Construction Review

Reflecting activity to the end of September 2025

October 2025

- **21% decrease in detailed planning approvals** against the preceding three months
- **2% decrease in main contract awards** against the preceding three months
- **15% decrease in project starts** against the preceding three months

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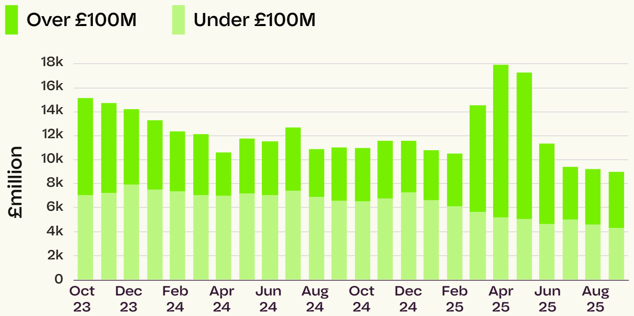
Executive Summary

- **18% decline** in detailed planning approvals against the previous year
- **32% decrease** in main contract awards against the previous year
- **40% decrease** in project starts against the previous year

The latest figures indicate a notable slowdown in construction, with project starts, main contract awards, and detailed planning approvals all declining compared with both the preceding three months and the same period last year.

The UK construction sector struggled in the three months to September, with weaker performance in underlying projects (under £100 million) and major projects (£100 million or more) driving the overall decline. Low business confidence, which has fallen to a record low, is suppressing activity, while concerns over rising costs are further slowing construction ahead of the autumn budget.

Detailed Planning Approvals

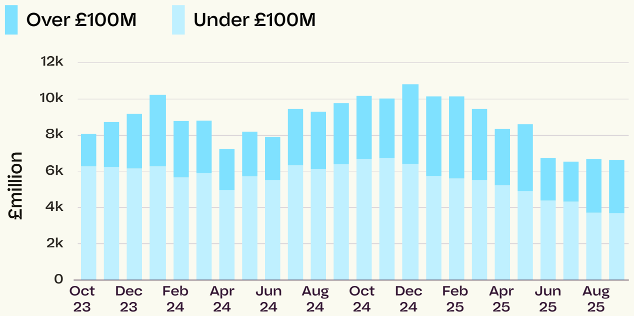


Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£million	12,847	14,167	**27,014**
YoY	-35%	6%	**-18%**
Prev. 3 months	-8%	-30%	**-21%**
Prev. 3 months (SA)	-5%		

Source: Glenigan. Three month average

Main Contract Awards

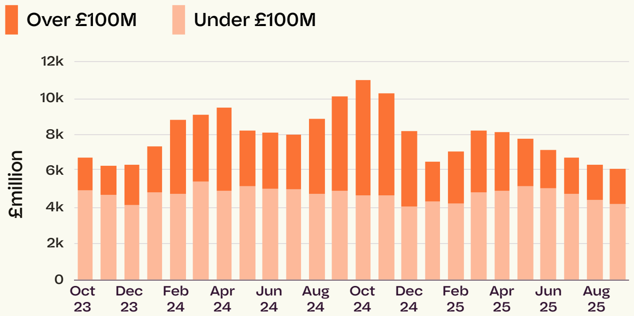


Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	11,094	8,807	**19,902**
YoY	-42%	-13%	**-32%**
Prev. 3 months	-16%	24%	**-2%**
Prev. 3 months (SA)	-16%		

Source: Glenigan. Three month average

Starts



Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	14,639	6,867	**21,505**
YoY	-15%	-63%	**-40%**
Prev. 3 months	-17%	-8%	**-15%**
Prev. 3 months (SA)	-16%		

Source: Glenigan. Three month average

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Economic Outlook

Consumer spending underpins UK economic growth

- Consumer discretionary spending rises as confidence improves
- Service sector supports UK growth
- Weak export markets curb manufacturing output

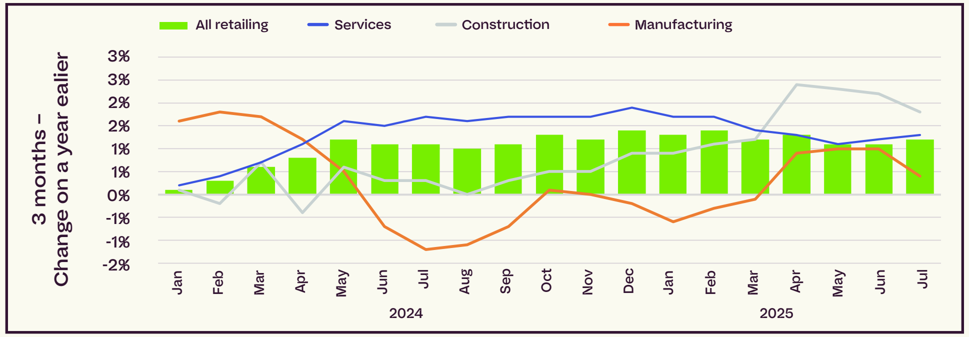
Higher consumer spending helped sustain UK economic growth in the second quarter. Household spending was 1.1% up on a year earlier, driven by stronger discretionary spending such as eating out and cultural activities. UK tourist expenditure abroad was also 6% up on a year earlier. Signs of improving consumer confidence.

Overall, the economy grew by 0.2% in the three months to July and was 1.2% higher than a year ago. Services were the main engine for growth, in part driven by increased consumer spending. In contrast manufacturing output declined by 1.1% against the previous three months, reflecting the disruption to overseas trade.

Industry surveys by CIPS point to continued weakness in manufacturing activity during August and September. In contrast service sector activity has grown, albeit more modestly.

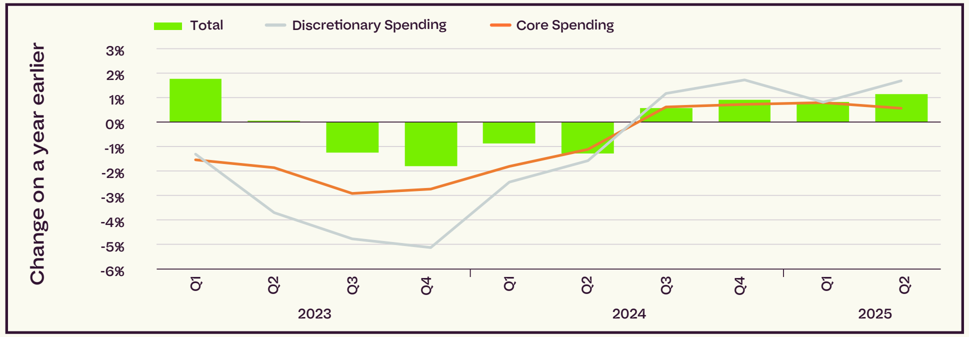
Consumers' financial position has been improving with average earnings rising faster than prices. However, although the latest data shows that earnings continue to outpace inflation, the gap is narrowing. Overall average earnings increased by 4.7% over the year to July. This compares to inflation of 3.8% over the same period. Whilst public sector wage growth is still firm, private sector pay increases are moderating especially in manufacturing. This may temper consumer confidence and spending over the coming months.

UK Economic Growth



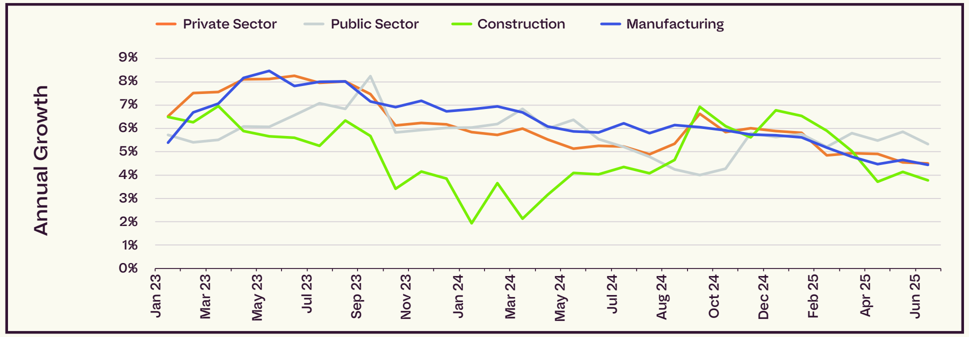
Source: ONS

Consumer Spending



Source: ONS, Glenigan analysis

Average Earnings



Source: ONS

Top 50 Contractors

Last 12 month totals:	994 projects / £41,322m
Last month totals:	**103 projects / £2,617m**

October 2024 to September 2025

	Contractors	#	£m	★
1	STRABAG	6	2938	0
2	Mace	13	2435	1
3	Kier	88	2332	-1
4	Morgan Sindall	227	2202	2
5	Royal BAM	33	2101	0
6	Sir Robert McAlpine	5	1794	3
7	Ferrovial	2	1615	1
8	Bowmer & Kirkland	28	1490	2
9	Graham Construction	27	1309	2
10	Laing O'Rourke	8	1270	-6
11	Ringway Group	3	1159	1
12	Balfour Beatty	33	1131	-5
13	Willmott Dixon	49	966	9
14	Bouygues	26	955	-1
15	M Group Services	13	926	-1
16	McLaren	18	887	0
17	Wates	41	886	1
18	Costain	4	859	1
19	Winvic	19	850	-4
20	Mears Group	5	800	0
21	TSL Projects	7	766	3
22	John Sisk & Son	7	714	8
23	Multiplex	2	700	3
24	Bovis	3	650	-7
25	Galliford Try	110	629	-2

	Contractors	#	£m	★
26	JRL Group	3	604	-1
27	McAleer & Rushe Contracts	10	582	0
28	Jones Bros	3	548	NEW
29	Fidra Energy	1	500	NEW
30	VINCI	35	470	3
31	Kanadevia Inova UK	2	450	-2
32	McLaughlin & Harvey	11	426	-11
33	Tilbury Douglas	37	421	-5
34	G W Highways	1	400	-3
35	ACCIONA	1	400	-3
36	Caddick Group	12	398	-2
37	Hill Group	14	367	NEW
38	Siemens	5	352	-3
39	Enka	1	350	-3
40	SDC Holdings	7	321	NEW
41	Bovis Construction	2	298	NEW
42	Gilbert Ash	7	287	-5
43	Marlborough Surfacing	2	285	NEW
44	Cfield Construction	4	225	-1
45	Zenobe Energy	1	220	-5
46	G2 Design	1	216	-4
47	HG Construction	6	216	-6
48	Clark Contracts	37	216	-4
49	J W Muir Group	9	207	NEW
50	Marshall Holdings	5	200	-4

September 2025

	Contractors	#	£m	★
1	John Sisk & Son	1	300	NEW
2	Morgan Sindall	17	245	5
3	Sir Robert McAlpine	1	225	NEW
4	Kier	6	155	NEW
5	Graham Construction	3	124	NEW
6	Marlborough Surfacing	1	115	NEW
7	Willmott Dixon	4	104	3
8	Hill Group	3	92	NEW
9	Royal BAM	5	86	36
10	Bowmer & Kirkland	2	66	-7
11	Winvic	2	61	5
12	Bovis Construction	1	60	NEW
13	Tilbury Douglas	5	58	-1
14	C.Wynne & Sons	3	58	NEW
15	Clegg Group	1	50	NEW
16	Clarke Energy UK	1	50	NEW
17	A & H Cons. & Development	1	49	NEW
18	Pentaco Construction	2	43	25
19	RE: GEN Group	1	42	NEW
20	VINCI	4	41	NEW
21	STRABAG	1	38	-20
22	McLaughlin & Harvey	1	38	-14
23	Clegg Construction	1	38	NEW
24	Galliford Try	3	36	7
25	Andrew Scott	4	31	NEW

	Contractors	#	£m	★
26	Stepnell	3	24	NEW
27	TNV Construction	1	22	NEW
28	Laing O'Rourke	1	20	-6
29	Linear Projects	2	19	NEW
30	Esh Group	1	19	0
31	McAleer & Rushe	1	18	-13
32	Hetherington Painting	1	18	NEW
33	Wates	2	16	NEW
34	Low Energy Exchange	1	16	NEW
35	Nevada Construction	1	16	NEW
36	DMS	1	15	NEW
37	Millane Contract Services	1	15	NEW
38	MD Building Services	1	15	NEW
39	ReGen UK	1	15	NEW
40	P J Lilley	1	15	NEW
41	1 Call Property	1	15	NEW
42	Gilmartins	1	15	-3
43	TCL Group (London)	1	15	NEW
44	Cornel Building Services	1	15	NEW
45	Charter Property Repairs	1	15	NEW
46	Westcountry Maintenance	1	15	NEW
47	R Dunham	1	15	NEW
48	Quality Assured Property	1	15	NEW
49	Carson Powell Construction	1	15	NEW
50	Wirral Roofcare	1	15	NEW

★ Change in ranking since the previous period

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Top 50 Clients

October 2024 to September 2025

	Clients	#	£m	★
1	Department for Transport	49	4611	0
2	United Utilities Group	5	2900	0
3	Tata Steel Group	4	1266	1
4	Hertfordshire County Council	4	1164	1
5	Department of Health	155	1145	-2
6	Oxfordshire County Council	8	998	1
7	Dep. for Env., Food & Rural	6	943	1
8	Ministry of Defence	40	773	1
9	Ministry of Justice	32	723	4
10	SSE	7	706	NEW
11	The British Library	1	700	0
12	Scottish Prison Service	3	685	0
13	British Land	5	678	1
14	Department for Education	65	596	1
15	Tritax Group	5	507	1
16	Kingsway Solar Farm	1	500	1
17	Community Wind Power	1	500	NEW
18	Milton Keynes BC	3	487	1
19	The City of Cardiff Council	12	483	22
20	Kent County Council	9	482	0
21	Therme Group UK	1	450	NEW
22	Kemble Water	4	420	-1
23	MEC London Property 3	1	400	8
24	Co-re	1	400	8
25	National Grid	7	363	-15
26	Dover District Council	2	360	-3
27	Clarion Housing Group	8	323	20
28	University of London	12	320	-4
29	University of Glasgow	2	301	-4
30	MVV Environ. Devonport	1	300	-4
31	Mitsubishi Estate London	1	300	-4
32	Marriott International	1	300	-4
33	Lidl UK	46	286	-3
34	North Lanarkshire Council	14	275	-5
35	Gov.t Property Agency	3	260	NEW
36	Bruntwood Estates	1	250	NEW
37	Sanctuary Housing	3	229	NEW
38	Frogmore Real Estate	1	225	-3
39	C1 Capital	1	225	-5
40	Elements Green	1	216	-4
41	Greystar Developments	3	216	NEW
42	London Borough of Havering	3	209	-4
43	Anchor Housing	2	205	-10
44	Natural History Museum	2	204	-4
45	JTRE London	1	200	-2
46	Aviva Staff Pensions	1	200	-4
47	Havisham Sarl	1	200	-2
48	Southwark Charities	1	200	-4
49	Construc.and Procurement	6	199	-10
50	Urenco UK	2	196	-4

September 2025

	Clients	#	£m	★
1	Therme Group UK	1	450	NEW
2	Sanctuary Housing	1	224	NEW
3	Gov. Property Agency	1	118	NEW
4	RB of Windsor & Maidenhead	1	115	NEW
5	Henley Camland	1	100	NEW
6	Atlas Ward Structures	1	100	NEW
7	Department for Education	7	92	NEW
8	Peel Holdings Group	1	81	NEW
9	East Renfrewshire Council	3	71	NEW
10	Ministry of Justice	5	68	NEW
11	Rochdale Dev. Agency	1	67	NEW
12	London 1 Unit Trust	1	60	NEW
13	Lockwood 2002	1	58	NEW
14	Field Energy	1	50	NEW
15	Brickland	1	50	NEW
16	W. Midlands Comb. Auth.	1	44	NEW
17	Sandwell Met. BC	1	44	NEW
18	Sheffield City Council	1	42	14
19	Maidstone BC	1	39	NEW
20	Wepa UK	1	38	NEW
21	Dumfries & Galloway Council	1	38	NEW
22	Wellcome Trust	1	37	NEW
23	Gresham's School	1	35	NEW
24	Bristol City Council	3	33	NEW
25	Bridgend County BC	2	32	NEW
26	Prologis UK	1	31	NEW
27	University of Portsmouth	2	31	NEW
28	Clarion Housing Group	1	31	NEW
29	Equites Ukspv 17	1	30	NEW
30	ORE Catapult	1	30	NEW
31	Avon Capital Estates 1	1	29	NEW
32	Edmundsham Dev.	1	24	NEW
33	Blackpool Council	1	24	NEW
34	MOPAC	1	24	NEW
35	Ministry of Defence	3	23	-30
36	The James	1	22	NEW
37	Hill Residential & Silversaw	1	22	NEW
38	Carmarthenshire CC	2	21	NEW
39	South Gloucestershire CC	1	20	NEW
40	Calderdale BC	1	19	NEW
41	Falkirk Community Trust	1	19	NEW
42	Capital & Centric	1	19	NEW
43	Newcastle-Under-Lyme BC	1	19	NEW
44	YASA Motors	1	18	NEW
45	Swansea City Council	1	17	NEW
46	New Anglia Local Enterprise	1	16	NEW
47	Department of Health	7	16	-44
48	Dep. for Education	1	16	NEW
49	Aldi	4	15	NEW
50	Costco Europe (UK)	1	15	NEW

Glenigan Index

Underlying construction starts (under £100 million) experienced a weak period in the three months to September, poor performances in non-residential and residential held back overall growth.

- The value of underlying work starting on-site during the three months to September **declined 16%** and remained 15% below 2024 levels.
- Residential starts **declined 26%** on the preceding three months and declined 24% against 2024 figures.
- Non-residential project-starts **declined 9%** against the preceding three months to stand 5% down on a year ago.
- Civils work starting on-site **increased 4%** against the preceding three months but decreased 13% against the previous year.

Sector Analysis

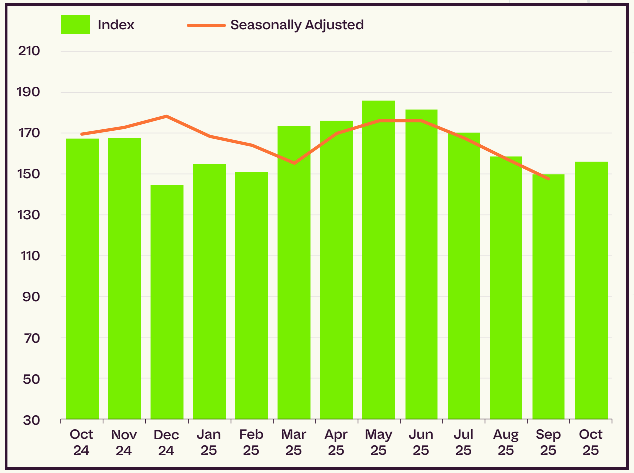
	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
Residential	6,395	-28%	-26%	-24%
Industrial	1,236	-11%	-14%	-11%
Offices	1,458	35%	32%	123%
Retail	317	-26%	-17%	-28%
Hotel & Leisure	923	-3%	-11%	-1%
Education	1,278	-1%	-19%	-32%
Health	643	-1%	-21%	-30%
Community & Amenity	541	-20%	-24%	12%
Civil Engineering	1,848	-23%	4%	-13%
Total	**14,639**	**-17%**	**-16%**	**-15%**

Regional Analysis

	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
East of England	1,772	3%	-5%	6%
East Midlands	973	-24%	-20%	-23%
London	1,870	-21%	-27%	-20%
North East	727	-19%	-32%	54%
North West	1,597	3%	6%	0%
Northern Ireland	422	-4%	2%	-12%
Scotland	1,192	-25%	-21%	-32%
South East	2,062	-21%	-17%	-25%
South West	1,380	-28%	-24%	-23%
Wales	482	-21%	-28%	-42%
West Midlands	1,208	-12%	-13%	5%
Yorkshire & the Humber	953	-31%	-23%	-11%

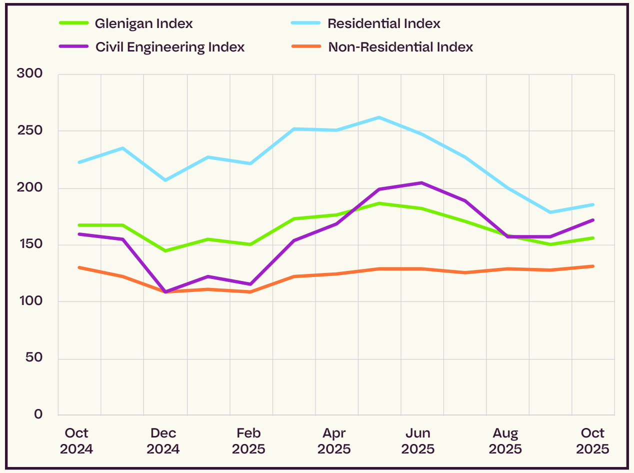
N.B. Index 2006 =100

Glenigan Index



Source: Glenigan

Indices Growth



Source: Glenigan

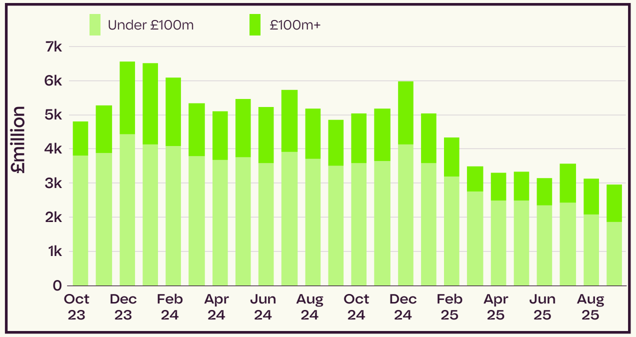
Housing

Overview

- **7% decrease** in project starts year-on-year.
- **47% decrease** in main contract awards from last year.
- **39% decrease** in detailed planning approvals compared to 2024.

Residential project-starts, contract awards and detailed planning approvals all experienced a decline against both last year and the preceding quarter during the three months to September. Private Housing experienced a particularly poor period; however, the pipeline also weakened in the Social Housing sector. More positively, there was strong growth in major project starts (£100 million or more) compared to last year and the previous quarter.

Detailed Planning Approvals

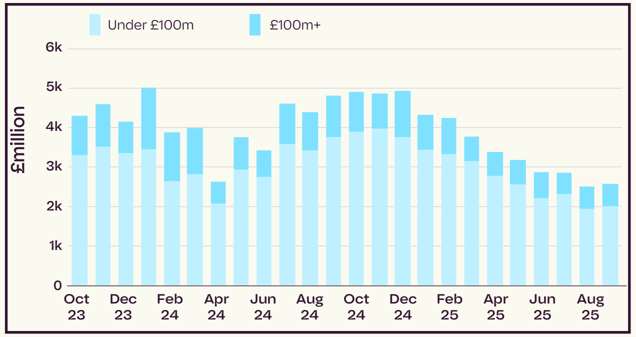


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	5,565	3,294	**8,860**
YoY	-47%	-18%	**-39%**
Prev. 3 months	-21%	36%	**-6%**
Prev. 3 months (SA)	-16%		

Main Contract Awards

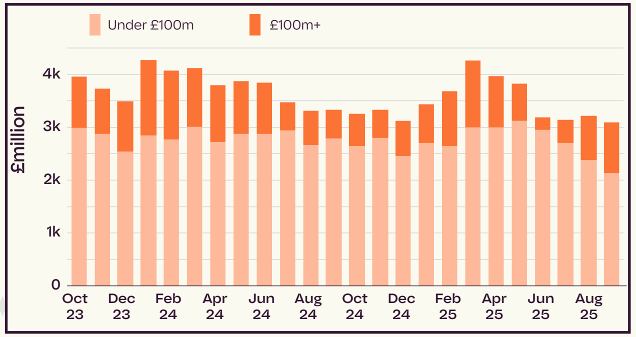


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	6,019	1,694	**7,712**
YoY	-47%	-46%	**-47%**
Prev. 3 months	-9%	-14%	**-11%**
Prev. 3 months (SA)	-13%		

Housing Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	6,395	2,894	**9,289**
YoY	-24%	77%	**-7%**
Prev. 3 months	-28%	313%	**-3%**
Prev. 3 months (SA)	-26%		

Housing

Types of projects started

Sub-sector performance was mixed, with half of the categories down compared to a year ago.

- Private housing accounted for the largest share (48%), having decreased 12% year-on-year to total £4,431 million.
- Private apartments fell 13% against the previous year, totalling £1,700 million.
- Totalling £1,484 million, social sector housing starting on site grew 12% on a year ago.

Project Spotlight

Brighton Gasworks Development

£280m

Detailed plans have been approved on the £280 million Brighton Gasworks mixed-use development. Berkeley Group has been appointed as the main contractor on the scheme, with works due to be completed in Q1 2028.

PROJECT ID: 19384031

IMAGE SOURCE: EPR ARCHITECTS

Types of Housing Projects Started

Three months to September 2025

	£ million	Percentage
Private Apartments	1,700	**18%**
Elderly Persons Homes	1	**0%**
Private Housing	4,431	**48%**
Private Sheltered Housing	74	**1%**
Social Sector Sheltered Housing	92	**1%**
Social Sector Apartments	796	**9%**
Social Sector Housing	1,484	**16%**
Homes, Hostels Etc.	1	**0%**
Student Accommodation	712	**8%**
Total	9,289	**100%**

Housing League Tables

October 2024 to September 2025

Contractors	Projects	£m
Barratt Redrow	67	2,093
Persimmon	78	1,831
Hill	25	1,515
Bloor Homes	35	1,449
Taylor Wimpey	44	1,208
Bellway	42	1,044
Vistry	27	1,032
Mears	7	840
Bouygues UK	17	779
McAleer & Rushe	6	485

Clients	Projects	£m
Barratt Redrow	85	2,252
Persimmon Plc	97	2,033
Taylor Wimpey	63	1,752
Vistry	69	1,524
Bloor Homes	36	1,318
Bellway	45	1,042
Milton Keynes BC.	4	730
Hill	12	643
Berkeley DeVeer	21	457
Apollo Manag. Inter.	29	432

Housing

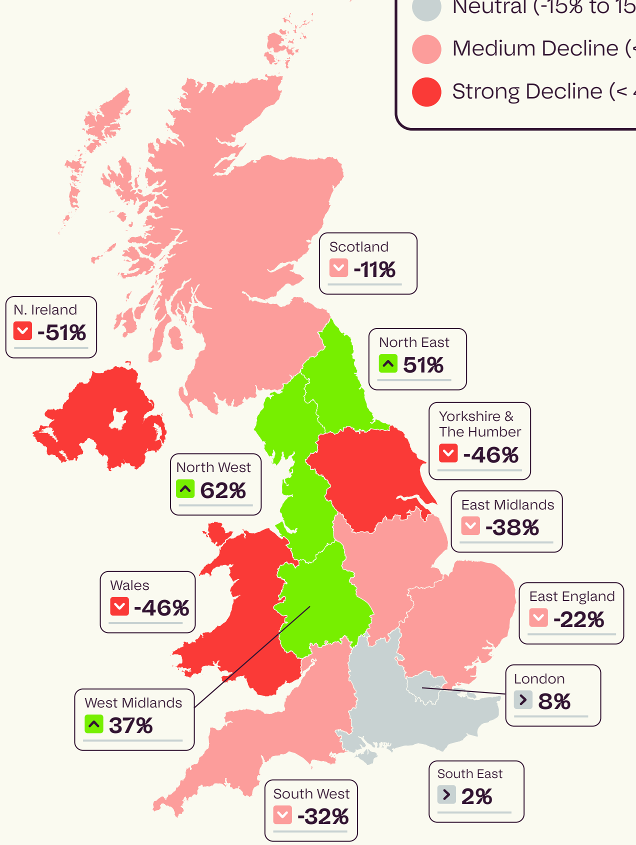
Regional

- Most regions experienced a decline in project starts.
- Regional performance was especially weak for detailed planning approvals, with only three regions up year-on-year.
- The North East experienced strong growth in both project starts and approvals.

London led residential project starts, thanks to an 8% increase to total £1,826 million. The South East also climbed 2% to total £1,807 million. The North West jumped 62% to total £1,148 million. Scotland, on the other hand, performed poorly, having decreased 11% on a year ago to total £910 million.

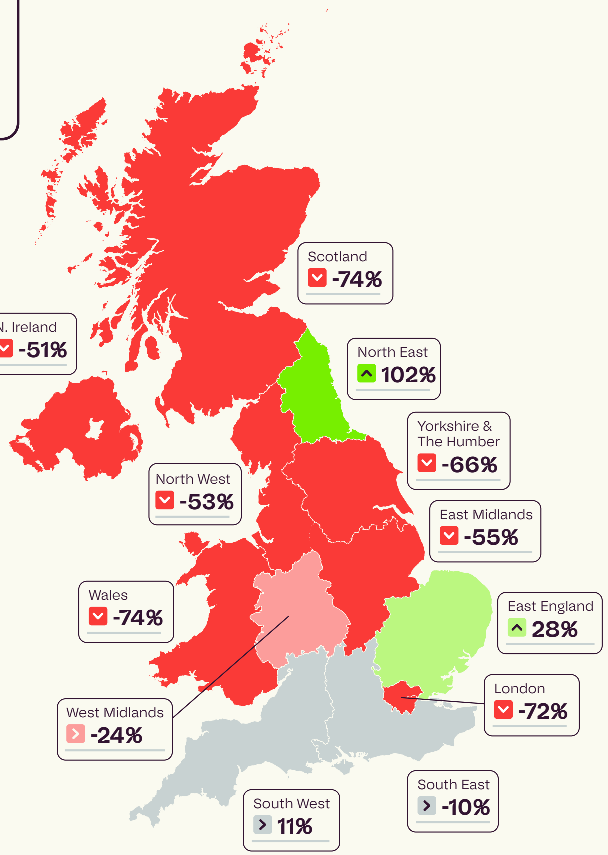
The South East was the most active region for detailed planning approvals, accounting for a 22% share, despite having declined 10% year-on-year. Consents in the North West also slipped back 53% on a year ago to total £1,214 million. In contrast, accounting for a 14% share, the East of England grew 28% on a year ago. At £1,118 million, the South West grew 11% on a year ago.

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



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Industrial

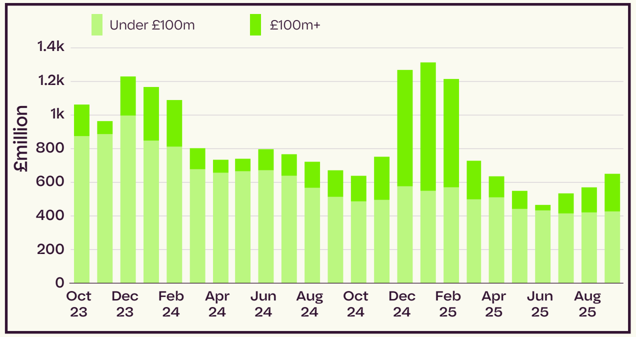
Overview

- **19% decrease** in project starts year-on-year.
- **50% decrease** in main contract awards from last year.
- **3% decrease** in detailed planning approvals compared to 2024.

Performance in the industrial sector was weak in the three months to September. Starts were 19% down on a year ago and 11% lower than the preceding three months. Main contract awards were 19% lower than the preceding quarter, to stand 50% down year-on-year, with no major projects (£100 million or more) awarded. While detailed planning approvals grew 40% quarter-on-quarter, they still stood 3% down on a year ago.

Manufacturing activity continues to decline in the UK, weighing down construction activity in the industrial sector. In September, the S&P Global Purchasing Managers' Index for Britain's manufacturing fell to the lowest level since April.

Detailed Planning Approvals

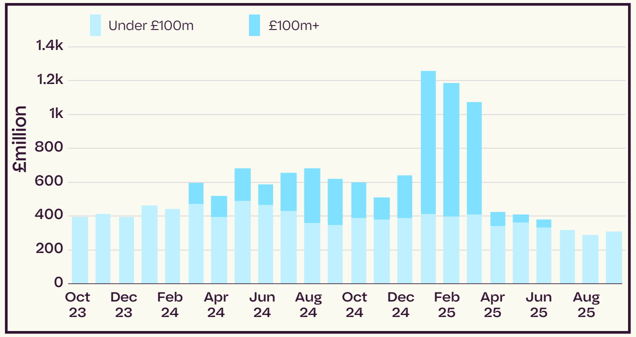


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,283	666	**1,949**
YoY	-17%	40%	**-3%**
Prev. 3 months	-1%	566%	**40%**
Prev. 3 months (SA)	5%		

Main Contract Awards

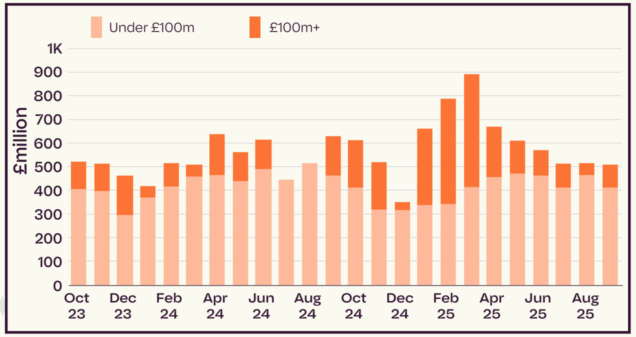


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	922	-	**922**
YoY	-12%	-100%	**-50%**
Prev. 3 months	-7%	-100%	**-19%**
Prev. 3 months (SA)	-10%		

Industrial Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,236	290	**1,526**
YoY	-11%	-42%	**-19%**
Prev. 3 months	-11%	-10%	**-11%**
Prev. 3 months (SA)	-14%		

Glenigan
Powered by Hubexo

Industrial

Types of projects started

Despite the overall weak performance of the sector, project starts grew in two out of three categories.

- Warehousing & logistics accounted for 59% of industrial starts, 112% up on a year ago to total £898 million.
- Totalling £99 million, other industrial projects accounted for 6%, a 1% increase.
- Manufacturing fell 61% year-on-year, totalling £529 million, a 35% share of the sector.

Project Spotlight

BAE Rochester Development

£220m

Detailed plans have been approved for a £220 million development at BAE Systems in Rochester, which will include a new factory building, an office building, and a deep storage facility. A main contractor has yet to be appointed, with works scheduled for completion in Q4 2028.

PROJECT ID: 21374953

IMAGE SOURCE: CASSIDY ASHTON ARCHITECTURE

Types of Industrial Projects Started

Three months to September 2025

	£ million	Percentage
Manufacturing	529	**35%**
Other Industrial	99	**6%**
Warehousing & Logistics	898	**59%**
Total	1,526	**100%**

Industrial League Tables

October 2024 to September 2025

Contractors	Projects	£m
Newarthill	1	1,250
TSL Projects	5	635
Winvic	12	568
Enka	1	350
McLaren	8	326
Caddick	9	199
Marshall	3	193
Magrock	12	152
Bowmer & Kirkland	3	148
Glencar Construc.	11	134

Clients	Projects	£m
Tata Steel	1	1,250
Tritax	6	590
Lidl UK	3	156
BMW (GB)	1	130
Watts Solar	1	126
Lond. Gateway Port	2	122
Panattoni UK	6	106
Prologis UK	5	99
Marshall Holdings	2	95
Essar Oil (uk)	1	88

Glenigan
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Industrial

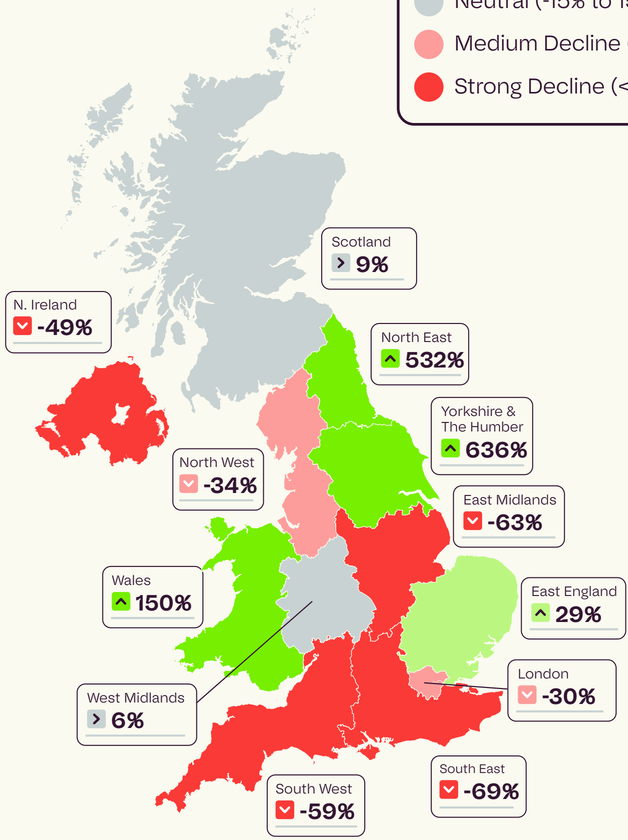
Regional

- Regional performance in project starts was mixed.
- Detailed planning approvals decreased in most regions.
- Wales had a strong performance in both starts and approvals.

The East Midlands led project starts in the industrial sector, despite a 63% decline on a year ago, totalling £233 million. The North West also fell 34%, totalling £162 million. In contrast, projects commencing on site jumped more than six times in the North East, bumping the total to £215 million.

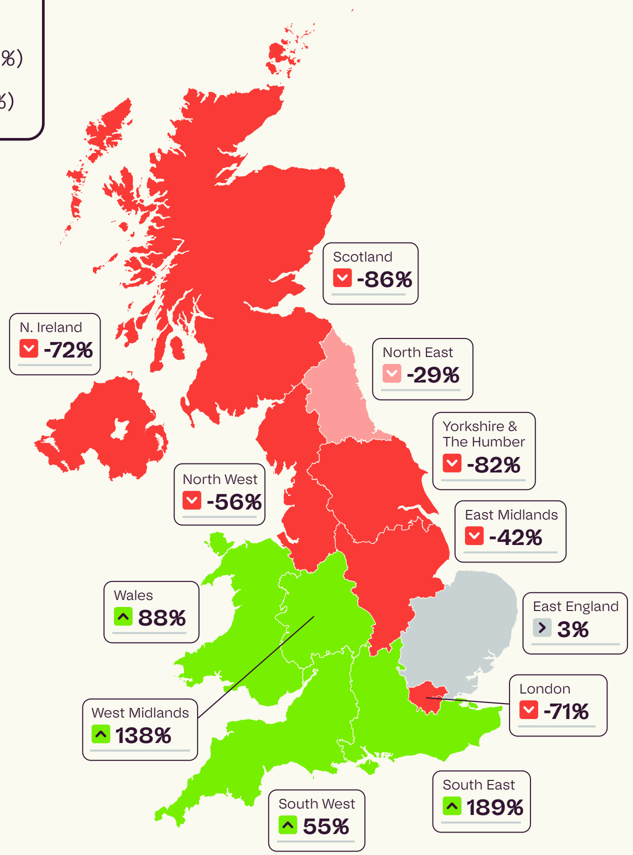
The South East accounted for 29% of detailed planning approvals, totalling £573 million. The region grew 189% on a year ago, boosted by the £257.88 million approval of phase 2 of the PLP MK industrial and logistics business park in Caldecotte, Buckinghamshire, and the £220 million development at BAE Systems in Rochester. Accounting for 21%, approvals in the West Midlands also doubled, totalling £416 million.

Changes in Industrial Starts
on a Year Earlier



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

Changes in Industrial Planning Approvals
on a Year Earlier



Glenigan
Powered by Hubexo

Offices

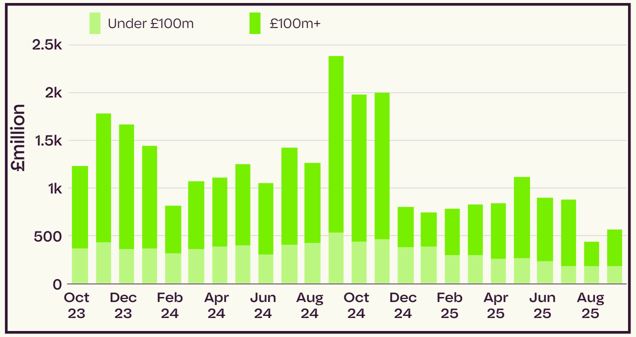
Overview

- **82% increase** in starts year-on-year.
- **9% decrease** in main contract awards from last year.
- **76% decrease** in detailed planning approvals compared to 2024.

The office sector experienced a mixed performance during the three months to September, with a decline in main contract awards and detailed planning approvals against both the previous three months and a year ago. However, project starts grew strongly, boosted by an increase in underlying starts (under £100 million).

The government recently signed a Tech Prosperity Deal, announcing an AI "growth zone" in the North East. The £30bn investment will make the region home to one of the largest data centre hubs in Europe. Data centres remain a hot topic and will boost activity in the office sector.

Detailed Planning Approvals

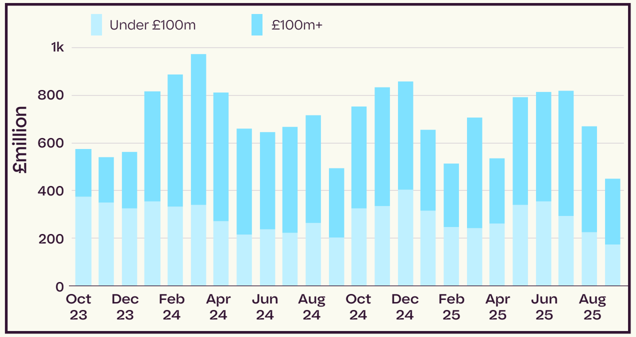


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	535	1,158	**1,693**
YoY	-66%	-79%	**-76%**
Prev. 3 months	-23%	-42%	**-37%**
Prev. 3 months (SA)	-42%		

Main Contract Awards

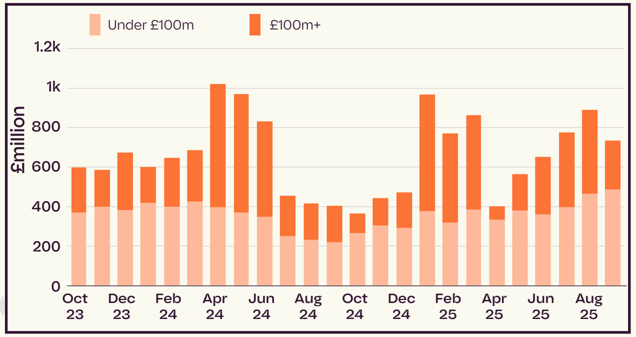


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	517	828	**1,345**
YoY	-15%	-5%	**-9%**
Prev. 3 months	-51%	-40%	**-45%**
Prev. 3 months (SA)	-46%		

Office Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,458	745	**2,203**
YoY	123%	34%	**82%**
Prev. 3 months	35%	-15%	**13%**
Prev. 3 months (SA)	32%		

Offices

Types of projects started

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

- Starts in the over £100 million value band totalled £745 million, having grown 34% on a year ago.
- The £50 million to £100 million value band jumped 238% year-on-year, totalling £676 million.
- The £20 million to £50 million value band doubled year-on-year, totalling £286 million.

Project Spotlight

Salford Data Centre

£250m

Detailed plans have been approved for the £250 million Salford Data Centre. Works are due to be completed in Q1 2027, with a main contractor yet to be appointed for the scheme.

PROJECT ID: 24039225

IMAGE SOURCE: SALFORD COUNCIL

Types of Office Projects Started

Three months to September 2025

	£ million	Percentage
Up to £5 million	221	**10%**
£5 million up to £10 million	86	**4%**
£10 million up to £20 million	189	**9%**
£20 million up to £50 million	286	**13%**
£50 million up to £100 million	676	**31%**
Over £100 million	745	**34%**
Total	2203	**100%**

Office League Tables

October 2024 to September 2025

Contractors	Projects	£m
Mace	7	1,435
Morgan Sindall	130	1,073
Multiplex Construc.	2	700
JRL	2	475
Bovis	1	330
McLaren	3	265
SDC (Holdings)	2	259
Kier	8	243
Bowmer & Kirkland	3	225
Wates	14	222

Clients	Projects	£m
British Land	3	667
Co-re	1	400
MEC London Prop.	1	400
Endurance Land	2	350
Mitsubishi Est. Lond.	1	300
Bruntwood Estates	1	250
Southwark Charities	1	200
JTRE London Ltd	1	200
Havisham	1	200
HSBC Bank Plc	4	169

Offices

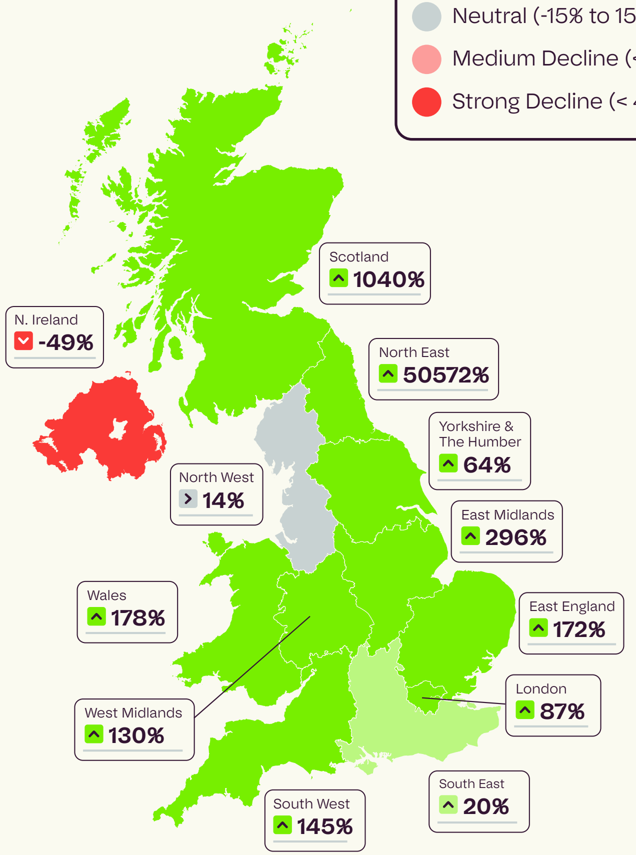
Regional

- Strong performance for starts, with only one region down against last year.
- Only three regions saw growth in detailed planning approvals.
- The North East and the West Midlands experienced strong growth in both starts and planning approvals.

London had the highest share (68%) of starts during the period, thanks to an 87% increase. Growth was boosted by the £400 million 50 Fenchurch Street development in the City. Totalling £138 million, starts in the North West grew 14% on a year ago, boosted by the £98.8 million The Republic at Mayfield development in Manchester.

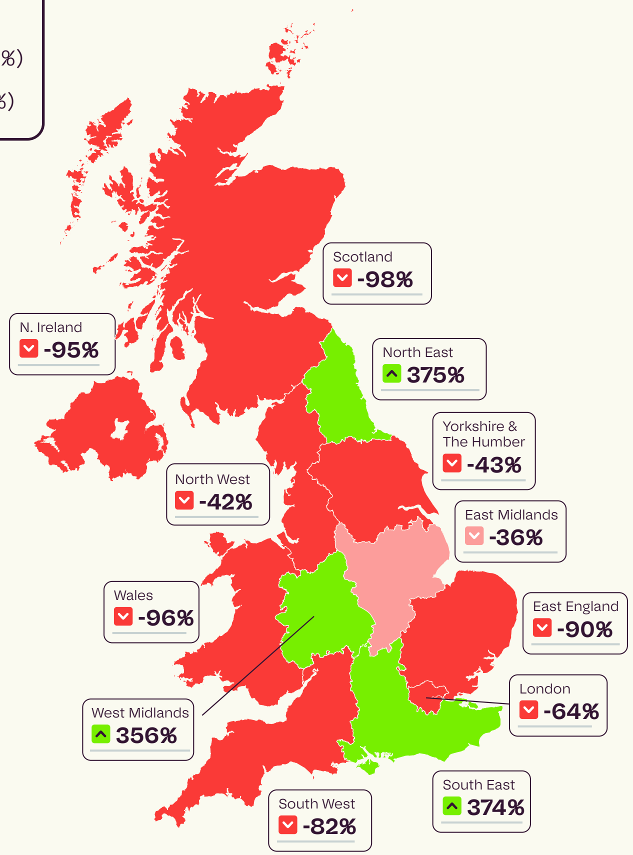
The East of England led detailed planning approvals despite a 90% decline year-on-year to total £412 million. Further decline was prevented by the £400 million Sky Studios Elstree North development in Hertfordshire. London also contracted 64% against 2024 to total £366 million. In contrast, at £249 million the South East jumped nearly five times against last year's figures.

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



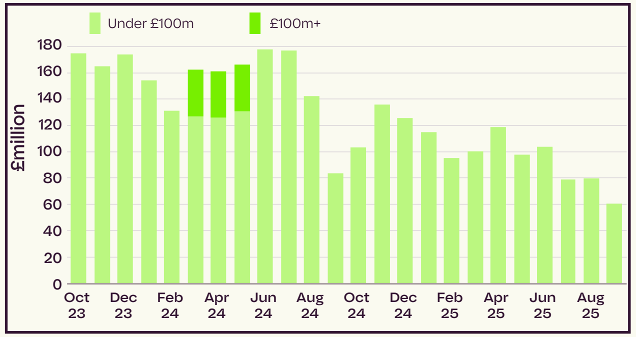
Retail

Overview

- **28% decrease** in project starts year-on-year.
- **46% decrease** in main contract awards from last year.
- **28% decrease** in detailed planning approvals compared to the previous year.

Performance in the Retail sector continued a downward trajectory in the three months to September, with project starts, main contract awards and detailed planning approvals all down year-on-year and quarter-on-quarter. No major projects (over £100 million) reached any of the three stages in the development pipeline, and underlying projects (£100 million) all down against both periods.

Detailed Planning Approvals

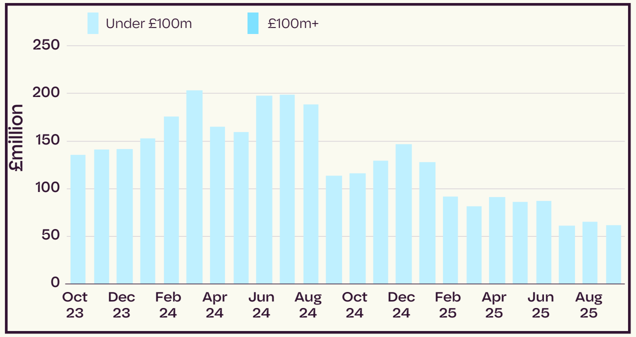


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	181	-	181
YoY	-28%		-28%
Prev. 3 months	-42%		-42%
Prev. 3 months (SA)	-28%		

Main Contract Awards

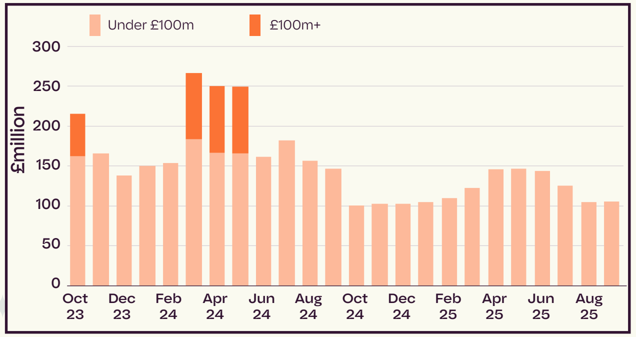


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	185	-	185
YoY	-46%		-46%
Prev. 3 months	-29%		-29%
Prev. 3 months (SA)	-23%		

Retail Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	317	-	317
YoY	-28%	-100%	-28%
Prev. 3 months	-26%		-26%
Prev. 3 months (SA)	-17%		

Glenigan
Powered by Hubexo

Retail

Types of projects started

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

- Supermarkets accounted for the largest share (67%), having increased 44% year-on-year to total £214 million.
- Totalling £19 million, petrol filling stations were 156% higher year-on-year.
- Totalling £61 million, shop projects starting on site decreased 73% on a year ago.

Project Spotlight

Lidl Supermarket

Detailed plans have been approved for a new £6 million Lidl Supermarket in Ledbury, Hereford & Worcester. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q4 2026.

PROJECT ID: 20278665

IMAGE SOURCE: CORSTORPHINE AND WRIGHT

Types of Retail Projects Started

Three months to September 2025

	£ million	Percentage
Other Retail	19	6%
Petrol Filling Stations	19	6%
Retail Warehousing	1	0%
Shopping Centres	4	1%
Shops	61	19%
Supermarkets	214	67%
Total	317	100%

Retail League Tables

October 2024 to September 2025

Contractors	Projects	£m
Kier	2	50
Bowmer & Kirkland	1	43
DSP Construction	12	41
McPhillips Wellington	1	37
Mildren Construction	2	27
G F Tomlinson	1	23
Clark Contracts	5	22
B Team	7	21
VINCI Construction	1	20
Adston UK	4	17

Clients	Projects	£m
Lidl UK	40	125
Aldi	50	100
Marks & Spencer Gr.	24	69
Walsall Metro. BC.	2	52
T J Morris	13	43
McPhillips Wellington	1	37
Tesco	61	32
J Sainsbury	18	15
Marks & Spencer Plc	1	14
MEPC Milton Park	1	14

Retail

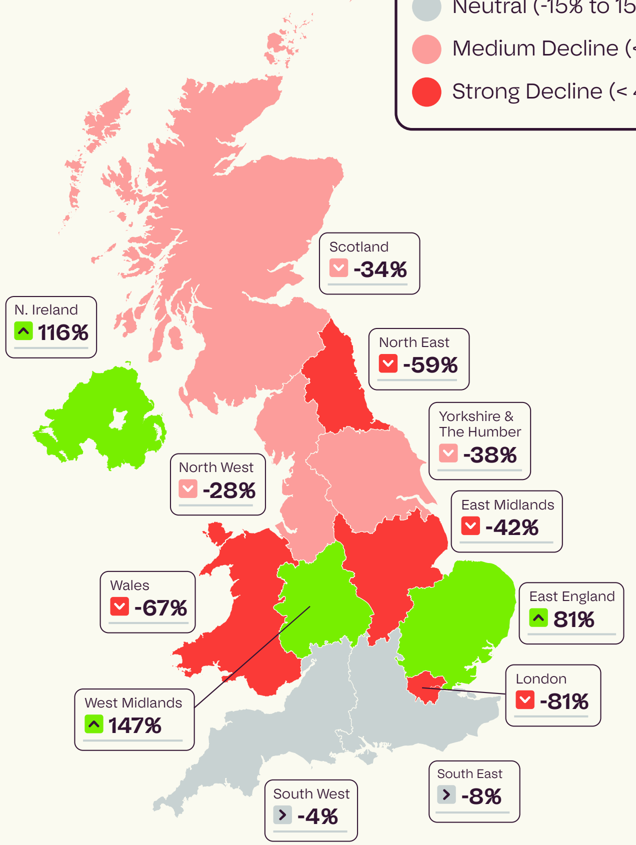
Regional

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

The West Midlands dominated retail project starts, thanks to a 147% increase on a year ago. The region accounted for 18% at £59 million. Northern Ireland also increased 116%, totalling £29 million. In contrast, starts in the South East fell 8% on a year ago to total £45 million. At £33 million, Yorkshire & the Humber also declined 38% against last year.

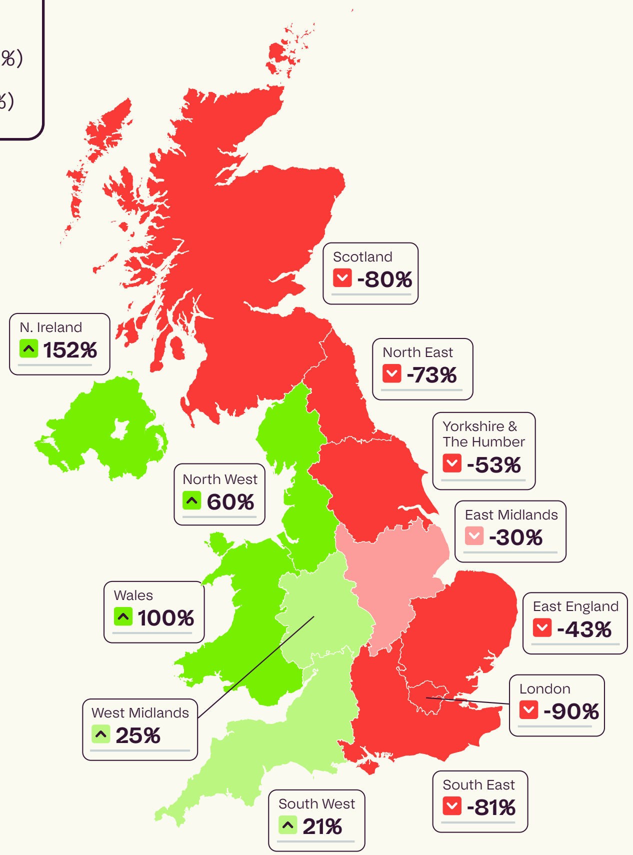
Totalling £32 million, the North West led detailed planning approvals, having grown 60% on a year ago. Northern Ireland also jumped 152% year-on-year to total £30 million. Totalling £30 million, consents in the South West were 21% up against last year.

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



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

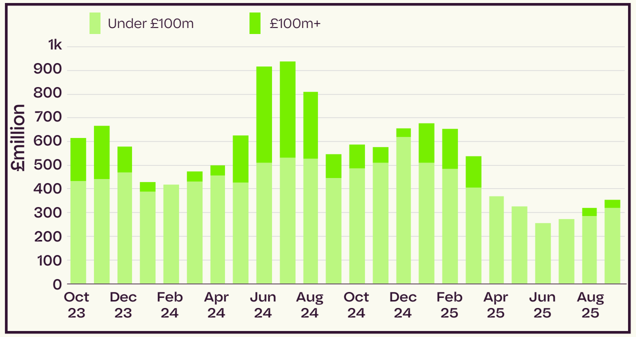
Hotel & Leisure

Overview

- **93% increase** in starts year-on-year.
- **14% increase** in main contract awards from last year.
- **35% decrease** in detailed planning approvals compared to a year ago.

Project starts and main contract awards increased both year-on-year and quarter-on-quarter, driven entirely by major projects (£100 million or more). Detailed planning approvals rose compared with the previous quarter but remained 35% lower than a year ago.

Detailed Planning Approvals

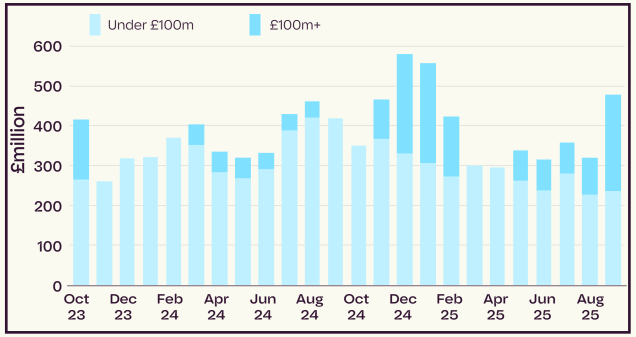


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	960	100	1,060
YoY	-28%	-67%	-35%
Prev. 3 months	25%		39%
Prev. 3 months (SA)	10%		

Main Contract Awards

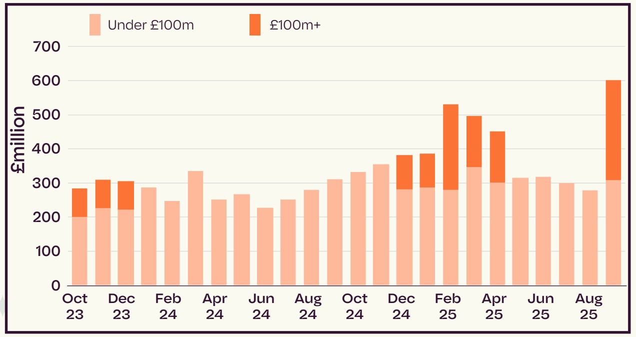


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	707	730	1,437
YoY	-44%		14%
Prev. 3 months	-1%	217%	52%
Prev. 3 months (SA)	-12%		

Hotel & Leisure Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	923	883	1,805
YoY	-1%		93%
Prev. 3 months	-3%		89%
Prev. 3 months (SA)	-11%		

Hotel & Leisure

Types of projects started

The hotel and leisure sector performed strongly, with growth recorded across most categories.

- Indoor leisure facilities accounted for 35%, having jumped 237% on a year ago.
- Totalling £635 million, sport facilities grew 344% year-on-year.
- Hotels & guest houses fell 18% against the previous year, accounting for a 17% share.

Project Spotlight

Nottingham Forest Football Club: City Ground

Detailed plans have been approved for the £130 million Nottingham Forest Football Club: City Ground development. A main contractor is yet to be appointed on the scheme, with works due to complete in Q1 2027.

PROJECT ID: 19065197

IMAGE SOURCE: BENOY LTD

£130m

Types of Hotel & Leisure Projects Started

Three months to September 2025

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	21	**1%**
Cinemas & Theatres	49	**3%**
Hotels, Guest Houses	304	**17%**
Indoor Leisure Facilities	635	**35%**
Other Hotel & Leisure	161	**9%**
Sport Facilities	635	**35%**
Total	1,805	**100%**

Hotel & Leisure League Tables

October 2024 to September 2025

Contractors	Projects	£m
Newarthill	4	544
Morgan Sindall	7	178
Pellikaan Construc.	4	158
McLaren	2	156
Bovis	1	100
Gilbert Ash	3	97
Graham Construction	2	94
Legendre UK	1	82
BCEGI Construction	2	77
Tilbury Douglas	4	72

Clients	Projects	£m
Therme Group	1	450
Marriott International	1	300
Cardiff CC.	3	285
C1 Capital	1	225
Frogmore Real Estate	1	225
Great. London Auth.	2	135
Whitbread	22	100
Crystal Palace FC.	1	100
Alliance Leisure	6	83
Fc100	1	82

Hotel & Leisure

Regional

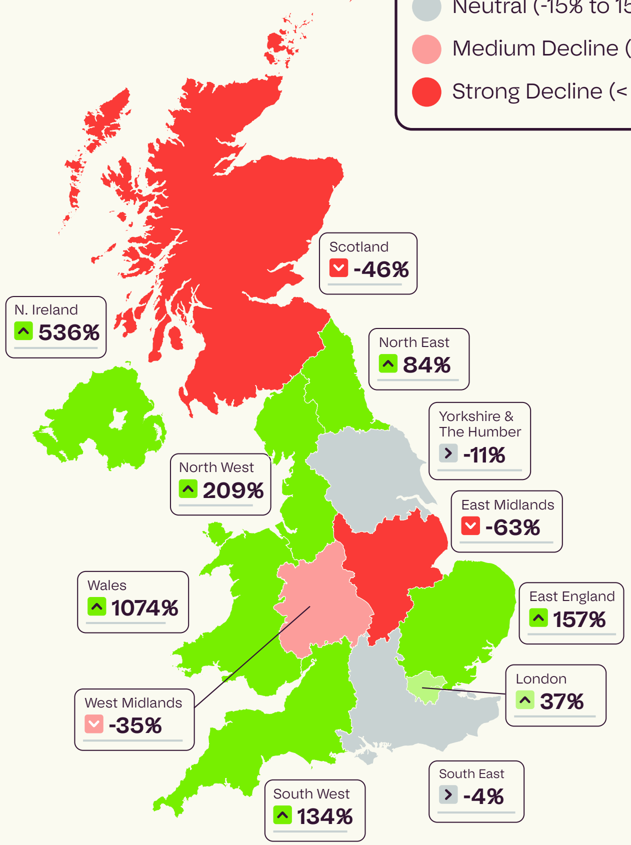
- Regional performance in project starts was strong.
- Most regions saw a decline in detailed planning approvals.
- The South West and Wales grew in both starts and approvals.

The North West was the leader in hotel & leisure starts, having grown 209% year-on-year to total £527 million. Activity in the region was boosted by the £450 million Therme Manchester wellbeing resort development. Wales also jumped more than tenfold to total £343 million, boosted by the £280 million Cardiff Arena & Hotel Atlantic Wharf Phase 1 development.

The South East dominated detailed planning approvals, despite a 21% decline on the previous year. The region totalled £197 million and accounted for 19%. Totalling £158 million, London also fell 69% against last year. In contrast, Wales jumped nearly five times to total £149 million.

Changes in Hotel & Leisure Starts

on a Year Earlier

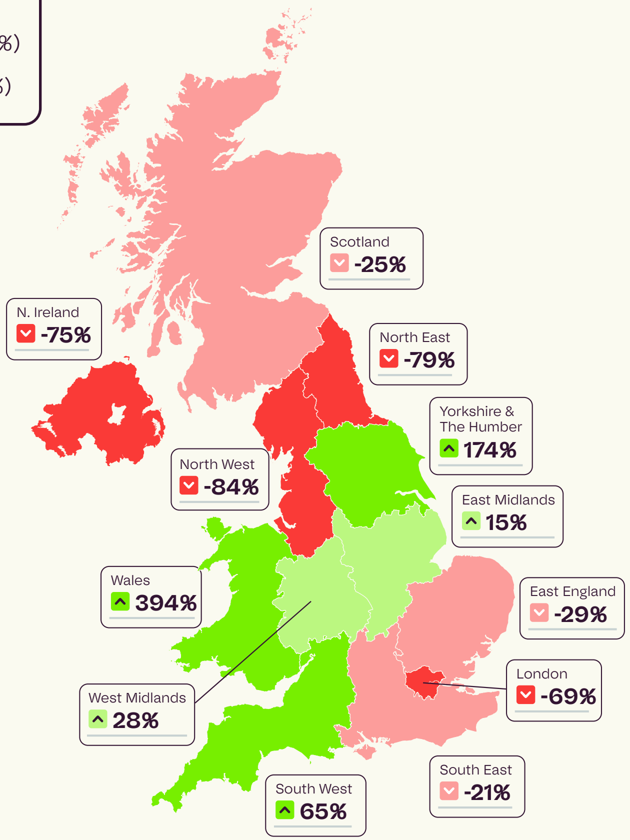


Growth or Decline

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

Changes in Hotel & Leisure Planning Approvals

on a Year Earlier



Health

Overview

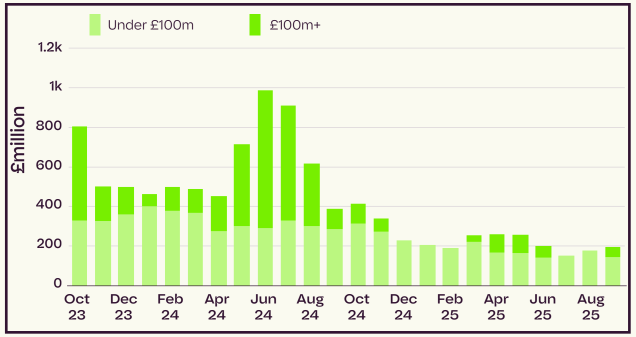
- **24% decline** in project starts against the preceding three months.
- **57% decline** in main contract awards against the preceding three months.
- **3% decrease** in detailed planning approvals compared to the preceding three months.

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

The UK healthcare construction sector has faced a tough period in the three months to September, with delays to various hospital programmes contributing to the overall decline.

High profile schemes such as the New Hospital Programme creates cause for optimism for the future, but the programme has faced various delays, contributing to the poor performance of the sector. Many hospitals expecting maintenance and refurbishment have seen plans stalled; procurement challenges and budget allocation issues highlight the disconnect between spending announcements and practical delivery within the sector.

Detailed Planning Approvals

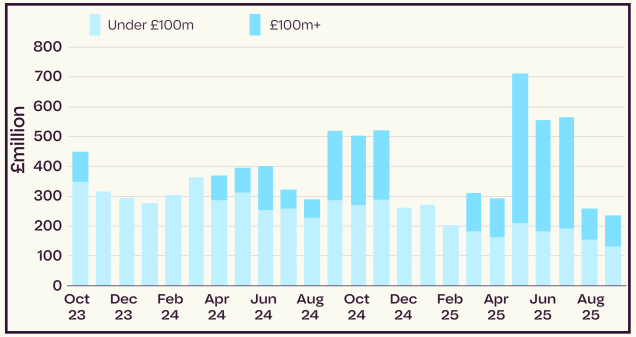


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	435	150	585
YoY	-49%	-51%	-50%
Prev. 3 months	3%	-17%	-3%
Prev. 3 months (SA)	-21%		

Main Contract Awards

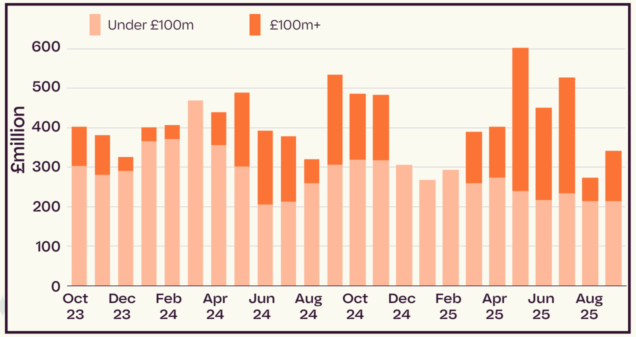


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	395	315	710
YoY	-54%	-55%	-54%
Prev. 3 months	-28%	-72%	-57%
Prev. 3 months (SA)	-18%		

Health Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	643	381	1,024
YoY	-30%	-44%	-36%
Prev. 3 months	-1%	-46%	-24%
Prev. 3 months (SA)	-21%		

Health

Types of projects started

The health sector experienced a poor performance compared to the previous year.

- Nursing Homes & Hospices accounted for (31%), having grown 97% year-on-year to total £318 million.
- Totalling £11 million, the value of Dental, Health & Veterinary Centres/ Surgeries starting on site declined 94% on a year ago.
- Hospitals experienced a 24% decline against the previous year to total £274 million, a 27% share of the total value.

Project Spotlight

Sidegate Road Hospice

Detailed plans have been approved for the Sidegate Road Hospice development in Norfolk. A main contractor is yet to be appointed on the £15 million scheme, with works expected to be completed in Q4 2027.

PROJECT ID: 12087317

IMAGE SOURCE: LSI ARCHITECTS

£15m

Types of Health Projects Started

Three months to September 2025

	£ million	Percentage
Day Centres	-	**0%**
Dental, Health & Veterinary Centres/ Surgeries	11	**1%**
Hospitals	274	**27%**
Nursing Homes & Hospices	318	**31%**
Other Health	421	**41%**
Total	1,024	**100%**

Health League Tables

October 2024 to September 2025

Contractors	Projects	£m
Laing O'Rourke	2	919
Graham Construction	3	394
Mace Group	2	286
McLaughlin & Harvey	4	216
Bouygues UK	1	215
Morgan Sindall	11	129
Bowmer & Kirkland	4	125
VINCI Construction	4	77
Kier	6	75
Kori Construction	5	68

Clients	Projects	£m
Dep. of Health	138	1,063
Dep. for Envir. Food	3	927
Nat. History Museum	1	201
CPD	2	195
Univ. of Cambridge	2	86
Lab. of Resear. Counc.	1	85
John Innes Centre	2	75
LNT	9	66
MBDA (UK)	1	59
Elysian Residences	1	43

Health

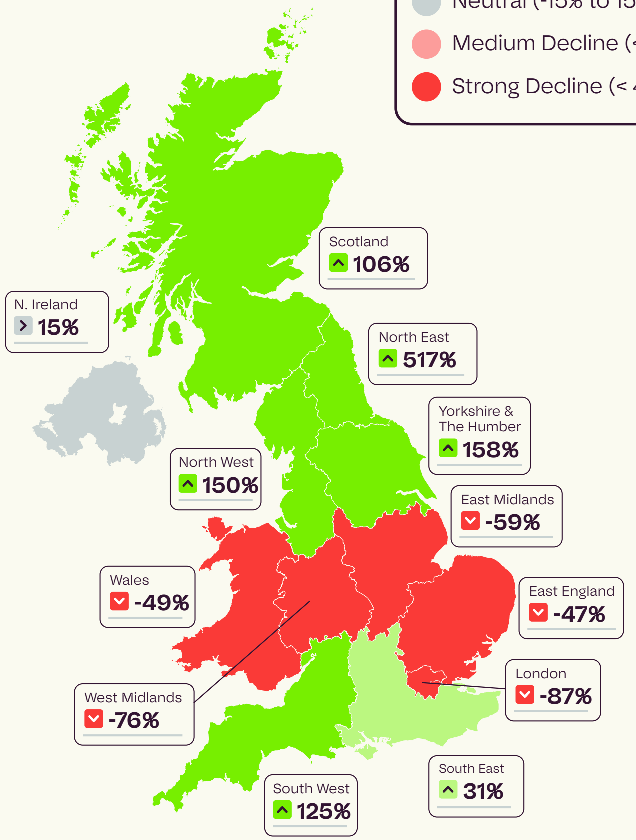
Regional

- The South East accounted for the largest share of project-starts, however the sector performed poorly against the previous year.
- The South West experienced sharp growth in project-starts.
- Scotland accounted for the largest share of approvals, a sharp rise against the previous year.

The South East at £283 million was the most active region for project starts, accounting for 28% of the total, with the region declining 31% against the previous year. The South West of England at £235 million experienced sharp growth, rising 125% against the previous year to account for 23% of the total value, the second most active region.

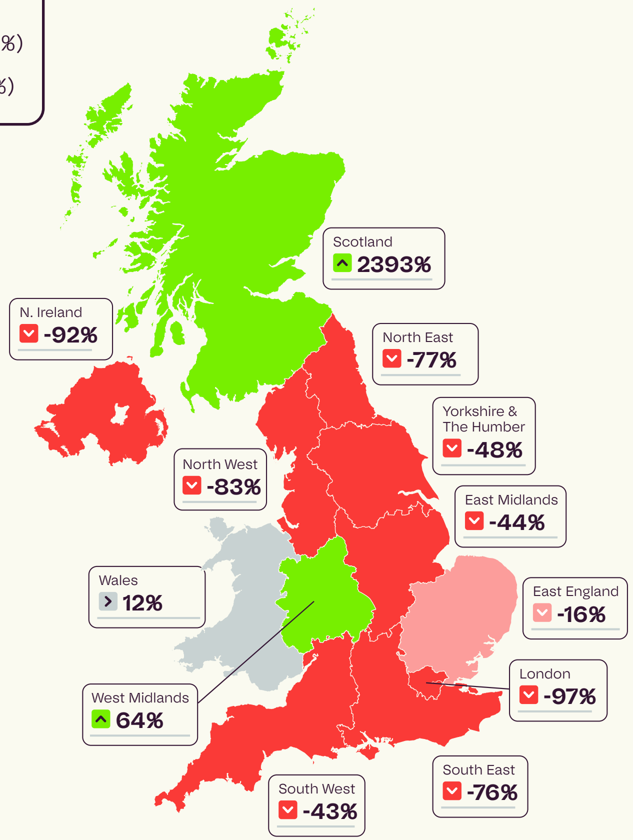
In planning approvals, Scotland accounted for the largest share (27%), increasing almost 25 times against the previous year. The South East of England at £143 million accounted for the second largest share of approvals at 24%, declining 76% against the previous year.

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

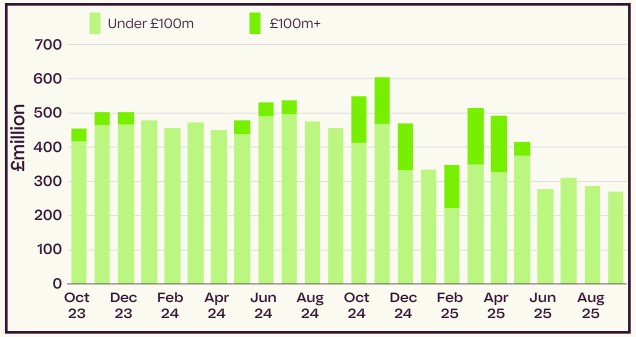
Overview

- **5% decline** in project starts against the preceding three months.
- **49% increase** in main contract awards against the preceding three months.
- **2% decrease** in detailed planning approvals compared to the preceding three months.

The education sector experienced a mixed three months to September; main contract awards increased against the preceding three months but remained below the previous years' levels. Elsewhere, detailed planning approvals and project-starts declined on both periods.

While there has been a short-term downturn in the education sector, with project delays holding back immediate performance, there is some cause for optimism in the future. With schemes such as the school rebuilding programme set to provide a much needed boost to the sector over the next few years.

Detailed Planning Approvals

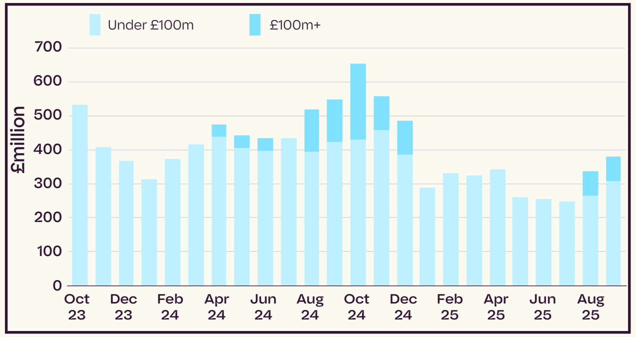


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	811	-	811
YoY	-41%		-41%
Prev. 3 months	-2%		-2%
Prev. 3 months (SA)	-19%		

Main Contract Awards

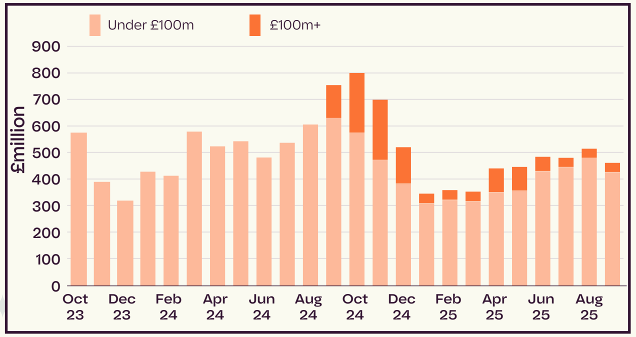


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	923	220	1,143
YoY	-27%	-41%	-31%
Prev. 3 months	20%		49%
Prev. 3 months (SA)	20%		

Education Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,278	103	1,382
YoY	-32%	-72%	-39%
Prev. 3 months	-1%	-35%	-5%
Prev. 3 months (SA)	-19%		

Education

Types of projects started

Project-starts in the education sector experienced a poor performance, with all segments declining against the previous year.

- Schools at £934 million accounted for the largest share of starts (68%), however the segment declined 36% against the previous year.
- Colleges at £160 million accounted for the second largest share of starts (12%), but declined 68% against the previous year.
- Universities declined 51% against the previous year to total £130 million.

Project Spotlight

Wales High School

Detailed plans have been approved for the £38 million Wales High School development in Sheffield. Work is scheduled for completion in Q1 2027.

PROJECT ID: 22266565

IMAGE SOURCE: BOND BRYAN ARCHITECTS

£38m

Types of Education Projects Started

Three months to September 2025

	£ million	Percentage
Colleges	160	**12%**
Other Education	158	**11%**
Schools	934	**68%**
Universities	130	**9%**
Total	1,382	**100%**

Education League Tables

October 2024 to September 2025

Contractors	Projects	£m
Morgan Sindall	39	436
Kier	22	395
Multiplex	1	300
Willmott Dixon	16	226
Royal BAM	8	200
Tilbury Douglas	16	175
Galliford Try	20	161
Bowmer & Kirkland	9	156
Graham Construc.	4	120
McLaren	2	114

Clients	Projects	£m
Dep. for Education	65	612
Univ. of Glasgow	2	301
Midlothian Council	3	163
University of London	9	115
City of Edin. Council	7	73
Kent CC.	7	70
Scot. Borders Council	2	58
Rhondda Cynon Taf	9	55
CambridgeshireCC.	4	49
Tyne Coast College	1	47

Education

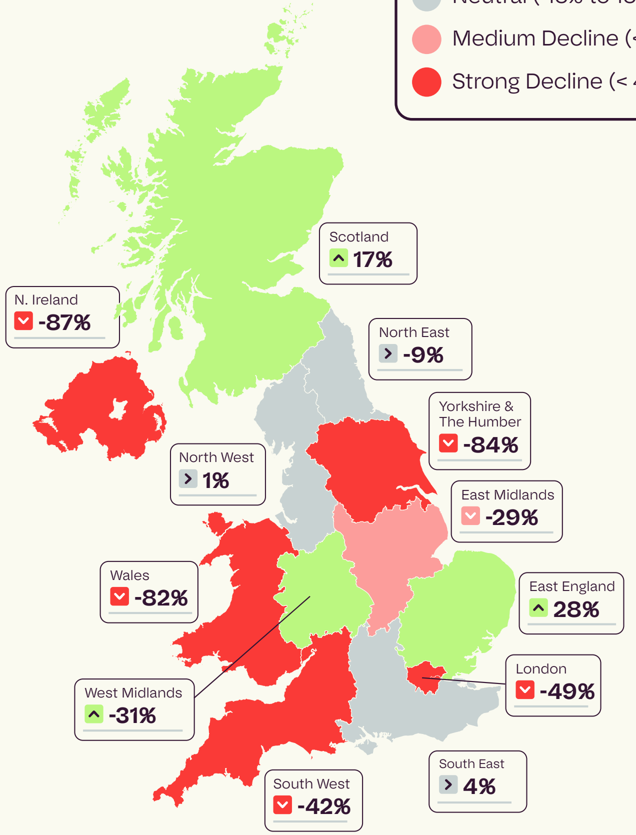
Regional

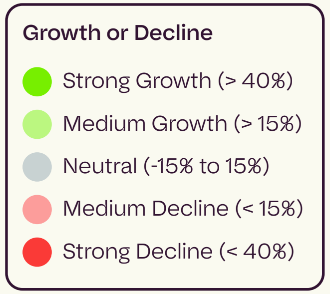
- The South East accounted for the largest share of sector starts, with the area experiencing a rise against the previous year.
- Scotland accounted for the largest share of sector approvals, with the area experiencing a sharp rise against the previous year.
- The East of England experienced moderate growth in starts.

The South East, at £212 million, was the most active region for project starts, accounting for 15% of the total value. The region experienced a 4% rise against the previous year. The East of England at £197 million experienced a strong period, increasing 28% against the previous year to account for 14% of the total value.

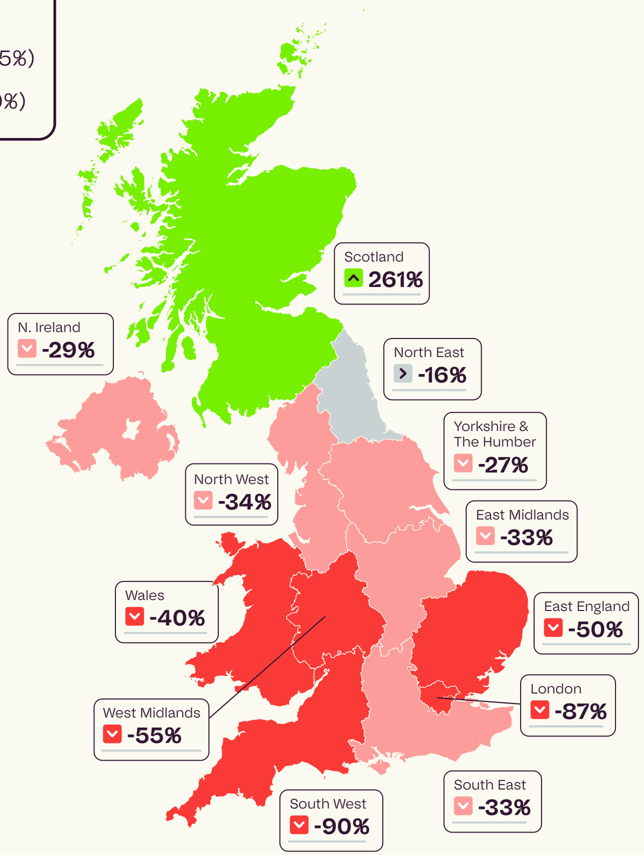
In planning approvals, Scotland accounted for the largest share (19%), increasing 261% against the previous year to total £157 million. Elsewhere, the North West accounted for 13% of the total value, a 34% decline against the previous year to total £109 million.

Changes in Education Starts
on a Year Earlier





Changes in Education Planning Approvals
on a Year Earlier



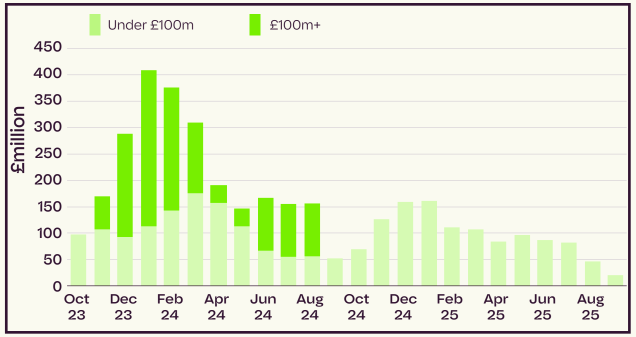
Community & Amenity

Overview

- **27% decrease** in project starts year-on-year.
- **139% increase** in main contract awards from last year.
- **62% decrease** in detailed planning approvals compared to 2024.

The sector experienced a mixed performance. Project starts, and detailed planning approvals were down year-on-year and quarter-on-quarter. No major projects (over £100 million) were approved. However, contract awards grew against last year and the previous quarter, driven by a strong increase in major projects.

Detailed Planning Approvals

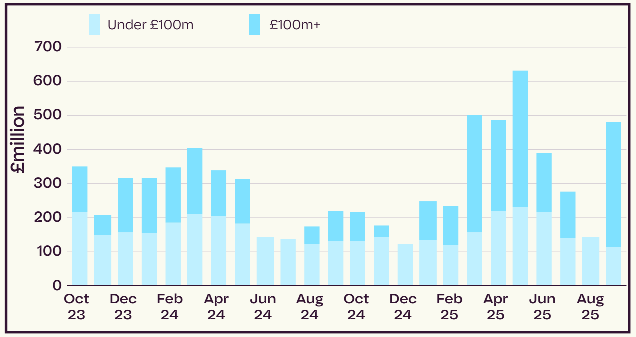


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	60	-	60
YoY	-62%		-62%
Prev. 3 months	-77%		-77%
Prev. 3 months (SA)	-73%		

Main Contract Awards

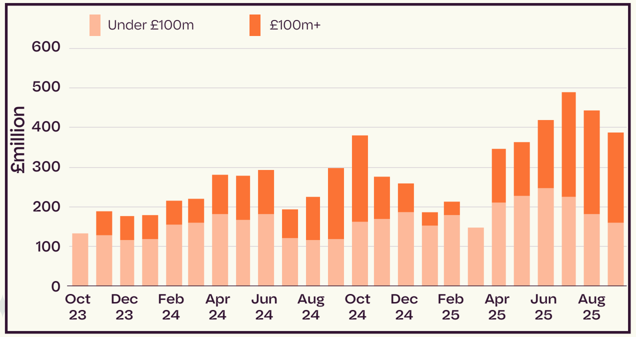


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	452	1,103	1,555
YoY	16%	324%	139%
Prev. 3 months	1%	169%	81%
Prev. 3 months (SA)	-1%		

Community & Amenity Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	541	126	668
YoY	12%	-71%	-27%
Prev. 3 months	-20%	-84%	-55%
Prev. 3 months (SA)	-24%		

Community & Amenity

Types of projects started

Reflecting the overall decline in the sector, only two sub-sectors saw growth in project starts.

- Local facilities accounted for the largest share (41%), thanks to 44% growth to total £272 million.
- Blue light projects jumped 68% on a year ago, totalling £112 million.
- Prisons totalled £206 million, 63% down year-on-year.

Project Spotlight

Clacton Hub

£10m

Detailed plans have been approved to create a central hub for community, education, and public services in Clacton Town Centre. A main contractor is yet to be appointed on the £10 million scheme, with works due to be completed in Q3 2027.

PROJECT ID: 24347299

IMAGE SOURCE: TENDRING DISTRICT COUNCIL

Types of Community & Amenity Projects Started

Three months to September 2025

	£ million	Percentage
Blue Light	112	**17%**
Government Buildings	60	**9%**
Law Courts	-	**0%**
Local Facilities	272	**41%**
Military	15	**2%**
Places of Worship	3	**0%**
Prisons	206	**31%**
Total	668	**100%**

Community & Amenity League Tables

October 2024 to September 2025

Contractors	Projects	£m
Kier	17	1,165
Mace	1	700
Wates	12	377
Laing O'Rourke	3	329
Bowmer & Kirkland	5	195
Galliford Try	12	117
Willmott Dixon	6	113
Morgan Sindall	8	113
Tilbury Douglas	5	91
Goldbeck Bower	1	78

Clients	Projects	£m
Ministry of Justice	30	1,027
The British Library	1	700
Scott. Prison Service	3	685
Ministry of Defence	23	581
UK Parliament	2	112
Gov. Property Agency	1	105
HMRC	2	85
Reuben Brothers	1	83
Sandwell Met BC.	3	81
Cardiff CC.	1	78

Community & Amenity

Regional

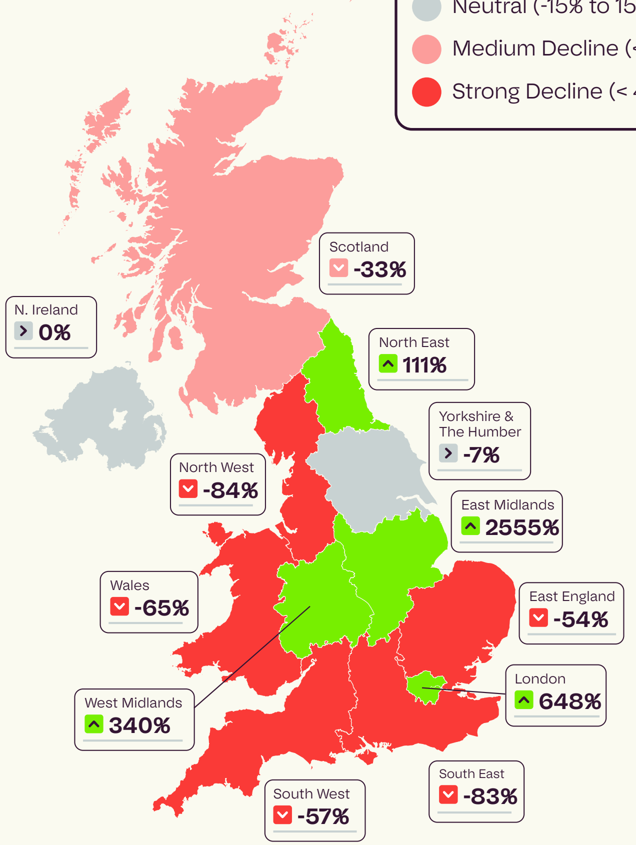
- Weak regional performance in starts.
- Detailed planning approvals only grew in one region.
- Starts grew strongly in the East and West Midlands, London, and the North East.

London accounted for the highest share of project starts, having grown more than seven times to total £198 million. Activity in the region was boosted by the £126.8 million Contingency Response Programme - Package 6 in the City. Accounting for 10%, the East Midlands also grew more than 25 times on a year ago to total £65 million. In contrast, totalling £156 million, starts in Scotland fell 33%.

Scotland accounted for 48% of detailed planning approvals, despite a 29% decline year-on-year to total £29 million. Accounting for a 20% share, the North West also fell 40% on a year ago to total £12 million.

Changes in Community & Amenity Starts

on a Year Earlier

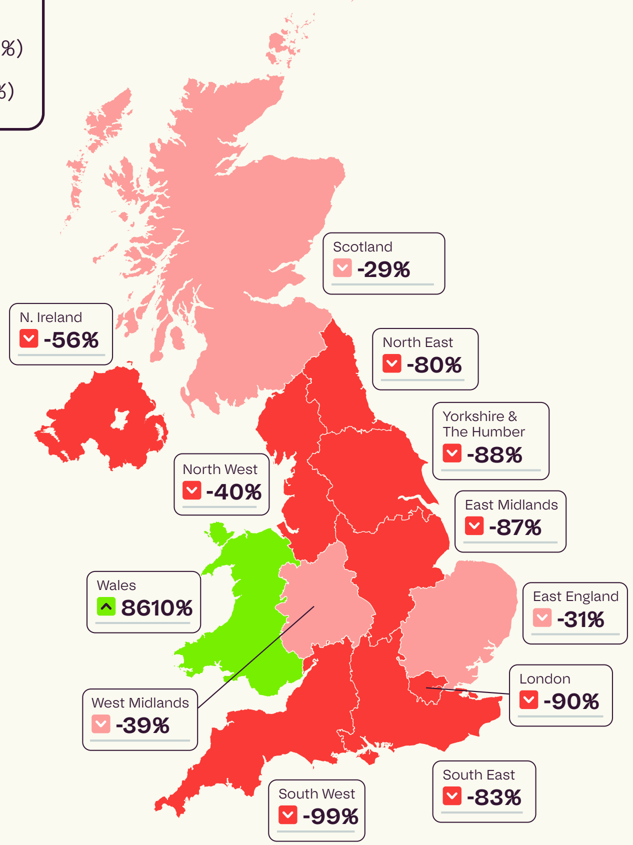


Growth or Decline

- 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

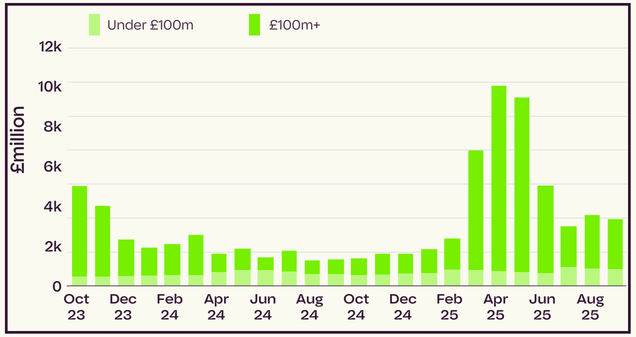
Overview

- **48% decline** in project starts against the preceding three months.
- **38% rise** in main contract awards against the preceding three months.
- **150% increase** in detailed planning approvals compared to the previous year.

Planning approvals weakened against the preceding three months but rose sharply against the previous year, with main contract awards also experiencing a mixed period. Project-starts fared poorly, declining against both periods.

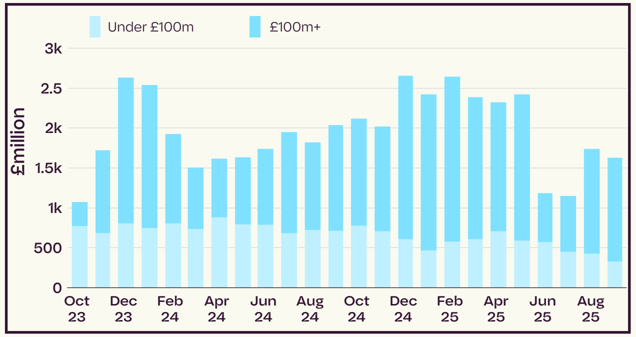
Despite the decline in approvals against the preceding three months, underlying figures were positive, rising 58% against the preceding three months (SA), indicating a steady strengthening of the development pipeline. The sector is rapidly evolving, with a government focus on clean energy projects as well as the approval of offshore windfarm projects set to support overall sector activity in the future.

Detailed Planning Approvals



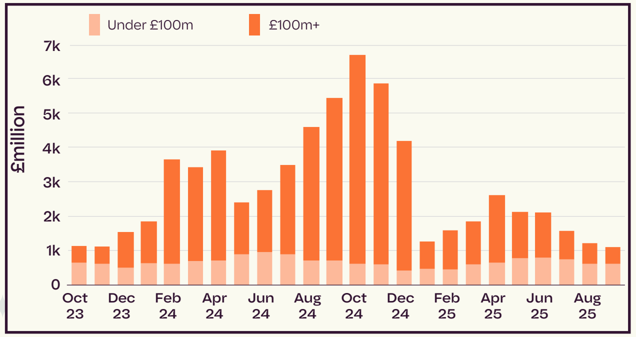
Source: Glenigan

Main Contract Awards



Source: Glenigan

Civil Engineering Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	3,016	8,799	**11,815**
YoY	44%	234%	**150%**
Prev. 3 months	33%	-43%	**-34%**
Prev. 3 months (SA)	58%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	974	3,918	**4,892**
YoY	-54%	-1%	**-20%**
Prev. 3 months	-44%	114%	**38%**
Prev. 3 months (SA)	-34%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,848	1,445	**3,293**
YoY	-13%	-90%	**-80%**
Prev. 3 months	-23%	-63%	**-48%**
Prev. 3 months (SA)	4%		

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Civil Engineering

Types of projects started

Performance across the sector was poor, with four of seven categories declining against the previous year.

- Energy at £1,590 million accounted for the largest share of starts (48%) but declined by 83% against the previous year.
- Roads accounted for the second largest share of starts (19%) but declined 38% against the previous year to total £622 million.
- Harbour/Ports increased 223% against the previous year to total £161 million.

Project Spotlight

M60/M62/M66 Simister Island

Detailed plans have been approved for the £340 million M60/M62/M66 Simister Island development. Costain has been appointed as the civil contractor on the scheme, with works expected to completed in Q3 2030.

PROJECT ID: 19342018

IMAGE SOURCE: NATIONAL HIGHWAYS

Types of Civil Engineering Projects Started

Three months to September 2025

	£ million	Percentage
Airports	31	**1%**
Other Civils	485	**15%**
Rail	19	**1%**
Roads	622	**19%**
Harbours/Ports	161	**5%**
Energy	1,590	**48%**
Water Industry	193	**6%**
Waste	191	**6%**
Total	3,293	**100%**

Civil Engineering League Tables

October 2024 to September 2025

Contractors	Projects	£m
STRABAG	5	2,900
Royal BAM	18	1,998
Ferrovial	2	1,615
Ringway	3	1,159
Balfour Beatty	29	969
M GROUP	11	921
Costain	4	859
Siemens	6	652
Jones Bros	3	548
Downing	9	526

Clients	Projects	£m
Dep. for Transport	48	4,607
United Utilities	5	2,900
Hertfordshire CC.	2	1,160
SSEN Transmission	5	1,050
Oxfordshire CC	4	989
SSE	6	727
Kingsway Solar Farm	1	500
Comm. Wind Power	1	500
Kemble Water	4	420
Kent CC.	4	416

Civil Engineering

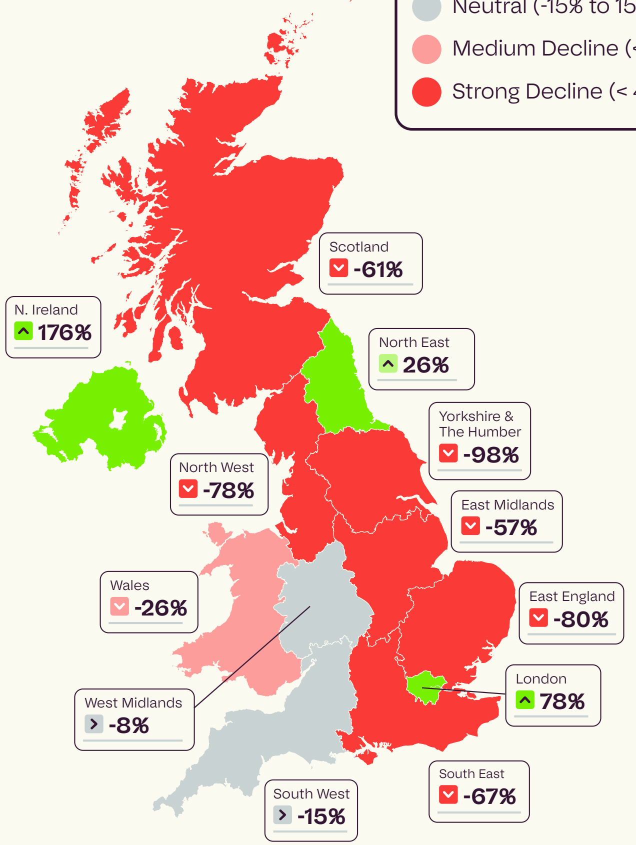
Regional

- Scotland accounted for the largest share of sector starts but declined against the previous year.
- The North West accounted for the largest share of approvals.
- Wales also experienced sharp growth in planning approvals.

Scotland at £1,550 million was the most active region for project starts accounting for 47% of the total, a 61% decline against the previous year. The South East, at £313 million, also fared poorly, declining 67% against the previous year.

In planning approvals, the North West accounted for the largest share (26%), a 365% increase compared to the previous year to total £3,095 million. Wales accounted for the second largest share of approvals (25%), an increase of 786% against the previous year to total £3,005 million.

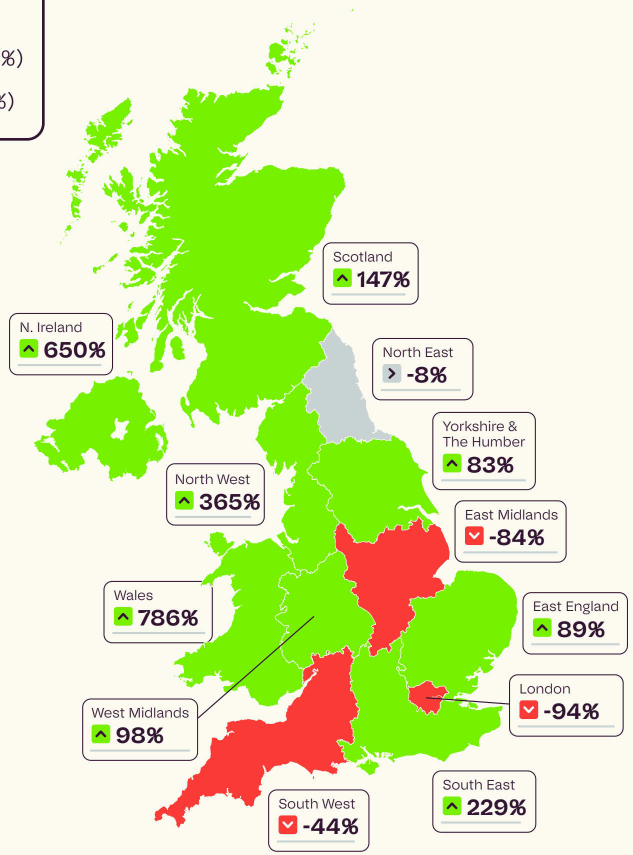
Changes in Civil Engineering Starts
on a Year Earlier



Growth or Decline

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

Changes in Civil Engineering Planning Approvals
on a Year Earlier



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