
Evelina Child. Hosp.	1	125
Cheltenham BC.	1	115
Kadans Science	1	100
Syngenta	1	100
Ashfield DC.	1	44
Elysian Residences	1	43
Wellcome Trust	1	42
Welsh Government	8	35

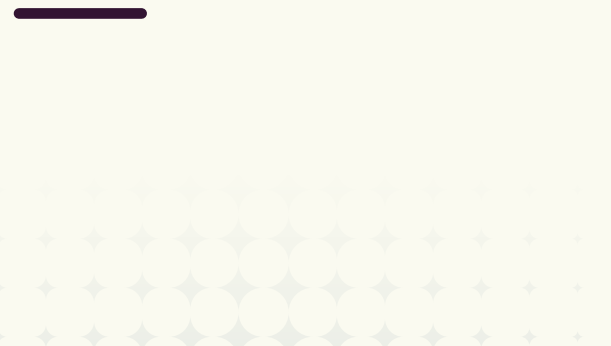
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Regional

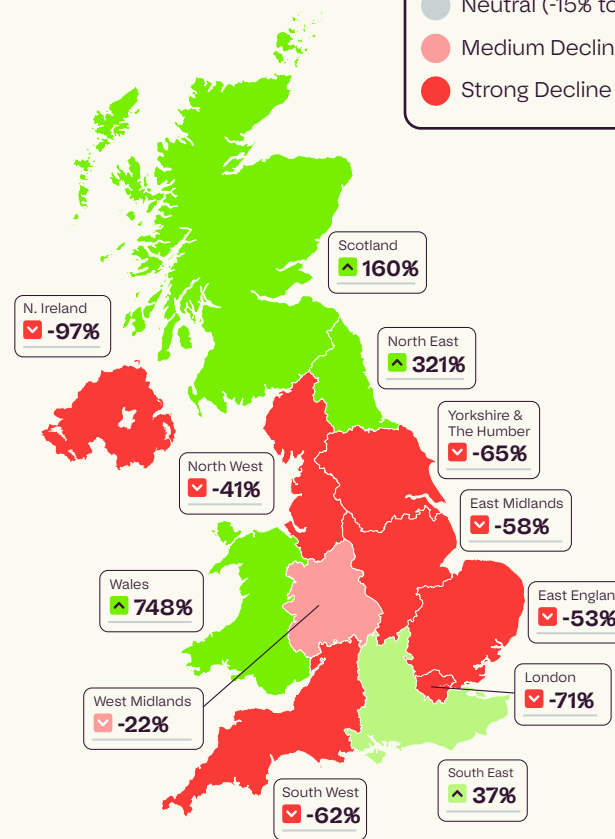
- Wales and the South East recorded the highest levels of activity for project starts.
- The North East and Scotland both delivered strong year-on-year growth for project starts.
- London and the South East recorded the highest levels of activity for approvals.

Regional performance was uneven, with a small number of areas accounting for a significant share of activity. Wales emerged as a key growth market, rising 748% against the previous year, while the South East maintained its position as a major contributor to total workload.

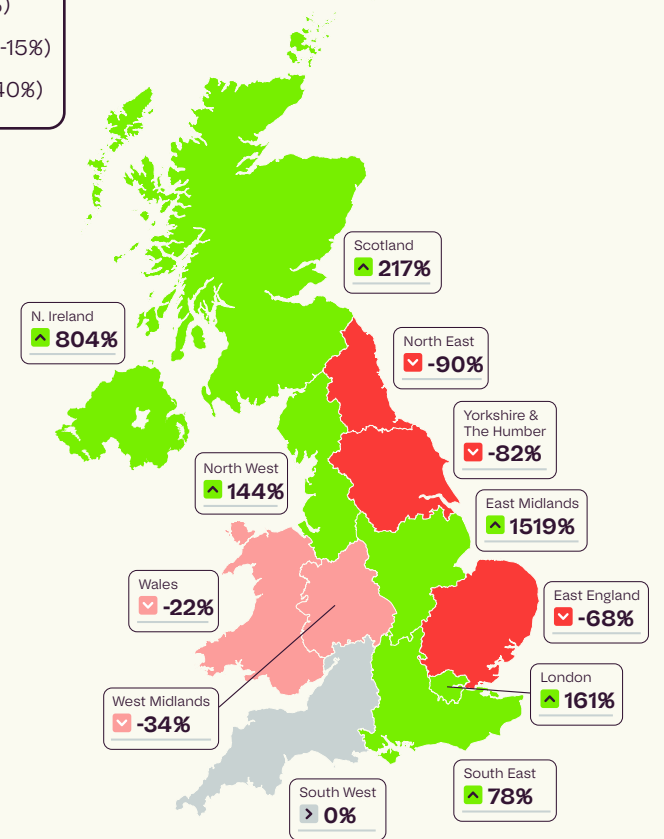
The South East was the most active region for approvals, accounting for a 28% share to total £258 million. London accounted for the second largest share of sector approvals, rising 161% against the previous year to total £176 million.



Changes in Health Starts
on a Year Earlier



Changes in Health Planning Approvals
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Education

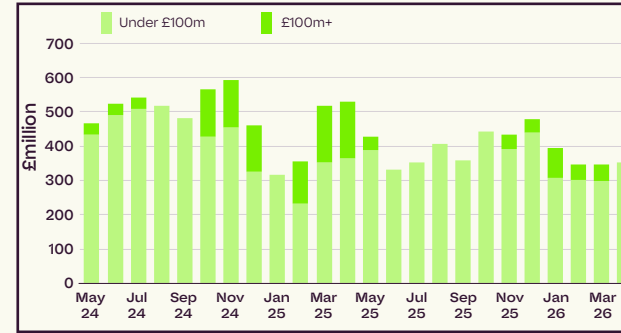
Overview

- ▼ **2% decline** in project starts against the previous year.
- ▼ **1% fall** in main contract awards year-on-year.
- ▼ **34% decrease** in detailed planning approvals compared to the previous year.

Education sector activity was broadly stable in terms of starts and awards, but a sharp fall in planning approvals points to a weakening near-term pipeline.

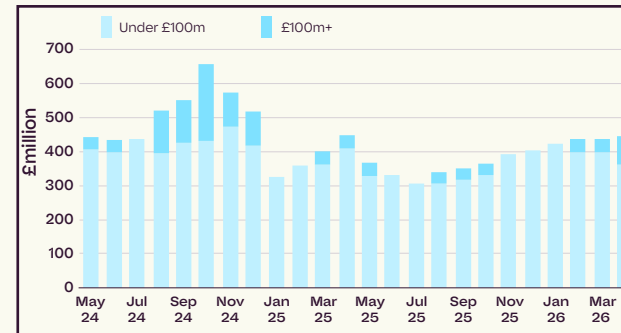
Looking ahead, the sector's prospects remain favourable. Ongoing policy commitments to upgrading the existing school estate, together with major initiatives such as the Schools Rebuilding Programme, are set to provide support to activity levels and sustain workload growth across the education sector in the future.

Detailed Planning Approvals



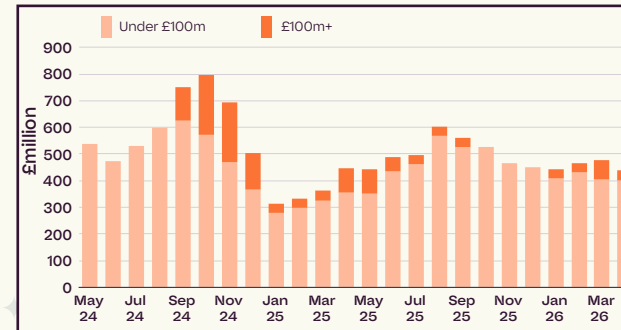
Source: Glenigan

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	1,055	-	1,055
YoY	-4%	-100%	-34%
Prev. 3 months	14%	-100%	-11%
Prev. 3 months (SA)	9%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	1,088	245	1,333
YoY	-11%	104%	-1%
Prev. 3 months	-14%		5%
Prev. 3 months (SA)	-20%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,198	120	1,318
YoY	12%	-55%	-2%
Prev. 3 months	-2%	20%	0%
Prev. 3 months (SA)	-10%		

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Education

Types of projects started

- Schools dominated activity, accounting for three-quarters of total project starts.
- College projects recorded strong growth from a relatively smaller base.
- University-led development declined significantly, reducing its overall share.

Types of Education Projects Started

Three months to April 2026

	£ million	Percentage
Colleges	194	15%
Other Education	16	1%
Schools	994	75%
Universities	114	9%
Total	1,318	100%

Project Spotlight

Mount St Mary's Catholic High School Extension

Plans have been approved for the Mount St Mary's Catholic High School extension. BAM Construction has been appointed as the main contractor on the £32 million scheme.

PROJECT ID: 21338351

IMAGE SOURCE: ADP

£32m



Education League Tables

May 2025 to April 2026

Contractors	Projects	£m
Willmott Dixon	20	320
Morgan Sindall	26	301
Royal BAM Group	7	255
Bowmer & Kirkland	10	200
Graham Cons.	4	161
Kier	6	137
Robertson Group	6	137
Galliford Try	11	136
Tilbury Douglas	10	116
McLaren Cons.	1	100

Clients	Projects	£m
Dep. for Education	46	665
Aberdeen City C.	3	127
University of London	4	107
Univ. of Portsmouth	3	101
Midlothian Council	2	48
Educ. Authority NI.	10	46
College of NW London	1	46
United Colleges Grp.	1	46
Univ. of East London	1	45
South Ayrshire Coun.	6	43

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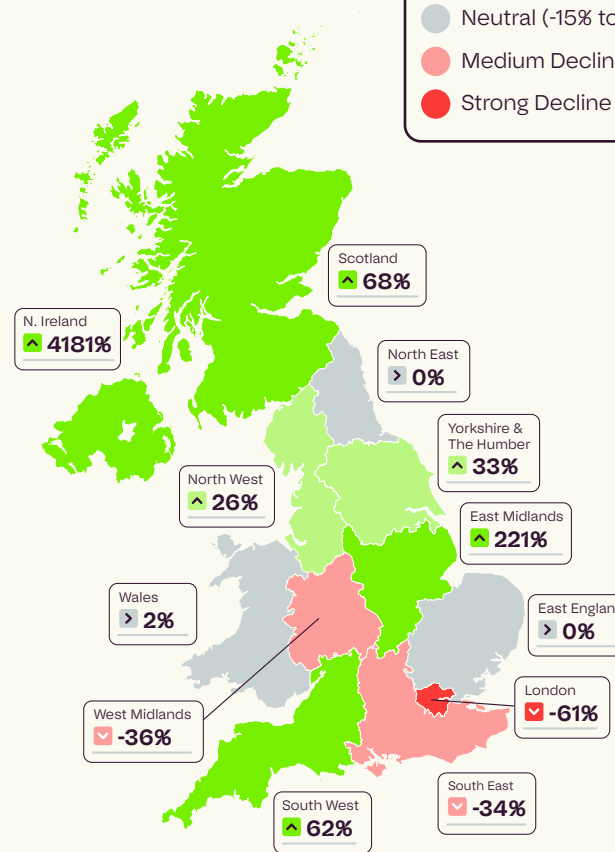
- Scotland was the most active area for project starts.
- The East Midlands recorded strong growth from a lower base.
- The East Midlands accounted for the largest share of approvals.

Scotland, at £206 million, accounted for the largest share of sector starts, experiencing a 68% rise against the previous year, accounting for 16% of the total value. The East Midlands also experienced a strong period, with the value of project-starts rising 221% against the previous year to account for one-tenth of the total value.

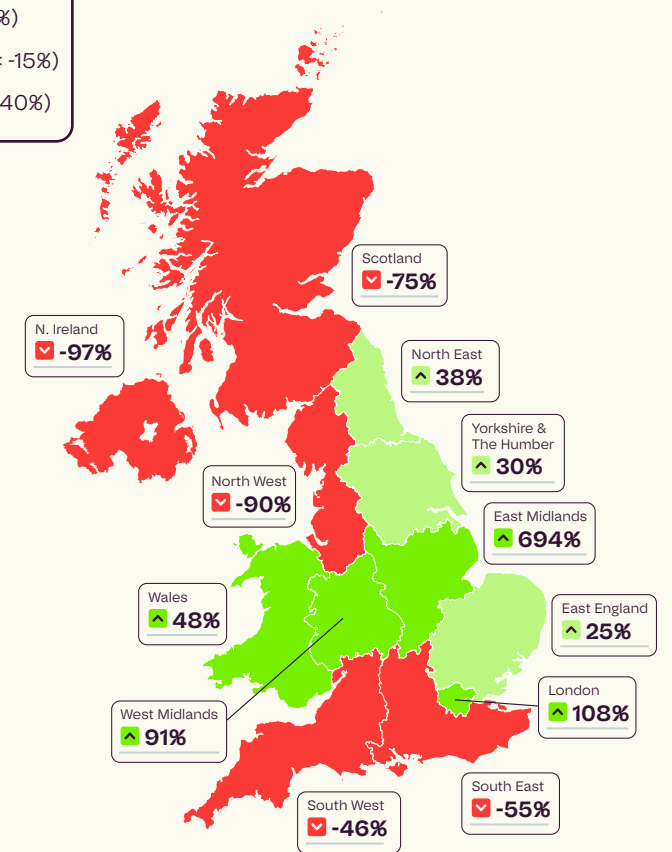
The East Midlands also experienced sharp growth for project approvals, with the region experiencing a 694% rise, bucking the national trend to account for 18% of the total value. London, at £146 million, also experienced triple-digit growth, more than doubling (+108%) against the previous year to account for 14% of the total value.



Changes in Education Starts
on a Year Earlier



Changes in Education Planning Approvals
on a Year Earlier



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Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Community & Amenity

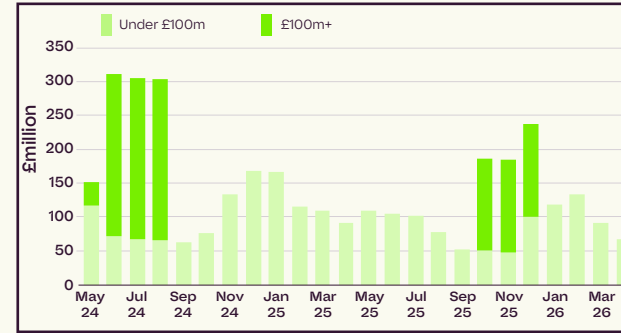
Overview

- ▼ **60% decrease** in project starts year-on-year.
- ▼ **83% decrease** in main contract awards from last year.
- ▼ **26% decrease** in detailed planning approvals compared to 2025.

The community & amenity sector experienced a significant downturn, with sharp declines across project starts, awards, and approvals. Quarter-on-quarter performance also remained weak, highlighting continued softness in activity. There was a decline in both underlying and major schemes across the board, with no projects over £100 million awarded or approved during the period.

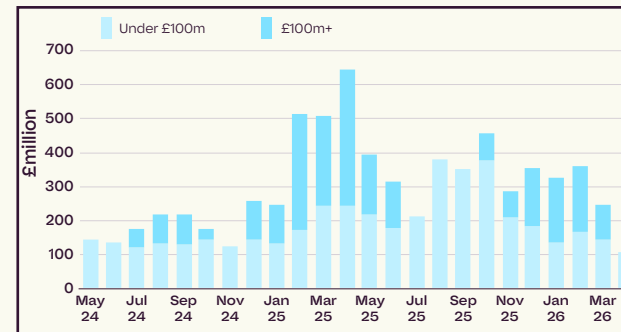
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Detailed Planning Approvals



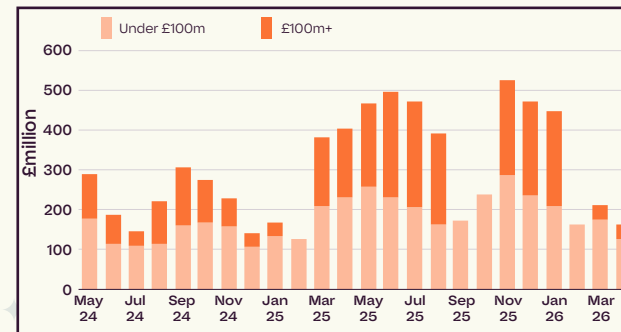
Source: Glenigan

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	204	-	204
YoY	-26%		-26%
Prev. 3 months	-43%		-43%
Prev. 3 months (SA)	-28%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	321	-	321
YoY	-56%	-100%	-83%
Prev. 3 months	-20%	-100%	-67%
Prev. 3 months (SA)	-36%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	380	108	489
YoY	-45%	-79%	-60%
Prev. 3 months	-39%	-85%	-63%
Prev. 3 months (SA)	-39%		

Community & Amenity

Types of projects started

In line with the overall weakness, activity was subdued in most sub-sectors.

- Prisons accounted for the largest share (23%), despite falling 82% year-on-year to total £114 million.
- Local facilities declined 48% year-on-year to total £105 million.
- Government buildings fell 45% against the previous year, totalling £96 million.

Types of Community & Amenity Projects Started

Three months to April 2026

	£ million	Percentage
Blue Light	91	19%
Government Buildings	96	20%
Law Courts	-	0%
Local Facilities	105	22%
Military	-	0%
Places of Worship	82	17%
Prisons	114	23%
Total	489	100%

Project Spotlight

Revitalised Cleator Moor Square

Detailed plans have been approved for the Revitalised Cleator Moor Square development. A main contractor is yet to be appointed on the £5.6 million development, with works due to be completed in Q3 2027.

PROJECT ID: 09339074

IMAGE SOURCE: OPTIMISED ENVIRONMENTS

£5.6m



Community & Amenity League Tables

May 2025 to April 2026

Contractors	Projects	£m
Bowmer & Kirkland	5	237
Willmott Dixon	8	131
Morgan Sindall	8	86
Galliford Try	5	69
Kier Group	5	55
Lawtech Group	1	20
Corrigenda	2	20
VINCI Construction	2	18
Thomas Sinden	1	17
Natta Building Co.	1	16

Clients	Projects	£m
Ministry of Justice	16	344
Home Office	31	70
Liverpool City Region	2	65
UK Parliament	1	50
The Church Of JCoLS	1	48
HM Rev. & Customs	1	46
Reuben Brothers	1	46
Min. of Housing	9	43
Ministry of Defence	11	39
Westworks Procure.	1	39

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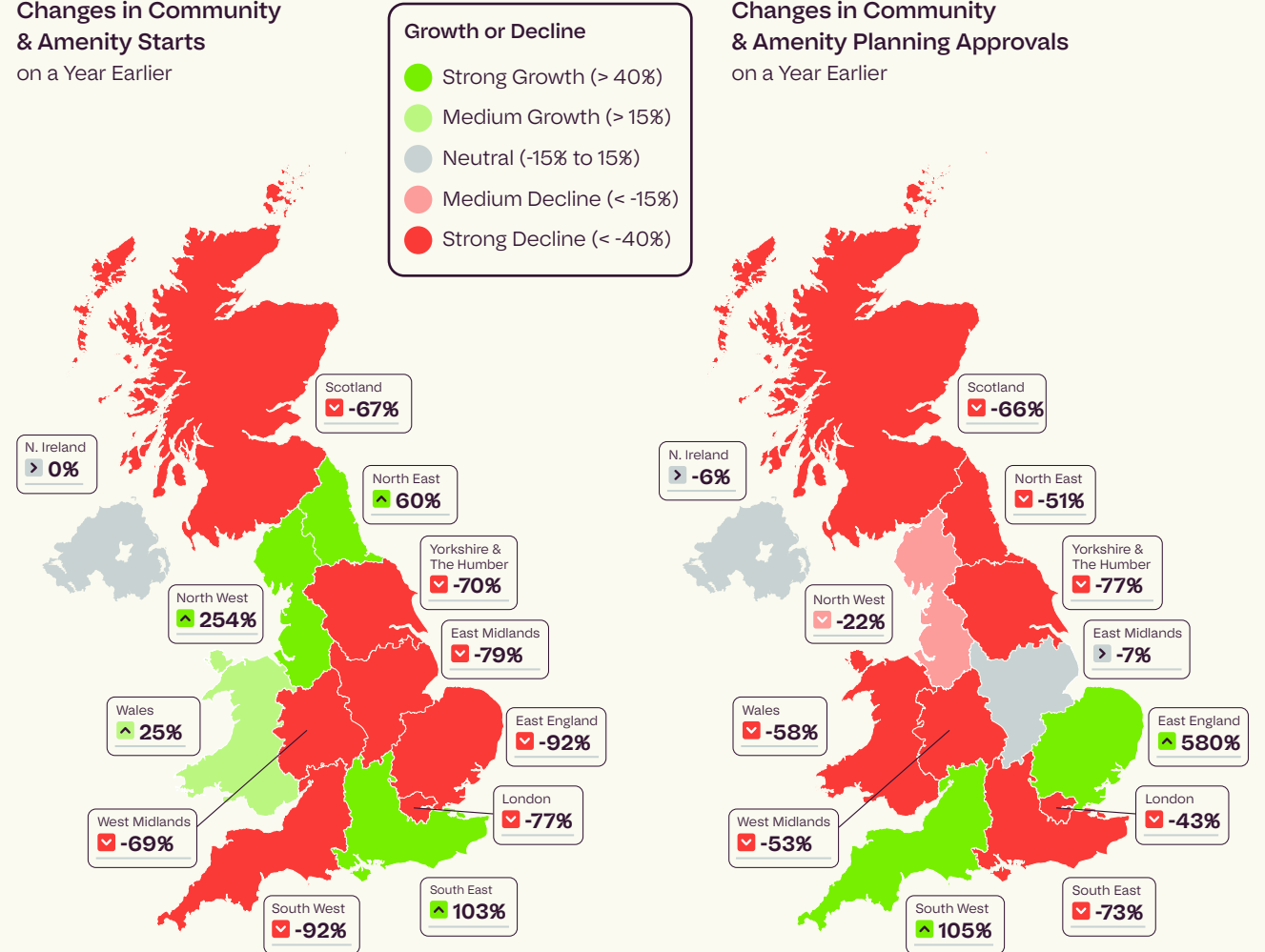
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- Most regions experienced sharp declines in project starts and detailed planning approvals.
- Project starts had strong growth in the North East, the North West and the South East.
- Strong growth in approvals in the East of England and the South West.

The North West dominated activity, rising sharply to £202 million. The South East also recorded strong growth, reaching £59 million. However, most other regions, including London, the South West and the East of England, saw significant declines, reflecting reduced investment across the sector.

Changes in Community & Amenity Starts on a Year Earlier



Civil Engineering Overview

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📌 **72% decline** in project starts against the previous year.

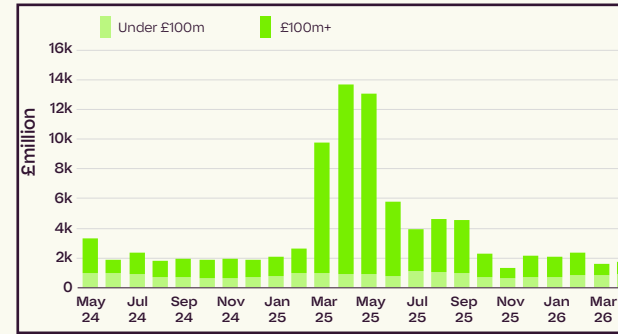
➔ **0% change** in main contract awards year-on-year.

📌 **87% fall** in detailed planning approvals compared to the previous year.

Civil engineering activity weakened significantly, with sharp declines in both project starts and planning approvals. While contract awards remained broadly stable, the overall trend points to a slowdown in project initiation and pipeline development. This suggests weaker short-term output, despite some resilience in contract commitments.

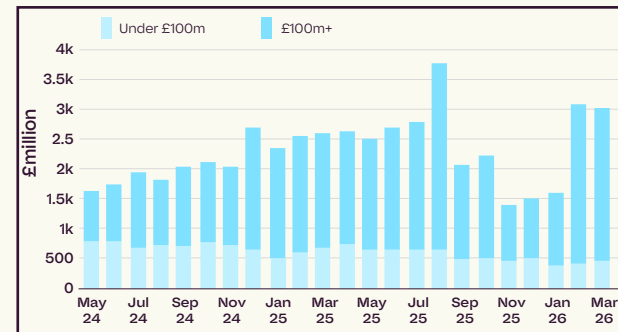
The wider outlook for the sector remains underpinned by several supportive factors. The latest Spending Review is expected to drive increased investment in road and rail infrastructure from 2026/27, helping to establish a stronger base for future workloads. In addition, activity in the utilities segment is likely to pick up in the near term, supported by rising expenditure on power generation and grid upgrades linked to the UK's net zero targets, alongside expanding capital investment programmes within the water industry.

Detailed Planning Approvals



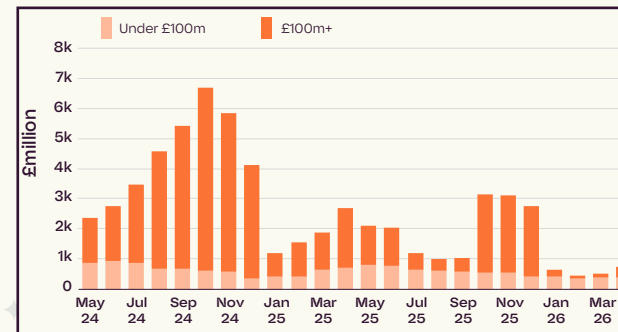
Source: Glenigan

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	2,692	2,638	5,329
YoY	-4%	-93%	-87%
Prev. 3 months	28%	-36%	-15%
Prev. 3 months (SA)	11%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	1,587	6,301	7,888
YoY	-29%	11%	0%
Prev. 3 months	36%	73%	64%
Prev. 3 months (SA)	10%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,182	1,119	2,301
YoY	-47%	-81%	-72%
Prev. 3 months	-9%	72%	18%
Prev. 3 months (SA)	-42%		

Civil Engineering

Types of projects started

- Roads projects accounted for the largest share of activity despite a substantial decline.
- Harbour/Ports work also declined, contributing to overall weakness.
- Water-related projects provided relative stability compared with other subsectors.

Types of Civil Engineering Projects Started

Three months to April 2026

	£ million	Percentage
Airports	48	2%
Other Civils	529	23%
Rail	7	0%
Roads	1,233	54%
Harbours/Ports	172	7%
Energy	122	5%
Water Industry	183	8%
Waste	7	0%
Total	2,301	100%

Project Spotlight

Blyth Relief Road

Detailed plans have been approved for the £47 million Blyth Relief Road development. A main contractor is yet to be appointed on the scheme, with works expected to complete in Q4 2027.

PROJECT ID: 22151852

IMAGE SOURCE: NORTHUMBERLAND COUNCIL

£47m



Civil Engineering League Tables

May 2025 to April 2026

Contractors	Projects	£m
Jones Bros	2	532
ACCIONA	1	400
Marlborough Surf.	3	365
M GROUP Services	5	341
Cascade Infrast.	1	332
STRABAG	1	332
Equitix	1	332
Galliford Try	80	324
Tusker Construction	1	300
Balfour Beatty	7	238

Clients	Projects	£m
United Utilities	5	1,014
Kemble Water	19	505
Com. Wind Power	1	500
Manby BGE	1	300
Tribus Clean Energy	1	250
Hertfordshire CC.	3	246
Herefordshire Coun.	3	210
Heidelberg Materials	1	203
Southend On Sea BC.	1	200
Immersa	1	200

Civil Engineering

Regional

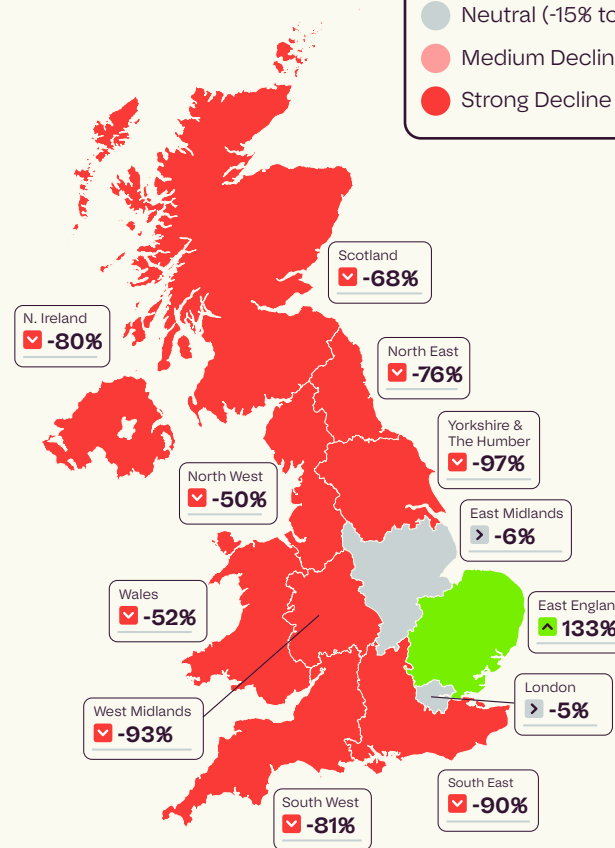
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- The East of England was the dominant region for project-start activity.
- London and the East Midlands experienced moderate declines for project-starts.
- The East Midlands accounted for the largest share of sector approvals.

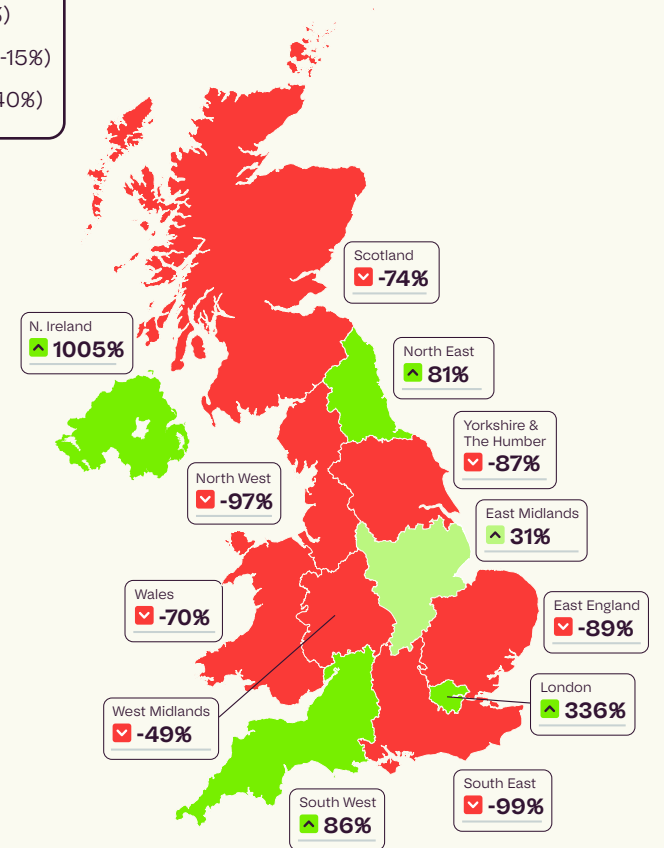
The East of England accounted for the largest share of sector starts, rising 133% against the previous year to account for 35% of the total value. Work in the region totalled £802 million during the period. The East Midlands (-6%) and London (-5%) experienced moderate declines compared to the previous year.

The East Midlands accounted for the largest share of sector approvals, with the region accounting for 31% of the total value. Approvals in the region rose 31% against the previous year to total £1,638 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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