

# THE GLENIGAN CONSTRUCTION REVIEW

*Reflecting activity to the end of August 2024*

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- > Detailed planning approvals down 37% year-on-year
- > Main contract awards down 7% year-on-year
- > Project starts remained flat against the previous year

September 2024





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## INTRODUCTION

The Glenigan economics team have decades of experience delivering tailored construction insight, analysis and recommendations to companies just like yours. Our industry insight has been built up over years of impartial data gathering and our economics team combine this with their commercial expertise to provide the in-depth strategic insight that you need to make key budgeting and planning decisions.

Glenigan data covers all construction sectors, including education, health, hotel and leisure, industrial, infrastructure, offices, private housing, retail, social housing, and utilities, and spans across all 12 regions of the UK.

**If your strategic planning would benefit from our unique industry insight, contact us on 0800 060 8698 to discuss your requirements.**

## AUTHORS



Written by **Allan Wilén**  
*Glenigan Economics Director*

30 years experience in providing insightful market analysis and forecasts on UK construction and the built environment that can inform companies' business development and market strategies.



Co-written by **Yuliana Ivanykovych**  
*Senior Economist*

Yuliana provides research and analysis for Glenigan's suite of monthly industry reports, and regularly supports customers with their strategic decision-making by offering industry insights and expertise.

EXECUTIVE SUMMARY

- Detailed planning approvals down 37% year-on-year
- Main contract awards down 7% year-on-year
- ➔ Project starts remained flat against the previous year

Detailed planning approvals and main contract awards experienced poor periods against the preceding three months and previous year. Project starts remained flat against the previous year.

Averaging £9,751 million per month, work commencing on-site during the three months to August experienced a poor performance, decreasing 7% against the preceding three months but remaining flat against a year ago. Major project-starts (£100 million or more in value) averaging £3,703 million per month, decreased 23% against the preceding three months but increased by 13% compared with the previous year. Underlying work (less than £100 million) starting on-site averaged £6,048 million per month, a 7% increase against the preceding three months on a seasonally adjusted (SA) basis to stand 7% down on the previous year.

Main contract awards averaged £7,851 million per month; a 21% decrease compared with the preceding three-month period to stand 7% lower than the same time a year ago. Underlying main contract awards, averaging £5,286 million, increased 2% against the preceding three months (SA) but decreased by 7% against the previous year. Major project contract awards averaged £2,565 million per month; a 33% decrease compared with the preceding three months

and a 9% decrease against the previous year.

Detailed planning approvals, averaging £9,776 million per month, decreased by 11% against the preceding three months and by 37% against a year ago. Major project contract awards decreased 13% against the preceding three months and remained 59% down on the previous year to average £3,483 million per month. Underlying detailed planning approvals averaged £6,293 million per month, decreasing by 4% compared with the preceding three months (SA) and by 11% against the previous year.

CONSTRUCTION ACTIVITY

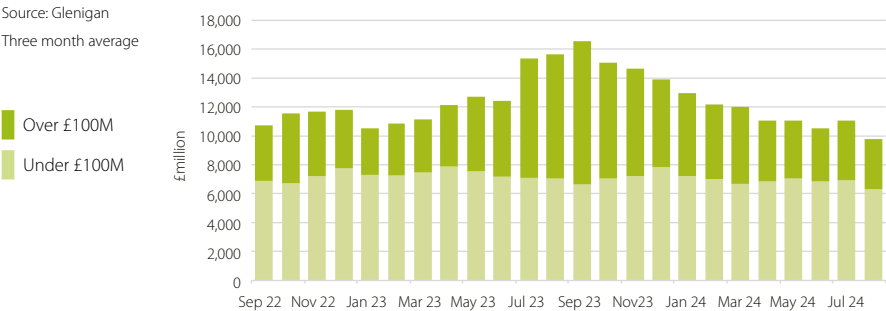
According to the most recent official data from the ONS, construction output increased in June, rising by 0.5% (SA). The three months to June saw a decrease in overall construction output of 0.1% (SA) and a 1.7% decrease on the previous year.

In the three months to June, Repair and Maintenance output increased by 0.4% (SA) to stand 6.8% up on the previous year. Public housing RM&I decreased by 0.7% (SA) with non-housing R&M increasing by 3%. Private housing RM&I decreased 2.6% (SA) during the period.

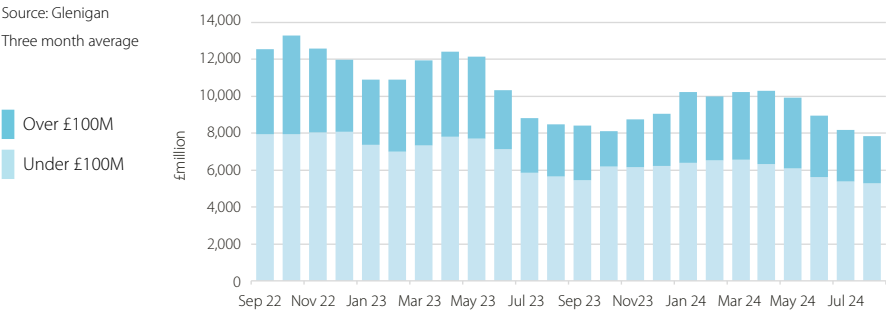
Overall new work output decreased by 0.5% (SA) during the three months to June and decreased 6.4% when compared with the same period a year ago. Public non-residential (+2.5%SA) increased against the preceding three months. Infrastructure work decreased 0.6% against the preceding three months.

Public new housing experienced an 8.2% decrease (SA) with private new housing experiencing a 0.8% decrease against the preceding three months. Commercial (+0.3%) experienced an increase against the preceding three months with industrial also experiencing a 0.3% rise against the three months to June.

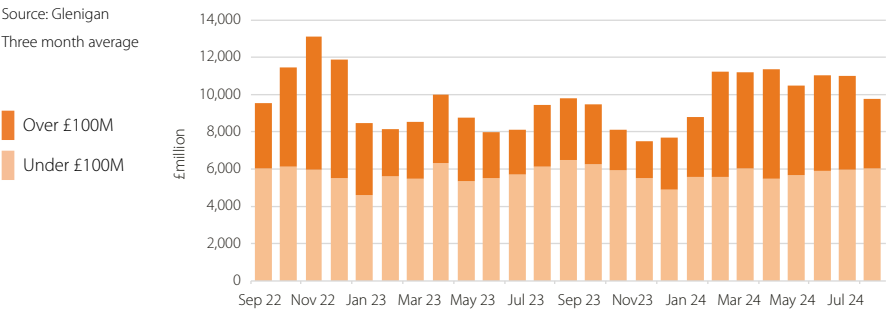
Detailed Planning Approvals



Main Contract Awards



Starts







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CONTRACTORS LEAGUE TABLES

TOP 50 CONTRACTORS - September 2023 to August 2024

Contractors	#	£m		Contractors	#	£m	
1 Morgan Sindall	250	2951	▲1	26 Mace	14	474	▲13
2 Hitachi	4	1795	▲1	27 OCU Group	6	469	▲4
3 Bouygues	27	1657	▲1	28 Gaelectric Developments	1	450	▲2
4 Multiplex	5	1530	▲1	29 Hochtief Group	1	450	NEW
5 Winvic	29	1429	▲2	30 Laing O'Rourke	4	403	▲12
6 ISG	33	1335	▲2	31 HG Construction	7	396	▲1
7 Royal BAM	34	1281	▲1	32 JRL Group	5	393	▲1
8 Galliford Try	108	1255	▲1	33 VINCI	31	361	▲6
9 Murphy	6	1136	▲7	34 GMI Construction	11	349	▲0
10 Skanska UK	3	1050	▲1	35 Spencer Group	2	336	NEW
11 Kier	73	1042	▲2	36 The Clancy Group	1	333	▲12
12 Wates	35	941	▲1	37 Story Contracting	9	329	▲1
13 Willmott Dixon	84	900	▲0	38 Octavius Infrastructure	5	329	▲1
14 Bowmer & Kirkland	23	851	▲7	39 IHP Integrated Health	9	314	▲6
15 Balfour Beatty	41	832	▲2	40 Bauer	2	304	▲0
16 Mears Group	7	712	▲2	41 VolkerWessels	19	303	▲6
17 Keltbray Group	7	638	▲2	42 Fortem Solutions	1	302	▲1
18 Ringway Group	4	603	▲3	43 John Sisk & Son	6	288	▲26
19 McLaren	6	555	▲6	44 Zhejiang Cons. Inv. Group Co	3	287	▲1
20 McAleer & Rushe UK	8	554	▲3	45 AtkinsRealis	5	279	▲1
21 United Living	9	549	▲1	46 GHL	1	276	▲1
22 Graham Construction	21	545	▲4	47 Taziker Industrial	3	274	▲0
23 Glencar Construction	21	533	▲1	48 RG Group Ltd	2	271	▲6
24 Gilbert Ash	6	480	▲4	49 Amey Cons. & Rail Property	1	269	NEW
25 M Group Services	10	475	▲4	50 Amco	1	269	▲0

LAST 12 MONTH TOTALS:  
995 projects, £33,867m

LAST MONTH TOTALS:  
96 projects, £3,065m

TOP 50 CONTRACTORS - August 2024

Contractors	#	£m		Contractors	#	£m	
1 Hochtief Group	1	450	NEW	26 Winvic	2	30	▲12
2 Morgan Sindall	14	311	▲4	27 Hill Group	3	28	NEW
3 Mace	3	236	▲28	28 M Group Services	2	26	NEW
4 Woodvale	1	188	NEW	29 Karl Group	1	25	NEW
5 Lowry Building & Civil Engineering	1	188	NEW	30 Farrans Construction	1	25	NEW
6 LendLease	1	150	NEW	31 Redstart Northwest	1	25	NEW
7 Red Construction Group	2	133	NEW	32 Reds10 (UK)	1	25	NEW
8 Galliford Try	6	121	▲10	33 Story Contracting	1	23	NEW
9 ISG	4	67	NEW	34 Knights Brown Construction	1	22	NEW
10 IHP Integrated Health	1	65	NEW	35 Andrew Scott	4	22	NEW
11 Huber Car Park Int. GmbH	1	59	NEW	36 R G Carter	2	20	▲36
12 Knight Harwood	1	57	NEW	37 Neilcott Construction	4	17	NEW
13 McLaren	1	56	▲12	38 Helix Construct	1	17	NEW
14 Kier	2	56	▲1	39 Balfour Beatty	4	16	NEW
15 Octavius Infrastructure	3	53	NEW	40 Clegg Group	1	16	NEW
16 Ashleigh Cons. (Scotland)	2	52	▲23	41 Triton Construction	3	16	NEW
17 Graham Construction	1	50	▲26	42 Allison Homes	1	15	NEW
18 Blue Sky Building	1	43	NEW	43 McDermott Developments	1	15	NEW
19 McAleer & Rushe Contracts UK	1	43	▲9	44 Thomas Sinden	1	14	NEW
20 HarperCrewe	1	39	NEW	45 Parkway	1	13	NEW
21 Elmya Energy	2	38	NEW	46 Baxall Construction	1	13	NEW
22 Bowmer & Kirkland	1	36	▲11	47 The Hunt Group	1	12	NEW
23 STP Construction	1	35	NEW	48 Willmott Dixon	1	12	▲20
24 Glencar Construction	1	35	▲12	49 Ogilvie	2	12	NEW
25 Curo Group	1	33	NEW	50 Sir Robert McAlpine	1	12	NEW



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Civil Engineering

## CLIENTS LEAGUE TABLES

### TOP 50 CLIENTS - September 2023 to August 2024

Clients	#	£m		Clients	#	£m	
1 Network Rail	36	3725	▲1	26 Scottish Government	9	247	NEW
2 SSE	12	2412	▼1	27 Rolls-Royce	3	236	▲1
3 Department for Transport	48	1712	▲2	28 City of London Corporation	9	230	▲2
4 Department of Health	228	1652	0	29 Morgan Sindall	8	228	NEW
5 National Grid	9	1594	▲1	30 Clarion Housing Group	7	227	NEW
6 Northern Ireland Executive	13	1031	▲1	31 Const. & Procurement Del. (CPD)	16	219	NEW
7 Statera Energy	1	1000	▲1	32 London & Quadrant Hous. Trust	2	206	0
8 Ministry of Justice	19	839	▲1	33 Kemble Water	15	202	▲11
9 Birmingham City Council	9	706	▲1	34 Pnbj I	1	200	0
10 Department for Education	84	652	▲1	35 Yondr Group	1	200	0
11 A2Dominion Housing Group	1	575	▲1	36 Carlton Power	2	200	NEW
12 Google	2	550	▲2	37 British Land	6	197	▼1
13 Essex County Council	8	549	0	38 Prologis UK	5	196	NEW
14 Kent County Council	11	538	▲1	39 Warner Bros Stu. Leavesden	1	190	▼1
15 Segro	2	501	▲1	40 Cole Waterhouse	1	185	0
16 North Lanarkshire Council	11	498	NEW	41 Tritax Group	7	177	▼8
17 Axa Insurance	2	484	0	42 R. Borough of Kingston	1	165	▲1
18 St Johns Wood Square	1	450	0	43 Westminster City Council	2	161	▲2
19 Ministry of Defence	41	406	0	44 Southwark Council	3	156	NEW
20 Global Infrastructure UK	1	400	0	45 Unite Group	4	156	▼3
21 Epic Systems Corporation	1	360	0	46 Breakthrough Properties	2	155	NEW
22 Ardersier Port	2	301	0	47 Home Office	27	155	▼1
23 GLP	2	284	NEW	48 St Modwen Properties	7	155	▼7
24 Milton Keynes Borough Council	7	274	▲1	49 Welsh Government	8	152	▼2
25 Land Securities Group	3	253	▲1	50 Government Property Agency	2	152	NEW

### TOP 50 CLIENTS - August 2024

Clients	#	£m		Clients	#	£m	
1 North Lanarkshire Council	2	451	NEW	26 Ferrovial	1	30	NEW
2 Department for Education	6	224	▲11	27 Equation Properties	1	28	NEW
3 Cons. and Procure. Delivery (CPD)	2	188	NEW	28 GreenOak Real Estate Advisors	1	28	NEW
4 Crystal Palace Football Club	1	150	NEW	29 Ministry of Justice	3	27	▲10
5 Southwark Council	1	150	NEW	30 St Edmunds School Canterbury	1	26	NEW
6 University of Durham	1	130	NEW	31 University of Kent	1	26	NEW
7 London Borough of Sutton	1	120	NEW	32 Oxfordshire County Council	1	25	NEW
8 St Thomas Bermondsey	1	118	NEW	33 Newship	1	25	NEW
9 MDS (Exeter)	1	94	NEW	34 South Lakeland District Council	1	25	NEW
10 University of East Anglia	1	88	NEW	35 Monson Homes	1	25	NEW
11 MY Devco	1	80	NEW	36 Newcastle Upon Tyne Council	2	24	▲13
12 National Galleries of Scotland	1	75	NEW	37 Cumbria County Council	2	24	NEW
13 Blackpool Council	1	65	NEW	38 Royal Borough of Greenwich	2	23	NEW
14 MBDA (UK)	1	59	NEW	39 Cambridgeshire County Council	2	23	NEW
15 London 1 Unit Trust	1	57	NEW	40 Railway Pension Nominees	1	22	NEW
16 Curzon De Vere	1	53	NEW	41 Railpen	1	22	NEW
17 Global Mutual Properties	1	51	NEW	42 Capitol Park Junction 36 M62	1	20	NEW
18 Fermanagh District Council	1	50	NEW	43 Norfolk County Council	1	20	NEW
19 North Ayrshire Council	1	50	▲3	44 Sterling Capital	1	20	NEW
20 Bangor Marine	1	50	NEW	45 East Dunbartonshire Council	1	20	NEW
21 Welbeck Estates Co	1	39	NEW	46 GS8	1	19	NEW
22 Harwell Science and Inn. Campus GP	1	36	NEW	47 Donard (Bristol)	1	19	NEW
23 Birmingham City Council	2	36	NEW	48 Breakthrough Properties	1	18	NEW
24 Travers Smith	1	35	NEW	49 Vitrum Building Owner	1	18	NEW
25 Duchy of Cornwall	1	31	NEW	50 Novus Solar	1	18	NEW

GLENIGAN INDEX

The Glenigan Index is a leading indicator of construction market conditions. The report covers projects with a construction value of less than £100 million that have started on-site in the previous three-month period. Comparisons with the preceding three-month period are seasonally adjusted.

Commenting on the findings, Glenigan's Economics director, Allan Wilén says – "The latest data provides a somewhat positive outlook for the industry, with a rise in private housing and infrastructure starts underpinning a 7% rise in construction starts against the preceding three months. Increased confidence among developers, with an expected upturn in housing market activity, is expected to lead to a rise in private housing starts. The commencement of infrastructure starts is a positive sign, however the government's decision to postpone various road and rail projects may mean this upturn is short lived."

SECTOR ANALYSIS

Residential construction starts rose 22% on the preceding three months but decreased 8% against 2023 figures.

Private housing rose by 30% against the preceding three months to stand 4% down on a year ago. Social housing work starting on site remained weak, dropping by 4% against the preceding three months to stand 21% down against the previous year.

Industrial project starts experienced a strong period, with the value of starts increasing 45% during the three months to August and 27% against the previous year. The increase was accelerated by the commencement of the £60 million development of 4 industrial/warehouse units in Hillingdon, London.

Education starts didn't fare as well, with the value of underlying project starts falling 29% against the preceding three months and declining 22% against a year ago.

Hotel & Leisure decreased 22% against the preceding three months but were 17% up against the previous year.

Health starts have continued to weaken, decreasing 28% against the preceding three months and by 44% on the previous year. Office starts also performed poorly, decreasing 14% against the preceding three months to stand 27% down on the previous year.

Community & Amenity decreased 31% against the preceding three months but stood 1% up on the previous year. Retail starts increased 3% against the preceding three months and stood 4% up against the previous year.

Civils work starting on-site rose 18% against the preceding three months and was 9% up on the previous year.

Civils activity was boosted by a strong performance in infrastructure starts which rose by 31% against the preceding three months and by 36% on a year ago. Infrastructure starts were boosted by the commencement of the Old Oak Common Station development in London. Utility starts decreased 3% against the preceding three months to stand 23% down against the previous year.

REGIONAL ANALYSIS

The East Midlands experienced a 65% rise in starts against the preceding three months to stand 16% up against the previous year. The South West and Northern Ireland experienced double-digit growth of 20% and 32% respectively against the preceding three months, to stand 6% and 36% up respectively against the previous year.

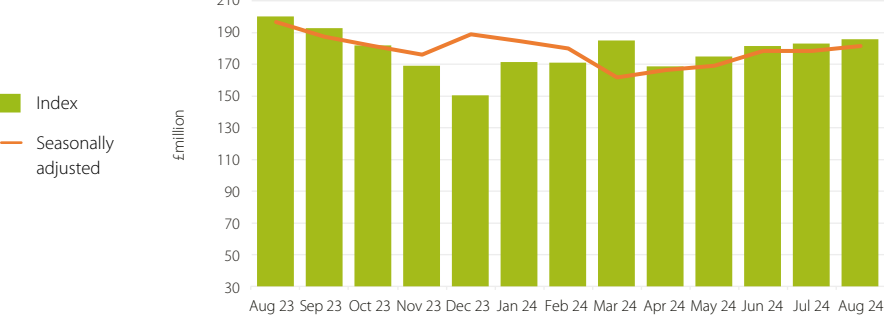
London experienced a 10% rise against the preceding three months but was 8% down against the previous year. Scotland increased 20% against the preceding three months but remained 13% down on the previous year.

The value of starts in Yorkshire and the Humber and Wales declined by 19% and 6% during the three months to August and were 12% and 46% down respectively on a year earlier. The East of England experienced a mixed period, increasing 18% against the preceding three months to stand 13% down on the previous year

Starts in the North East and the North West also performed poorly, declining by 35% and 15% respectively against the previous three months, to stand 29% and 12% down against the previous year.

Glenigan Index

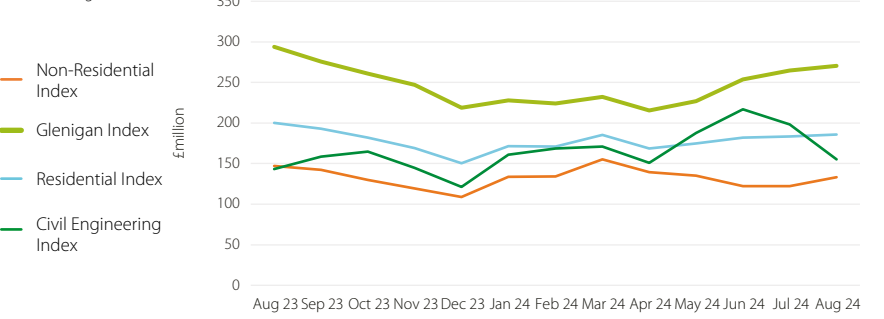
Source: Glenigan



Note: For the Index, 2006 = 100

Indices Growth

Source: Glenigan





## ECONOMIC OUTLOOK

### Economic recovery underway

- Service sector drives growth
- Dip in manufacturing output
- Inflationary pressures ease

The UK economy grew by 0.6% during the second quarter, following an increase of 0.7% in the first quarter according to the ONS. Survey data from CIPS indicate that the rise has continued over the summer months.

The rise during the second quarter was despite a drop in manufacturing activity. Manufacturing output dropped by 0.6% during the quarter following a 1.1% rise in quarter 1. The decline was led by a fall in transport manufacturing, with anecdotal evidence pointing to temporary disruption as factories repurpose to electric car manufacturer.

CIPS surveys have recorded a more positive trend in manufacturing activity. The CIPS manufacturing index for July stood at 52.1, above the 50.0 no change level, with respondents reporting higher, and increased orders. Initial survey results point to further growth during August.

Services output continued to climb during the second quarter, rising by 0.8%. Growth was widespread across the sector with increases in 11 out of 14 subsectors. Professional services, information and communication, and transportation and storage were the best performing subsectors. Consumer related services, including retailing, arts, entertainment and recreation and hospitality, were subdued, slipping by 0.1% during the quarter after a 0.6% rise in quarter 1.

The CIPS services survey points to further growth. At 52.5 the July index was up slightly on June and above the 50.0 no change level, while initial survey data points to a strengthening in growth during August.

## INFLATION

Whilst growth in consumer related services was weak during the first half of this year, households' improving financial position promises to lift growth over the coming months. Average earnings during the second quarter were 4.5% higher than a year ago, and weaker inflation has lifted earnings growth in real terms. Real regular pay during the quarter was 2.4% up on a year ago.

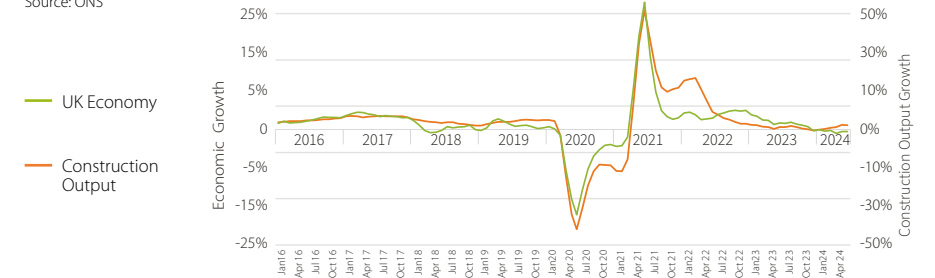
At 2.2%, consumer price inflation in July was close to the Bank of England's 2% target. Whilst the Bank cut the base rate to 5% in August, the timing of future rate reductions will be dictated by underlying cost pressures across the economy.

Manufacturers input costs have stabilised; fuel costs have softened over the last year while recent months have seen a drop in material costs against a year ago. This is feeding through to manufacturers' selling prices; the price of manufactured goods increased by just 0.8% over the year to July.

Service sector inflation has been a concern for the Bank with the risk that higher wage costs could lift prices. Encouragingly, the latest CIPS survey reports that service sector cost pressures moderated during August.

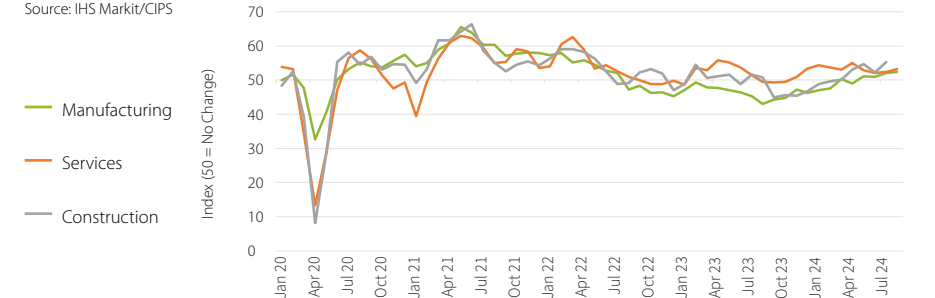
## Construction & The Economy

Source: ONS



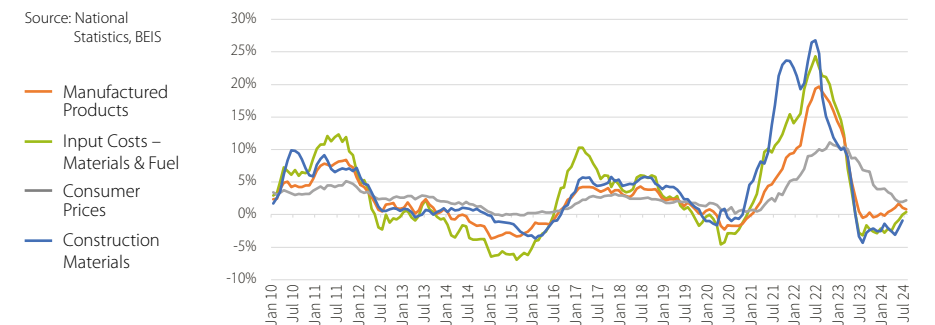
## CIPS Activity Surveys

Source: IHS Markit/CIPS



## Inflationary Pressures

Source: National Statistics, BEIS



## HOUSING – OVERVIEW

**Project starts and main contract awards increased compared to the preceding three months. However, detailed planning approvals fell against the previous quarter and last year.**

The total value of residential work commencing on-site in the three months to August was £12,150 million. This was a 5% increase compared to the previous three months but a 21% decrease compared to the same period last year. Major starts (worth £100 million or more) totalled £2,494 million, down 29% from the previous quarter and 49% from a year ago. Underlying starts (less than £100 million) totalled £9,655 million, up 21% seasonally adjusted but down 8% year-on-year.

Residential main contract awards decreased 8% quarter-on-quarter but were up 21% compared to a year ago, totalling £12,913 million. Underlying contract awards totalled £9,947 million, up 11% seasonally adjusted and 20% year-on-year. Major awards increased 4% quarter-on-quarter and 26% year-on-year.

5%

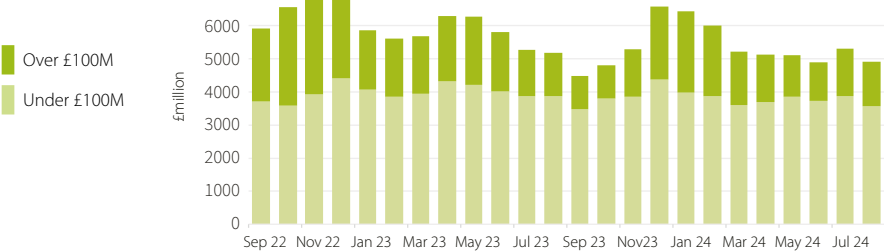
*increase in the value of residential work starting on site against the preceding three months*

Detailed planning approvals totalled £14,712 million, down 4% from the previous quarter and 5% from a year ago. Major project approvals totalled £3,984 million, up 7% from the previous quarter and 1% from a year ago. Underlying approvals totalled £10,728 million, up 3% seasonally adjusted but down 8% year-on-year.

### Housing: Detailed Planning Approvals

Source: Glenigan

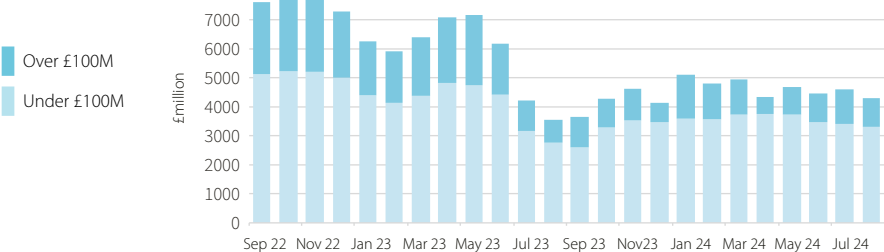
Three month average



### Housing: Main Contract Awards

Source: Glenigan

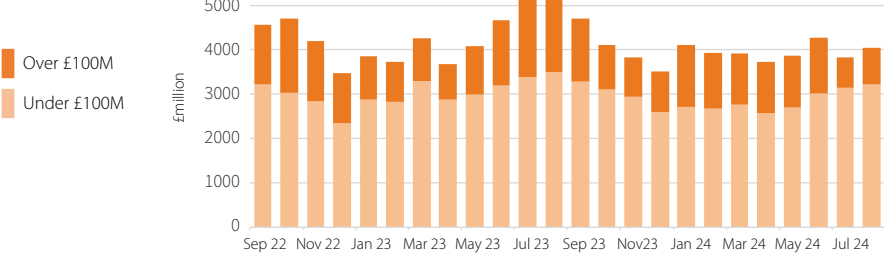
Three month average



### Housing: Starts

Source: Glenigan

Three month average





HOUSING – TYPES OF PROJECTS STARTED

Private housing accounted for 54% of the total value of work starting on site during the three months to August, with a total value of £6,628 million. Private housing starts fell 17% compared to the previous year. Private apartment work starting on site fell 11% to total £2,410 million, accounting for 20% of starts during the period.

Social sector housing slipped back 12% to total £1,600 million, accounting for a 13% share. Student accommodation decreased 11% to total £608 million, accounting for a 5% share. Social sector apartments accounted for 3%, having slipped back 82% compared to a year ago, totalling £325 million.

Homes, hostels, etc. totalled £8 million, after a 49% decline against 2023 levels. Private sheltered housing grew 22% year-on-year to total £3 million, accounting for 3% of the sector. Social sector sheltered housing accounted for 1% of residential starts, totalling £132 million, an 81% jump from the previous year. The number of elderly people’s homes increased against last year when no projects started on site, accounting for 1% of residential starts at £91 million.

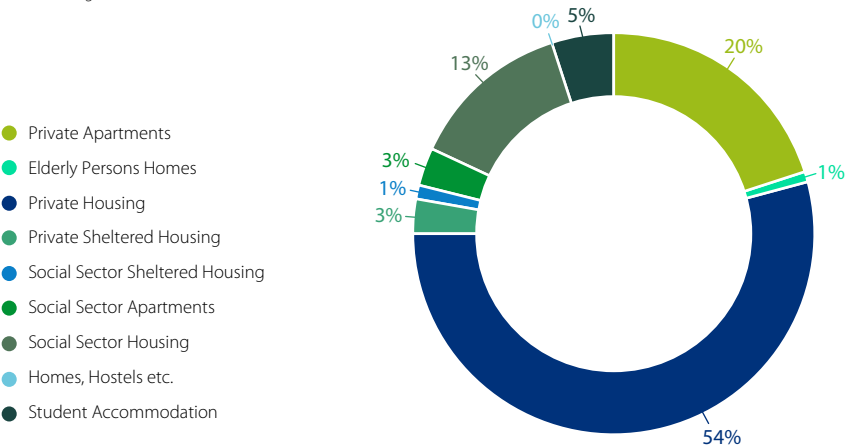
Housing: League Tables (September 2023 to August 2024)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Persimmon	96	2,293	Persimmon	90	1,955
Barratt	83	2,138	Barratt	84	1,880
Hill	29	1,420	The Berkeley Group Plc	15	1,361
The Berkeley Group	15	1,360	Vistry	60	1,331
Bellway	55	1,322	Taylor Wimpey	48	1,160
Taylor Wimpey	49	1,317	Bellway	49	1,060
Vistry	36	1,009	Northern Ireland Executive	13	1,031
Berkeley DeVeer	20	816	Bloor Homes	30	810
Bloor Homes	29	815	Legal & General	36	761
Morgan Sindall	34	776	Berkeley DeVeer	19	736

Types of Housing Projects Started Three Months to August 2024

Source: Glenigan



PROJECT SPOTLIGHT

£570m

CROWN STREET  
PHASE 3

Detailed plans have been approved for the £570 million Crown Street residential development in Manchester. Renaker Build has been appointed as the main contractor on the scheme.

PROJECT ID: 23217562



Image Source: Simpson Haugh and Partners

HOUSING – REGIONAL

London accounted for the greatest proportion (19%) of residential work during the period, totalling £2,319 million, despite a 39% decrease compared with the previous year's levels. Accounting for 17%, the South East fell 10% against the previous year to total £2,012 million. In contrast, the North West grew 26% against the previous year to total £1,251 million, a 10% share of project starts in the housing sector. Growth in the region was boosted by the £370 million, 988-unit Contour project in Manchester (Project ID: 21284782).

Accounting for the same share, the East of England climbed 1% on last year, totalling £1,195 million. The East Midlands also experienced a 19% growth against the previous year, bringing its total value up to £1,144 million, a 9% share of housing starts. Similarly, project-starts increased 17% in the South West to total £1,122 million, also accounting for a 9% share.

The North West was the most active region for detailed planning approvals, totalling £2,964 million, a 20% share of the sector. The value of approvals in the region grew 32% against the previous year, boosted by the £570 million Crown Street Phase 3 development in Manchester (Project ID: 23217562). London, accounting for 19% of approvals, also increased 48% against last year to total £2,811 million.

The East of England grew 12% on a year ago, totalling £1,249 million, with an 8% share of residential approvals. In contrast, despite accounting for the same share at £1,234 million, consents in Scotland slipped back 18%. Residential approvals in the South West, also accounting for 8%, fell 32% to total £1,110 million.

-5%

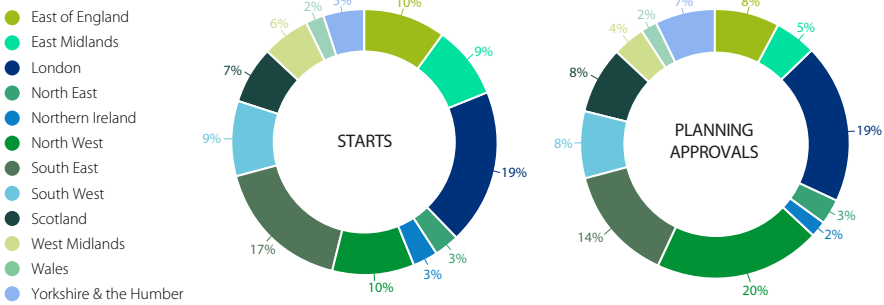
decrease in the value of detailed planning approvals against the previous year

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Share Value of Housing Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



Changes in Housing Starts and Planning Approvals on a Year Earlier

Source: Glenigan



## INDUSTRIAL – OVERVIEW

**Detailed planning approvals declined compared to both the previous quarter and the previous year. On a more positive note, project starts increased compared to the preceding three months and the year prior, bolstering the development pipeline.**

During the three months to August, industrial project starts grew 11% against the preceding three months to stand 37% up on a year ago, totalling £1,975 million. Major projects (worth £100 million or more) starting on site totalled £150 million, a 76% decline from the previous quarter but a growth from 2023 levels when no major projects commenced on-site. Underlying industrial work starting on site (less than £100 million in value) jumped 46% against the previous quarter on a seasonally adjusted (SA) basis to stand 27% higher than a year ago, totalling £1,825 million.

Industrial main contract awards totalled £1,397 million, a 34% decrease against the preceding three months but 6% up against last year. Underlying industrial main contract awards decreased 31% (SA) against the preceding three months and remained 33% lower than a year ago. Major projects totalled £509 million during the period, a 40% decrease against the preceding three months but an increase from the previous year where no major projects were present.

Industrial detailed planning approvals totalled £1,984 million, having fallen 10% on the previous three months to stand 37% down on last year. Major project approvals climbed 5% against the previous quarter but slipped back 35% on the preceding year to total £367 million. Underlying projects totalled £1,617 million, a 15% decrease (SA) on the preceding three months, and 38% lower than the previous year.

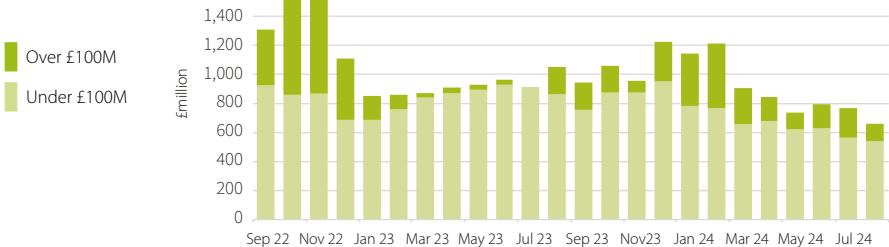
37%

*increase in the value of work starting on site against the previous year*

### Industrial: Detailed Planning Approvals

Source: Glenigan

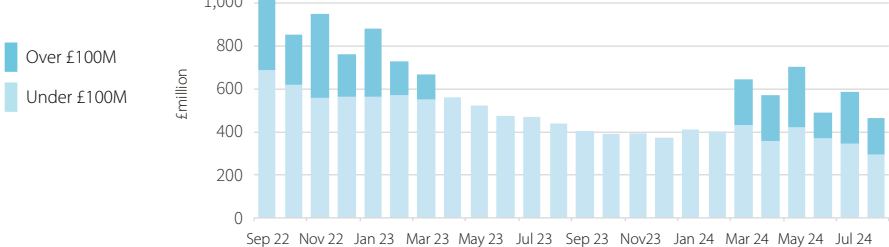
Three month average



### Industrial: Main Contract Awards

Source: Glenigan

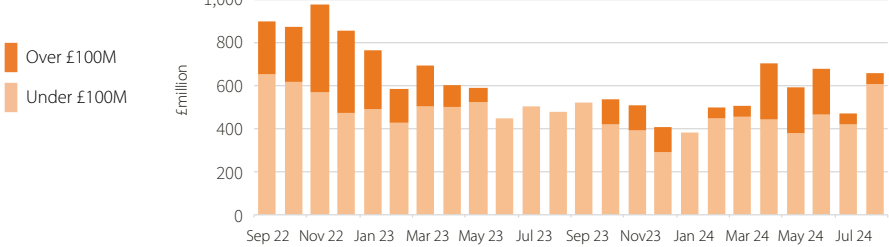
Three month average



### Industrial: Starts

Source: Glenigan

Three month average





INDUSTRIAL – TYPES OF PROJECTS STARTED

Manufacturing work starting on site added up to £1,335 million, a 79% increase compared with the previous year. This segment accounted for 68% of industrial starts during the three months to August, making it the most active sector. Other industrial starts also grew 25% against the previous year to total £80 million, accounting for 4% of the sector.

Warehousing & logistics, on the other hand, fell 11% against the previous year, bringing the total down to £560 million, a 28% share of the whole sector.

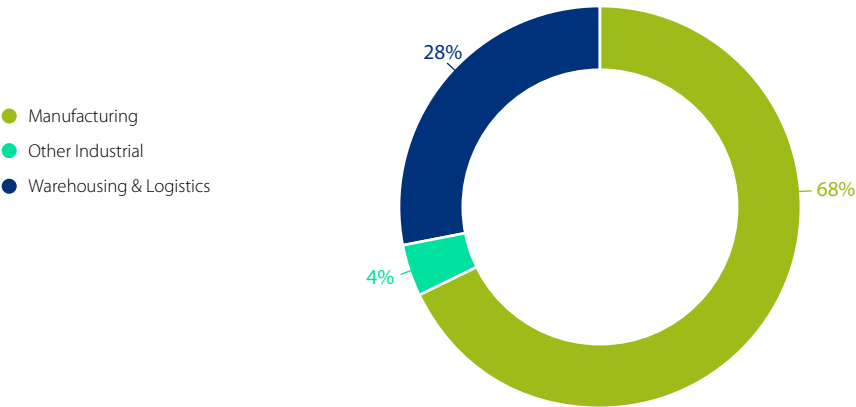
Industrial: League Tables (September 2023 to August 2024)

Source: Glenigan

Contractors			Projects	£m	Clients			Projects	£m		
Winvic	20	1,043	Segro	1	500	Glencar	16	342	Rolls-Royce	1	211
Balfour Beatty	1	211	Arla Foods	5	192	Arla Foods	1	179	Morgan Sindall	1	180
McLaren	4	118	Panattoni & LU UK	5	138	TSL	6	116	Tritax	6	119
Magrock	6	112	Marshall	3	96	Magrock	5	108	GLP	1	84
Caddick	3	96	Ipsen Biopharm	1	75	Marshall	3	96	Ipsen Biopharm	1	75
Kaefer Uk & Ireland	1	90	Amatrix Grantham Propco	1	73	Kaefer Uk & Ireland	1	90	Amatrix Grantham Propco	1	73

Types of Industrial Projects Started Three Months to August 2024

Source: Glenigan



PROJECT SPOTLIGHT

£46m

ECO PARK  
PETERBOROUGH

Detailed plans have been approved for the £46 million Eco Park Peterborough distribution centre. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q4 2025.

PROJECT ID: 22437876



Image Source: CMP Architects

INDUSTRIAL – REGIONAL

The East of England was one of the most active regions for industrial project starts during the period. Having grown 66% on a year ago, the region accounted for 14% of sector starts during the three months to August, with the value adding up to £281 million. The growth was boosted by the £150 million Enkalon Business Park Antrim development (Project ID: 23010691). Similarly, the East Midlands, also accounting for a 14% share, grew 49% on a year ago to total £276 million.

The North West grew 1% to £206 million, representing a 10% share of industrial starts. London jumped 78% against last year to total £195 million, also accounting for 10% of the sector. Northern Ireland, also with a 10% share, more than doubled against last year to total £191 million, boosted by the £150 million Enkalon Business Park Antrim development (Project ID: 23010691).

The East of England was the most active region for detailed planning approvals, accounting for a 17% share of all consents, despite having decreased 2% on last year, bringing its total value down to £330 million. The South East, accounting for 14%, totalled £279 million, having slipped back 29% on a year ago.

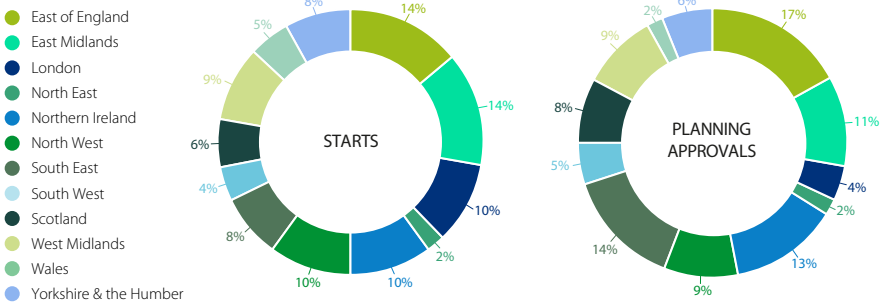
The East Midlands accounted for an 11% share of approvals at £225 million, having decreased 35% against last year's levels. The North West declined 52% against last year to total £203 million, representing a 9% share. In contrast, Northern Ireland experienced a strong period, more than doubling compared to last year with a total of £256 million, accounting for a 13% share.

6%

increase in the value of projects reaching the main contract awarded stage against the previous year

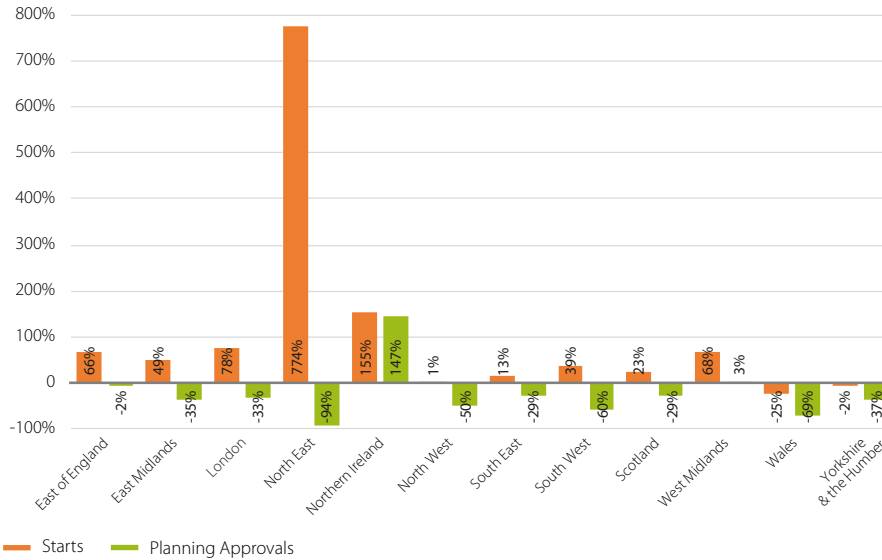
Share Value of Industrial Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



Changes in Industrial Starts and Planning Approvals on a Year Earlier

Source: Glenigan



## OFFICES – OVERVIEW

**Project starts decreased compared to both the previous quarter and the previous year. Positively, detailed planning approvals increased year-on-year and quarter-on-quarter, bolstering the development pipeline.**

Office work starting on site totalled £1,149 million during the three months to August, a 47% decline compared with the preceding quarter, and 42% down on the previous year. Major projects (worth £100 million or more) decreased 75% against the previous quarter and 66% on a year ago, totalling £250 million. Underlying starts (less than £100 million in value) fell 15% against the preceding three months on a seasonally adjusted (SA) basis and were 27% lower than a year ago, totalling £899 million.

Office main contract awards totalled £1,987 million, a 9% decrease against the preceding three months but 12% up on the previous year. Major projects totalled £1,347 million during the period, a 12% decrease against the preceding three months and a 196% increase on the previous year. Underlying contract awards declined 7% against the preceding three months (SA) and by 51% against the previous year to total £640 million.

Office detailed planning approvals totalled £3,378 million, growing 1% on the preceding three months and 13% against last year. Major project approvals were 12% up against the preceding three months and increased 22% on a year ago, totalling £2,288 million. Underlying project approvals were 7% down (SA) against the previous quarter and decreased 3% on a year ago, totalling £1,090 million.

13%

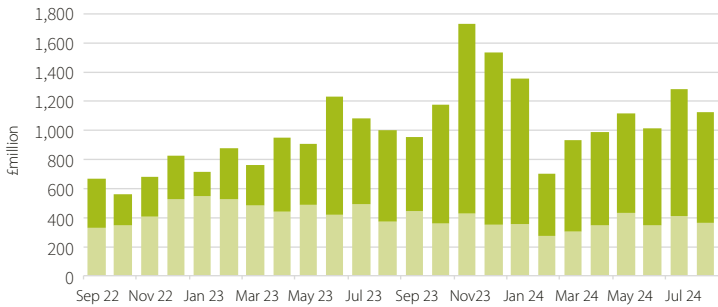
*increase in the value of office detailed planning approvals against the previous year*

### Offices: Detailed Planning Approvals

Source: Glenigan

Three month average

Over £100M  
Under £100M

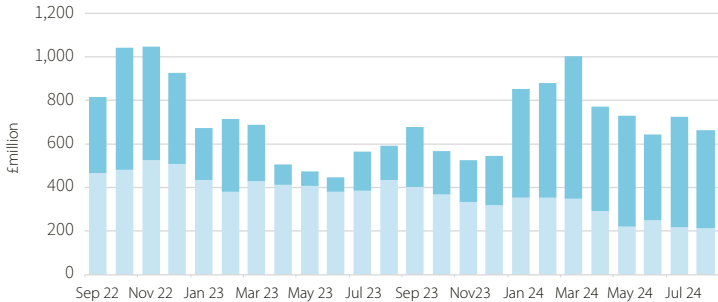


### Offices: Main Contract Awards

Source: Glenigan

Three month average

Over £100M  
Under £100M

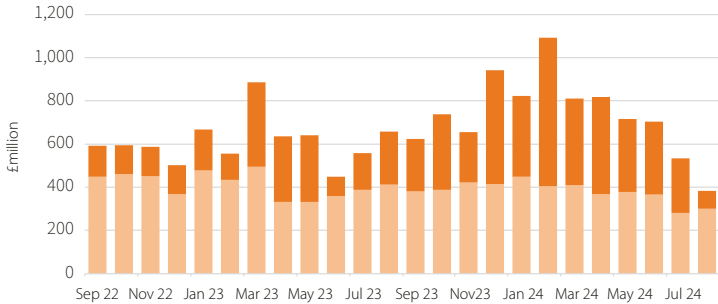


### Offices: Starts

Source: Glenigan

Three month average

Over £100M  
Under £100M





SIZE OF OFFICE PROJECTS

Starts in the 'Over £100 million' value band decreased 66% year-on-year to £250 million. Project starts in the '£20 million to £50 million' value band fell 17% year-on-year, totalling £239 million. The '£50 million to £100 million' value band slipped back 58% year-on-year to £159 million. Starts in the '£10 million to £20 million' value band fell 59% year-on-year, totalling £116 million.

In contrast, the 'Up to £5 million' value band increased 24% year-on-year to £214 million. Project starts in the '£5 million to £10 million' value band jumped 51% year-on-year to £171 million.

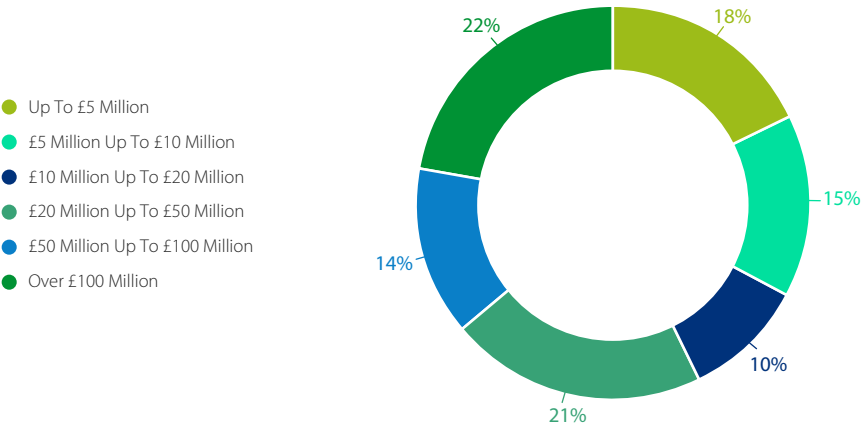
Offices: League Tables (September 2023 to August 2024)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Multiplex	4	1,080	Google	2	550
Morgan Sindall	137	633	Axa Insurance	2	484
ISG Construction	8	624	Global Infrastructure	1	400
Mace	7	610	Epic Systems	1	360
Skanska	2	450	Rocket Investments	1	300
McLaren	2	437	Land Securities	2	252
Gilbert Ash	2	371	Yondr	1	200
Bowmer & Kirkland	4	313	Pnbj I	1	200
Royal BAM	2	253	GLP	1	200
Wates	8	224	Warner Bros Leavesden	1	190

Value of Office Projects Started Three Months to August 2024

Source: Glenigan



PROJECT SPOTLIGHT

£163m

SKIPTON HOUSE

Detailed plans have been approved for the £163 million Skipton House development in London. Works are due to be completed in Q1 2027. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 15334174



Image Source: Piercy and Company

OFFICES – REGIONAL

London was the most active area of the UK for office starts, accounting for 44% of the total value during the three months to August, despite a 53% decrease compared with the previous year's levels. Office work starting in the Capital totalled £510 million. Further decline was prevented by the £150 million Lansdowne House Redevelopment in Westminster (Project ID: 20144571). The East of England also experienced a 77% slump on a year ago. The value of projects starting on site in the region added up to £81 million, accounting for 7% of the office sector.

In contrast, at £187 million, the North West experienced a strong performance, with starts having grown 32% on last year's levels, to account for 16% of the sector. Accounting for 13%, the South East increased 53% on a year ago to total £150 million.

Scotland had the largest share of detailed planning approvals (26%), with a total value of £894 million, with the value having jumped more than 18 times on last year's figures. The growth in the region was accelerated by the £850 million Buchanan Galleries project in Glasgow (Project ID: 06499796). The North East grew almost 14 times to total £584 million, a 17% share of office consents.

Accounting for a 9% share of approvals, Wales increased 164% on a year ago to total £305 million. In contrast, accounting for a 23% share at £781 million, London slipped back 60% against last year. Totalling £200 million, the East of England fell 14% against the previous year to account for a 6% share of consents.

12%

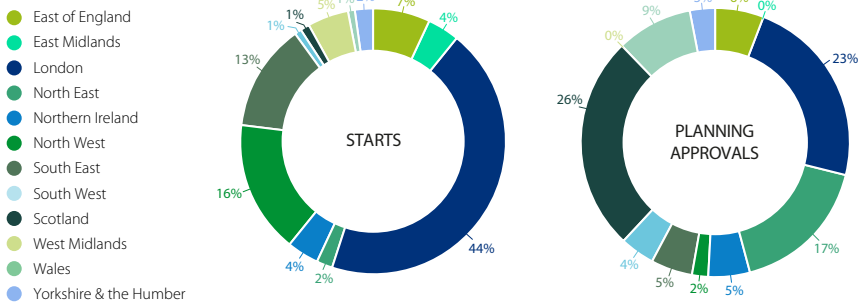
increase in the value of main contract awards against the previous year

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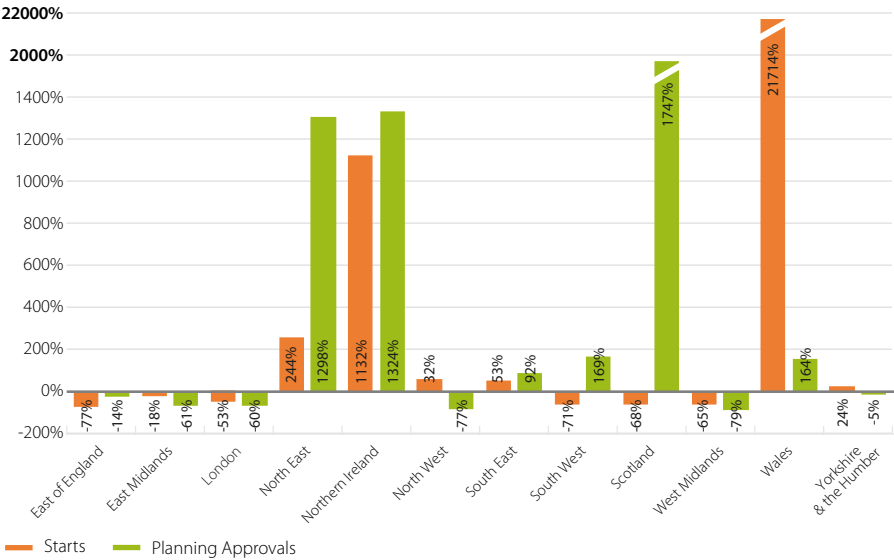
Share Value of Office Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



Changes in Office Starts and Planning Approvals on a Year Earlier

Source: Glenigan



## RETAIL – OVERVIEW

**Project starts, main contract awards, and detailed planning approvals all declined compared to both the previous quarter and the previous year.**

Retail work starting on site during the three months to August totalled £511 million, a 25% decline against the preceding three months and 21% lower than a year ago. There were no major projects starting on-site (worth £100 million or more), a decrease from both the previous quarter and the previous year. Underlying project-starts (less than £100 million in value) experienced a 3% growth against the preceding three months on a seasonally adjusted (SA) basis, standing 4% up against last year.

Retail main contract awards totalled £236 million, a 2541% decrease against the preceding three months and 32% down against the same period a year ago. There were no major projects during the period, unchanged from both periods. Underlying contract awards decreased by 33% (SA) against the preceding three months, standing 32% lower than the previous year.

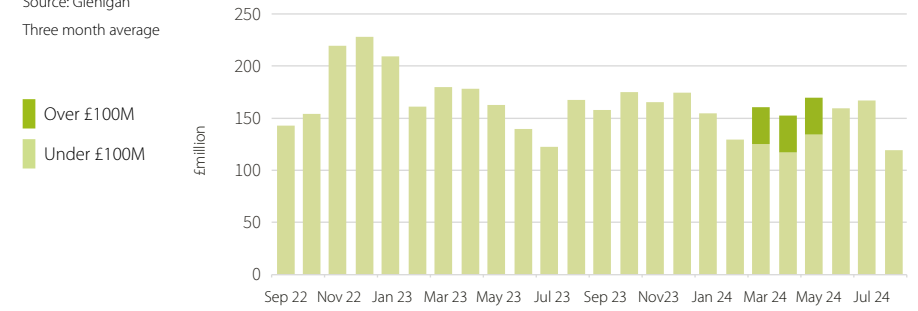
Detailed planning approvals totalled £359 million, a 30% decline against the preceding three months and 29% down on the previous year. Underlying approvals slipped back 7% (SA) compared with the preceding three months, standing 29% down against the previous year to total £510 million. Like project-starts and main contract awards, there were no major consents.

# -21%

*decrease in the value of retail work starting on site against the previous year*

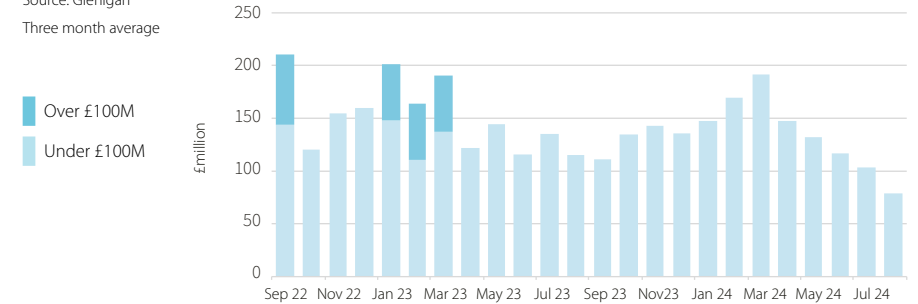
### Retail: Detailed Planning Approvals

Source: Glenigan  
Three month average



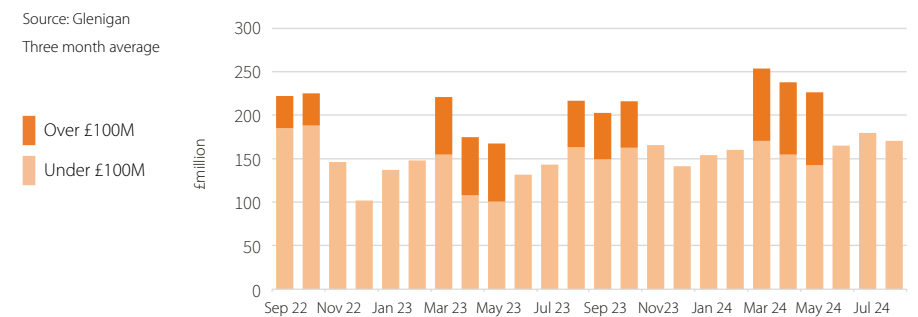
### Retail: Main Contract Awards

Source: Glenigan  
Three month average



### Retail: Starts

Source: Glenigan  
Three month average





RETAIL – TYPES OF PROJECTS STARTED

The value of supermarket starts grew 44%, to total £265 million, accounting for 52% of all retail work starting on site. Petrol filling stations experienced a 73% increase against last year's levels to total £24 million, a 5% share of retail project starts. Having climbed 1% compared to a year ago, retail warehousing projects commencing on site totalled £12 million during the three months to August, accounting for a 2% share.

In contrast, standing 51% lower than a year ago, shops totalled £161 million to account for a 32% share of retail work. At £16 million, shopping centres decreased 79% on the previous year, accounting for a 3% share of the retail sector.

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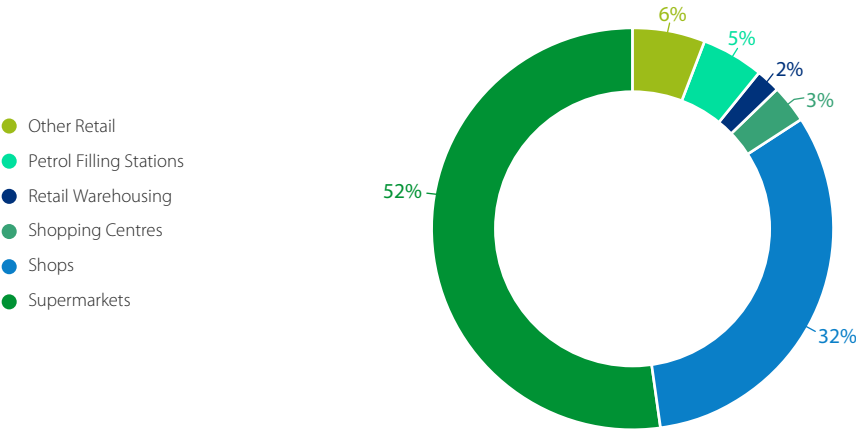
Retail: League Tables (September 2023 to August 2024)

Source: Glenigan

Contractors	Projects	£m	Clients	Projects	£m
Galliford Try	2	50	Aldi	86	135
VINCI Construction	3	44	Lidl UK	32	91
DSP Construction	12	43	King Sloane	1	90
STP Construction	2	39	Asda	112	61
Carey	1	30	Aberdeen City Council	1	50
New West End Company	1	30	Tesco	84	47
Murphy	1	30	Scarborough	1	32
CTM Management	5	26	T J Morris	15	32
Princebuild	1	22	B & M Retail	58	31
Jem Build	1	18	Marks & Spencer	24	28

Types of Retail Projects Started Three Months to August 2024

Source: Glenigan



PROJECT SPOTLIGHT

£15m

PENISTONE ROAD

Detailed plans have been approved for the £15 million development of 7 commercial units and a supermarket in Sheffield. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q3 2025.

PROJECT ID: 19060735



RETAIL – REGIONAL

The North West was the most active region for retail starts, accounting for 20% of all retail starts nationwide, despite a 8% decrease against the previous year to total £103 million. London, accounting for a 9% share, fell 79% on a year ago, totalling £45 million. In contrast, the South East grew 77% on a year ago to total £78 million, representing a 15% share.

The West Midlands experienced a strong period with starts jumping 173% compared with a year ago to account for 10% of the retail sector, totalling £49 million. Project-starts in the South West and Scotland, both accounting for a 9% share, grew 54% and 31% respectively compared with a year ago, totalling £47 million and £46 million.

The South East had the highest proportion of retail approvals, with a 29% share, despite a 13% decline against last year's levels, totalling £104 million. London fell 52% against the previous year, accounting for 9% of the sector and totalling £32 million.

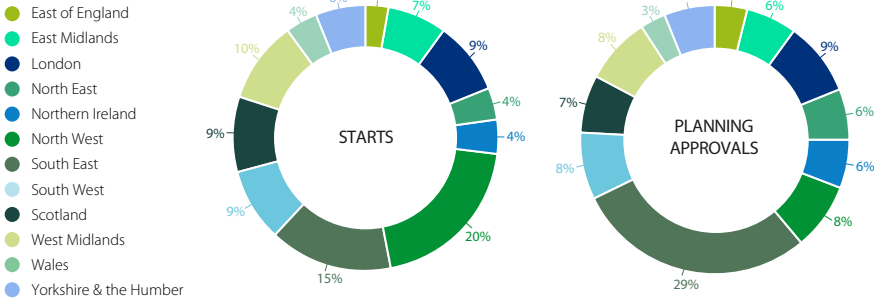
Approvals in the South West slipped back 6% to total £30 million. The North West and the West Midlands decreased 59% and 22% respectively, both accounting for a 9% share. Scotland grew 34% against last year, totalling £25 million, accounting for a 7% share of retail approvals.

-29%

decrease in the value of detailed planning approvals against the previous year

Share Value of Retail Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



Changes in Retail Starts and Planning Approvals on a Year Earlier

Source: Glenigan



## HOTEL & LEISURE – OVERVIEW

**Project starts and main contract awards decreased year-on-year. Positively, detailed planning approvals increased compared to both the previous quarter and the previous year.**

Hotel & leisure projects starting on site during the three months to August totalled £1,015 million, a 10% decline against the preceding three months and 16% down on the previous year. Major projects (worth £100 million or more) commencing on site totalled £114 million, 19% lower than the previous quarter and a 74% decrease on last year. Underlying starts (less than £100 million) decreased 22% against the preceding three months on a seasonally adjusted (SA) basis but grew 17% compared with last year to total £922 million.

Hotel & leisure main contract awards totalled £885 million, a 10% decrease against the preceding three months and 37% against the previous year. Major projects totalled £150 million, a 44% decrease against the preceding three months and 75% down against the previous year. Underlying contract awards decreased 13% (SA) against the preceding three months and by 10% compared with a year ago.

Hotel & leisure detailed planning approvals totalled £2,256 million, growing 10% during the quarter and 19% on the previous year. Underlying approvals increased 22% (SA) against the preceding three months, standing 51% up on the previous year, totalling £1,526 million. Major projects totalled £730 million during the period, a 9% decline on the previous quarter and 17% down on a year ago.

# -10%

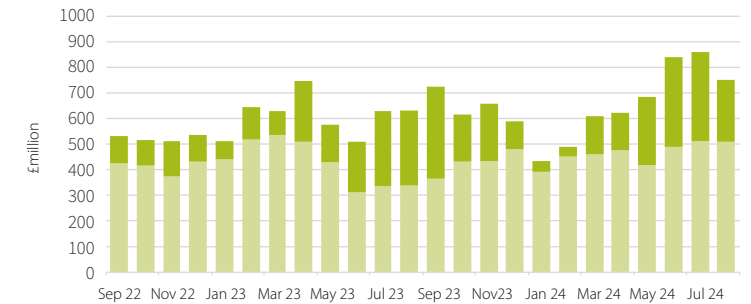
*decrease in the value of hotel & leisure starting on site against the preceding three months*

### Hotel & Leisure: Detailed Planning Approvals

Source: Glenigan

Three month average

Over £100M  
Under £100M

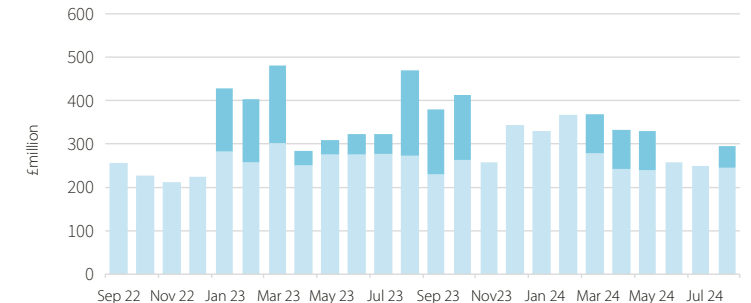


### Hotel & Leisure: Main Contract Awards

Source: Glenigan

Three month average

Over £100M  
Under £100M

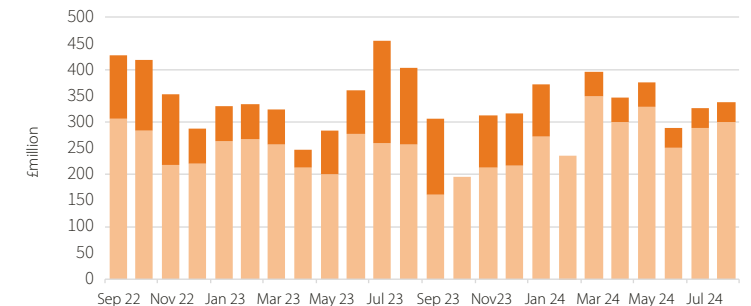


### Hotel & Leisure: Starts

Source: Glenigan

Three month average

Over £100M  
Under £100M





HOTEL & LEISURE –  
TYPES OF PROJECTS STARTED

Hotels and guest houses accounted for 43% of sector starts during the three months to August, with the value adding up to £437 million. The segment jumped 115% compared with last year's levels. Sport facilities grew 10% on last year's levels to total £228 million, accounting for 23% of the sector. In contrast, cinemas & theatres experienced a 43% decline compared to the preceding year. The segment accounted for 4% of the sector with a total value of £40 million.

Indoor leisure facilities also slipped back 76% on a year ago to total £34 million, a 3% share of the sector. Cafés, restaurants, and fast-food outlets fell 61% against the previous year to total £21 million, accounting for 2% of the sector.

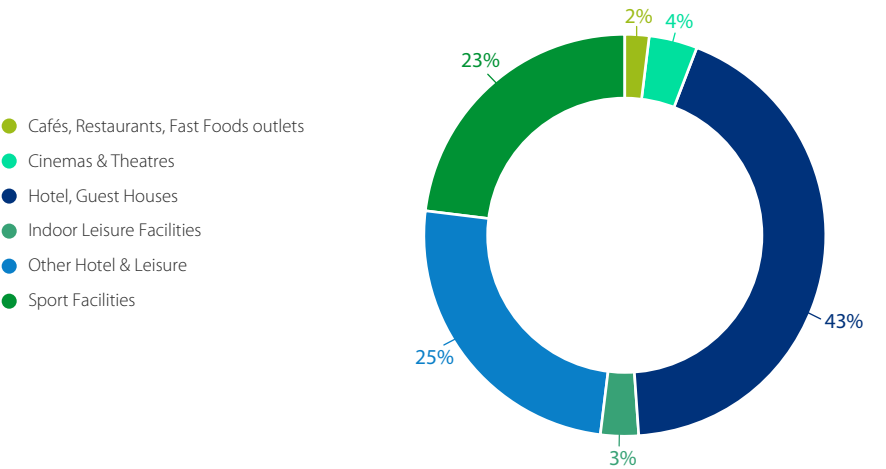
Hotel & Leisure: League Tables (September 2023 to August 2024)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
YTL Developments	1	155	YTL	1	155
Lendlease	2	152	Crystal Palace Football Club	1	150
Willmott Dixon	27	125	Bloor Homes	1	114
Galliford Try	7	125	National Galleries Of Scotland	1	75
Bloor Homes	1	114	Partingtons Holiday Centres	1	75
GMI Construction	3	104	Lisburn Borough Council	6	70
Legacie	1	95	The Tate Gallery	3	60
Graham Construction	3	93	Elephant & Castle Projects	1	51
Gilbert Ash	3	87	Fermanagh District Council	1	50
Morgan Sindall	6	76	Aberdeen City Council	4	50

Types of Hotel & Leisure Projects Started Three Months to August 2024

Source: Glenigan



PROJECT SPOTLIGHT  
£150m

SELHURST PARK MAIN  
STAND DEVELOPMENT

Detailed plans have been approved for the £150 million development of the Selhurst Park main stand for Crystal Palace Football Club. Lendlease has been appointed as the main contractor on the scheme, with works expected to be completed in Q1 2025.

PROJECT ID: 17438932



Image Source: Crystal Palace

HOTEL & LEISURE – REGIONAL

London accounted for 23% of hotel & leisure work starting on site, making it the most active region for project-starts, despite a 64% decrease against the previous year, totalling £235 million. In contrast, accounting for 16%, Scotland grew 460% against last year to total £164 million.

The South West accounted for a 13% share, with the value of work adding up to £136 million, having doubled compared with last year's levels. The growth was mainly driven by the £113.76 million sport pitch development in Devon (Project ID: 23155085).

Accounting for a 12% share, the North West increased 30% to total £126 million. The East of England, accounting for a 10% share, more than tripled against last year to total £106 million. The South East, also accounting for 10%, increased 348% to total [value].

London accounted for the highest share of project approvals (46%), thanks to a 330% growth against the previous year, totalling £1,047 million, boosted by the 380 Kensington High Street London Hotel Development worth £450 million (Project ID: 23137089). Consents in Scotland increased more than six times, nearly quadrupling from last year's levels, adding up to £376 million, accounting for a 17% share of the sector.

The South East accounted for a 7% share, having grown 47% on a year ago to total £147 million. In contrast, the North West experienced a weak period, with approvals decreasing 57% on a year ago, totalling £228 million, accounting for 10% of the sector.

19%

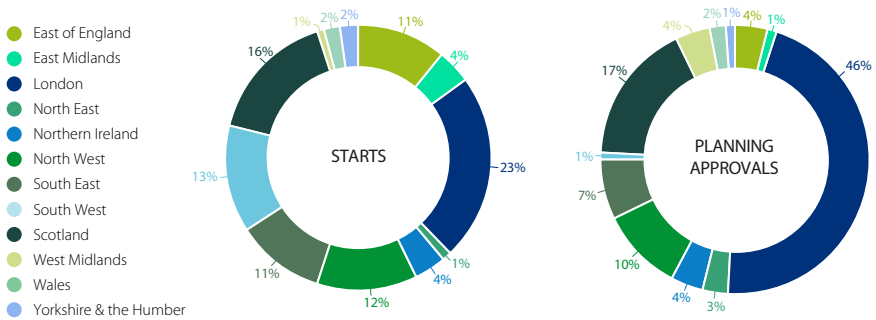
increase in the value of hotel & leisure detailed planning approvals against the previous year

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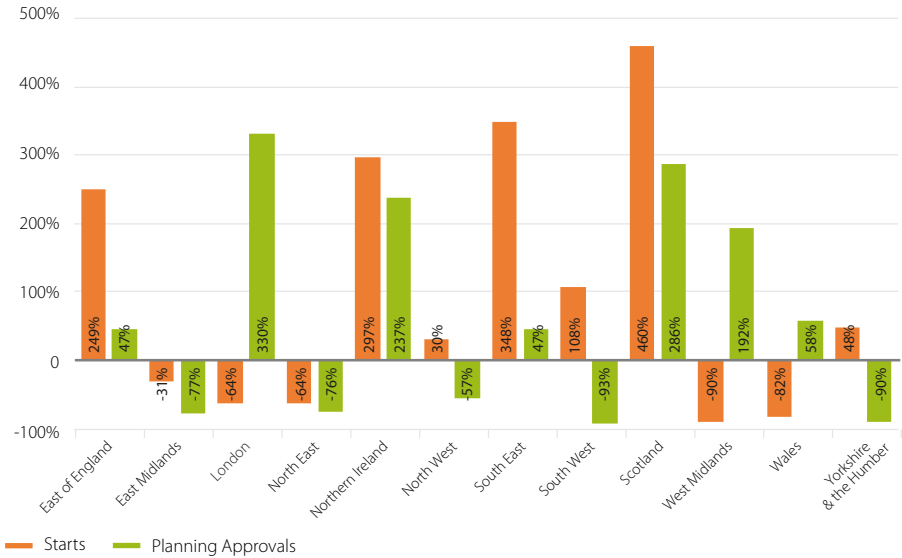
Share Value of Hotel & Leisure Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



Changes in Hotel & Leisure Starts and Planning Approvals on a Year Earlier

Source: Glenigan



HEALTH – OVERVIEW

**Project starts decreased quarter-on-quarter and year-on-year. More positively, main contract awards and detailed planning approvals increased compared to the previous quarter, strengthening the development pipeline.**

Underlying health work starting on site (less than £100 million in value) during the three months to August totalled £571 million, a 28% decline against the preceding three months on a seasonally adjusted (SA) basis and 44% down against the previous year. Major projects (worth £100 million or more) starting on site climbed 3% against the previous quarter and more than doubled on last year, totalling £684 million. Overall, health starts fell 18% against the previous quarter and decreased 5% on a year ago, totalling £1,255 million.

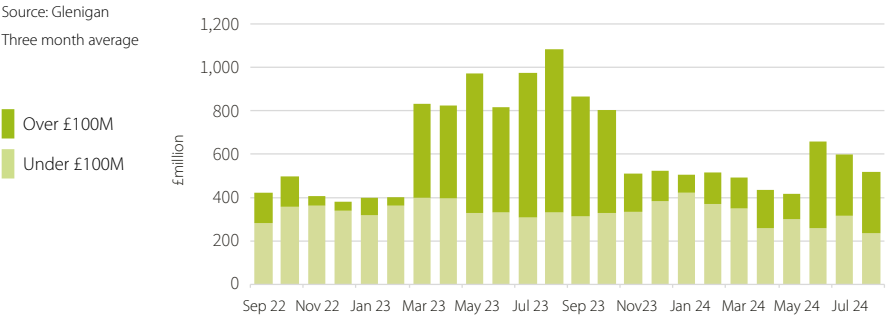
Health main contract awards totalled £1,103 million, a 3% increase against the preceding three months but remaining 37% down against a year ago. Major projects totalled £334 million, up 32% against the preceding three months and decreased 65% against the previous year. Underlying contract awards experienced mixed poor performance, increasing 14% against the preceding three months (SA) but standing 2% down against the previous year.

-5%

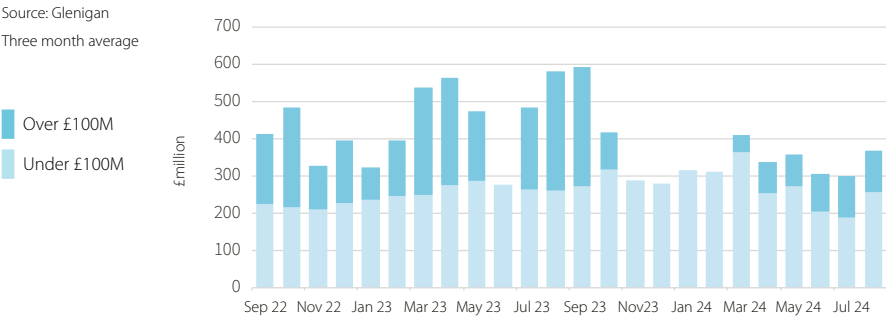
decrease in the value of health work starting on site against the previous year

Detailed planning approvals totalled £1,551 million, growing 24% against the preceding quarter but falling 52% on the previous year. Major project approvals jumped 143% against the previous quarter to total £843 million, standing 63% down against last year. Underlying approvals totalled £708 million, a 20% decrease (SA) compared with the preceding three months and 29% lower than a year ago.

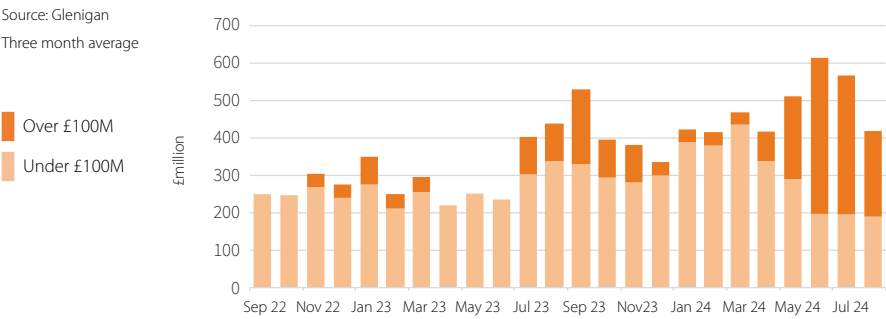
Health: Detailed Planning Approvals



Health: Main Contract Awards



Health: Starts



HEALTH – TYPES OF PROJECTS STARTED

Dental, health, and veterinary accounted for 12% of health work starting on site during the three months to August, with the value having decreased 14% against the previous year's levels to total £152 million. Accounting for 10%, nursing home project starts totaled £124 million during the period, having slipped back 47% on a year ago.

Accounting for 9% of health projects starting on-site, hospitals decreased 86% on a year ago to total £112 million. Day centre projects totalled £12 million, an increase from last year when there were no project starts.

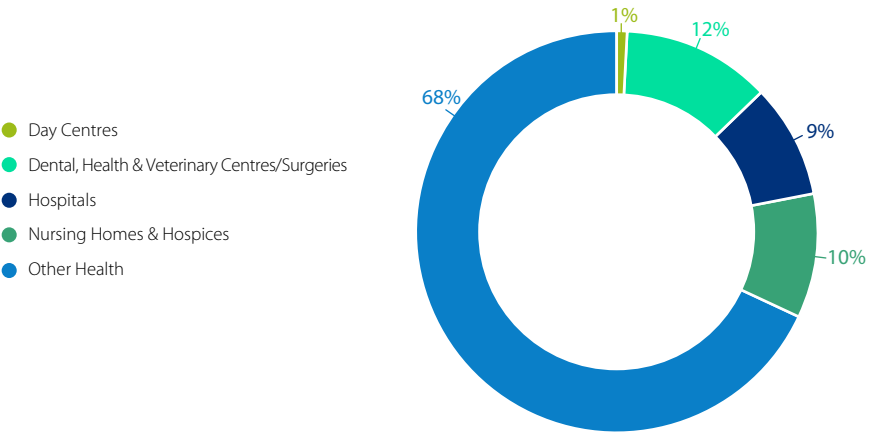
Health: League Tables (September 2023 to August 2024)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
IHP Integrated Health	7	192	Department of Health	212	1,496
Laing O'Rourke	1	190	Breakthrough Properties	2	155
SDC	3	165	Prologis UK	1	144
McLaughlin & Harvey	2	161	Smith & Nephew	1	82
Morgan Sindall	15	146	MBDA (UK)	2	68
Kier	12	119	Tritax	1	58
Winvic	1	116	Siemens	1	58
Tilbury Douglas	7	111	Officescape	1	54
Shepherd Building	6	109	Global Mutual	1	51
Willmott Dixon	9	101	Welsh Government	4	46

Types of Health Projects Started Three Months to August 2024

Source: Glenigan



PROJECT SPOTLIGHT

£700m

MONKLANDS HOSPITAL  
REPLACEMENT PROJECT

Detailed plans have been approved for the new University Hospital Monklands in Strathclyde. A main contractor is yet to be appointed on the £700 million scheme, with works expected to be completed in Q3 2030.

PROJECT ID: 17038923



Image source : NHS Lanarkshire



HEALTH – REGIONAL

London was the most active region for health project-starts during the three months to August, totalling £578 million and accounting for 46% of sector starts. This represents a 59% growth compared to the previous year, primarily driven by the £500 million Canary Wharf North Quay Life Science Building (Project ID: 22120609). The South East accounted for a 22% share at £281 million, with a 19% increase compared with last year's levels.

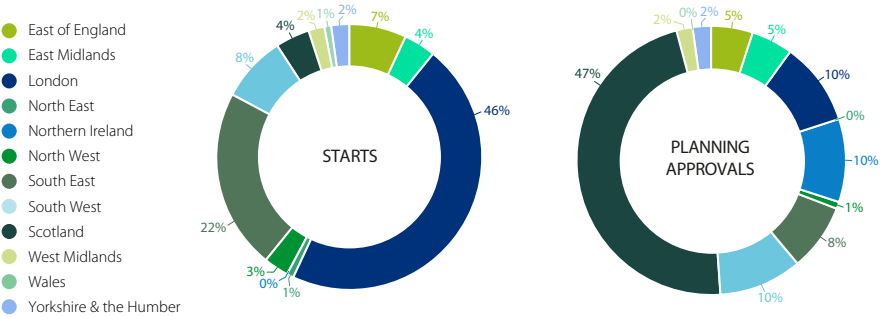
Health starts in Scotland accounted for 4%, jumping nearly 29 times compared with the previous year's levels, totalling £53 million. Similarly, the East Midlands doubled on a year ago, accounting for 4% of the sector with a total of £44 million. The South West, accounting for 8%, experienced a weak period, decreasing 15% on a year ago to total £100 million. The East of England, accounting for a 7% share, slipped back 28% against the previous year to total £88 million.

Scotland was the most active region for detailed planning approvals, with a total value of £726 million, representing a nearly 15-fold increase from last year. This was driven by the £700 million Monklands Replacement Project (MRP) in Airdrie (Project ID: 17038923), accounting for 47% of the health sector. Approvals in the South West grew 85% compared with the previous year to total £163 million, a 10% share of health consents. Northern Ireland also saw a significant increase, with approvals jumping 631% in value to total £149 million, accounting for 10% of the sector.

In contrast, London, despite also accounting for a tenth of health consents, slipped back 80% on a year ago to total £156 million. The South East, accounting for 8%, also experienced a decline, with health approvals down 75% on a year ago to total £118 million.

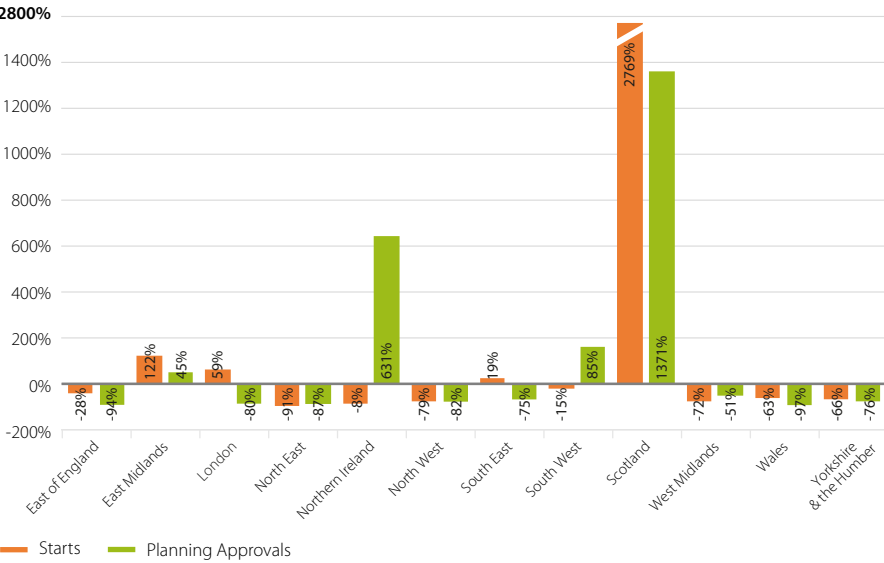
Share Value of Health Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



Changes in Health Starts and Planning Approvals on a Year Earlier

Source: Glenigan



24%

increase in the value of projects reaching the detailed planning approval stage against the preceding three months

## EDUCATION – OVERVIEW

**Project starts and detailed planning approvals declined compared to both the previous quarter and the previous year. More positively, main contract awards increased compared to the previous quarter.**

Education work starting on site during the three months to August totalled £1,616 million, a 6% decline against the preceding three months and 21% down on the previous year. No major projects (worth £100 million or more) started during the period, unchanged from the preceding quarter and a year ago. Underlying education work starting on site (less than £100 million in value) decreased 29% against the preceding three months on a seasonally adjusted (SA) basis and was 21% down on a year ago.

Education main contract awards increased 51% against the preceding three months to total £1,678 million, remaining 9% lower than the previous year. Underlying contract awards increased 12% (SA) against the preceding three months but declined by 33% against the previous year. Major projects totalled £505 million, an increase from the preceding three months (where there were no major projects) and a 405% increase on the previous year.

Detailed planning approvals totalled £1,218 million, a 9% decline against the preceding three months and 18% down on last year. No major project approvals were approved during the period, a decrease from both the previous quarter and last year. Underlying project approvals fell 5% (SA) against the previous quarter and decreased 10% against last year.

**-21%**

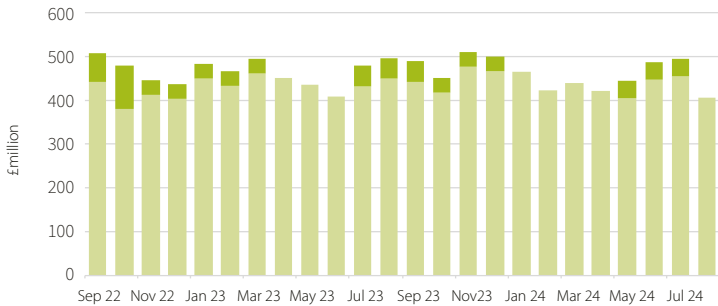
*decrease in the value of education work starting on site against the previous year*

### Education: Detailed Planning Approvals

Source: Glenigan

Three month average

Over £100M  
Under £100M

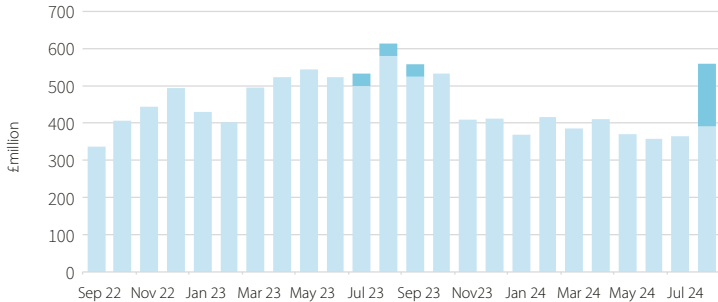


### Education: Main Contract Awards

Source: Glenigan

Three month average

Over £100M  
Under £100M

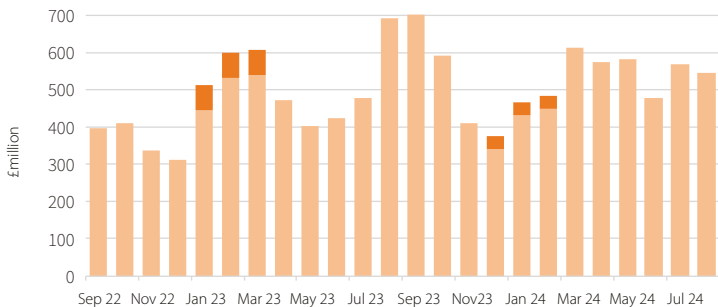


### Education: Starts

Source: Glenigan

Three month average

Over £100M  
Under £100M



EDUCATION – TYPES OF PROJECTS STARTED

School project-starts totalled £989 million during the three months to August, accounting for the largest share of education construction starts (61%), having decreased 38% on the previous year. Universities also fell 10% against last year to total £177 million, accounting for 11% of the total value.

College starts, on the other hand, experienced a strong period, with the value having grown 124% against the previous year to total £358 million, accounting for a 22% share of education sector work starting on site.

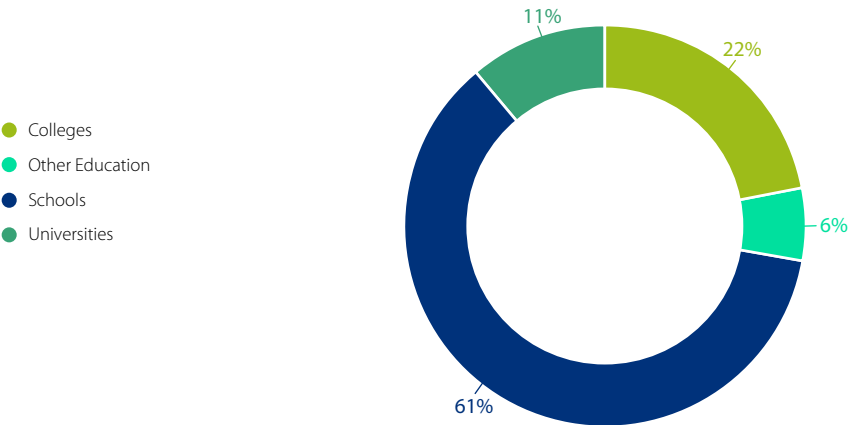
Education: League Tables (September 2023 to August 2024)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Morgan Sindall	40	456	Department for Education	107	831
Kier	22	414	Construction & Procurement	3	203
Willmott Dixon	18	354	University of Durham	2	146
Royal BAM	9	272	University of East Anglia	4	98
Bowmer & Kirkland	20	260	Cardiff County Council	5	97
Galliford Try	23	231	Bridgend College	2	90
Woodvale	1	188	Northumberland County Council	4	88
Lowry Building & Civil Engin.	1	188	Kier	4	84
ISG Construction	8	107	London Borough of Lewisham	2	83
Graham Construction	6	105	City of Edinburgh Council	6	72

Types of Education Projects Started Three Months to August 2024

Source: Glenigan



PROJECT SPOTLIGHT

£54m

NAIRN ACADEMY

Detail plans have been approved for the Nairn Academy development. Balfour Beatty have been appointed as main contractors on the £54 million scheme, with works due to be completed in Q1 2026.

PROJECT ID: 21025954



Image Source: Reiach and Hall Architects

EDUCATION – REGIONAL

The South East was the most active region for education project-starts during the three months to August, accounting for a 23% share of the sector, totalling £365 million. This represented an 118% increase on last year's levels. London accounted for 15% of starts in the sector and grew 67% against the previous year to total £243 million. The West Midlands, accounting for a 9% share, climbed 9% on a year ago to total £140 million.

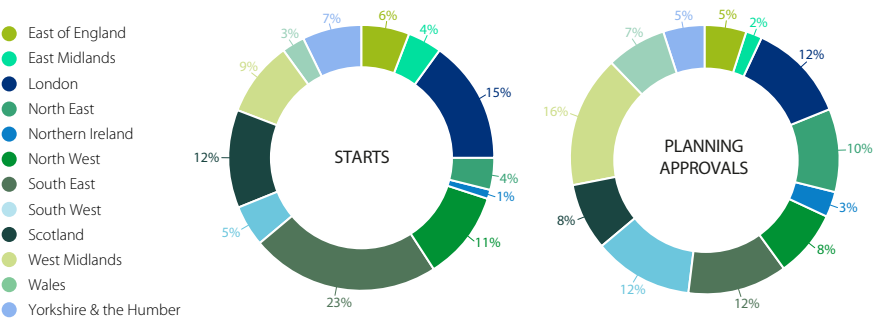
In contrast, Scotland experienced a 19% slump on a year ago, totalling £195 million and accounting for a 12% share. The North West, also accounting for 11%, experienced a weak period, with starts declining 43% on a year ago to total £178 million.

The West Midlands was the most active region for detailed planning approvals in the education sector, accounting for a 16% share, with the value nearly tripling against a year ago to total £191 million. The South West also grew 30% in value against last year to total £149 million, a 12% share of all consents during the period. The South East increased 37% compared with the 2023 figures to total £146 million, also accounting for a 12% share.

The North East jumped more than 37 times against last year, totalling £125 million and accounting for 10% of education consents. London, accounting for 12% of consents, faced a 51% slump, totalling £148 million.

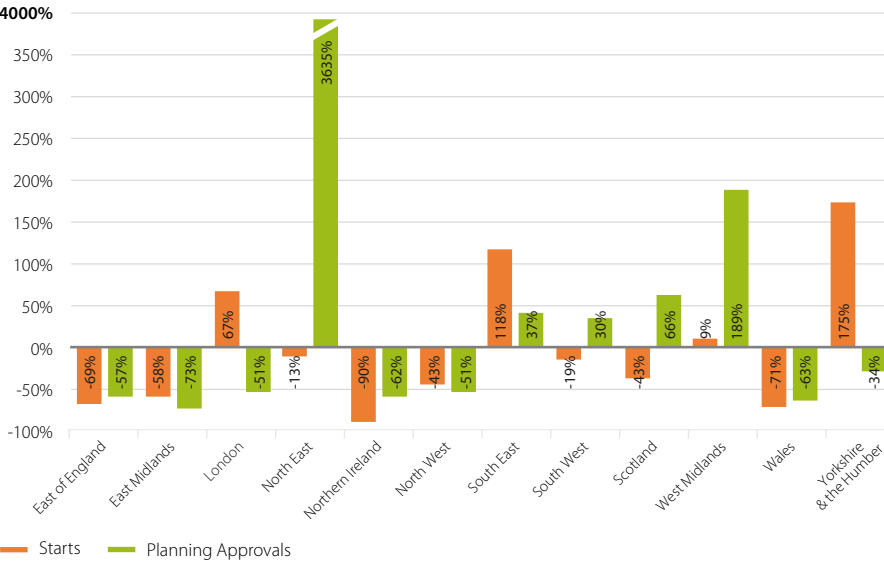
Share Value of Education Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



Changes in Education Starts and Planning Approvals on a Year Earlier

Source: Glenigan



51%

increase in the value of main contract awards against the preceding three months



COMMUNITY & AMENITY – OVERVIEW

Main contract awards declined compared to both the previous quarter and the previous year. More positively, detailed planning approvals increased quarter-on-quarter and year-on-year, boosting the development pipeline.

Community & amenity work starting on site during the three months to August totalled £482 million, a 42% decline against the preceding three months but a 40% increase on the previous year. Major project-starts (worth £100 million or more) totalled £135 million, a 60% decline from the previous quarter but an increase from a year ago when no major projects started on site. Underlying starts (less than £100 million in value) fell 31% against the preceding three months on a seasonally adjusted (SA) basis to stand 1% up against last year's levels.

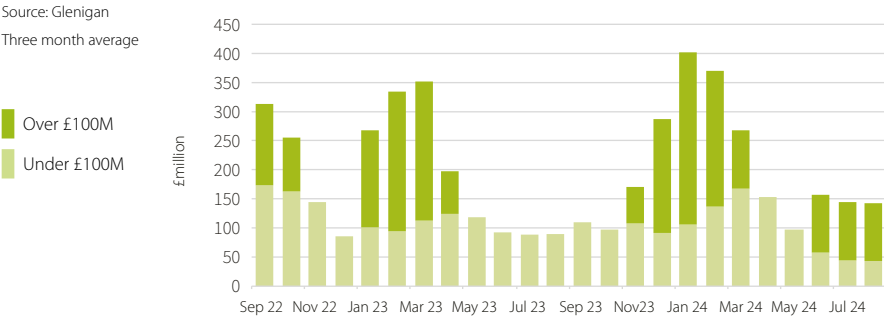
Community & amenity main contract awards totalled £289 million, a 30% decrease during the period and 66% down on the previous year. There were no major projects during the period, unchanged from the preceding three months but down from the previous year. Underlying contract awards decreased 35% against the preceding three months (SA) to stand 54% down against the previous year.

Detailed planning approvals grew 48% against the previous three months to stand 61% up against last year, totalling £429 million. Major approvals totalled £300 million, an increase from the preceding quarter and a year ago when no major projects were approved. Underlying project approvals decreased 31% (SA) on the previous three months and fell 52% against a year ago to total £129 million.

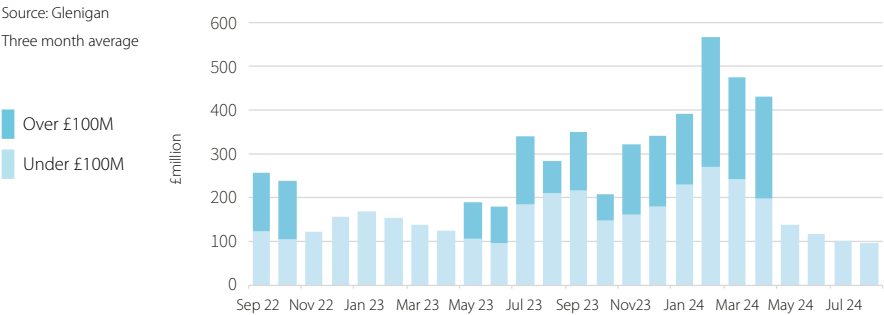
40%

increase in the value of community & amenity work starting on site against the previous year

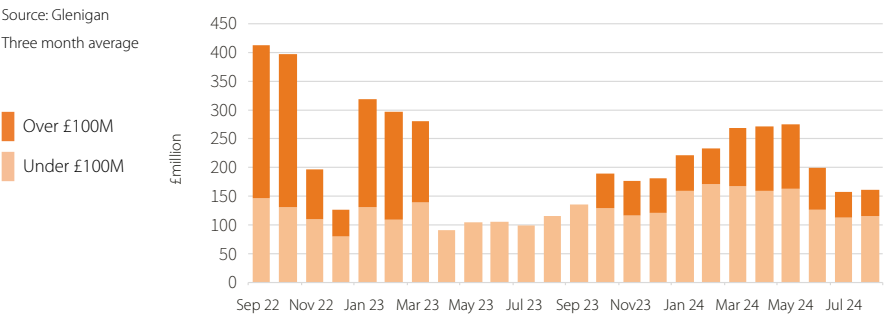
Community & Amenity: Detailed Planning Approvals



Community & Amenity: Main Contract Awards



Community & Amenity: Starts



COMMUNITY & AMENITY –  
TYPES OF PROJECTS STARTED

Prisons accounted for the highest proportion (55%) of community & amenity starts, totalling £266 million, due to a more than eight-fold increase from the previous year. Local facilities, totalling £95 million, grew 43% compared with last year, accounting for 20% of the sector. Government building project starts added up to £61 million, a 202% increase against last year, accounting for 13% of sector starts.

Blue light projects fell 51% to total £35 million, accounting for a 7% share. Military projects experienced an 86% decline against 2023 levels, totalling £18 million and accounting for 4% of the sector. Places of worship totalled £6 million, a 68% decrease on a year ago, accounting for a 1% share. No law court projects started during the three months to August, unlike the same period last year.

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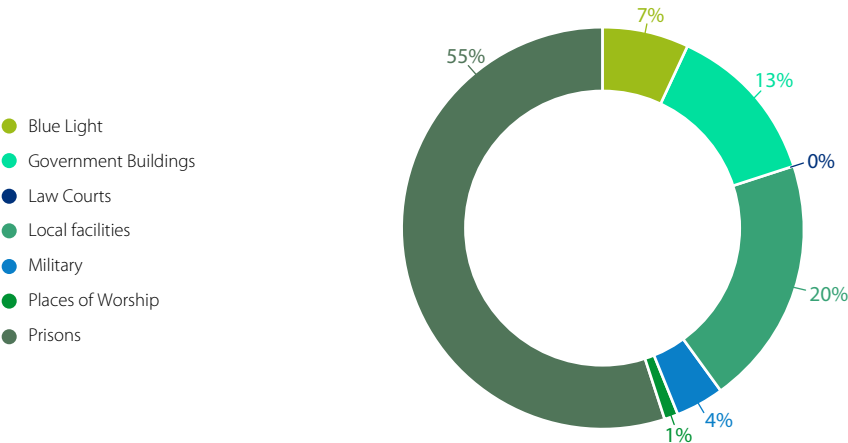
Community & Amenity: League Tables (September 2023 to August 2024)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Kier	11	472	Ministry of Justice	20	847
ISG	9	466	Ministry of Defence	22	386
Wates	5	309	Scottish Prison Service	2	200
Morgan Sindall	15	256	Kier	1	200
Laing O'Rourke	1	186	City of London Corporation	1	180
Galliford Try	9	96	Manchester Met. University	1	90
Sykes & Son	1	90	Home Office	21	88
Robertson	3	90	Ministry of Housing, Communities & Local Gov.	8	61
Reds10 (UK)	2	88	Clackmannanshire Council	1	39
Willmott Dixon	9	51	Hub East Central Scotland	1	39

Types of Community & Amenity Projects Started Three Months to August 2024

Source: Glenigan



PROJECT SPOTLIGHT

£400m  
HMP GLASGOW

Detail plans have been approved for HMP Glasgow. Kier has been appointed as the main contractor on the £400 million scheme, with works due to be completed in Q2 2027.

PROJECT ID: 19429386



COMMUNITY & AMENITY – REGIONAL

The South East dominated community & amenity starts, accounting for 60% of new work valued at £289 million, having doubled on a year ago. This growth was significantly boosted by the £134.76 million HMP Bullingdon - Accelerated Houseblocks Development Programme in Bicester (Project ID: 22000692). Scotland accounted for 10% of sector starts, having increased 37% against the previous year to total £51 million.

The South West starts were 20% higher than last year, totalling £19 million and accounting for 4% of the sector. In contrast, accounting for 5% at £25 million, London fell 14% against the preceding year. The East of England accounted for a 4% share, having slipped back 73% on a year ago to total £17 million.

The East Midlands was the most active region for community & amenity detailed planning approvals, accounting for a 71% share. The value of consents there grew almost 15 times against the previous year, solely thanks to the £300 million HMP Gartree 2 prison development in Leicestershire (Project ID: 21301670). The South West also performed well, growing 36% on the preceding year's level, accounting for 12%, with a total value of £51 million.

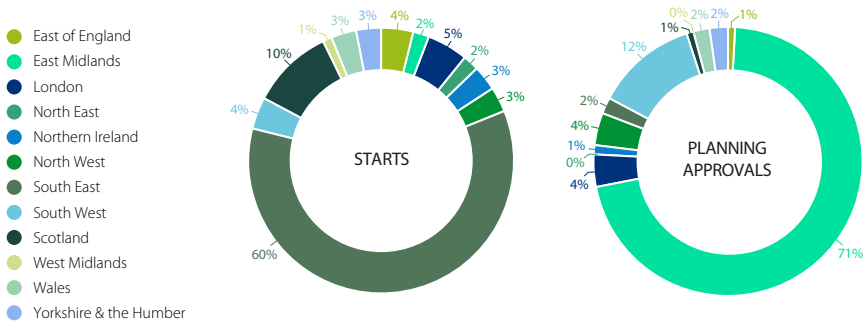
London experienced growth in detailed planning approvals, with the value increasing 25% compared with last year's levels to total £18 million, accounting for a 4% share of sector consents. In contrast, despite accounting for the same share, approvals in the North West slipped back 40% against the previous year to total £18 million.

61%

increase in the value of community and amenity  
planning approvals against the previous year

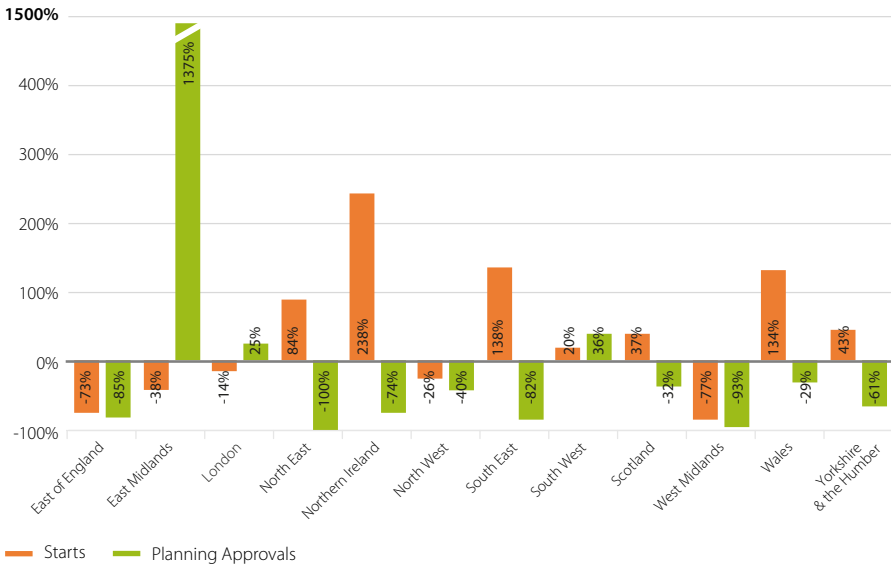
Share Value of Community & Amenity Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



Changes in Community & Amenity Starts and Planning Approvals on a Year Earlier

Source: Glenigan



## CIVIL ENGINEERING – OVERVIEW

**Main contract awards and detailed planning approvals declined compared to both the previous quarter and the previous year. On a positive note, project starts increased year-on-year.**

Civil engineering work starting on site during the three months to August totalled £9,100 million, a 9% decrease against the preceding three months but 83% higher than the previous year. Major projects (worth £100 million or more), totalling £7,283 million, fell 7% against the preceding three months but stood 120% higher than last year. Underlying project-starts (less than £100 million in value) grew 17% against the preceding three months on a seasonally adjusted (SA) basis and were 9% up compared with last year, totalling £1,817 million.

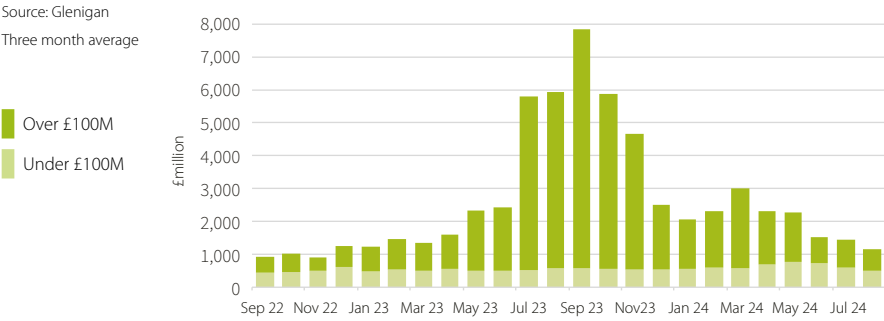
Civil engineering main contract awards added up to £3,064 million, a 59% decrease against the preceding three months and 44% down on the previous year. Underlying contract awards experienced a weak performance, decreasing 13% against the preceding three months (SA) and 35% down on 2023 levels. Major projects totalled £1,885 million, a 67% decrease on the preceding three months and a 49% decrease on the previous year.

83%

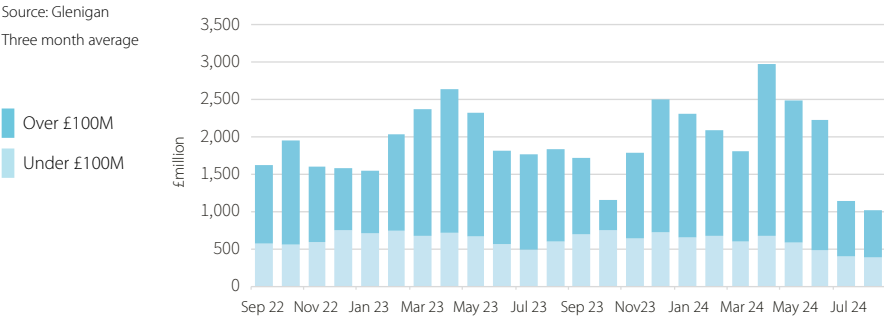
*increase in the value of civil engineering work starting on site against the previous year*

Civil engineering detailed planning approvals totalled £3,441 million, a 50% decline compared with the previous quarter and 81% down on a year ago. Major project approvals, at £1,938 million, decreased 57% against the preceding three months and 88% on the previous year. Underlying approvals decreased 29% (SA) against the previous three months and were also 13% lower than a year ago, totalling £1,503 million.

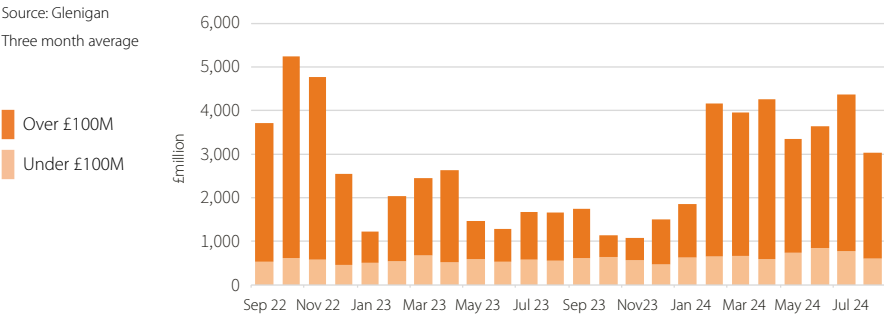
### Civil Engineering: Detailed Planning Approvals



### Civil Engineering: Main Contract Awards



### Civil Engineering: Starts





- Housing
- Industrial
- Offices
- Retail
- Hotel & Leisure
- Health
- Education
- Community & Amenity
- Civil Engineering

## CIVIL ENGINEERING – TYPES OF PROJECTS STARTED

Energy projects accounted for the greatest share (60%) of civil engineering starts during the three months to August, totalling £5,430 million, a 12-fold increase from the previous year. Waste projects doubled on a year ago, reaching £77 million and accounting for a 1% share. Road project-starts fell 7% to total £774 million, representing a 9% share.

Harbour/port projects were 20% lower than last year, totalling £194 million, accounting for a 2% share of civil engineering starts. Rail projects totalled £123 million, a 47% decrease on a year ago, accounting for a 1% share. Water industry projects accounted for an insignificant share, totalling £35 million, having decreased 71% on a year ago. There were no airport projects starting on site during the period, a decrease from a year ago.

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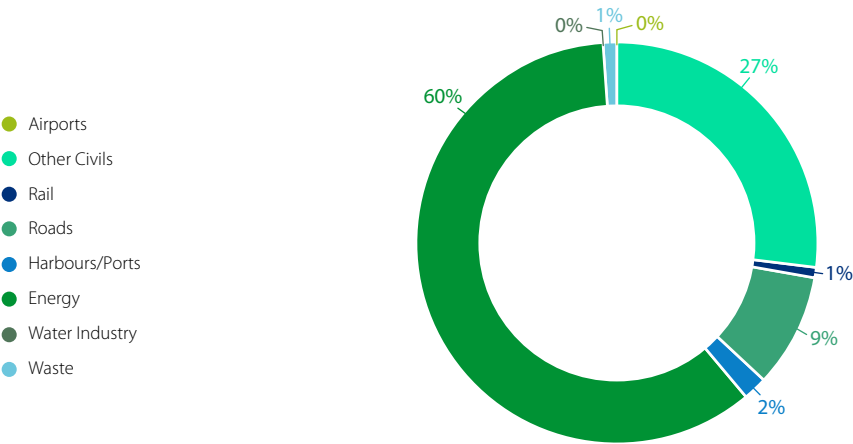
### Civil Engineering: League Tables (September 2023 to August 2024)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Hitachi Energy	4	1,795	Network Rail	33	3,696
Murphy	5	1,106	SSE	13	2,462
Bouygues	11	1,023	Department for Transport	49	1,702
Morgan Sindall	15	855	National Grid	10	1,595
Royal BAM	19	725	Statera Energy	1	1,000
Keltbray	6	618	Milton Keynes Borough Council	4	614
Ringway	4	603	Essex County Council	6	548
Skanska	1	600	Kent County Council	6	505
Balfour Beatty	38	539	Hemiko	1	500
Hemiko	1	500	North Lanarkshire Council	4	470

### Types of Civil Engineering Projects Started Three Months to August 2024

Source: Glenigan



### PROJECT SPOTLIGHT

£20m

#### HILSEA BUS DEPOT

Detailed plans have been approved for the £20 million Hilsea Bus Depot development in Portsmouth. A main contractor is yet to be appointed on the scheme with works expected to be completed in Q4 2025.

PROJECT ID: 23355102



Image Source: Janus Architecture

CIVIL ENGINEERING – REGIONAL

Yorkshire & the Humber accounted for 65% of starts during the period, the highest of any area. The value of projects commencing in the region jumped 15 times against the previous year to total £5,946 million. This growth was boosted by the £4,033 million Dogger Bank B offshore wind farm in Cottingham (Project ID: 12391584). Accounting for 5% of starts, the North West increased 15% to total £441 million.

Scotland also experienced growth during the period. Accounting for 4% of the sector, the value of project-starts in the region increased 32% to total £336 million. Similarly, the East of England doubled on a year ago to total £341 million, also accounting for 4% of the sector. In contrast, accounting for an 11% share, the South East fell 61% on a year ago, totalling £978 million.

The East of England, at £879 million, was the most active region for civil engineering planning approvals, accounting for 26% of the sector. The value grew 81% against the previous year, boosted by the £600 million Sunnica Energy Farm in Suffolk (Project ID: 19093653). The West Midlands increased 33% against the previous year to total £198 million, representing a 6% share of the sector.

The South West decreased 60% to total £741 million, accounting for 21% of consents. Further decline was prevented by the £500 million Lime Down Solar Park in Bath (Project ID: 24218684). The East Midlands accounted for an 18% share, having faced a 29% decline against 2023 figures to total £628 million. Yorkshire & the Humber fell 97% on a year ago, totalling £264 million and accounting for an 8% share of consents.

-50%

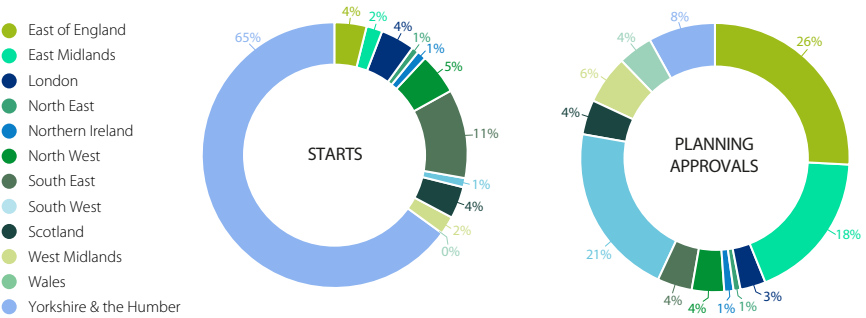
decrease in the value of civil engineering detailed planning approvals against the preceding three months

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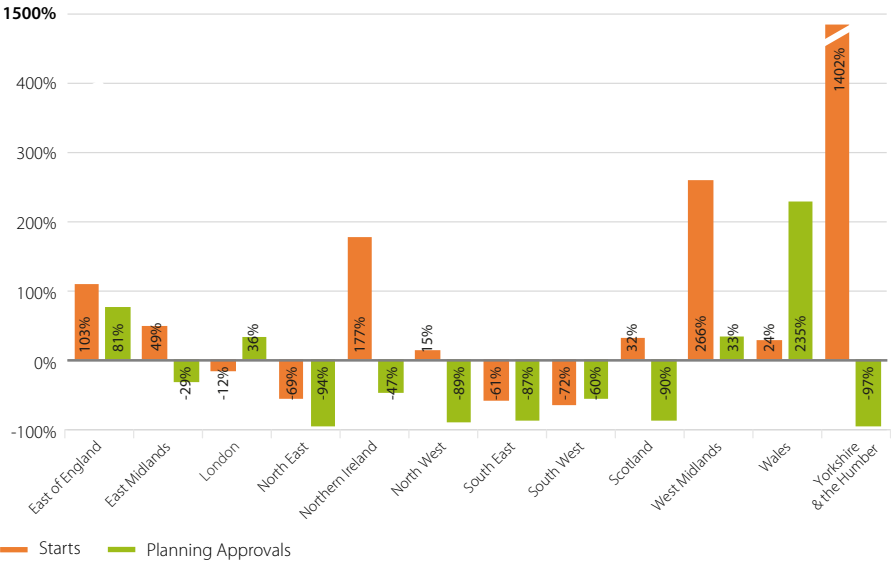
Share Value of Civil Engineering Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



Changes in Civil Engineering Starts and Planning Approvals on a Year Earlier

Source: Glenigan





EXECUTIVE SUMMARY

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LEAGUE TABLES

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ECONOMIC OUTLOOK

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SECTOR ANALYSIS

Housing

Industrial

Offices

Retail

Hotel & Leisure

Health

Education

Community & Amenity

Civil Engineering

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