



Glenigan

A Hubexo Product

Construction Review

Reflecting activity to the end of September 2026

October 2026

- ✓ **16% decline in detailed planning approvals** against the preceding three months
- ✓ **19% decline in main contract awards** against the preceding three months
- ✓ **26% decline in project starts** against the preceding three months



Expert insights

to support your construction strategy

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

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

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

Methodology

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

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

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

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

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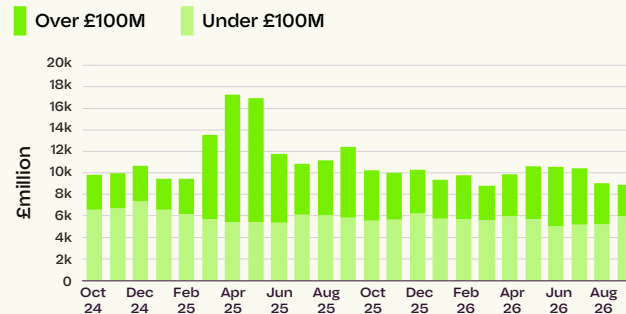
Executive Summary

- 
28% decline in detailed planning approvals against the previous year
- 
25% rise in main contract awards against the previous year
- 
21% decline in project starts against the previous year

UK construction activity weakened during the latest period. Detailed planning approvals fell by 16% against the preceding three months, while project starts declined by 26%, reflecting softer levels of activity commencing on site. Main contract awards also fell during the quarter, declining by 19% and indicating a slowdown in projects progressing into construction. These results point to a weaker short-term market, with declines recorded across all three key indicators.

On an annual basis, detailed planning approvals were 28% lower than a year earlier, reflecting a significant reduction in the value of projects progressing through the planning system. Project starts also fell by 21% compared with the previous year, indicating weaker development activity across several sectors. In contrast, main contract awards rose by 25% year-on-year, supported by a number of major project commitments and higher-value schemes entering the construction pipeline.

Detailed Planning Approvals

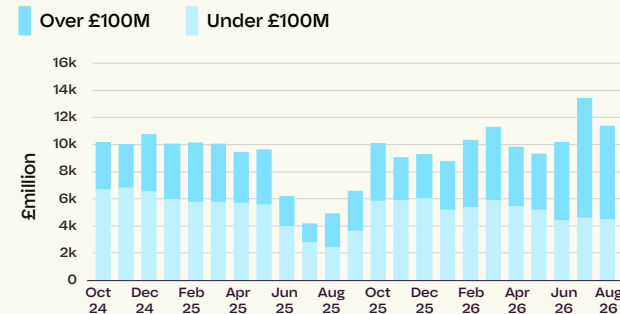


Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	17,857	8,830	26,687
YoY	2%	-55%	-28%
Prev. 3 months	18%	-47%	-16%
Prev. 3 months (SA)	14%		

Source: Glenigan. Three month average

Main Contract Awards

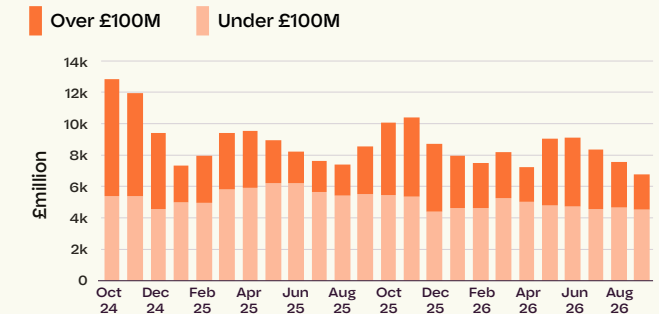


Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	12,126	12,567	24,693
YoY	12%	41%	25%
Prev. 3 months	-9%	-27%	-19%
Prev. 3 months (SA)	-6%		

Source: Glenigan. Three month average

Starts



Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	13,554	6,785	20,339
YoY	-18%	-25%	-21%
Prev. 3 months	-4%	-48%	-26%
Prev. 3 months (SA)	-2%		

Source: Glenigan. Three month average

Economic Outlook

Consumers under pressure

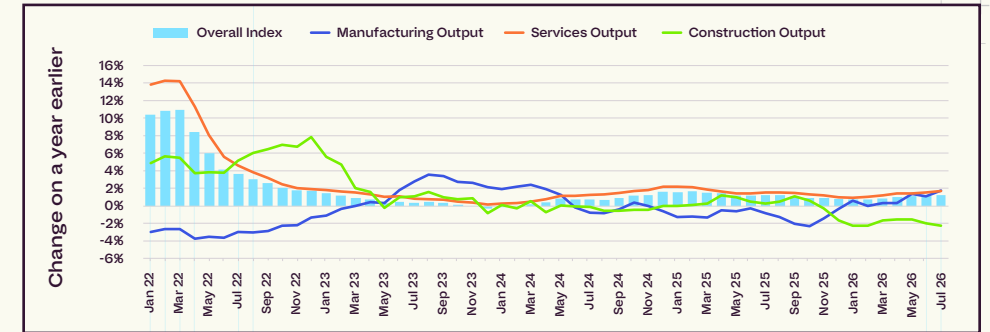
-  Increase in manufacturing and services sectors
-  Labour market cools
-  Renewed squeeze on households' finances

The UK economy continued to grow during the three months to July, according to ONS, with manufacturing and services output expanding by 0.5% and 0.6% respectively. Construction was the one weak spot, contracting by 0.5%. The latest industry surveys by CIPS indicate that this pattern of growth continued during August and September. Both the manufacturing and service sector surveys reported an expansion in activity, while the construction index, at 46.1, was still below the 50 'no change' level.

Despite the overall rise in economic activity, consumer facing sectors are under pressure. Retail and wholesale output dropped during the three months to July, while a weakening in private housing activity has led the decline in construction output and project starts.

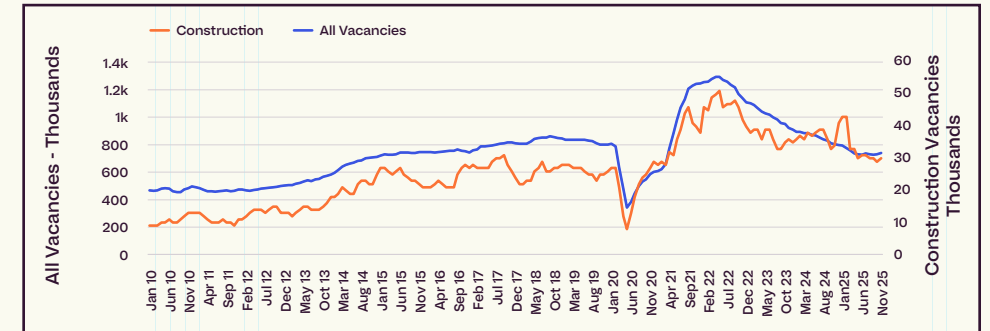
Household finances are under renewed pressure from a pick-up in inflation and a weakening labour market. Consumer price inflation rose to 3.3% in August, with higher energy costs expected to accelerate inflation over the coming months. The unemployment rate edged up to 4.9% in August, while the number of job vacancies dropped 1.1% to 702,000 and average earnings, which rose by 3.9% in the three months to July, recorded their slowest rate of growth since 2020.

Economic Growth – UK Growth by Sector



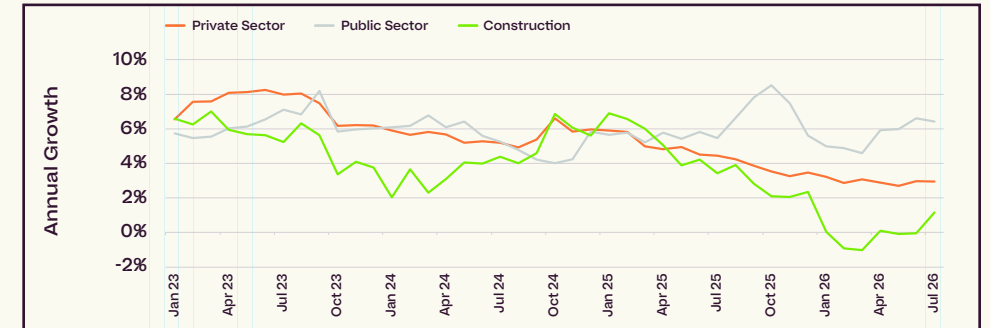
Source: ONS

Vacancies



Source: ONS

Average Earnings



Source: ONS

Top 50 Contractors

Last 12
month
totals:

1,049 projects
£44,328m

Last
month
totals:

84 projects
£1,694m

October 2025 to September 2026

Contractors	#	£m	★
1 Morgan Sindall	210	3,925	0
2 Graham Construction	26	2,694	0
3 Skanska UK	6	2,530	0
4 Kier	94	2,175	3
5 Sacyr UK	1	2,000	6
6 Galliford Try	143	1,983	7
7 Bovis	7	1,840	-2
8 Wates	67	1,757	1
9 VINCI	19	1,665	-5
10 Winvic	20	1,551	-2
11 Vital Energi Utilities	11	1,408	NEW
12 IHP Integrated Health	4	1,358	13
13 Willmott Dixon	70	1,293	-3
14 Sir Robert McAlpine	7	1,191	-8
15 Bowmer & Kirkland	30	1,149	-3
16 Laing O'Rourke	7	1,035	26
17 McLaren	9	797	-1
18 Bouygues	3	766	0
19 Mace	5	744	-4
20 Dragados UK	1	648	-1
21 Royal BAM	24	645	-7
22 Caddick Group	22	632	-2
23 Sisk	8	593	-6
24 McLaughlin & Harvey	14	583	-1
25 Robertson	41	562	1

September 2026

Contractors	#	£m	★
1 Galliford Try	10	161	NEW
2 Graham Construction	4	135	NEW
3 JJ Rhatigan & Company	1	86	NEW
4 HG Construction	1	76	23
5 Higgins	1	69	14
6 Eric Wright	1	65	NEW
7 Dowhigh	1	65	NEW
8 CLC Group	3	61	NEW
9 Foster Property Main.	1	58	NEW
10 Tilbury Douglas	3	57	27
11 Bowmer & Kirkland	3	55	NEW
12 McLaren	1	55	3
13 Caddick Group	2	55	-7
14 Bouygues	1	51	NEW
15 A & H Construction & Dev.	2	42	NEW
16 Gilbert Ash	1	35	-5
17 Glasgiven Constracts	1	35	NEW
18 Wates	4	32	-10
19 Morgan Sindall	4	31	-10
20 Robertson	4	29	NEW
21 Willmott Dixon	2	25	-5
22 Legendre Construction	1	24	NEW
23 Hadley Group	1	23	NEW
24 LST Projects	1	22	NEW
25 Balfour Beatty	1	22	NEW

★ Change in ranking since the previous period

Expert Insights

Executive Summary

Economic Outlook

Top 50 Contractors

Top 50 Clients

Sector Analysis

Housing

Industrial

Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

Top 50 Clients

October 2025 to September 2026

Clients	#	£m	★
1 Department of Health	259	10525	0
2 Department for Education	78	1586	0
3 Univ. Destinations & Exper.	3	1261	0
4 Comcast	1	1250	0
5 East West Railway Company	1	1250	0
6 Bedford Borough Council	1	1250	0
7 Ministry of Defence	30	728	1
8 States of Jersey	2	710	-1
9 United Utilities Group	8	562	0
10 Cadent Gas	1	500	0
11 Department for Transport	35	488	5
12 Network Rail	26	451	0
13 Greater London Authority	10	440	7
14 Heidelberg Materials	2	406	21
15 Derwent London	4	355	-1
16 Hampshire County Council	41	338	-1
17 Ministry of Justice	34	328	-4
18 Manby BGE	1	300	-1
19 R&F Properties QS	1	300	-1
20 Dev. Control Plan. Thurrock	6	299	-1
21 Land Securities Group	6	294	0
22 British Land	5	281	19
23 Battersea Project Phase 3	1	280	-1
24 Kemble Water	23	260	1
25 Hertfordshire CC.	6	259	-2

Clients	#	£m	★
26 Westminster City Council	9	235	1
27 Tower Hamlets Council	4	229	2
28 Maidstone Borough Council	6	228	NEW
29 Segro	4	223	NEW
30 Welsh Government	34	223	10
31 London Bor. of Croydon	4	219	0
32 Northern Ireland Executive	2	211	-2
33 Herefordshire Council	13	209	-1
34 Southend On Sea BC.	2	203	2
35 Crystal Palace Football Club	1	200	NEW
36 Birmingham City Council	10	196	NEW
37 Cole Waterhouse	1	185	1
38 Whitbread	25	184	NEW
39 Severn Trent	12	183	NEW
40 East Dunbartonshire DC.	8	181	NEW
41 Fusion Students	3	172	1
42 University of Southampton	2	171	3
43 Environment Agency	23	164	-9
44 Great Portland Estates	4	163	3
45 Sunderland City Council	6	159	3
46 Oxfordshire County Council	8	158	NEW
47 Barclays Bank	5	156	-8
48 Lidl UK	42	156	-2
49 Statkraft	2	155	0
50 Pulse Clean Energy	1	155	0

September 2026

Clients	#	£m	★
1 Crystal Palace Football Club	1	200	NEW
2 Severn Trent	2	112	NEW
3 Sky UK	1	100	NEW
4 Hurlington	1	76	NEW
5 Cubex	1	75	NEW
6 Alara Investments	1	75	NEW
7 Far East Consortium Int.	1	70	NEW
8 Whitbread	4	65	NEW
9 Wythenshawe Com. Hous. Gr.	2	48	NEW
10 Department of Health	18	43	NEW
11 Brent Cross S. Partnership	1	43	NEW
12 Argent Group	1	43	31
13 RB. of Greenwich	1	41	NEW
14 Ulster University	1	35	NEW
15 Green Man Lane	1	35	NEW
16 A2Dominion Housing Group	1	35	NEW
17 SSE	1	33	NEW
18 Tatton Services	1	33	NEW
19 Westmorland	1	33	NEW
20 PATRIZIA Group	1	28	NEW
21 FABX2.9 LP uk	1	28	NEW
22 Coleg Gwent	1	25	NEW
23 Newport City Council	1	25	NEW
24 Sanctuary Housing	1	23	NEW
25 UK Docks	1	22	NEW

Clients	#	£m	★
26 Southend-on-Sea City Council	1	22	NEW
27 Bury Met. BC.	1	20	NEW
28 Northumbria University	1	20	NEW
29 Sizewell C	1	20	-11
30 Department for Education	5	20	-24
31 London Bor. of Lewisham	1	18	NEW
32 Stonewater	1	18	NEW
33 Leicestershire CC.	3	18	NEW
34 Midlothian Council	1	17	NEW
35 S&S Quality Building Contractors	1	16	NEW
36 North Somerset Council	2	16	NEW
37 St Helen Met. BC.	1	15	NEW
38 Anglian Water Services	1	15	NEW
39 Torus Housing Group	1	14	NEW
40 Elms Farm Partnership	1	14	NEW
41 Trebor Developments	1	14	NEW
42 HE2 UK Ent. 14 GP & Litchgate	1	14	NEW
43 Stockport Met. BC.	1	14	NEW
44 Harworth Estates Inv.	1	14	NEW
45 Benamara Properties	1	14	NEW
46 Oxfordshire CC.	1	14	NEW
47 c/o Agent (Anchor Hanover Gr.)	1	13	NEW
48 Dep. for Infrastructure	3	12	NEW
49 Ministry of Justice	3	12	NEW
50 Cheshire W. & Chester Council	1	12	NEW

★ Change in ranking since the previous period

Housing

Overview

- ✓

3% decrease

in project starts

year-on-year

⬆

22% increase

in main contract awards

from last year

⬆

2% increase

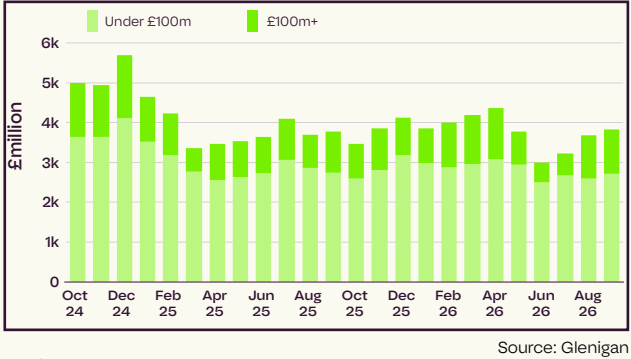
in detailed planning

approvals compared to 2025

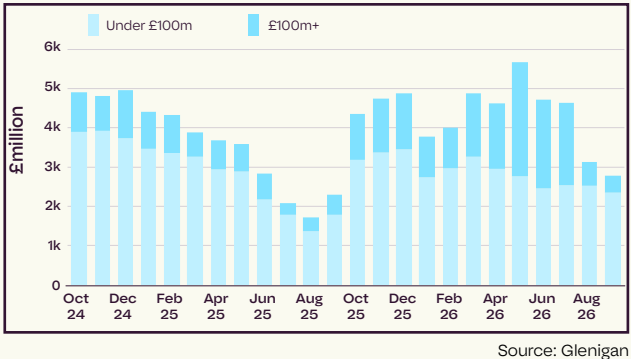
Residential activity was mixed during the period, with project starts declining slightly compared with last year but increasing against the previous three months, driven by major projects. Main contract awards strengthened on a year ago, supported by growth in underlying projects, although they fell compared with the preceding quarter. Planning approvals increased against both periods, indicating a modest improvement in the medium-term pipeline.

The future of the housing market remains uncertain, with Nationwide reporting a decline in house prices. Mortgage rates have also gone up amidst the higher cost of living and economic uncertainty.

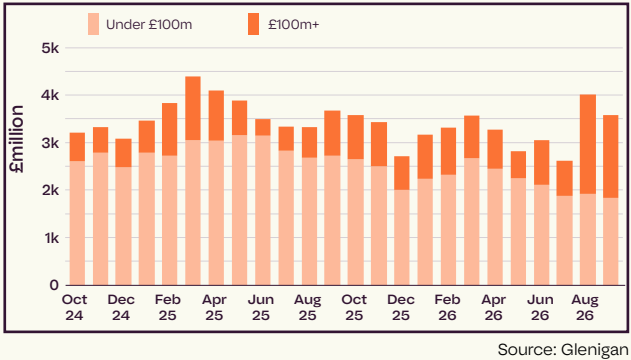
Detailed Planning Approvals



Main Contract Awards



Housing Starts



Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	8,142	3,356	11,498
YoY	-1%	8%	2%
Prev. 3 months	8%	130%	28%
Prev. 3 months (SA)	10%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	7,062	1,291	8,353
YoY	32%	-15%	22%
Prev. 3 months	-4%	-81%	-41%
Prev. 3 months (SA)	-4%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	5,495	5,240	10,735
YoY	-33%	83%	-3%
Prev. 3 months	-13%	85%	17%
Prev. 3 months (SA)	-8%		

Housing

Types of projects started

Performance was generally weak across residential sub-sectors, with most sub-sectors down on a year ago.

- Social Sector Housing accounted for the largest share (47%), having increased 165% year-on-year to total £5,049 million
- Private Housing fell 34% against the previous year, totalling £3,252 million
- Private Apartments decreased 52% year-on-year to total £1,235 million

Types of Housing Projects Started

Three months to September 2026

	£ million	Percentage
Private Apartments	1,235	12%
Elderly Persons Homes	41	0%
Private Housing	3,252	30%
Private Sheltered Housing	111	1%
Social Sector Sheltered Housing	44	0%
Social Sector Apartments	785	7%
Social Sector Housing	5,049	47%
Homes, Hostels Etc.	0	0%
Student Accommodation	218	2%
Total	10,735	100%

Project Spotlight

Orchard Wharf Development

Detailed plans have been approved on the £500 million “Orchard Wharf” development in London. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q4 2029.

PROJECT ID: 20211920

IMAGE SOURCE: BENEWS

£500m



Housing League Tables

October 2025 to September 2026

Contractors	Projects	£m
Barratt Redrow	73	2,322
Bloor Homes	63	2,153
Persimmon Plc	70	2,015
Taylor Wimpey	46	1,737
Graham Construc.	8	1,098
Vistry	26	1,019
The Berkeley	10	944
Hill Group	22	936
Bellway	43	923
Apollo Management	35	687

Clients	Projects	£m
Barratt Redrow	92	2,367
Bloor Homes	66	2,191
Taylor Wimpey	67	2,186
Persimmon Plc	87	1,944
Vistry	69	1,824
The Berkeley	16	1,182
Bellway	50	1,112
The Guinness Prtnsp.	8	1,043
Apollo Management	37	658
Keepmoat	19	462

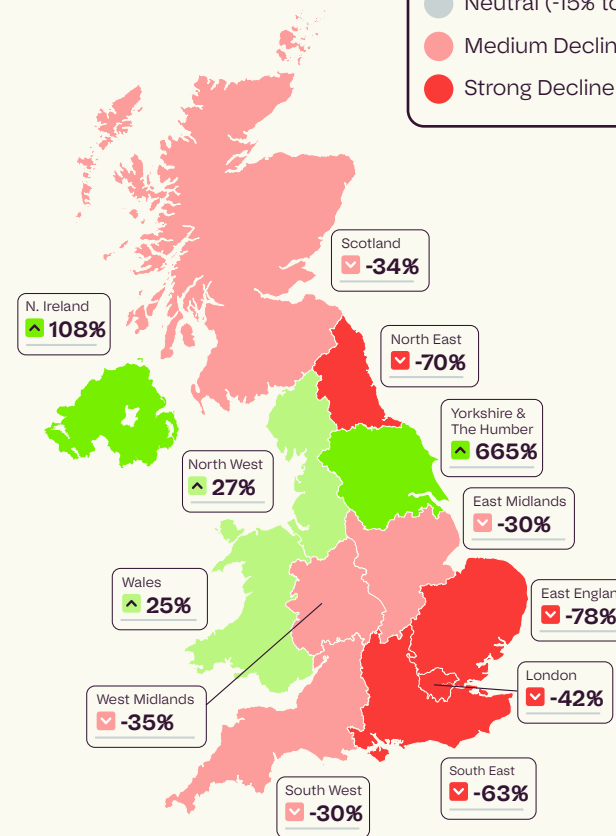
Housing

Regional

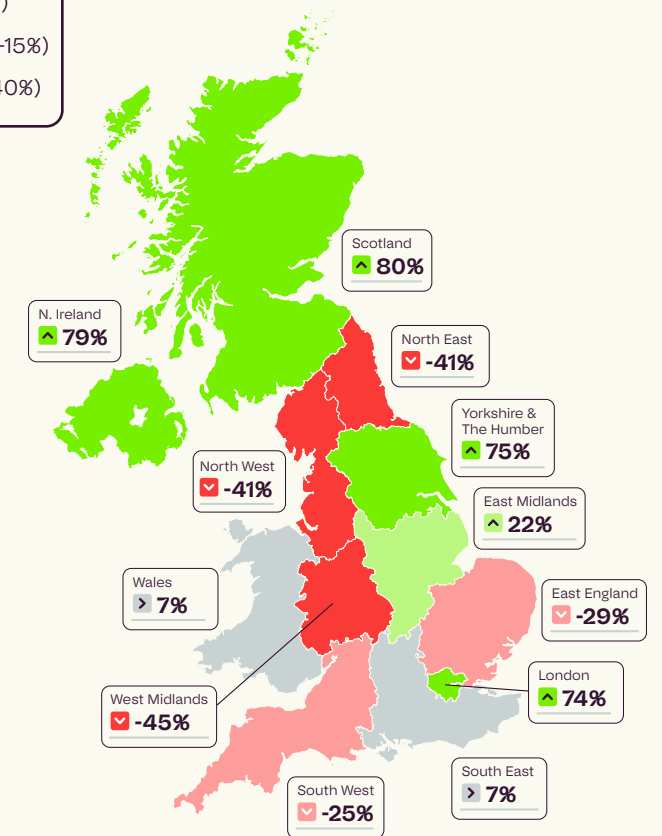
- Yorkshire & the Humber recorded the strongest growth in residential starts
- Most regions experienced declines in project starts
- Approvals grew strongly in London, Northern Ireland, Scotland and Yorkshire & the Humber

Yorkshire & the Humber led residential starts at £4,427 million, rising more than sevenfold compared with last year. Activity in the region was mainly driven by the £4,086 million Leeds City Centre Heat Network project. London was the second most active region at £1,239 million despite a 42% decline, while the North West increased 27% to £1,144 million. Northern Ireland also more than doubled to £296 million, but most other regions experienced declines.

Changes in Housing Starts
on a Year Earlier



Changes in Housing Planning Approvals
on a Year Earlier



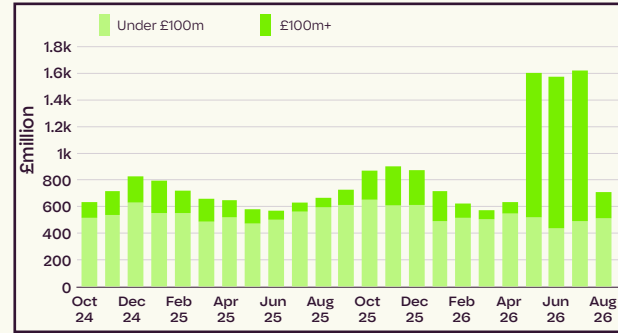
Industrial

Overview

- ✓ **55% decrease** in project starts year on year
- ✓ **48% decrease** in main contract awards from last year
- ✓ **6% decrease** in detailed planning approvals compared to 2025

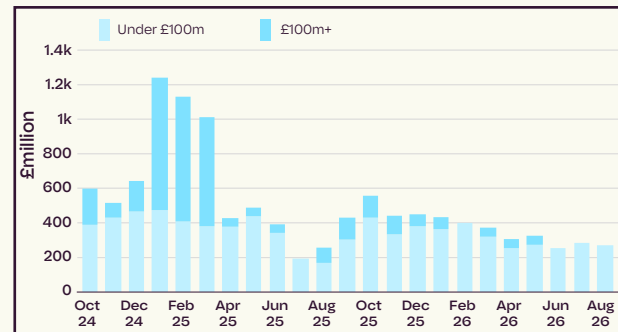
Industrial activity weakened considerably on an annual basis, with project starts and main contract awards falling sharply compared with last year. Starts increased against the previous three months, supported by underlying projects, while contract awards declined. No major projects were awarded or started on site during the period. Planning approvals also fell against both periods, indicating a softer development pipeline and reduced near-term workload.

Detailed Planning Approvals



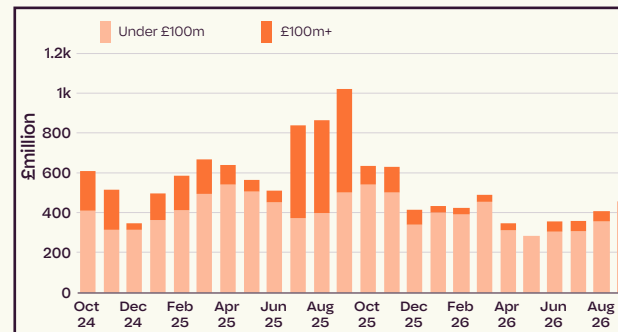
Source: Glenigan

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	1,616	426	2,042
YoY	-12%	25%	-6%
Prev. 3 months	23%	-87%	-57%
Prev. 3 months (SA)	23%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	673	-	673
YoY	-26%	-100%	-48%
Prev. 3 months	-12%		-12%
Prev. 3 months (SA)	-8%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,371	-	1,371
YoY	-9%	-100%	-55%
Prev. 3 months	50%	-100%	28%
Prev. 3 months (SA)	20%		

Industrial

Types of projects started

All sub-sectors declined in value.

- Manufacturing accounted for the largest share (63%), but decreased 55% year-on-year to total £868 million
- Warehousing & Logistics fell 51% against the previous year, totalling £466 million
- Other Industrial projects decreased 79% year-on-year to total £38 million

Types of Industrial Projects Started

Three months to September 2026

	£ million	Percentage
Manufacturing	868	63%
Other Industrial	38	3%
Warehousing & Logistics	466	34%
Total	1,371	100%

Project Spotlight

Prologis Park – Fradley

Detailed plans have been approved for the £100 million “Prologis Park – Fradley” development. A main contractor is yet to be appointed on the scheme with works due to be completed in Q4 2027.

PROJECT ID: 26295085

IMAGE SOURCE: PALLETWAYS

£100m



Industrial League Tables

October 2025 to September 2026

Contractors	Projects	£m
Winvic Group	13	377
Glencar Constr.	8	301
MCS Group	11	188
TSL Projects	3	153
GMI Construction	7	139
Morgan Sindall	4	118
Caddick Group	5	116
Benniman	2	112
The Barnfield Group	6	106
Murphy Group	2	102

Clients	Projects	£m
Segro	4	223
DP World	3	141
Prologis UK	3	140
Panattoni UK	7	120
Amazon UK	2	89
JPW Consulting	1	84
Harworth Estates Inv.	1	84
Mountpark Prop.	3	84
Firethorn Trust	1	74
Caddick Group	2	69

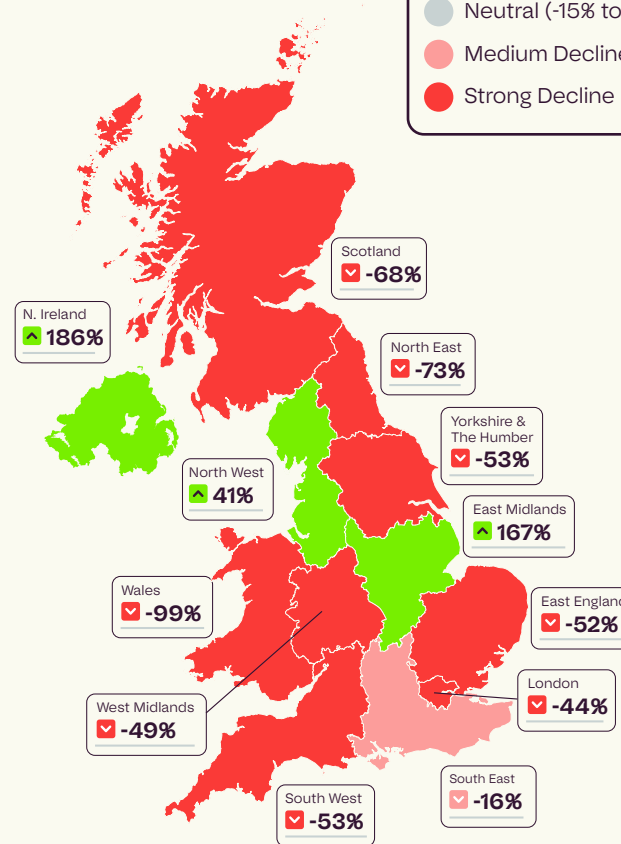
Industrial

Regional

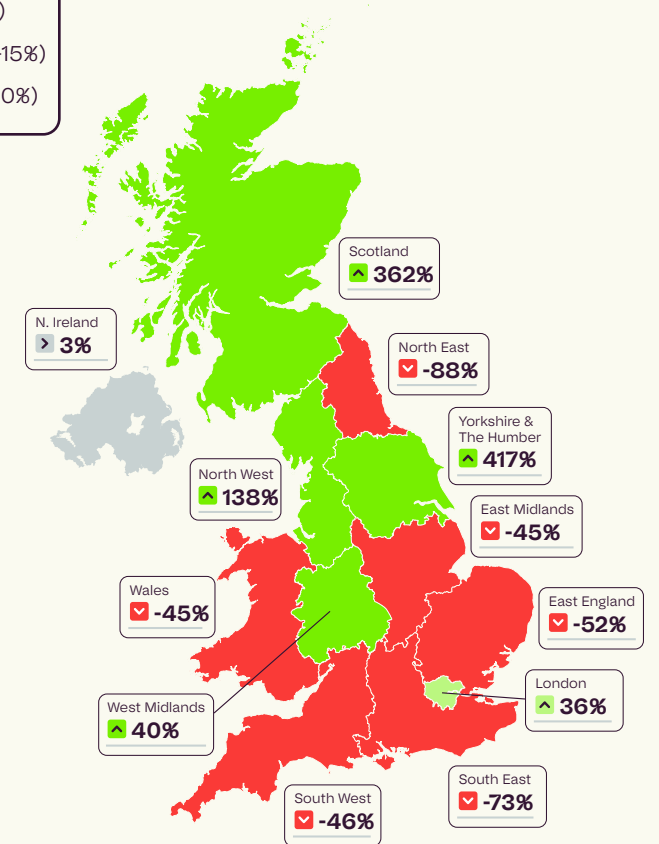
- Project starts declined in all but three regions
- Mixed regional performance in detailed planning approvals
- The North West experienced strong growth in both starts and approvals

The East Midlands was the most active region for industrial starts, rising 167% year-on-year to £255 million. The North West followed at £230 million, increasing 41%, while Northern Ireland recorded the strongest growth, rising 186% to £119 million. By contrast, all other regions experienced substantial declines in activity.

Changes in Industrial Starts
on a Year Earlier



Changes in Industrial Planning Approvals
on a Year Earlier



Offices

Overview

- ▼

55% decrease

in project starts year on year

▼

38% decrease

in main contract awards from last year

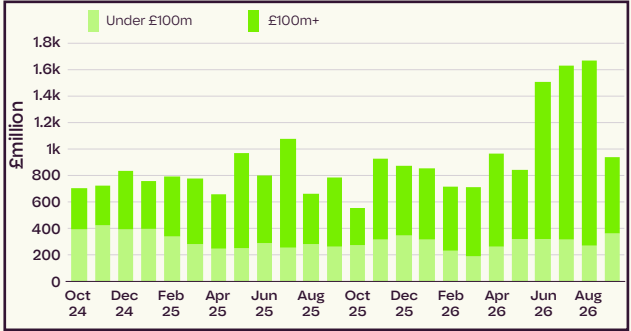
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19% increase

in detailed planning approvals compared to a year ago

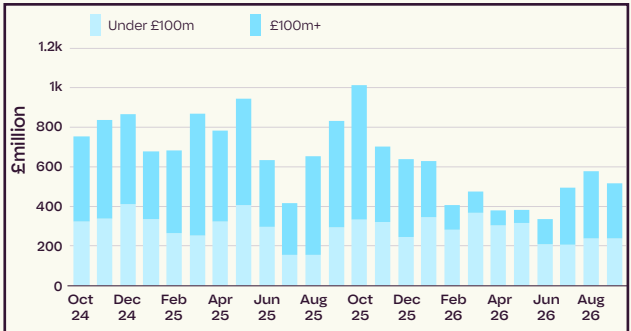
Office sector activity weakened during the period, with project starts falling sharply against both last year and the previous three months. Main contract awards also declined on a year ago, although they strengthened compared with the preceding quarter. Planning approvals increased annually due to growth in major projects, but fell against the previous three months, pointing to a stronger year-on-year pipeline despite softer recent momentum.

Detailed Planning Approvals



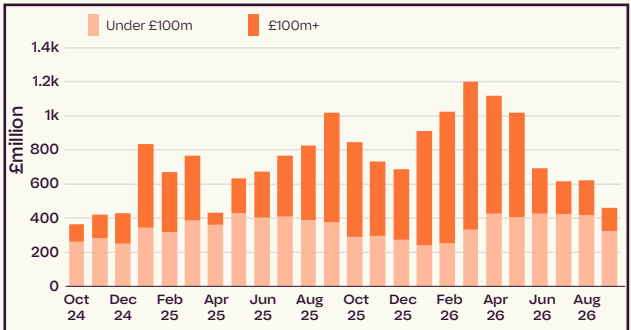
Source: Glenigan

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	1,086	1,731	2,817
YoY	38%	10%	19%
Prev. 3 months	14%	-52%	-38%
Prev. 3 months (SA)	0%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	713	838	1,551
YoY	-19%	-48%	-38%
Prev. 3 months	15%	119%	54%
Prev. 3 months (SA)	7%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	974	410	1,384
YoY	-13%	-79%	-55%
Prev. 3 months	-24%	-49%	-33%
Prev. 3 months (SA)	-15%		

Offices

Types of projects started

Most value bands experienced a decline in project starts, with only one up on a year ago.

- The £50 million to £100 million value band accounted for the largest share (33%), increasing 26% year-on-year to £455 million
- Projects over £100 million represented 30% of activity, falling 79% year-on-year to £410 million
- The £20 million to £50 million value band decreased 23% year-on-year to total £217 million

Types of Office Projects Started

Three months to September 2026

	£ million	Percentage
Up to £5 million	162	12%
£5 million up to £10 million	42	3%
£10 million up to £20 million	98	7%
£20 million up to £50 million	217	16%
£50 million up to £100 million	455	33%
Over £100 million	410	30%
Total	1384	100%

Project Spotlight

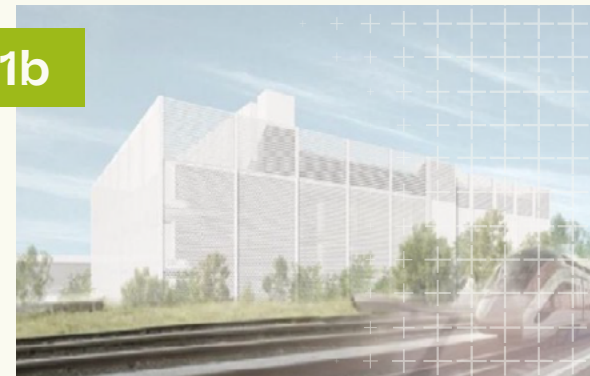
SEGRO Park Premier Data Centre

Detailed plans have been approved for the £1 billion "SEGRO Park Premier Data Centre" development. Works are due to complete in Q2 2030, with a main contractor yet to be appointed on the scheme.

PROJECT ID: 25160156

IMAGE SOURCE: SEGRO

£1b



Office League Tables

October 2025 to September 2026

Contractors	Projects	£m
Morgan Sindall	111	904
Skanska UK	2	555
Multiplex Construc.	3	508
Mace Group	3	440
Structure Tone	3	349
McLaren Construc.	3	303
Newarthill	2	270
Willmott Dixon	4	159
Bovis	1	150
Avondale Construc.	2	139

Clients	Projects	£m
Land Securities	2	283
Derwent London	3	256
Barclays Bank	6	184
British Land	3	178
Great Portland Est.	3	162
Great. London Auth.	5	153
St Martins Property	1	150
Ho Bee Land (UK)	1	138
GIC	1	137
Clifford Chance	1	130

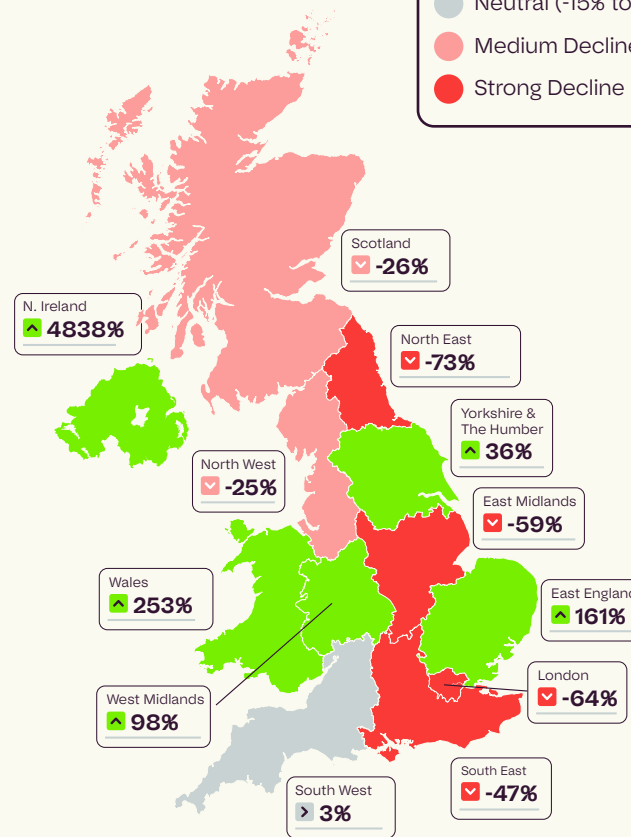
Offices

Regional

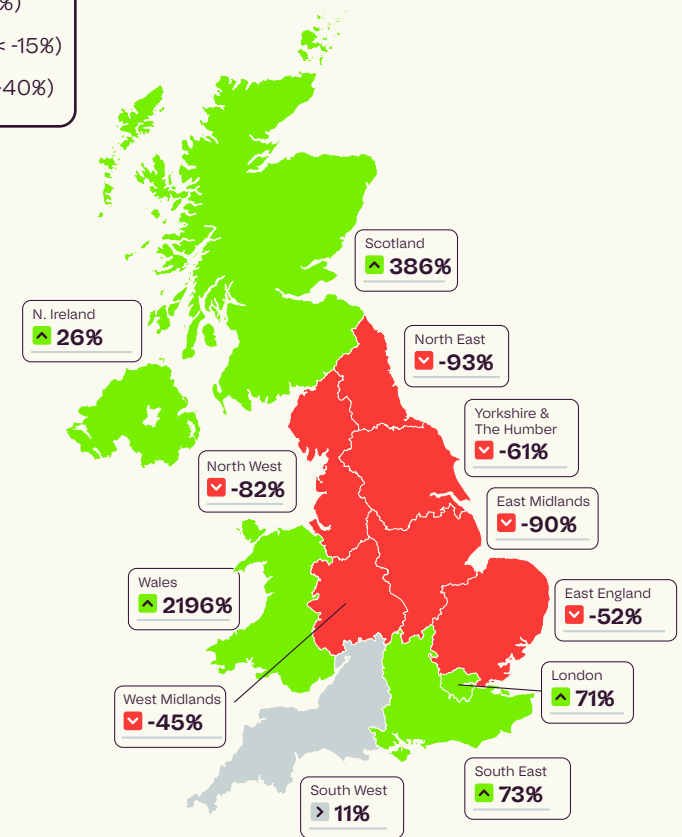
- Most regions experienced a decline in project starts
- Project starts surged in Northern Ireland, Wales and the West Midlands
- London, the South East, Scotland and Wales recorded strong growth in approvals

London accounted for almost two-thirds of all office starts, totalling £908 million despite a 64% decline on a year ago. Further decline was prevented by large projects such as the £155 million 63 New Bond Street development in Westminster. The West Midlands was the second most active region at £69 million, rising 98%, while the East of England increased 161% to £35 million. Wales and Northern Ireland also recorded particularly strong growth, highlighting divergent regional performance across the sector.

Changes in Office Starts on a Year Earlier



Changes in Office Planning Approvals on a Year Earlier



Retail

Overview

- ▼

26% decrease

in project starts year on year
- ▲

52% increase

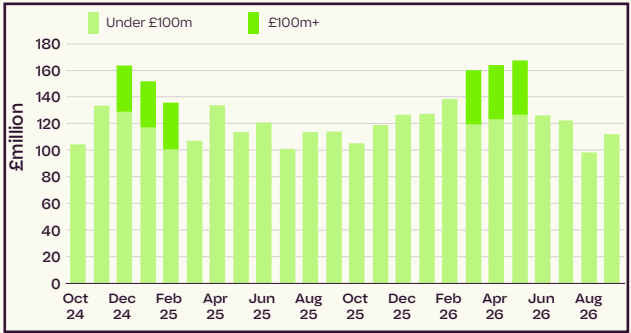
in main contract awards from last year
- ▼

2% decrease

in detailed planning approvals compared to 2025

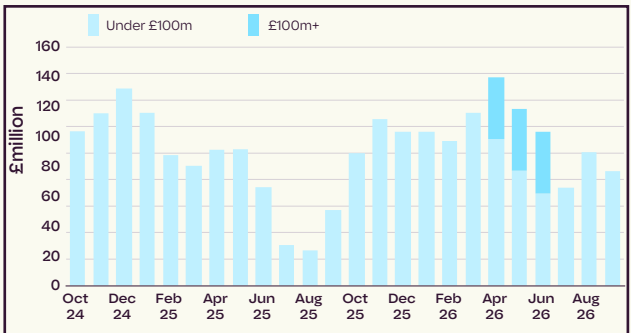
Retail activity weakened during the period, with project starts falling compared with both last year and the previous three months. In contrast, main contract awards strengthened significantly on a year ago, although they declined against the preceding quarter. Planning approvals remained broadly unchanged compared with last year but fell against the previous three months, indicating a subdued near-term pipeline.

Detailed Planning Approvals



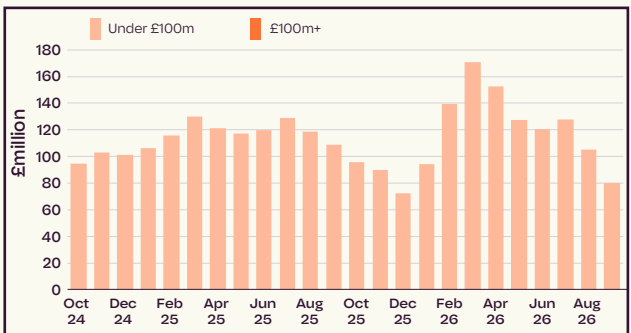
Source: Glenigan

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	338	-	338
YoY	-2%		-2%
Prev. 3 months	-11%		-11%
Prev. 3 months (SA)	9%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	259	-	259
YoY	52%		52%
Prev. 3 months	24%	-100%	-26%
Prev. 3 months (SA)	23%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	240	-	240
YoY	-26%		-26%
Prev. 3 months	-33%		-33%
Prev. 3 months (SA)	-23%		

Retail

Types of projects started

Project starts declined in all but one retail sub-sector.

- Supermarkets accounted for the largest share (79%), having increased 31% year-on-year to total £191 million
- Shops fell 74% against the previous year, totalling £37 million
- Other Retail decreased 20% year-on-year to total £8 million

Types of Retail Projects Started

Three months to September 2026

	£ million	Percentage
Other Retail	8	3%
Petrol Filling Stations	1	0%
Retail Warehousing	2	1%
Shopping Centres	2	1%
Shops	37	16%
Supermarkets	191	79%
Total	240	100%

Project Spotlight

Aldi Stores - Ivybridge, Devon

Detailed plans have been approved for the £8 million Aldi Store in Ivybridge, Devon. A main contractor is yet to be appointed on the scheme, with work due to be completed in Q4 2027.

PROJECT ID: 24228297

IMAGE SOURCE: KENDALL KINGSCOTT PARTNERSHIP

£8m



Retail League Tables

October 2025 to September 2026

Contractors	Projects	£m
McLaren	1	140
Kier Group	1	99
Vistry	1	40
DSP Construction	8	31
The Barnfield Group	2	24
Willmott Dixon	1	24
Adston UK	5	21
HBC Construction	1	21
Braithwaite Group	6	19
CTM Management	2	16

Clients	Projects	£m
Lidl UK	37	154
Derwent London	1	99
Aldi	31	87
Rioja Developments	1	70
Buckminster Estate	1	70
J Sainsbury	14	36
Sovereign Centros	1	35
Metrocentre Partsp.	1	35
Marks & Spencer	14	35
T J Morris	9	32

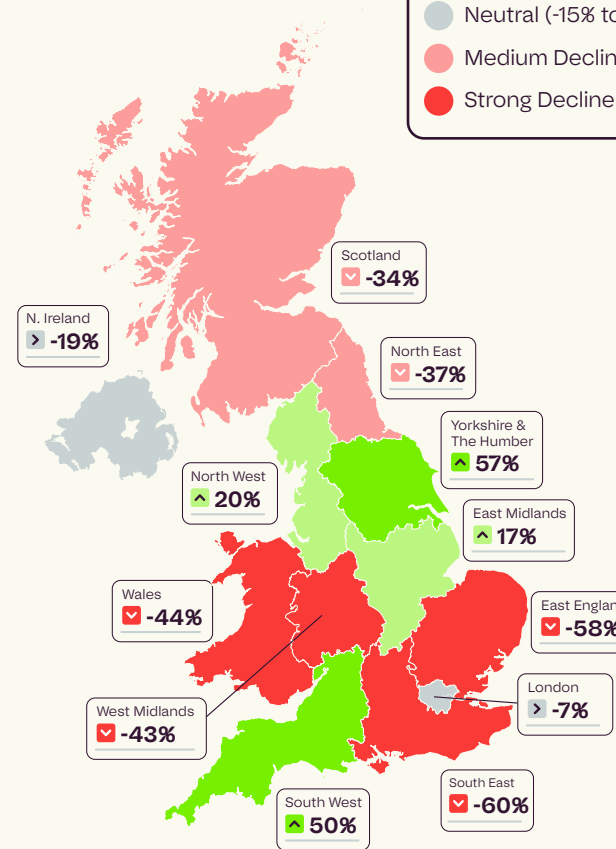
Retail

Regional

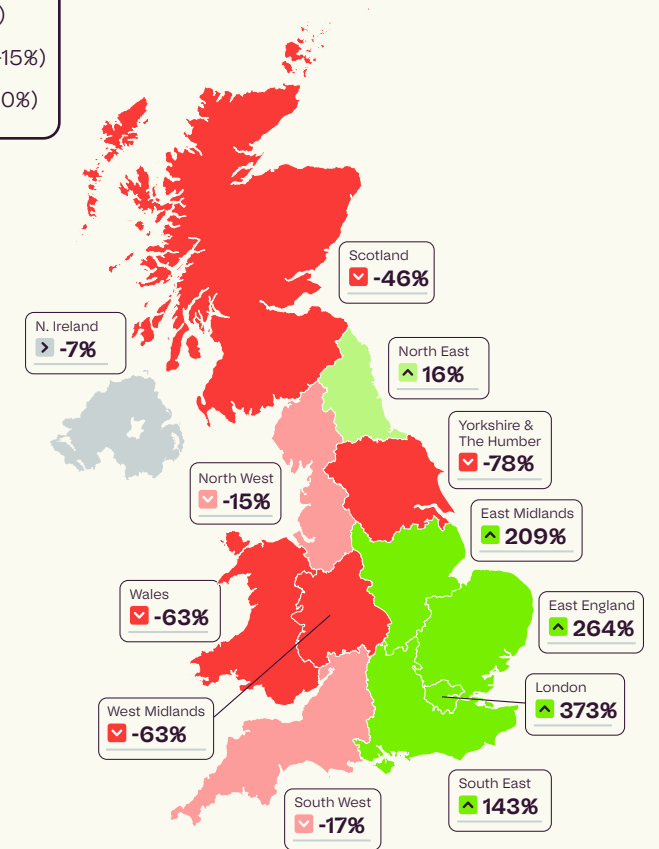
- Project starts only grew in four regions
- Weak performance in detailed planning approvals
- The East Midlands recorded growth in both project starts and approvals

London was the largest retail market during the period at £34 million, although activity decreased 7% compared with last year. The South West followed at £31 million, rising 50%, while Yorkshire & the Humber recorded the strongest growth, increasing 57% to £21 million. By contrast, the South East, the East of England and Wales all experienced substantial declines.

Changes in Retail Starts on a Year Earlier



Changes in Retail Planning Approvals on a Year Earlier



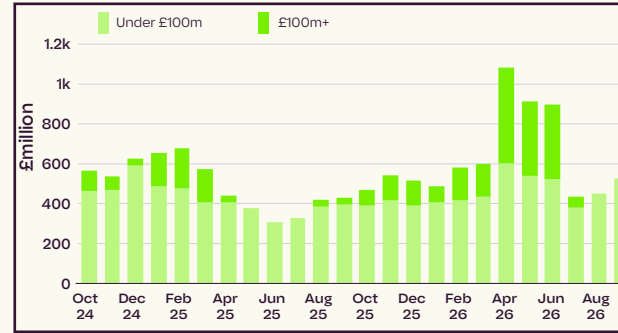
Hotel & Leisure

Overview

- ▼ **51% decrease** in project starts year-on-year
- ▼ **39% decrease** in main contract awards from last year
- ▲ **22% increase** in detailed planning approvals compared to 2025

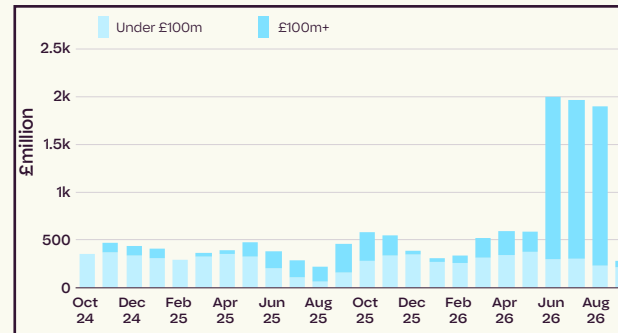
Hotel & leisure activity weakened during the period, with project starts and main contract awards falling sharply compared with both last year and the previous three months. In contrast, planning approvals increased on a year ago, supported by growth in underlying projects, although they declined against the preceding quarter. This indicates a stronger annual pipeline despite weaker current activity.

Detailed Planning Approvals



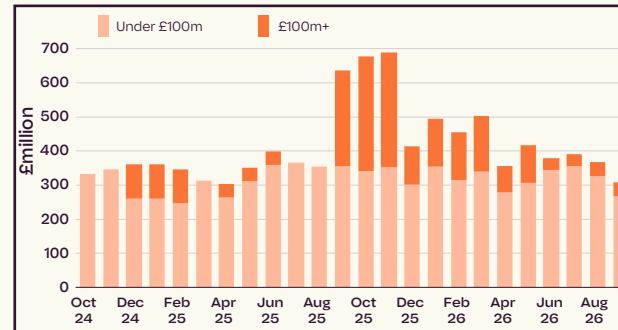
Source: Glenigan

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	1,576	-	1,576
YoY	33%	-100%	22%
Prev. 3 months	0%	-100%	-41%
Prev. 3 months (SA)	-18%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	634	200	834
YoY	35%	-78%	-39%
Prev. 3 months	-28%	-96%	-86%
Prev. 3 months (SA)	-23%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	801	125	926
YoY	-25%	-85%	-51%
Prev. 3 months	-23%	25%	-18%
Prev. 3 months (SA)	-20%		

Hotel & Leisure

Types of projects started

Activity fell in most categories, with only two up on a year ago.

- Hotels & Guest Houses accounted for the largest share (45%), having increased 10% year-on-year to total £420 million
- Indoor Leisure Facilities fell 68% against the previous year, totalling £232 million
- Other Hotel & Leisure projects decreased 45% year-on-year to total £108 million

Types of Hotel & Leisure Projects Started

Three months to September 2026

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	65	7%
Cinemas & Theatres	7	1%
Hotels, Guest Houses	420	45%
Indoor Leisure Facilities	232	25%
Other Hotel & Leisure	108	12%
Sport Facilities	94	10%
Total	926	100%

Project Spotlight

Andover Theatre

Plans have been approved for the "Andover Theatre" development. Work is due to complete in Q4 2029 for the £50 million development.

PROJECT ID: 17445966

IMAGE SOURCE: ARCHITECTS JOURNAL

£50m



Hotel & Leisure League Tables

October 2025 to September 2026

Contractors	Projects	£m
Newarthill	5	921
Galliford Try	9	918
Wates	4	915
Morgan Sindall	6	902
Bovis	1	833
Winvic	1	833
West End (London)	1	400
Robertson Group	5	151
Willmott Dixon	9	137
VINCI Construction	1	125

Clients	Projects	£m
Univ. Dest. and Exp.	1	1,250
Bedford BC.	1	1,250
Comcast	1	1,250
East West Railway	1	1,250
Crystal Palace FC.	1	200
Whitbread	25	184
Criterion Capital	2	135
West End (London)	1	133
NEOS Hospitality	1	133
Alvarez & Marsal	1	131

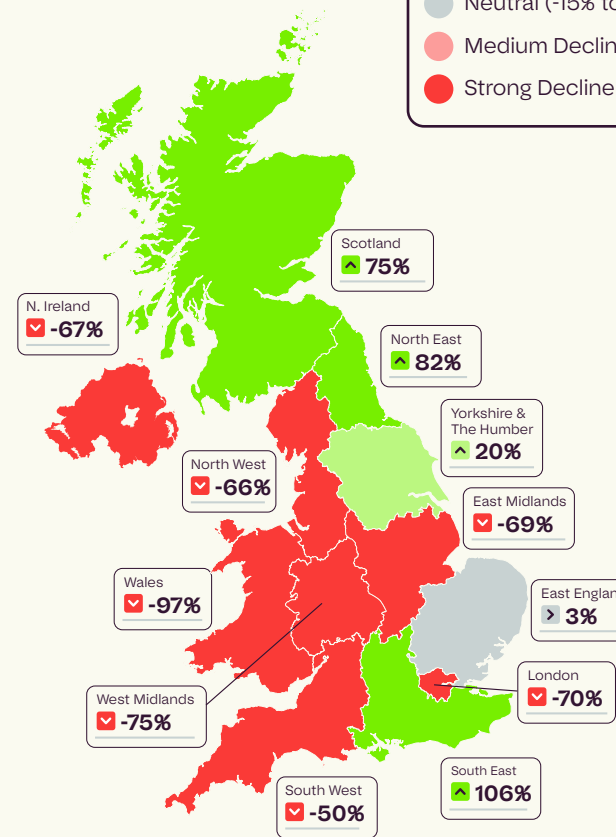
Hotel & Leisure

Regional

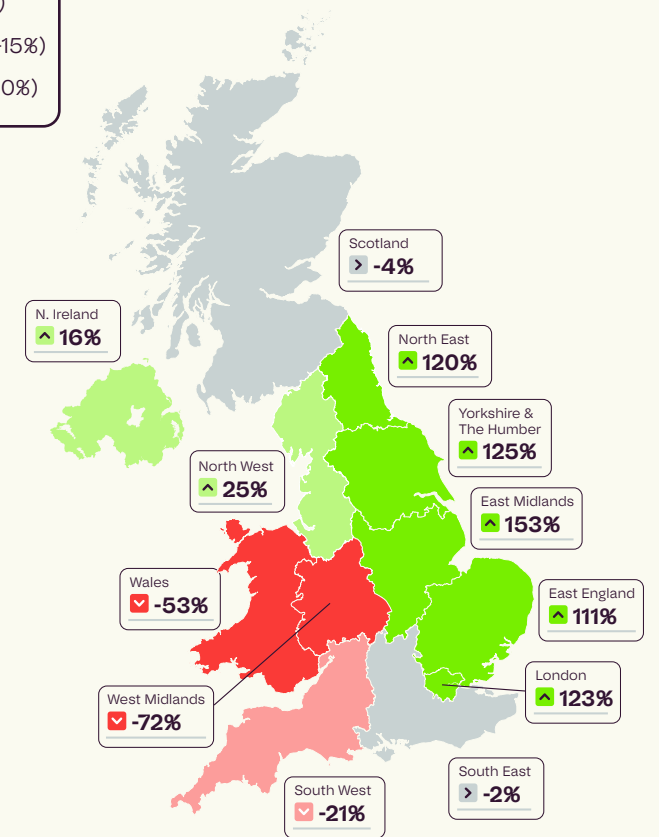
- Project start performance was weak, with most regions down on a year ago
- Detailed planning approvals grew in most regions
- The North East experienced strong growth in both starts and approvals

The North West was the most active region for hotel & leisure starts at £202 million, despite a 66% decline from last year. Further decline was prevented by the £125 million Eden Project Morecambe development in Lancashire. The South East followed at £157 million and recorded the strongest growth among the largest regions, rising 106%. Scotland and the North East also posted strong gains, increasing 75% and 82% respectively.

Changes in Hotel & Leisure Starts
on a Year Earlier



Changes in Hotel & Leisure Planning Approvals
on a Year Earlier



Health

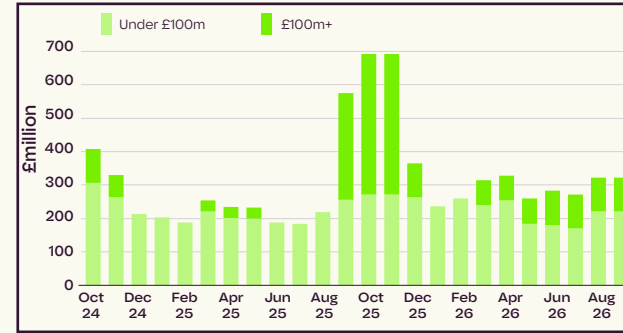
Overview

- ✓ **24% decline** in project starts against the previous year
- ↑ **1,517% rise** in main contract awards year-on-year
- ✓ **44% fall** in detailed planning approvals compared to the previous year

The sector recorded weaker on-site activity, with project starts declining against the previous year. Detailed planning approvals also fell sharply, although main contract awards rose significantly, reflecting several major schemes moving into procurement. While starts fell 28% compared with the previous three months, approvals increased 14% and awards rose almost six-fold, pointing to improving workload prospects over the coming quarters.

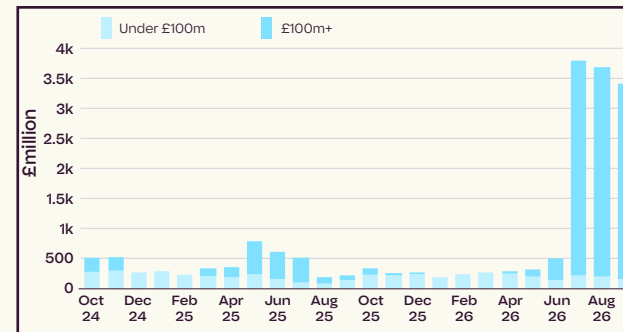
The sector's outlook remains supported by major healthcare investment programmes and ongoing capital expenditure commitments, which are expected to sustain construction activity and underpin future workloads.

Detailed Planning Approvals



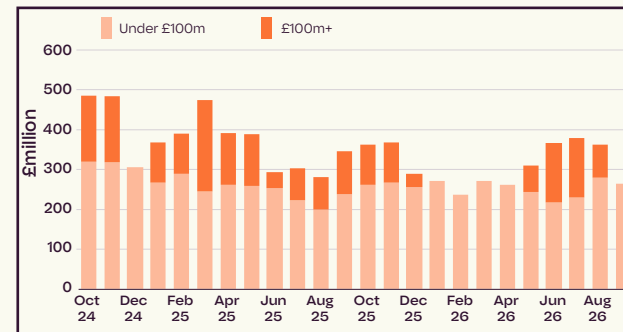
Source: Glenigan

Main Contract Awards



Source: Glenigan

Health Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	664	300	964
YoY	-13%	-69%	-44%
Prev. 3 months	23%	-2%	14%
Prev. 3 months (SA)	0%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	453	9,764	10,217
YoY	9%	4443%	1517%
Prev. 3 months	14%	803%	591%
Prev. 3 months (SA)	22%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	793	-	793
YoY	11%	-100%	-24%
Prev. 3 months	21%	-100%	-28%
Prev. 3 months (SA)	-2%		

Health

Types of projects started

- Hospitals accounted for the largest share of activity, representing 46% of total starts and increasing 5% against the previous year
- Nursing homes & Hospices represented 18% of activity and fell 37% year-on-year
- Dental, Health & Veterinary Centres/Surgeries recorded the strongest growth, rising 41% year-on-year and representing a 14% share of activity

Types of Health Projects Started

Three months to September 2026

	£ million	Percentage
Day Centres	-	0%
Dental, Health & Veterinary Centres/ Surgeries	109	14%
Hospitals	365	46%
Nursing Homes & Hospices	146	18%
Other Health	173	22%
Total	793	100%

Project Spotlight

The Fleming Centre

Detailed plans have been approved for The Fleming Medical Research Centre development. A main contractor is yet to be appointed on the £50 million scheme, with work due to complete in Q1 2029.

PROJECT ID: 24199331

IMAGE SOURCE: STANTON WILLIAMS

£50m



Health League Tables

October 2025 to September 2026

Contractors	Projects	£m
Sacyr	1	2,000
Skanska UK	2	1,950
Graham Construc.	2	1,507
IHP Integrated Health	4	1,358
Laing O'Rourke	2	789
Bouygues UK	1	710
Dragados UK	1	648
Morgan Sindall Group	10	624
Kier	1	600
Bovis	1	400

Clients	Projects	£m
Department of Health	241	10,432
States Of Jersey	1	710
The Sainsbury Lab.	1	125
John Innes Centre	1	125
Rolls-Royce	1	100
Kadans Science	1	100
Syngenta	1	94
Welsh Government	23	93
Cheltenham BC.	1	92
Cleveland Clinc	1	81

Health

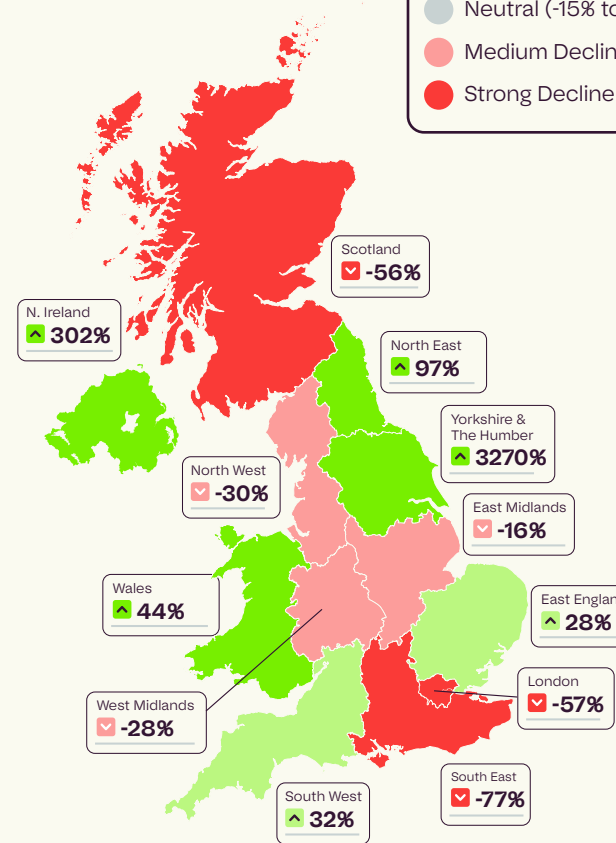
Regional

- The South West recorded the highest level of project-start activity at £217 million
- The East of England and the South East also reported substantial levels of starts, at £88 million and £80 million respectively
- London recorded the highest level of planning approvals at £333 million

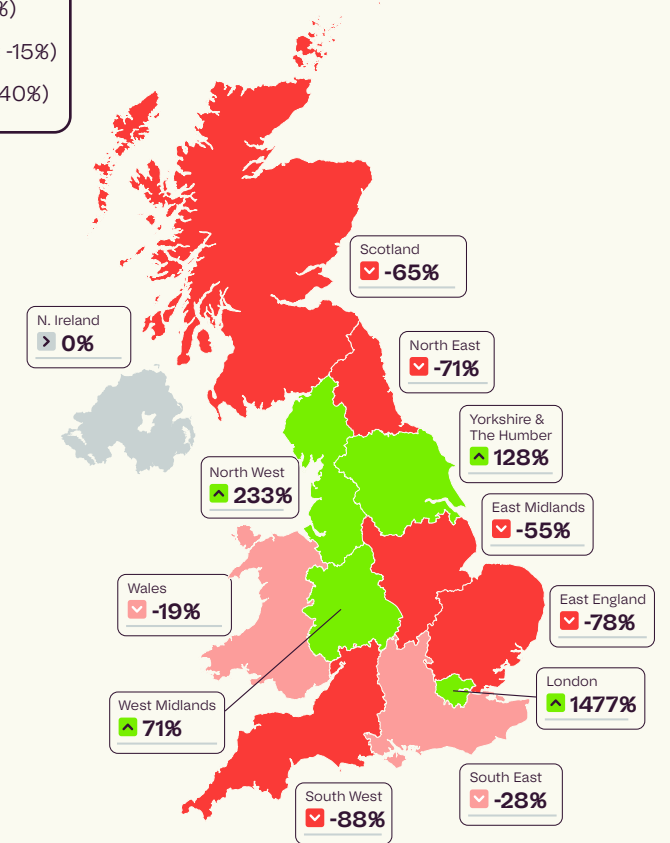
Regional activity was led by the South West, which accounted for £217 million of project starts and over a quarter of all sector activity. The region recorded growth of 32% against the previous year, demonstrating continued investment in healthcare infrastructure. The East of England was the second largest starts market at £88 million and delivered growth of 28%, while the South East recorded £80 million despite starts falling 77% compared with the previous year.

Planning approvals were concentrated in London, where approvals totalled £333 million and increased by more than 14 times compared with the previous year, making it the dominant approvals market. The South East ranked second with £130 million of approved schemes, while Yorkshire & the Humber accounted for £109 million and recorded annual growth of 128%.

Changes in Health Starts
on a Year Earlier



Changes in Health Planning Approvals
on a Year Earlier



Education

Overview

- ✓

35% decline

in project starts against the previous year

↑

15% rise

in main contract awards year-on-year

↑

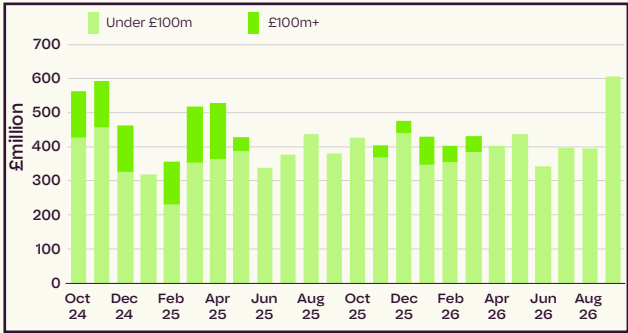
60% increase

in detailed planning approvals compared to the previous year

Education sector activity weakened in terms of starts, although both contract awards and planning approvals strengthened compared with the previous year. The decline in projects commencing on site contrasts with stronger forward indicators, suggesting improved prospects for future workloads. Compared with the previous three months, starts fell 39%, while approvals rose 77%.

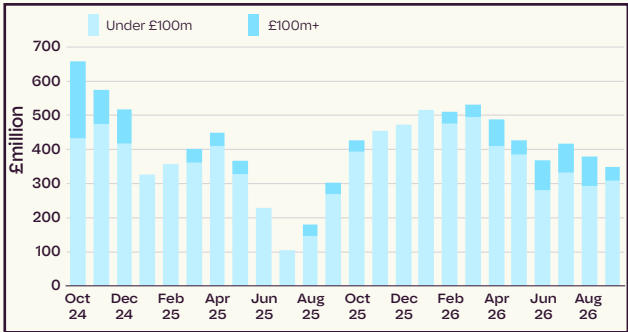
Looking ahead, ongoing investment in the education estate and major refurbishment and rebuilding programmes are expected to provide continuing support to activity across the sector.

Detailed Planning Approvals



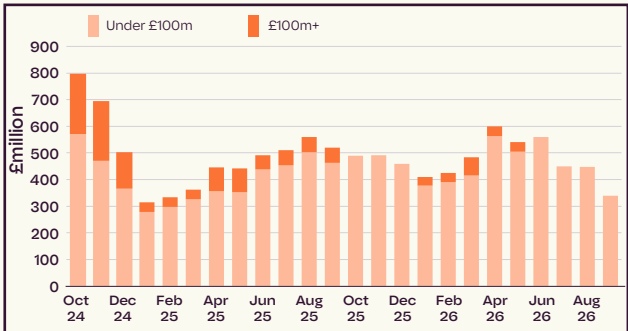
Source: Glenigan

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	1,818	-	1,818
YoY	60%		60%
Prev. 3 months	77%		77%
Prev. 3 months (SA)	32%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	925	120	1,045
YoY	14%	20%	15%
Prev. 3 months	10%	-54%	-5%
Prev. 3 months (SA)	9%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,016	-	1,016
YoY	-27%	-100%	-35%
Prev. 3 months	-39%		-39%
Prev. 3 months (SA)	-41%		

Education

Types of projects started

- Schools dominated activity, accounting for almost four-fifths (79%) of total project starts despite a 37% decline against the previous year
- University projects represented the second largest area of activity, rising 218% year-on-year and accounting for 15% of starts
- Colleges accounted for 2% of activity, falling 86% compared with the previous year

Types of Education Projects Started

Three months to September 2026

	£ million	Percentage
Colleges	16	2%
Other Education	39	4%
Schools	807	79%
Universities	153	15%
Total	1,016	100%

Project Spotlight

College – Kensington Gore

Plans have been approved for the development of a college in Kensington Gore, London. A main contractor is yet to be appointed on the £90 million scheme, with work due to complete in Q3 2032.

PROJECT ID: 25499133

IMAGE SOURCE: WITHERFORD WATSON MANN ARCHITECTS

£90m



Education League Tables

October 2025 to September 2026

Contractors	Projects	£m
Bowmer & Kirkland	16	564
Morgan Sindall	33	515
Willmott Dixon	25	464
Kier	19	413
Royal BAM Group	10	384
Galliford Try	22	269
Graham Construc.	4	210
Tilbury Douglas Con.	15	181
Robertson Group	8	176
McLaughlin & Harvey	3	143

Clients	Projects	£m
Dep. for Education	79	1,620
E. Dunbartonshire DC.	2	140
London Met. Univ.	1	125
Northumbria Univ.	4	89
Univ. of Edinburgh	2	63
Aberdeen C. Council	4	60
Univ. of Hertfordshire	1	55
Education Auth. NI.	9	54
hub North Scotland	1	53
Midlothian Council	2	48

Education

Regional

- Wales was the most active region for project starts, totalling £165 million
- The East of England and Scotland also recorded significant levels of starts, at £174 million and £109 million respectively
- The West Midlands accounted for the highest level of planning approvals at £274 million

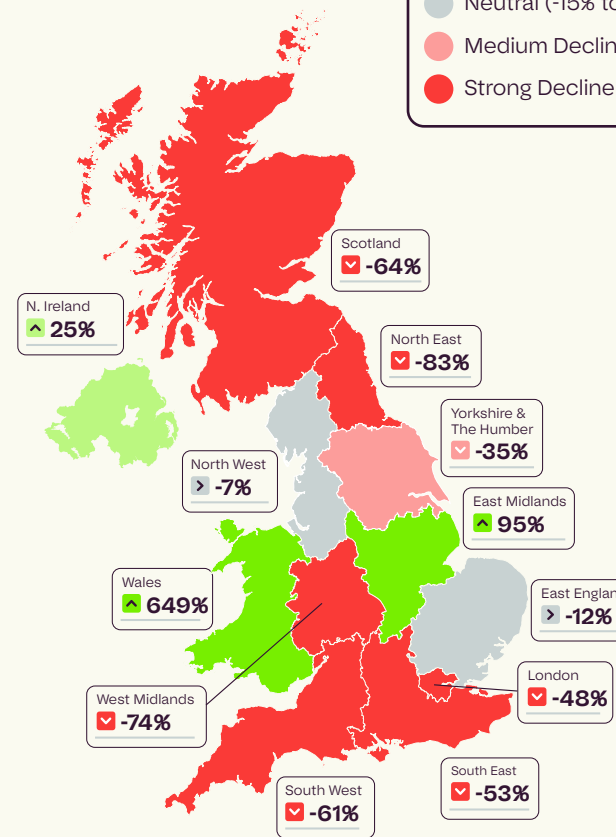
Wales was the largest market for education project starts, accounting for £165 million of activity and delivering exceptionally strong growth of 649% against the previous year. The East of England followed with £174 million of starts, while Scotland recorded £109 million despite activity remaining below the level recorded a year earlier.

In the approvals market, the West Midlands led all regions with £274 million of detailed planning approvals, rising 287% against the previous year. The South East and London also reported significant approval levels at £246 million and £235 million respectively. The South West recorded particularly strong growth, with approvals increasing 474%.

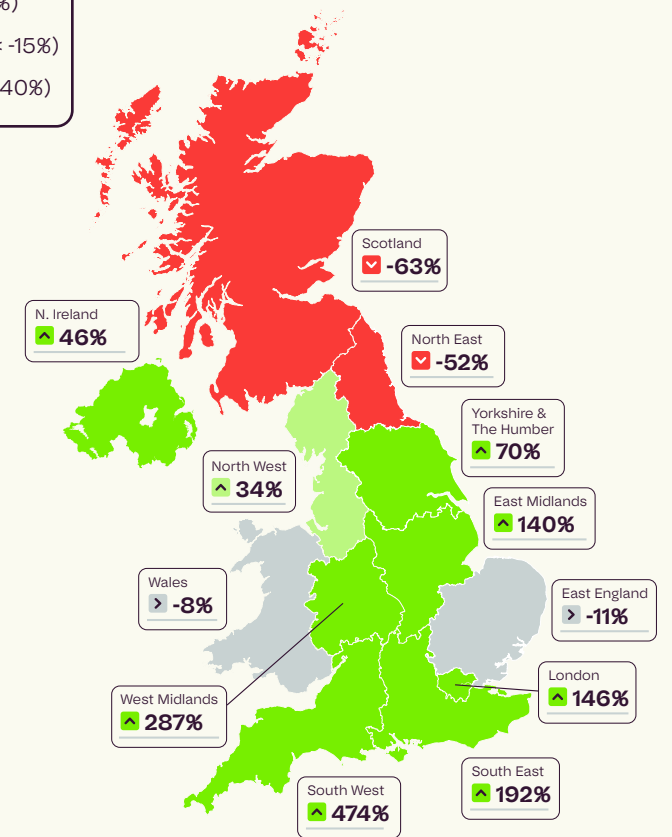
Changes in Education Starts on a Year Earlier

Growth or Decline

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



Changes in Education Planning Approvals on a Year Earlier



Community & Amenity

Overview

- ▲

3% increase

in project starts year-on-year
- ▼

55% decrease

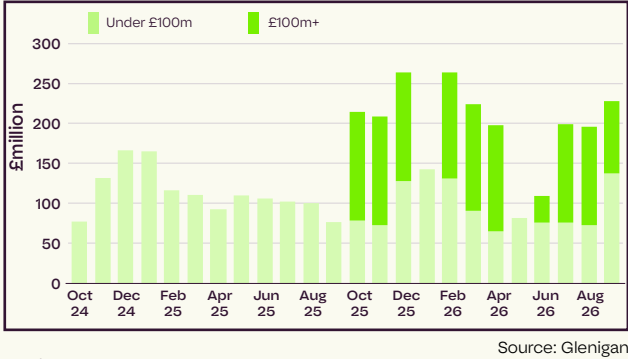
in main contract awards from last year
- ▲

200% increase

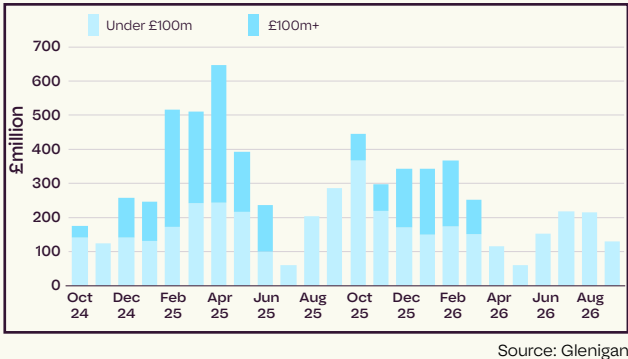
in detailed planning approvals compared to 2025

Community & amenity activity was mixed during the period, with project starts increasing compared with both last year and the previous three months. In contrast, main contract awards fell against both periods. Detailed planning approvals rose sharply on an annual and quarterly basis, supported by growth in both major and underlying projects, pointing to a considerably stronger future pipeline.

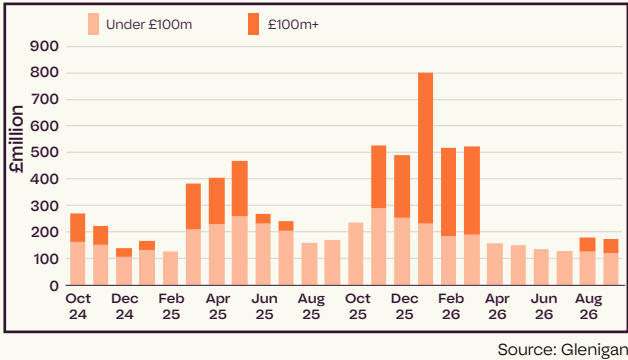
Detailed Planning Approvals



Main Contract Awards



Community & Amenity Starts



Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	412	271	683
YoY	81%		200%
Prev. 3 months	82%	171%	109%
Prev. 3 months (SA)	136%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	389	-	389
YoY	-55%		-55%
Prev. 3 months	-15%		-15%
Prev. 3 months (SA)	-41%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	359	159	518
YoY	-29%		3%
Prev. 3 months	-10%		29%
Prev. 3 months (SA)	-5%		

Community & Amenity

Types of projects started

Growth was driven by two sub-sectors, with all others down on a year ago.

- Military projects accounted for the largest share (39%), having increased more than sevenfold year-on-year to total £201 million
- Prisons increased 123% against the previous year, totalling £182 million
- Blue Light projects fell 33% year-on-year to total £81 million

Types of Community & Amenity Projects Started

Three months to September 2026

	£ million	Percentage
Blue Light	81	16%
Government Buildings	18	3%
Law Courts	-	0%
Local Facilities	34	7%
Military	201	39%
Places of Worship	2	0%
Prisons	182	35%
Total	518	100%

Project Spotlight

Roselawn Crematorium

Detailed plans have been approved for the Roselawn Crematorium development. A main contractor is yet to be appointed on the £18 million development.

PROJECT ID: 19423848

IMAGE SOURCE: ITV NEWS

£18m



Community & Amenity League Tables

October 2025 to September 2026

Contractors	Projects	£m
Corrigenda	1	300
Bowmer & Kirkland	5	234
Galliford Try	4	74
Kier	4	66
Graham Construc.	2	56
Wates	14	44
Reds10 (UK)	1	38
Morgan Sindall	10	37
Willmott Dixon	6	30
BMR Construction	1	23

Clients	Projects	£m
Ministry of Defence	21	709
Ministry of Justice	26	303
Hampshire CC.	1	300
Home Office	35	93
Liverpool City Region	2	65
Ridge And Partners.	1	59
The Guinness Prtnsp.	1	53
The COJCOLDS	1	48
Reuben Brothers	1	46
HM Revenue & Cust.	1	46

Community & Amenity

Regional

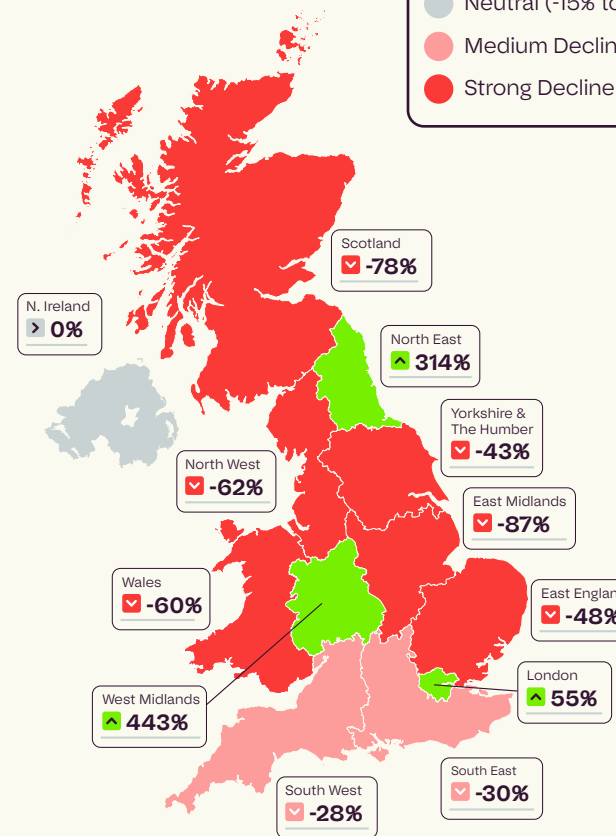
- Despite the overall sector growth, project starts only grew in three regions
- Most regions recorded strong growth in detailed planning approvals
- The West Midlands experienced substantial growth in both starts and approvals

The West Midlands dominated community & amenity starts, with activity rising more than fivefold year-on-year to £227 million, driven by the £159 million Defence Estates Optimisation Programme - Beacon Barracks development in Stafford. London was the second-largest regional market at £61 million, increasing 55%, while the North East recorded particularly strong growth, rising more than fourfold to £44 million. Elsewhere, activity weakened across most regions.

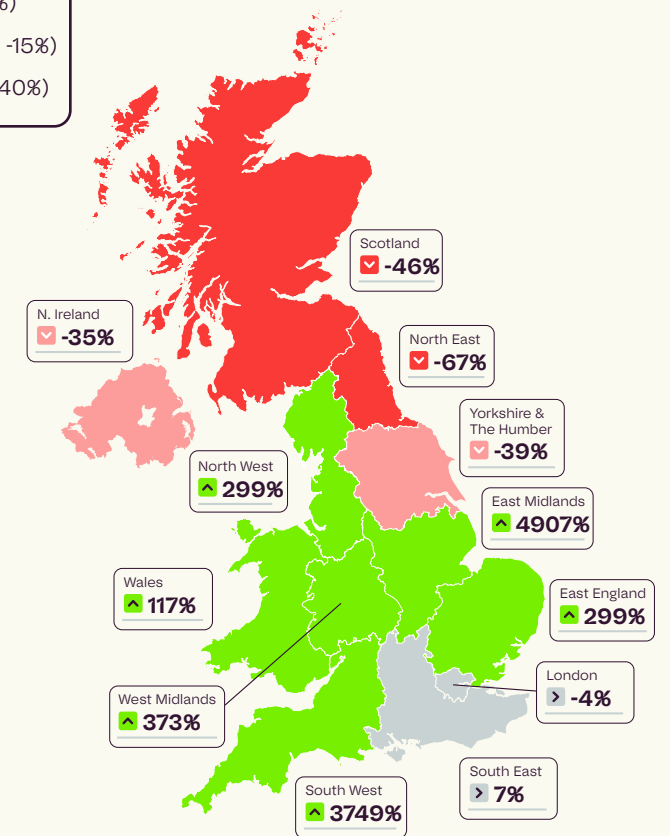
Changes in Community & Amenity Starts on a Year Earlier

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



Civil Engineering Overview

 **6% increase** in project starts against the previous year

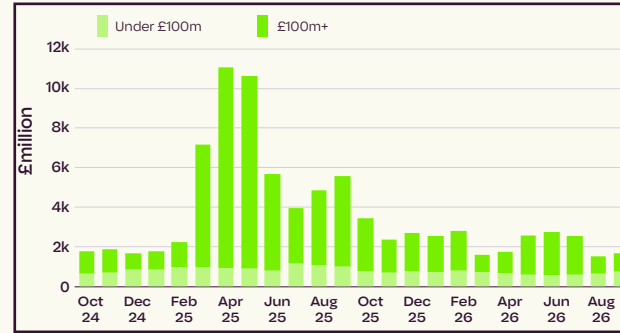
 **74% fall** in main contract awards year-on-year

 **70% fall** in detailed planning approvals compared to the previous year

Civil engineering activity presented a mixed picture during the period, with project starts increasing against the previous year while contract awards and planning approvals recorded substantial declines. Compared with the previous three months, starts fell 68%, awards declined 74% and approvals dropped 40%.

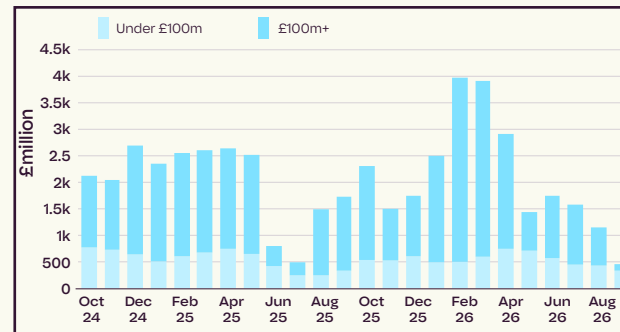
Despite weaker forward indicators, longer-term prospects continue to be supported by planned investment across transport, utilities, energy and environmental infrastructure.

Detailed Planning Approvals



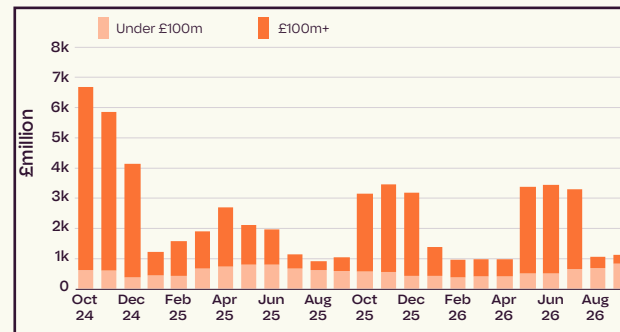
Source: Glenigan

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	2,205	2,745	4,951
YoY	-26%	-80%	-70%
Prev. 3 months	35%	-58%	-40%
Prev. 3 months (SA)	45%		

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	1,017	354	1,371
YoY	2%	-92%	-74%
Prev. 3 months	-41%	-90%	-74%
Prev. 3 months (SA)	-23%		

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	2,504	851	3,355
YoY	43%	-39%	6%
Prev. 3 months	63%	-90%	-68%
Prev. 3 months (SA)	101%		

Civil Engineering

Types of projects started

- Roads projects accounted for 30% of starts and recorded growth of 49% compared with the previous year
- Energy projects represented a further 18% of activity, although values were 48% lower than a year earlier
- Harbour/Ports increased 115% to account for 7% of the total value

Types of Civil Engineering Projects Started

Three months to September 2026

	£ million	Percentage
Airports	1	0%
Other Civils	1,030	31%
Rail	168	5%
Roads	1,016	30%
Harbours/Ports	226	7%
Energy	597	18%
Water Industry	273	8%
Waste	44	1%
Total	3,355	100%

Project Spotlight

Custom House Quay And Carlton Place

Detailed plans have been approved for the £25 million Custom House Quay And Carlton Place development. A main contractor is yet to be appointed on the scheme, with works expected to complete in Q3 2029.

PROJECT ID: 25382899

IMAGE SOURCE: HAWKINS BROWN

£25m



Civil Engineering League Tables

October 2025 to September 2026

Contractors	Projects	£m
Vital Energi Utilities	9	1,413
VINCI Construction	10	1,409
Kier	65	854
Galliford Try	90	564
Worley Europe	1	500
Marlborough Surf.	6	414
Balfour Beatty	14	405
M GROUP Services	7	348
VolkerWessels	16	313
Envision Energy	1	310

Clients	Projects	£m
Trafford Met. BC.	1	1,330
Westminster CC.	3	1,277
United Utilities	7	560
Cadent Gas	1	500
Dep. for Transport	30	465
Heidelberg Materials	2	406
Network Rail	24	381
Warwickshire CC.	3	322
Manby BGE	1	300
Kemble Water	23	260

Civil Engineering

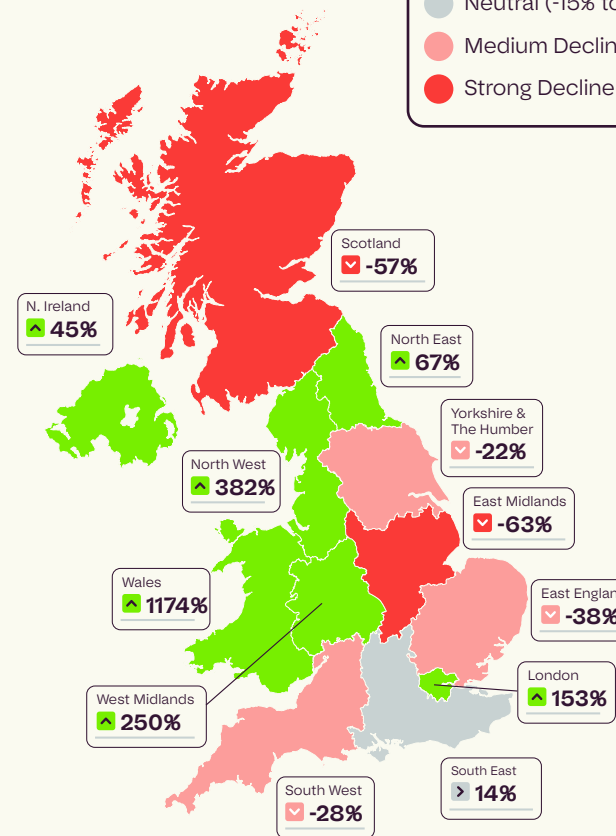
Regional

- The West Midlands recorded the highest level of project-start activity at £506 million
- The North West and Scotland also reported substantial levels of starts, at £471 million and £399 million respectively
- The East Midlands was the dominant approvals market, totalling £1,206 million

The West Midlands recorded the highest level of civil engineering project starts, accounting for £506 million of activity and benefiting from year-on-year growth of 250%. The North West followed with £471 million of starts and exceptionally strong growth of 382%, while Scotland recorded £399 million despite activity remaining below year-earlier levels.

Approvals activity was heavily concentrated in the East Midlands, where detailed planning approvals totalled £1.21 billion and increased by 286% compared with the previous year. The North West was the second largest approvals market at £1.19 billion, while Yorkshire & the Humber recorded approvals of £523 million.

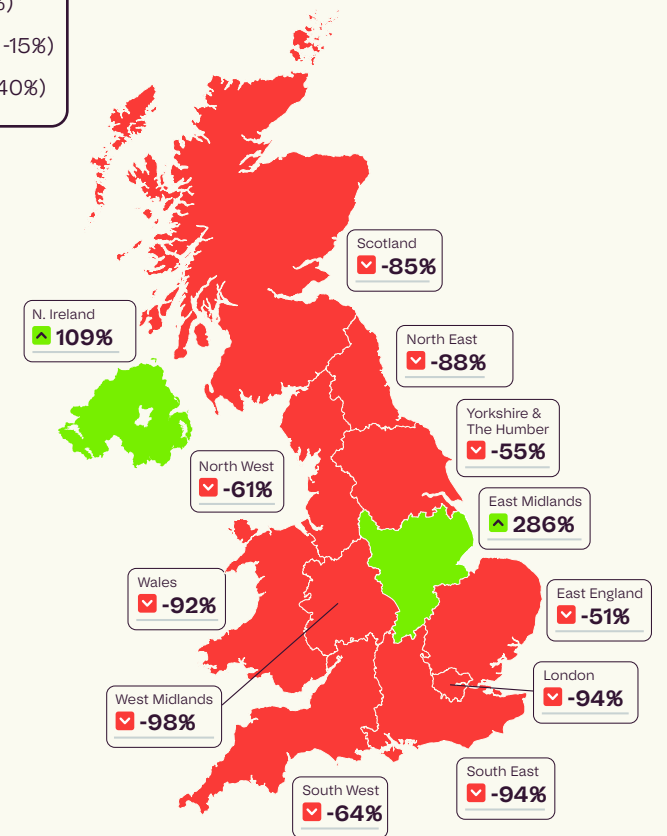
Changes in Civil Engineering Starts on a Year Earlier



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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