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Construction Review

Reflecting activity to the end of August 2026

September 2026

- **7% decline in detailed planning approvals** against the preceding three months
- **45% rise in main contract awards** against the preceding three months
- **49% 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

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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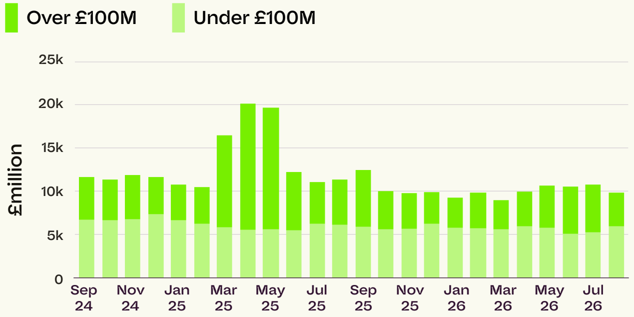
Executive Summary

- **13% decline** in detailed planning approvals against the previous year
- **120% rise** in main contract awards against the previous year
- **28% decline** in project starts against the previous year

UK construction activity remained subdued during the latest period. Detailed planning approvals fell by 7% against the preceding three months, while project starts declined sharply by 49%, reflecting weaker levels of activity commencing on site. In contrast, main contract awards increased by 45% over the quarter, indicating that parts of the future pipeline continue to strengthen despite softer current activity. On an annual basis, detailed planning approvals were 13% lower than a year earlier, highlighting a reduction in the volume of schemes progressing through the planning system. Project starts also fell by 28% compared with the previous year, reflecting weaker development activity across several sectors. However, main contract awards increased by 120% year-on-year, supported by a number of major project commitments and infrastructure-related schemes entering the construction pipeline. Looking ahead, the industry's performance is likely to remain influenced by economic conditions, financing availability and investor confidence. The significant growth in contract awards provides encouragement for future workload prospects and suggests that demand for major construction projects remains present in several areas of the market.

Detailed Planning Approvals

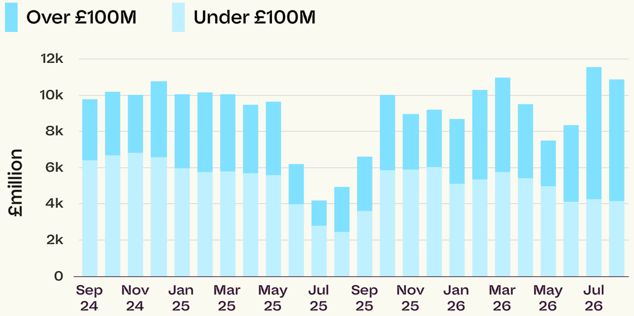


Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	17,732	11,793	**29,525**
YoY	-3%	-25%	**-13%**
Prev. 3 months	3%	-20%	**-7%**
Prev. 3 months (SA)	2%		

Source: Glenigan. Three month average

Main Contract Awards

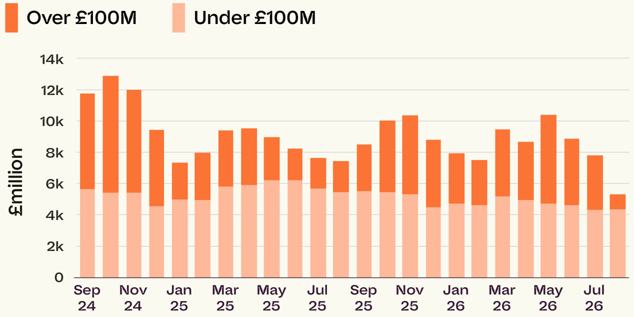


Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	12,502	20,126	**32,628**
YoY	70%	170%	**120%**
Prev. 3 months	-16%	165%	**45%**
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	13,073	2,899	**15,972**
YoY	-20%	-51%	**-28%**
Prev. 3 months	-8%	-83%	**-49%**
Prev. 3 months (SA)	-2%		

Source: Glenigan. Three month average

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Economic Outlook

Turning a corner?

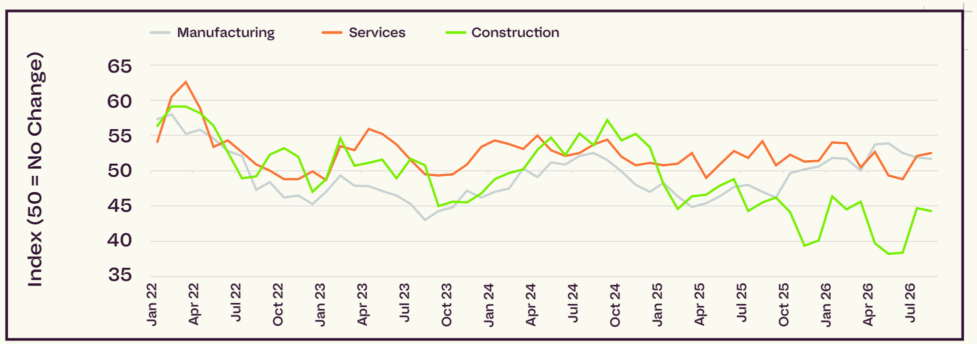
- Economy grows in June
- Rise in manufacturing and services sectors
- Government leads rise in capital spending

The Chancellor believes the UK economy is turning a corner, but the latest ONS data present a mixed picture. GDP grew by 0.3% in June after stagnating in April and May, suggesting that disruption from the Iran conflict is easing. CIPS surveys indicate stronger manufacturing and services activity in July and August, although construction continues to contract.

Household spending rose by 0.3% during the quarter, supporting demand. While the World Cup may have provided a temporary lift, the increase also points to improving consumer confidence.

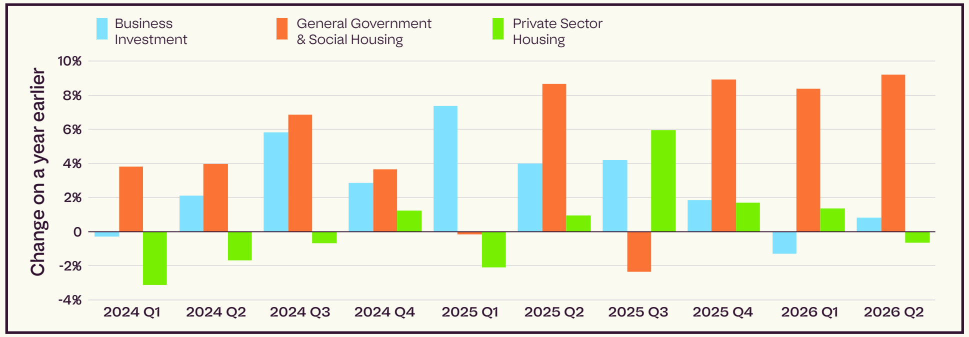
Strengthening investment is encouraging for both construction and long-term growth. Total investment increased by 1.2% in Q2 and was 2.7% higher than a year earlier. Government investment led the gains, up 10.6% year-on-year. The turnaround in business investment has been more modest, increasing by 1.7% during the quarter. A 7.4% increase in spending on ICT, plant and machinery suggests businesses are prioritising productivity and cost efficiency rather than expanding capacity.

CIPS Activity Surveys



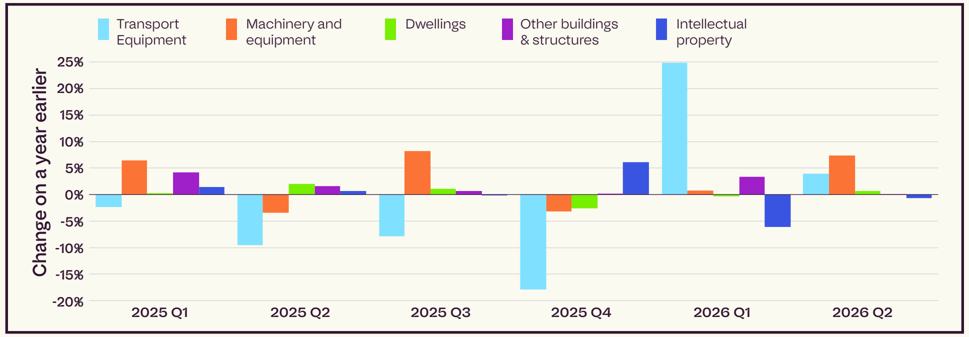
Sources: IHS Markit/CIPS

Investment



Source: ONS

Investment by Asset



Source: ONS

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Top 50 Contractors

Last 12 month totals:	794 projects	£40,630m
Last month totals:	**89 projects**	**£1,441m**

September 2025 to August 2026

	Contractors	#	£m	★
1	Morgan Sindall	128	3,611	0
2	Graham Construction	24	2,597	0
3	Skanska UK	5	2,506	0
4	VINCI	16	2,068	13
5	Bovis	8	2,067	1
6	Sir Robert McAlpine	9	2,016	-1
7	Kier	74	1,981	1
8	Winvic	21	1,804	2
9	Wates	42	1,777	-2
10	Willmott Dixon	66	1,526	1
11	Sacyr UK	1	1,500	1
12	Bowmer & Kirkland	28	1,423	1
13	Galliford Try	79	913	3
14	Royal BAM	27	765	6
15	Mace	5	744	-6
16	McLaren	8	731	3
17	Sisk	7	728	4
18	Bouygues	2	715	0
19	Dragados UK	1	648	5
20	Caddick Group	23	619	2
21	JRL Group	4	561	6
22	Marlborough Surfacing	6	525	4
23	McLaughlin & Harvey	13	507	7
24	Worley Europe	1	500	4
25	IHP Integrated Health	3	467	NEW
26	Robertson	23	434	-3
27	Hill Group	16	432	4
28	VolkerWessels	15	360	9
29	UI Social Infrastructure	3	343	5
30	M Group Services	6	342	2
31	Balfour Beatty	11	335	-6
32	Axis Group UK	3	312	4
33	Mears Group	2	312	7
34	GMI Construction	23	311	10
35	McAleer & Rushe UK	5	305	NEW
36	Corrigenda	2	304	2
37	Tusker Construction Group	1	300	5
38	HG Construction	4	299	1
39	Glencar Construction	11	281	-6
40	Tilbury Douglas	28	274	-5
41	Costain	6	261	5
42	Laing O'Rourke	4	260	-27
43	Multiplex	2	258	4
44	Structure Tone	2	247	5
45	Murphy	5	239	5
46	JSSH	9	236	NEW
47	Domis Construction	2	229	NEW
48	MTX Contracts	6	227	NEW
49	Keady Construction	3	226	NEW
50	Fortem Solutions	1	203	NEW

August 2026

	Contractors	#	£m	★
1	Kier	6	174	5
2	Winvic	2	76	NEW
3	McLaughlin & Harvey	1	70	13
4	McAleer & Rushe UK	1	62	NEW
5	Sisk	2	61	18
6	Caddick Group	1	61	11
7	JRL Group	1	56	NEW
8	Wates	5	55	4
9	Morgan Sindall	14	51	-4
10	Four Square	1	50	NEW
11	Gilbert Ash	1	40	NEW
12	Carnanbane Building	1	40	NEW
13	Believ	2	38	NEW
14	Formation Architec. Design	1	34	NEW
15	McLaren	1	29	NEW
16	Willmott Dixon	2	26	-5
17	Ogilvie	1	24	NEW
18	Alexander James Contracts	3	22	NEW
19	Higgins	1	22	NEW
20	Heydon & Carr	1	22	NEW
21	GMI Construction	2	21	NEW
22	J A Pye (Oxford)	1	20	NEW
23	Vital Energi Utilities	3	19	NEW
24	Lawrence Baker	1	18	NEW
25	Westfields Construction	1	18	NEW
26	McTear Contracts	1	18	NEW
27	HG Construction	1	17	NEW
28	Royal BAM	1	17	NEW
29	Magrock	1	17	-2
30	AC1 Construction	1	16	NEW
31	Equans Sci Tech	1	16	-1
32	G F Tomlinson	1	16	NEW
33	E G Carter & Co	2	16	NEW
34	Make One Group	1	15	13
35	FT Construction	2	14	NEW
36	Heddle Construction	1	14	NEW
37	Tilbury Douglas	1	14	11
38	G F Holdings	1	13	NEW
39	Spacemaker Developments	1	12	NEW
40	RH Insulation Services	1	12	NEW
41	Parkway	1	12	NEW
42	Assured CMS	1	12	NEW
43	Miller Freeman & Sons (Notts)	1	12	NEW
44	Clark Contracts	5	12	NEW
45	Kind & Company	1	11	-7
46	Heron Bros	1	11	NEW
47	Marlborough Surfacing	1	10	NEW
48	BW Interiors	1	10	NEW
49	Mazcraft	2	10	NEW
50	Neilcott Construction	2	9	NEW

★ Change in ranking since the previous period

Top 50 Clients

September 2025 to August 2026

	Clients	#	£m	★
1	Department of Health	228	8491	0
2	Department for Education	78	1614	1
3	Univ. Destinations and Exp.	3	1261	1
4	Comcast	1	1250	2
5	East West Railway Company	1	1250	0
6	Bedford Borough Council	1	1250	1
7	States of Jersey	2	710	3
8	Ministry of Defence	27	690	1
9	United Utilities Group	9	565	-7
10	Cadent Gas	1	500	2
11	Therme Group UK	1	450	3
12	Network Rail	24	445	1
13	Ministry of Justice	33	413	-2
14	Derwent London	4	354	11
15	Hampshire County Council	38	337	1
16	Department for Transport	29	314	7
17	Manby BGE	1	300	0
18	R&F Properties QS	1	300	0
19	Dev. Control Plan. Thurrockl	6	299	0
20	Greater London Authority	9	295	18
21	Land Securities Group	5	290	-1
22	Battersea Project Phase 3	1	280	-1
23	Herts. County Council	6	259	1
24	Prologis UK	4	255	-2
25	Kemble Water	23	253	4
26	Tribus Clean Energy	1	250	0
27	Westminster City Council	7	234	3
28	Sanctuary Housing	2	228	3
29	Tower Hamlets Council	4	225	3
30	Northern Ireland Executive	2	211	4
31	London Bor. of Croydon	4	210	NEW
32	Herefordshire Council	12	208	3
33	Leeds City Council	18	206	-5
34	Environment Agency	25	204	3
35	Heidelberg Materials	1	203	4
36	Southend On Sea BC.	2	203	4
37	RB. of Windsor & Maidenhead	3	188	7
38	Cole Waterhouse	1	185	7
39	Barclays Bank	6	184	7
40	Welsh Government	22	181	8
41	British Land	4	178	9
42	Fusion Students	3	172	-1
43	London Bor. of Haringey	16	170	4
44	Arora Group	1	170	NEW
45	University of Southampton	1	170	NEW
46	Lidl UK	43	164	34
47	Great Portland Estates	3	162	-11
48	Sunderland City Council	6	159	NEW
49	Statkraft	2	155	NEW
50	Pulse Clean Energy	1	155	NEW

August 2026

	Clients	#	£m	★
1	Derwent London	1	98	1
2	Caddick Group	1	61	NEW
3	SEGRO (Junction 15)	1	58	NEW
4	George Wilson Construction	1	57	NEW
5	Agrenewables	1	50	NEW
6	Department for Education	4	50	-3
7	RI of British Architects	1	40	NEW
8	The City of Cardiff Council	1	40	NEW
9	Ebrington Leisure Holdings	1	40	NEW
10	Thavies Inn House	1	35	NEW
11	Evans Randall Investors	1	35	NEW
12	More House School	1	34	NEW
13	Olympic Park Legacy	1	31	NEW
14	Greater London Authority	1	31	NEW
15	Champlon	1	29	NEW
16	Homelife Developments	1	29	NEW
17	LB of Hackney	2	29	-13
18	Sizewell C	1	29	NEW
19	UKI (Shoreditch)	1	28	NEW
20	Blue Coast Capital	1	28	NEW
21	Royal London Asset Mngmt.	1	27	NEW
22	Scottish Borders Council	1	24	NEW
23	BBC Workplace	1	22	NEW
24	Alliance Leisure Services	1	22	NEW
25	Peterborough City Council	1	22	NEW
26	Pollen Estate Trustee	1	21	NEW
27	Oakwood Homes	1	20	NEW
28	Bovis	1	20	NEW
29	The Crown Estate	1	20	NEW
30	Birmingham City Council	1	20	NEW
31	Blenheim Estate	1	20	NEW
32	Hoama (Staplehurst)	1	18	NEW
33	Telford & Wrekin Council	1	18	NEW
34	Redington Capital	1	18	NEW
35	Renfrewshire Council	1	18	NEW
36	Anglian Water Group	1	18	NEW
37	Gilead	1	17	NEW
38	London and Regional Prop.	1	17	NEW
39	Yorkshire Water Services	1	16	NEW
40	Inchcape Motors Int.	1	16	NEW
41	Milton Keynes City Council	1	16	NEW
42	Bromford Group	2	16	NEW
43	Argent Group	1	15	NEW
44	BXS Limited Partnership	1	15	NEW
45	Halcyon Dev. Partners	1	15	NEW
46	London Borough of Barnet	1	15	NEW
47	Chris Rd Dev. (London)	1	15	NEW
48	Orkney Island Council	1	14	NEW
49	Petersfield Town Council	1	13	NEW
50	Salvation Army Trustee	2	12	NEW

★ Change in ranking since the previous period

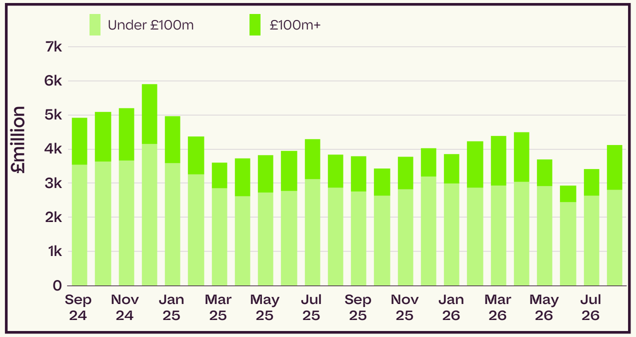
Housing

Overview

- **33% decrease** in project starts year-on-year.
- **77% increase** in main contract awards from last year.
- **7% increase** in detailed planning approvals compared to 2025.

Residential activity remained subdued during the period, with project starts falling sharply compared with last year and the previous quarter. In contrast, although maincontract awards declined on the previous three months, they strengthened significantly on a year ago, supported by strong growth in both major and underlying projects. Planning approvals increased against both periods, indicating a more positive medium term pipeline despite weaker current activity.

Detailed Planning Approvals

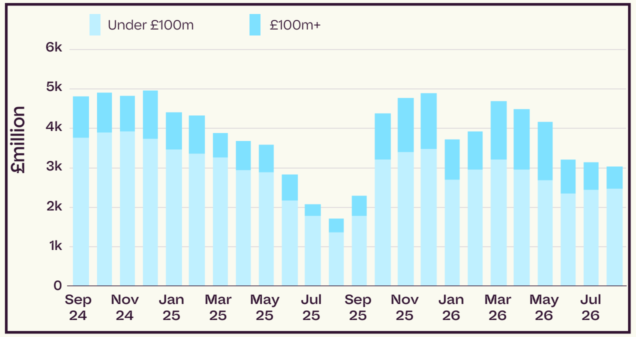


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	8,401	3,979	12,379
YoY	-2%	37%	7%
Prev. 3 months	-4%	71%	12%
Prev. 3 months (SA)	-2%		

Main Contract Awards

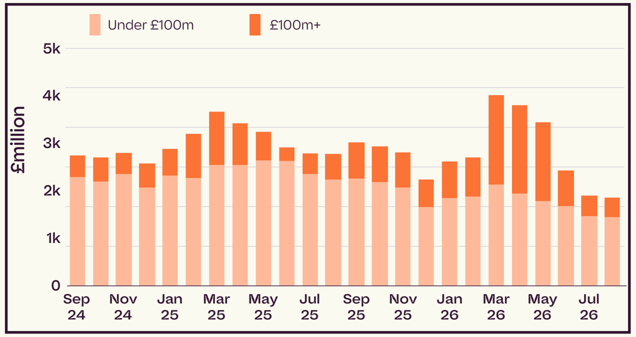


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	7,389	1,730	9,119
YoY	80%	66%	77%
Prev. 3 months	-8%	-61%	-27%
Prev. 3 months (SA)	17%		

Housing Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	5,186	1,485	6,671
YoY	-36%	-23%	-33%
Prev. 3 months	-19%	-75%	-46%
Prev. 3 months (SA)	-15%		

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Housing

Types of projects started

Most residential sub sectors experienced declines, reflecting weaker market activity across both private and affordable housing.

- Private Housing accounted for the largest share (47%), having decreased 34% year on year to total £3,155 million.
- Private Apartments fell 21% against the previous year, totalling £1,525 million.
- Social Sector Housing decreased 33% year on year to total £1,161 million.

Project Spotlight

Borough Triangle

Detailed plans have been approved on the £600 million "Borough Triangle" development in London. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q3 2034.

PROJECT ID: 14435269

IMAGE SOURCE: MACCREANOR LAVINGTON

Types of Housing Projects Started

Three months to August 2026

	£ million	Percentage
Private Apartments	1,525	**23%**
Elderly Persons Homes	57	**1%**
Private Housing	3,155	**47%**
Private Sheltered Housing	99	**1%**
Social Sector Sheltered Housing	108	**2%**
Social Sector Apartments	472	**7%**
Social Sector Housing	1,161	**17%**
Homes, Hostels Etc.	1	**0%**
Student Accommodation	93	**1%**
Total	6,671	**100%**

Housing League Tables

September 2025 to August 2026

Contractors	Projects	£m
JRL	4	539
Graham Construction	5	455
Hill	15	434
Domis Construction	3	429
Morgan Sindall	15	400
Winvic	4	357
HG Construction	5	346
John Sisk & Son	2	340
Axis Group UK	3	312
Mears	2	312

Clients	Projects	£m
Bloor Homes	67	2,159
Barratt Redrow	80	2,119
Taylor Wimpey	67	2,095
Persimmon	80	1,796
Vistry	56	1,637
Bellway	52	1,192
The Guinness Prtns.	6	1,033
The Berkeley Group	12	980
Apollo Management	37	677
Keepmoat	21	467

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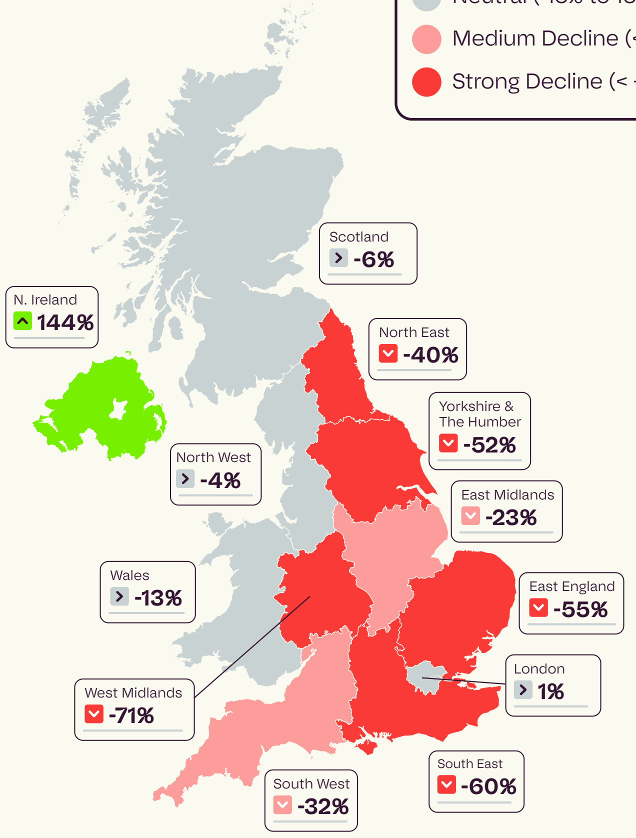
Housing

Regional

- Northern Ireland recorded the strongest growth in residential starts.
- Most regions experienced significant declines in project starts.
- Approvals grew in most regions.

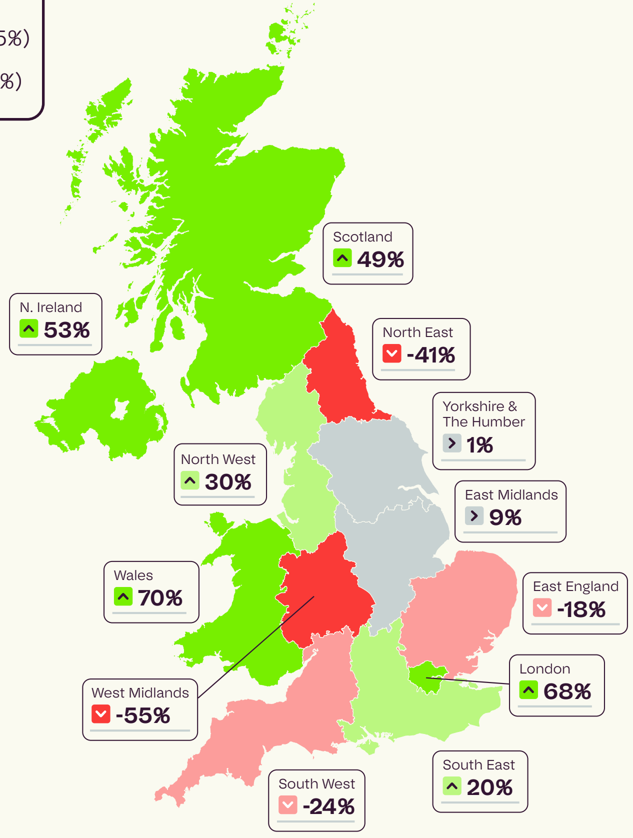
London led residential starts at £1,346 million, remaining broadly unchanged compared with last year. The North West was the second most active region at £1,017 million, while Northern Ireland recorded the strongest growth, rising 144% year on year to £375 million. By contrast, the South East, East of England and Yorkshire & the Humber all experienced substantial declines.

Changes in Housing Starts
on a Year Earlier



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

Changes in Housing Planning Approvals
on a Year Earlier



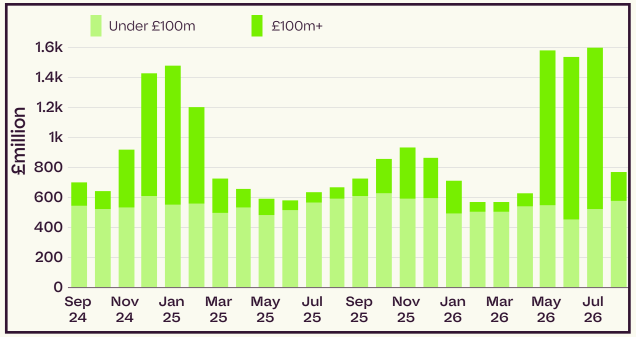
Industrial

Overview

- **49% decrease** in project starts year on year.
- **9% decrease** in main contract awards from last year.
- **16% increase** in detailed planning approvals compared to 2025.

Industrial activity weakened considerably, with project starts falling sharply on an annual basis. Main contract awards declined on both periods, reflecting reduced near term workload. However, planning approvals increased year on year, largely driven by growth in major projects, suggesting a stronger development pipeline.

Detailed Planning Approvals

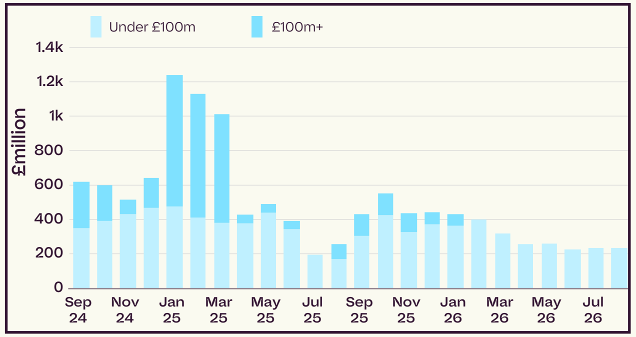


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,735	581	2,316
YoY	-2%	162%	16%
Prev. 3 months	6%	-81%	-51%
Prev. 3 months (SA)	-7%		

Main Contract Awards

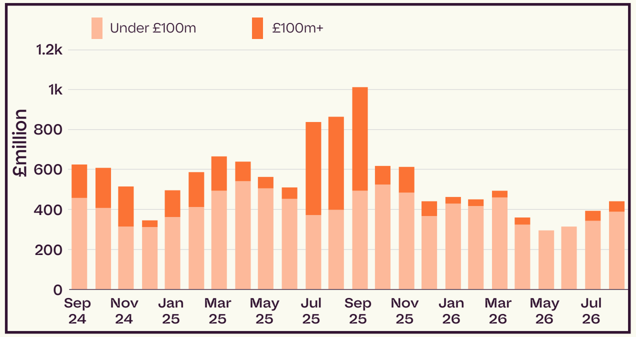


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	699	-	699
YoY	38%	-100%	-9%
Prev. 3 months	-10%		-10%
Prev. 3 months (SA)	-2%		

Industrial Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,166	155	1,321
YoY	-2%	-89%	-49%
Prev. 3 months	32%		50%
Prev. 3 months (SA)	37%		

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Industrial

Types of projects started

All sub-sectors declined in value

- Manufacturing accounted for the largest share (56%), having decreased 57% year on year to total £744 million.
- Warehousing & Logistics fell 35% against the previous year, totalling £528 million.
- Other Industrial projects decreased 7% year on year to total £49 million.

Project Spotlight

Metsa Tissue Paper Mill

Detailed plans have been approved for the £191 million "Metsa Tissue Paper Mill" development. A main contractor is yet to be appointed on the scheme with works due to be completed in Q3 2027.

PROJECT ID: 23307106

IMAGE SOURCE: CPMG ARCHITECTS

Types of Industrial Projects Started

Three months to August 2026

	£ million	Percentage
Manufacturing	1,204	**84%**
Other Industrial	20	**1%**
Warehousing & Logistics	217	**15%**
Total	1,441	**100%**

Industrial League Tables

September 2025 to August 2026

Contractors	Projects	£m
Winvic	14	487
MCS	11	188
Glencar Constr.	9	181
TSL Projects	3	153
Benniman	4	146
Caddick	7	145
GMI Construction	7	139
The Barnfield Group	6	104
Murphy Group	2	102
Morgan Sindall	4	102

Clients	Projects	£m
Prologis	5	271
DP World	3	141
Panattoni UK	6	95
Amazon UK	2	89
Firethorn Trust	1	74
Caddick	2	69
Cumberland Council	2	69
Cereal Partners UK	1	66
Pulpex	1	62
Indurent	3	61

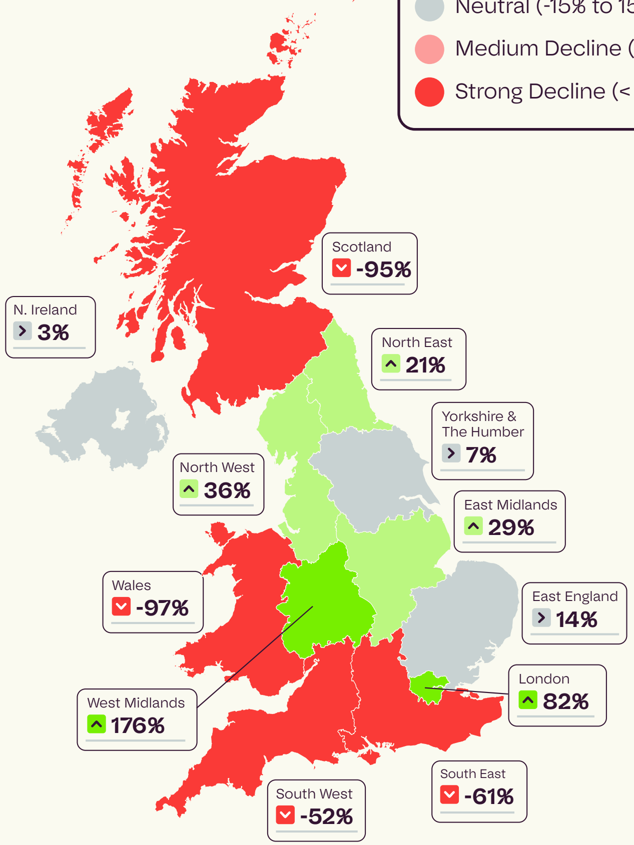
Industrial

Regional

- Most regions experiences gains in project starts and approvals.
- Strong project start growth was recorded in the West Midlands and London.
- Approvals increased considerably in Scotland and Yorkshire & the Humber.

The West Midlands was the most active region for industrial starts, rising 176% year on year to £299 million. The North West and East Midlands also recorded healthy growth, while London increased 82% to £73 million. In contrast, Scotland, Wales, the South East and South West all experienced substantial declines in activity.

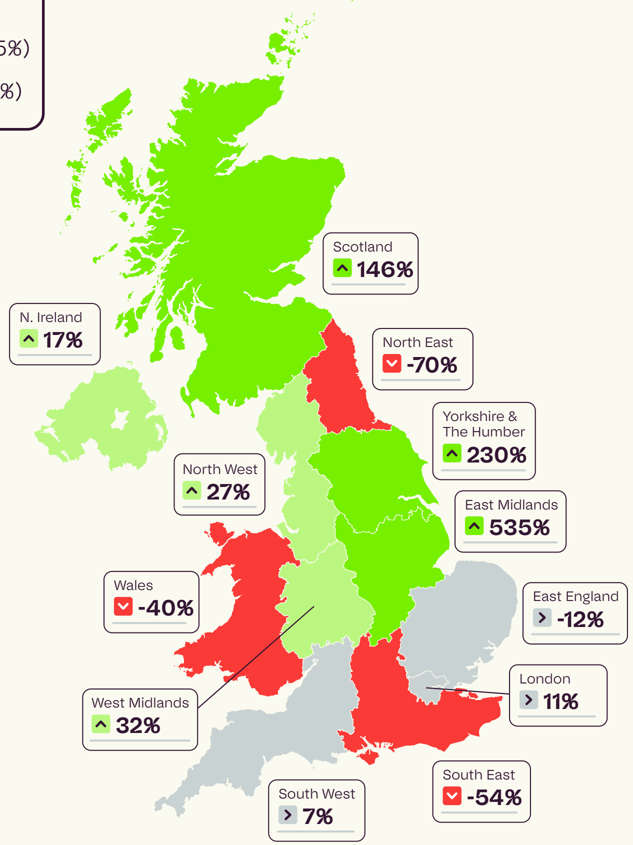
Changes in Industrial Starts
on a Year Earlier



Growth or Decline

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

Changes in Industrial Planning Approvals
on a Year Earlier



Glenigan
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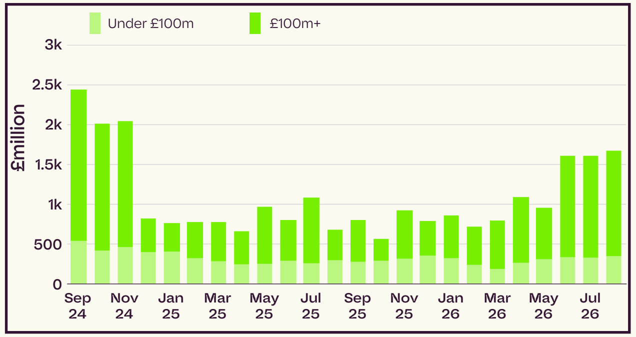
Offices

Overview

- **24% decrease** in project starts year on year.
- **24% decrease** in main contract awards from last year.
- **147% increase** in detailed planning approvals compared to a year ago.

Office sector activity weakened during the period, with both starts and contract awards declining against last year. Starts also fell compared with the preceding quarter, reflecting reduced major project activity. Planning approvals, however, increased sharply on both the previous quarter and a year ago due to a surge in large schemes, strengthening the sector's future pipeline.

Detailed Planning Approvals

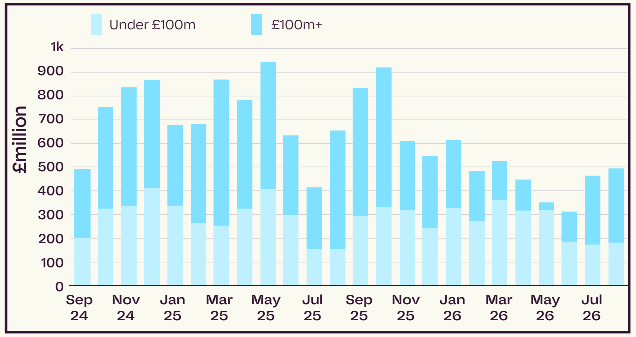


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,042	3,975	**5,016**
YoY	17%	248%	**147%**
Prev. 3 months	13%	104%	**75%**
Prev. 3 months (SA)	14%		

Main Contract Awards

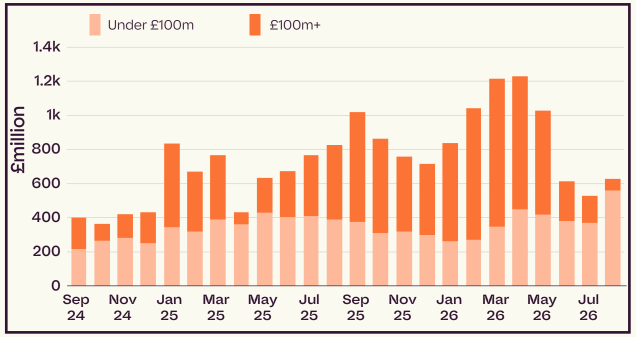


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	541	945	**1,486**
YoY	17%	-37%	**-24%**
Prev. 3 months	-43%	845%	**41%**
Prev. 3 months (SA)	-39%		

Office Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,677	205	**1,882**
YoY	44%	-84%	**-24%**
Prev. 3 months	34%	-89%	**-39%**
Prev. 3 months (SA)	61%		

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Offices

Types of projects started

Most value bands experienced a decline in project starts

- The £50 million to £100 million value band accounted for the largest share (35%), increasing 138% year on year to £657 million.
- The £20 million to £50 million value band rose 95% year on year to total £642 million.
- Projects over £100 million fell 84% year on year to £205 million.

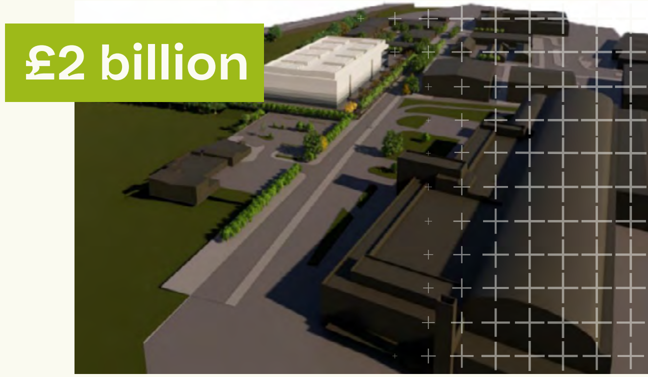
Project Spotlight

AI Data Centre- LON01

Detailed plans have been approved for the £2 billion "AI Data Centre-LON01" development. Works are due to complete in Q2 2031, with a main contractor yet to be appointed on the scheme.

PROJECT ID: 19147557

IMAGE SOURCE: DATA DYNAMICS



Types of Office Projects Started

Three months to August 2026

	£ million	Percentage
Up to £5 million	131	**7%**
£5 million up to £10 million	142	**8%**
£10 million up to £20 million	105	**6%**
£20 million up to £50 million	642	**34%**
£50 million up to £100 million	657	**35%**
Over £100 million	205	**11%**
Total	1882	**100%**

Office League Tables

September 2025 to August 2026

Contractors	Projects	£m
Skanska UK	2	555
Morgan Sindall	47	554
Mace	3	440
McLaren	3	303
Newarthill	2	270
Multiplex Constr.	2	258
Structure Tone	2	247
Bovis	2	210
Willmott Dixon	5	169
Avondale Constr.	1	138

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

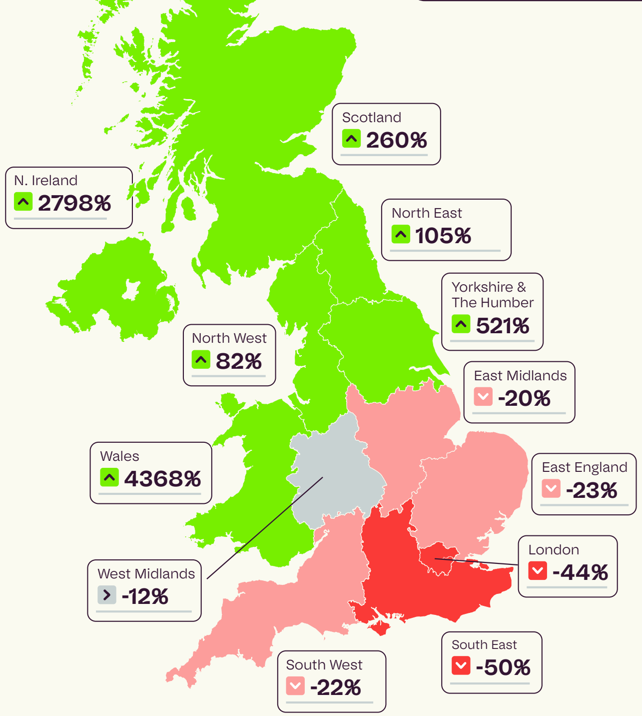
Regional

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

London accounted for more than half of all office starts, totalling £1,018 million despite a 44% decline on a year ago. Yorkshire & the Humber recorded particularly strong growth, rising over five fold to £197 million, while the North West increased 82% to £247 million. Scotland and Wales also experienced significant gains, highlighting divergent regional performance across the sector.

Changes in Office Starts

on a Year Earlier

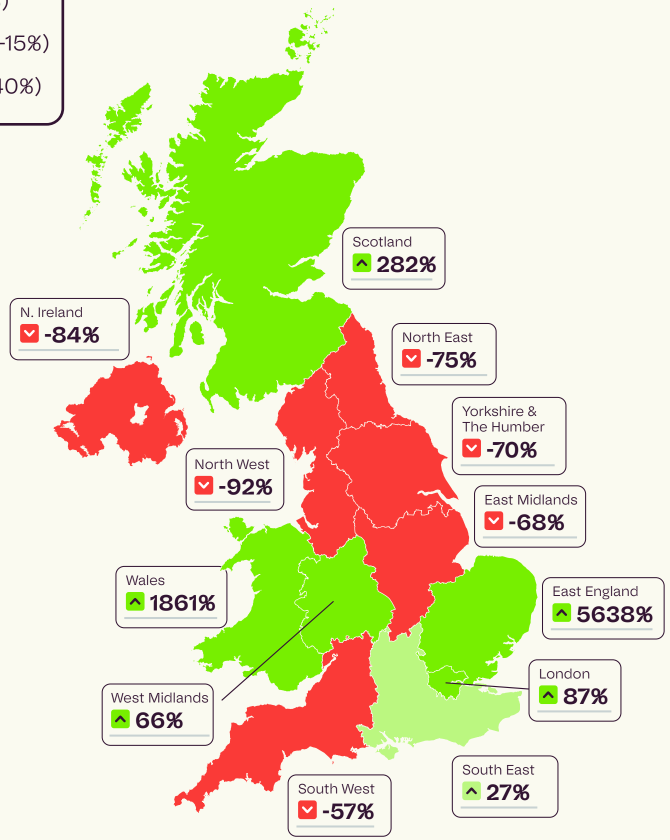


Growth or Decline

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

Changes in Office Planning Approvals

on a Year Earlier



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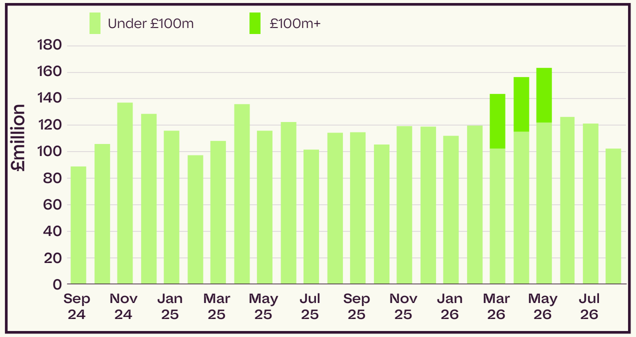
Retail

Overview

- **4% increase** in project starts year on year.
- **236% increase** in main contract awards from last year.
- **11% decrease** in detailed planning approvals compared to 2025.

Retail activity improved modestly compared with last year, with project starts increasing slightly again last year and the previous quarter, and contract awards strengthening substantially on a year ago. However, planning approvals fell on an annual basis and weakened relative to the previous quarter. This suggests that while current activity has improved, the future pipeline remains more subdued.

Detailed Planning Approvals

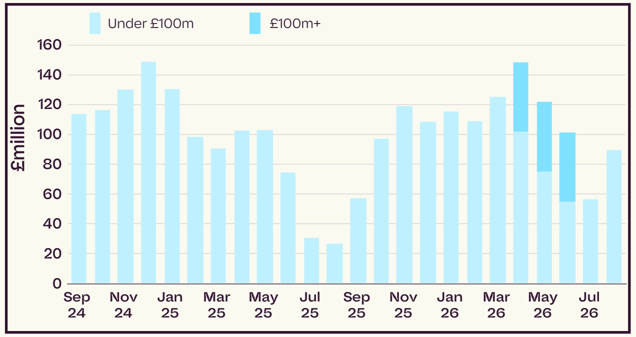


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	307	-	307
YoY	-11%		-11%
Prev. 3 months	-16%	-100%	-37%
Prev. 3 months (SA)	-1%		

Main Contract Awards

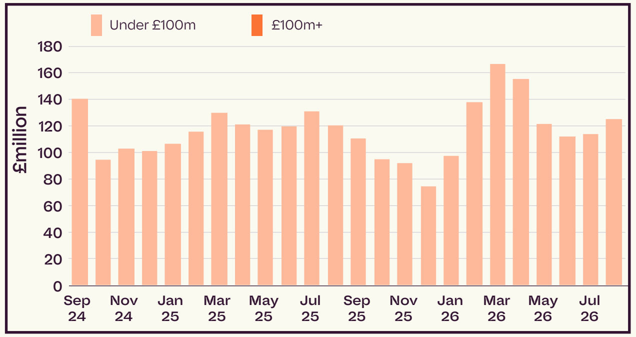


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	268	-	268
YoY	236%		236%
Prev. 3 months	19%	-100%	-27%
Prev. 3 months (SA)	30%		

Retail Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	376	-	376
YoY	4%		4%
Prev. 3 months	3%		3%
Prev. 3 months (SA)	-2%		

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Retail

Types of projects started

Retail starts only grew in two sub-sectors

- Supermarkets accounted for the largest share (70%), having increased 69% year on year to total £264 million.
- Shops fell 59% against the previous year, totalling £68 million.
- Shopping Centres increased significantly year on year to £32 million, more than nine times last year's level.

Project Spotlight

Kingshurst Village Centre Phase 2

Detailed plans have been approved for the £20 million Kingshurst Village Centre Phase 2 development. Willmott Dixon have been appointed as main contractors on the scheme, with work due to be completed in Q1 2028.

PROJECT ID: 25037888

IMAGE SOURCE: SOLIHULL COUNCIL

Types of Retail Projects Started

Three months to August 2026

	£ million	Percentage
Other Retail	1	**0%**
Petrol Filling Stations	9	**2%**
Retail Warehousing	2	**0%**
Shopping Centres	32	**9%**
Shops	68	**18%**
Supermarkets	264	**70%**
Total	376	**100%**

Retail League Tables

September 2025 to August 2026

Contractors	Projects	£m
McLaren	1	140
Kier	1	98
DSP Construction	9	36
HBC Construction	1	21
VINCI Construction	1	20
The Barnfield Group	1	20
CTM Management	3	20
Braithwaite Group	6	19
Stonedale	2	17
Adston UK Ltd	4	16

Clients	Projects	£m
Lidl UK	37	157
Aldi	34	110
Derwent London	1	98
Buckminster Estate	1	70
Rioja Developments	1	70
Metrocentre	1	35
Sovereign Centros	1	35
T J Morris	11	33
J Sainsbury	12	30
Marks & Spencer	9	27

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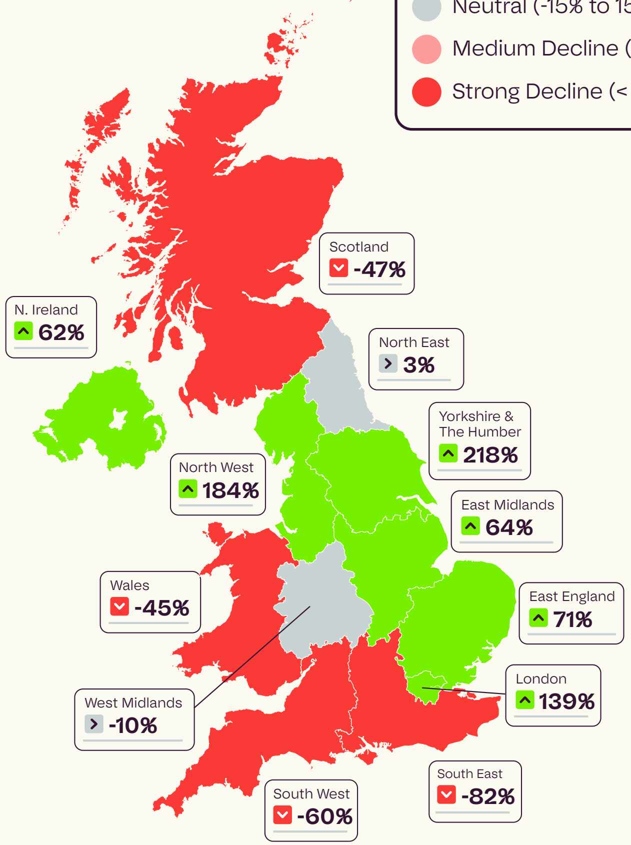
Retail

Regional

- Project starts grew in most regions.
- Mixed performance in detailed planning approvals.
- Strong growth in project starts was recorded across London, Northern Ireland, North West and Yorkshire & the Humber.

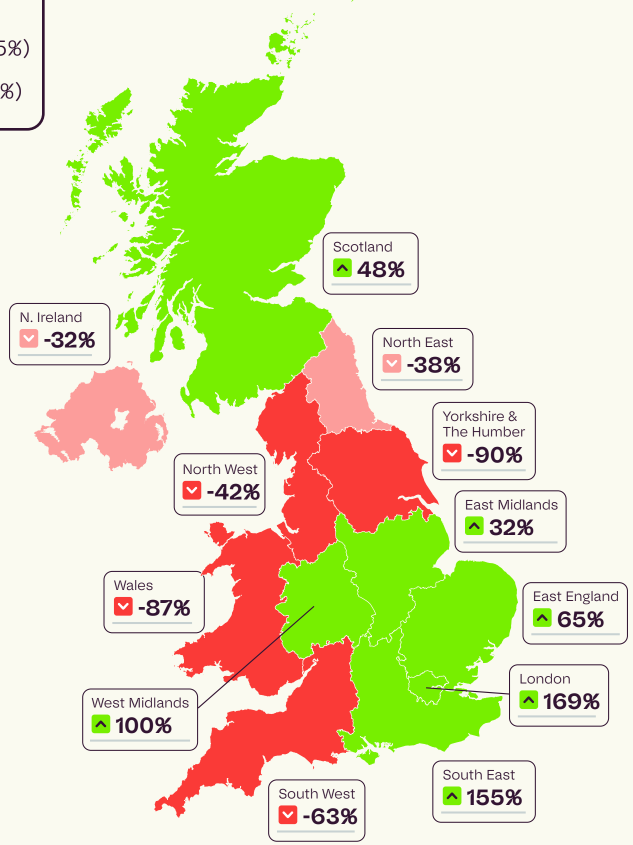
London was the largest retail market during the period, with project starts rising 139% year on year to £66 million. Yorkshire & the Humber and the North West also posted strong gains, increasing 218% and 184% respectively. By contrast, the South East, South West and Scotland all recorded notable declines.

Changes in Retail Starts
on a Year Earlier



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

Changes in Retail Planning Approvals
on a Year Earlier



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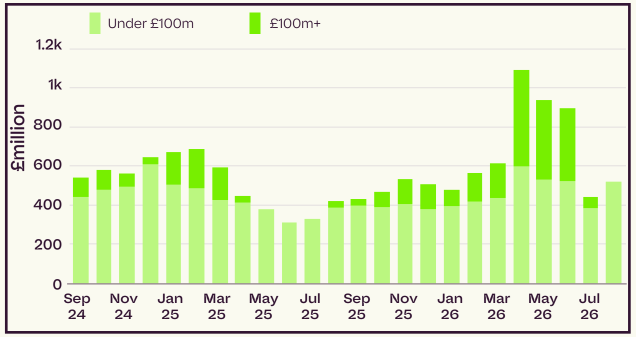
Hotel & Leisure

Overview

- **2% decrease** in project starts year-on-year.
- **761% increase** in main contract awards from last year.
- **24% increase** in detailed planning approvals compared to 2025.

Hotel & leisure activity was mixed during the period, with project starts easing only slightly compared with last year and declining 13% against the previous three months. Approvals declined on the preceding quarter but grew compared with last year. In contrast, contract awards surged due to a substantial increase in major projects.

Detailed Planning Approvals

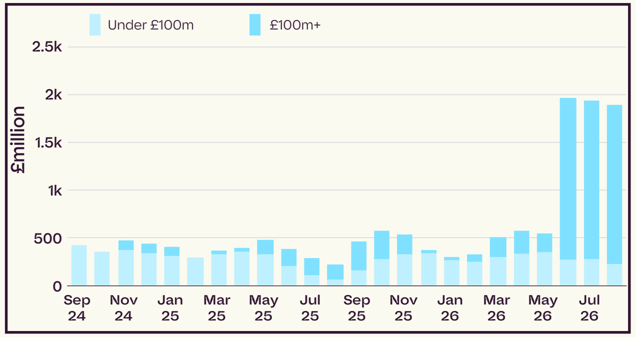


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,557	-	**1,557**
YoY	34%	-100%	**24%**
Prev. 3 months	-2%	-100%	**-45%**
Prev. 3 months (SA)	-14%		

Main Contract Awards

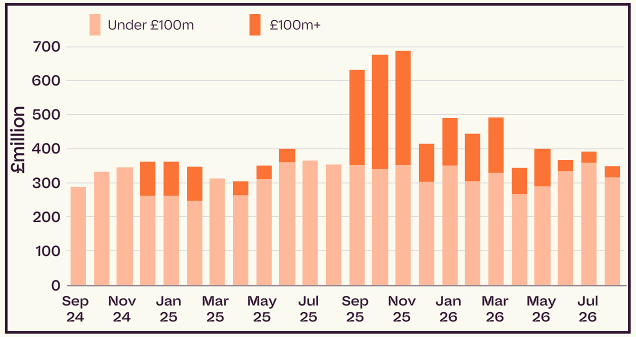


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	671	5,000	**5,671**
YoY	276%	942%	**761%**
Prev. 3 months	-35%	733%	**247%**
Prev. 3 months (SA)	-32%		

Hotel & Leisure Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	947	100	**1,047**
YoY	-11%	-	**-2%**
Prev. 3 months	9%	-70%	**-13%**
Prev. 3 months (SA)	-3%		

Hotel & Leisure

Types of projects started

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

- Hotels & Guest Houses accounted for the largest share (35%), having increased 95% year on year to total £367 million.
- Indoor Leisure Facilities fell 3% against the previous year, totalling £331 million.
- Sport Facilities decreased 25% year on year to total £188 million.

Project Spotlight

Vitality Stadium Redevelopment

Work has started on-site for the Vitality Stadium Redevelopment. Stadium Structures have been appointed as main contractors on the £50 million scheme, with works expected to be completed in Q4 2026.

PROJECT ID: 25143812

IMAGE SOURCE: CONSTRUCTION NEWS

Types of Hotel & Leisure Projects Started

Three months to August 2026

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	17	**2%**
Cinemas & Theatres	21	**2%**
Hotels, Guest Houses	367	**35%**
Indoor Leisure Facilities	331	**32%**
Other Hotel & Leisure	122	**12%**
Sport Facilities	188	**18%**
Total	1,047	**100%**

Hotel & Leisure League Tables

September 2025 to August 2026

Contractors	Projects	£m
Newarthill	6	1,313
Wates Group	3	1,079
Morgan Sindall	5	1,067
Bovis	1	1,000
Winvic Group	1	1,000
Robertson Group	3	143
Willmott Dixon	8	123
Royal BAM	2	114
HG Construction	1	103
Morrisroe Group	1	100

Clients	Projects	£m
Univeral Dest. & Exp.	1	1,250
Bedford BC.	1	1,250
Comcast	1	1,250
East West Railway	1	1,250
Therme Group UK	1	450
Arora Group	1	170
Criterion Capital	2	135
West End (London)	1	133
NEOS Hospitality	1	133
Alvarez & Marsal	1	131

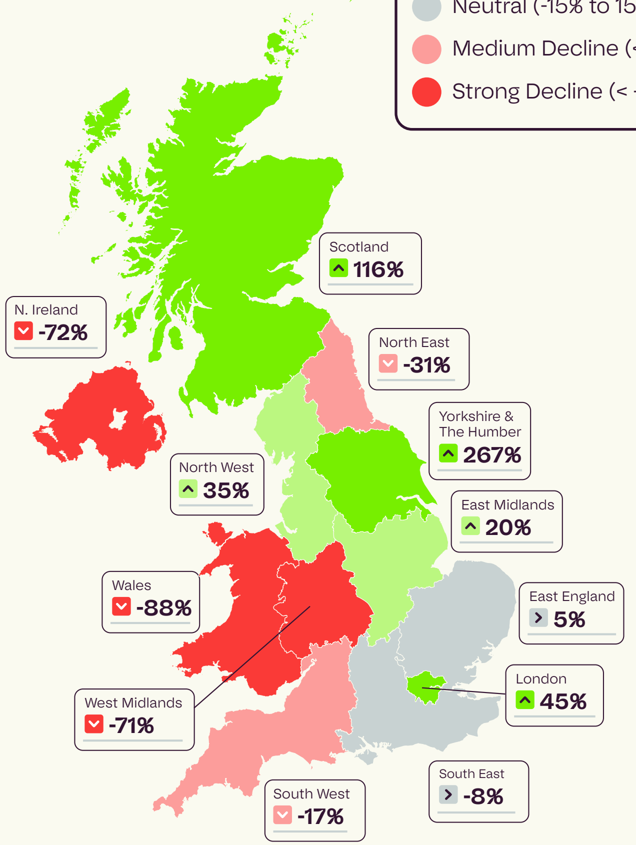
Hotel & Leisure

Regional

- Project start performance was mixed.
- Detailed planning approvals grew in most regions.
- Yorkshire & the Humber and Scotland recorded the strongest growth in project starts.

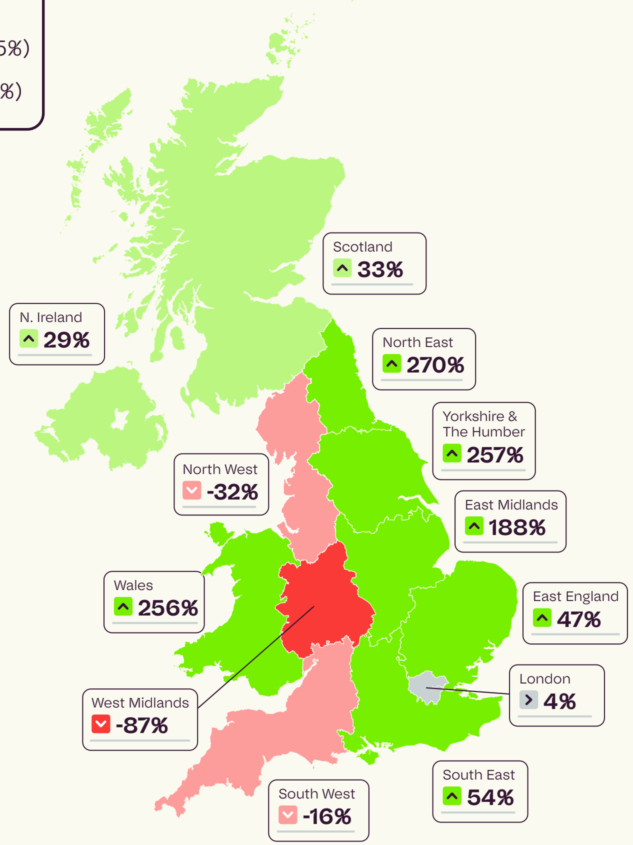
The South East was the most active region for hotel & leisure starts at £156 million, although activity was fell 8% from last year. The North West and London followed closely, while Yorkshire & the Humber recorded the strongest regional growth, rising 267% year on year to £127 million. Scotland also more than doubled compared with last year, reaching £137 million.

Changes in Hotel & Leisure Starts
on a Year Earlier



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

Changes in Hotel & Leisure Planning Approvals
on a Year Earlier



Health

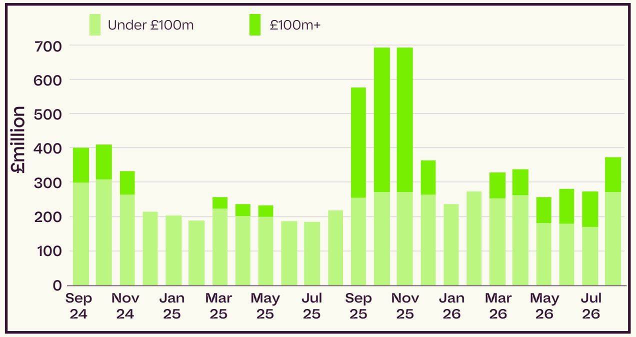
Overview

- **13% increase** in project starts against the previous year.
- **1,852% rise** in main contract awards year-on-year.
- **71% increase** in detailed planning approvals compared to the previous year.

The sector recorded growth in on-site activity, with project starts increasing against the previous year. Detailed planning approvals and main contract awards also rose sharply, indicating strengthening confidence and a significantly expanding pipeline of future work. While starts eased by 12% compared with the previous three months, approvals increased 46% and awards rose 15 times 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

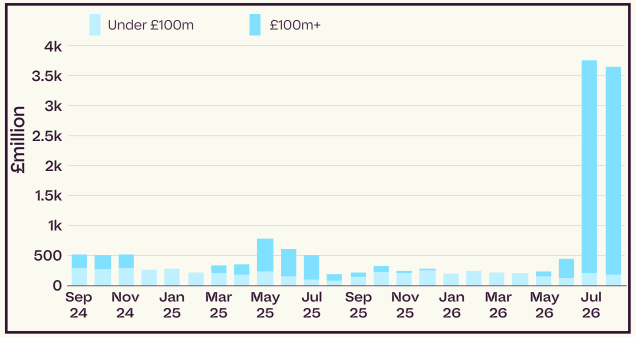


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	812	305	1,117
YoY	24%		71%
Prev. 3 months	50%	36%	46%
Prev. 3 months (SA)	29%		

Main Contract Awards

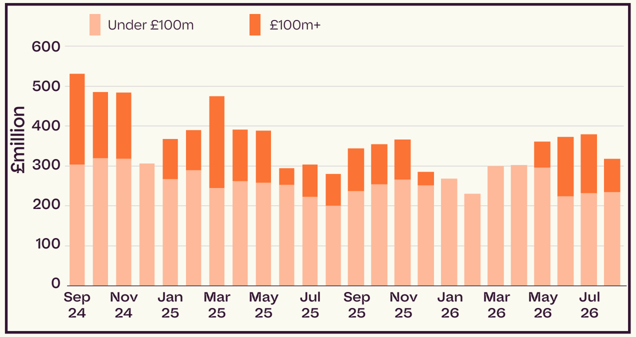


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	548	10,398	10,946
YoY	143%	3005%	1852%
Prev. 3 months	19%	4059%	1439%
Prev. 3 months (SA)	65%		

Health Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	704	250	954
YoY	17%	3%	13%
Prev. 3 months	-21%	27%	-12%
Prev. 3 months (SA)	-7%		

Health

Types of projects started

- Hospitals accounted for the largest share of activity, representing 43% of total starts and increasing 18% against the previous year.
- Nursing Homes & Hospices represented 26% of activity and remained broadly unchanged year-on-year.
- Dental, Health & Veterinary Centres/Surgeries recorded the strongest growth, rising 104% year-on-year and representing a 13% share of activity.

Project Spotlight

Lochaber Hospital – Replacement Belford Hospital

Detailed plans have been approved for the Lochaber Hospital development. Balfour Beatty have been appointed as main contractors the £137 million scheme, with works expected to be completed in Q4 2028.

PROJECT ID: 17411549

IMAGE SOURCE: KEPPIE DESIGN

£137m

Types of Health Projects Started

Three months to August 2026

	£ million	Percentage
Day Centres	-	**0%**
Dental, Health & Veterinary Centres/ Surgeries	128	**13%**
Hospitals	410	**43%**
Nursing Homes & Hospices	250	**26%**
Other Health	166	**17%**
Total	954	**100%**

Health League Tables

September 2025 to August 2026

Contractors	Projects	£m
Skanska UK	2	1,950
Graham Construction	2	1,507
Sacyr UK	1	1,500
Bouygues UK	1	710
Dragados UK	1	648
Morgan Sindall	7	626
Kier Group	1	600
IHP Integrated Health	3	467
VINCI Construction	2	443
Newarthill	1	433

Clients	Projects	£m
Department of Health	209	8,414
States Of Jersey	1	710
John Innes Centre	1	125
The Sainsbury Lab.	1	125
Rolls-Royce	1	100
Kadans Science	1	100
Syngenta	1	94
Cheltenham BC	1	92
Cleveland Clinc	1	81
Unilever UK Central	1	80

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Health

Regional

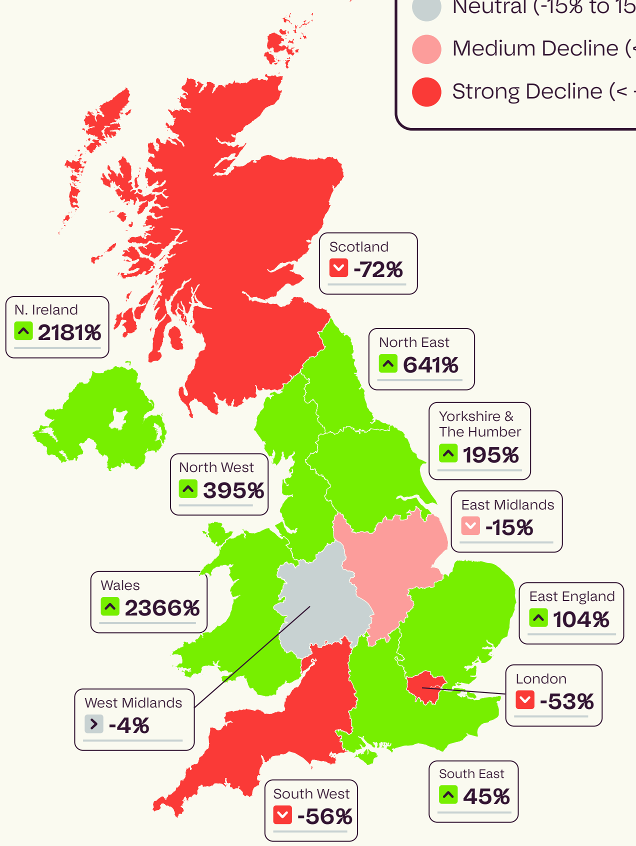
- The South East recorded the highest level of project-start activity at £281 million.
- Yorkshire & the Humber and the East of England also reported substantial levels of starts, at £113 million and £95 million respectively.
- Wales recorded the highest level of planning approvals at £285 million.

Wales, Scotland and the North West delivered particularly strong annual growth in approvals.

Regional activity was led by the South East, which accounted for £281 million of project starts and nearly 30% of all sector activity. The region recorded growth of 45% against the previous year, demonstrating continued investment in healthcare infrastructure. Yorkshire & the Humber was the second largest starts market at £113 million and delivered exceptionally strong growth of 641%, while the East of England also performed strongly, with starts rising 104% to £95 million.

Planning approvals were concentrated in Wales, where approvals totalled £285 million and increased by more than 26 times compared with the previous year, making it the dominant approvals market. The South East ranked second with £176 million of approved schemes, while Scotland accounted for £146 million and recorded annual growth of more than 1,400%.

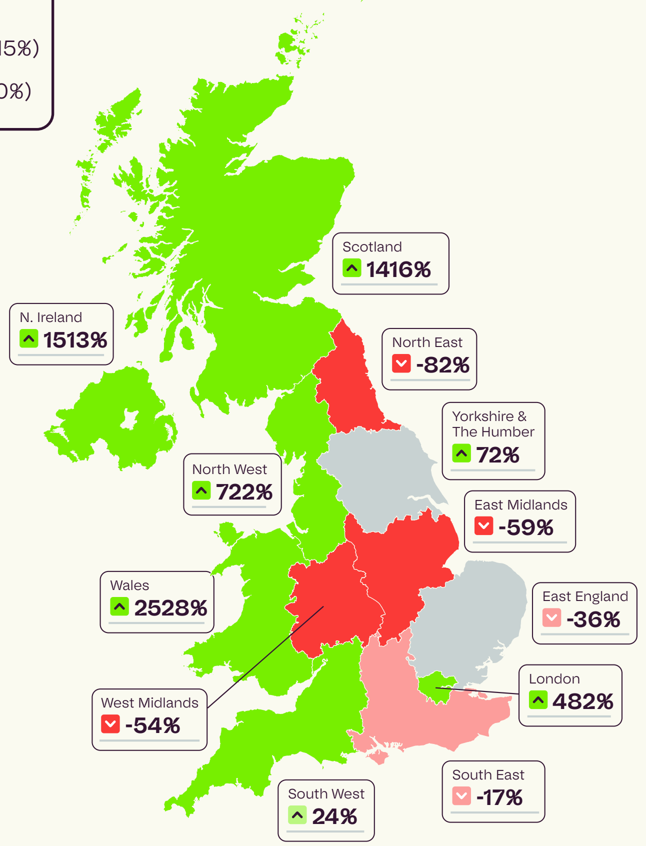
Changes in Health Starts
on a Year Earlier



Growth or Decline

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

Changes in Health Planning Approvals
on a Year Earlier



Glenigan
A Hubexo Product

Education

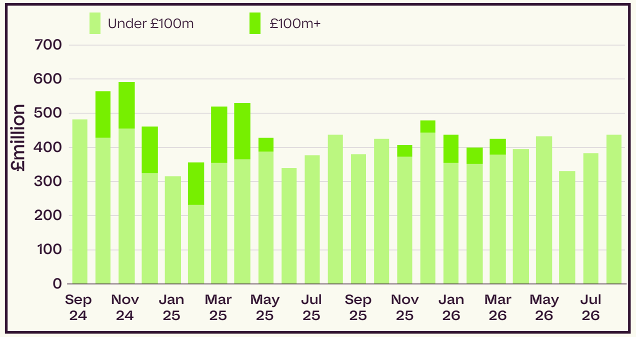
Overview

- **33% decline** in project starts against the previous year.
- **84% rise** in main contract awards year-on-year.
- **Flat** detailed planning approvals compared to the previous year.

Education sector activity weakened in terms of starts, although both contract awards and planning approvals remained stable to positive 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 30%, while approvals edged up 1%.

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

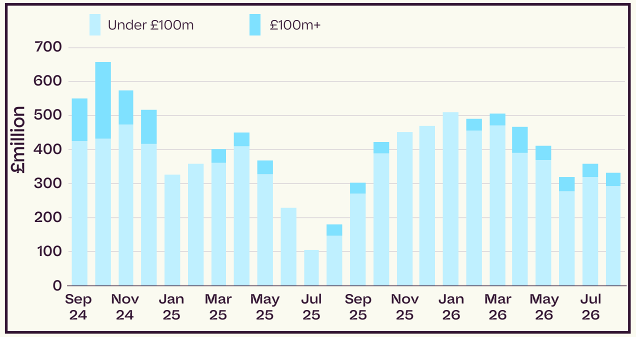


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,311	-	**1,311**
YoY	0%		**0%**
Prev. 3 months	1%		**1%**
Prev. 3 months (SA)	-12%		

Main Contract Awards

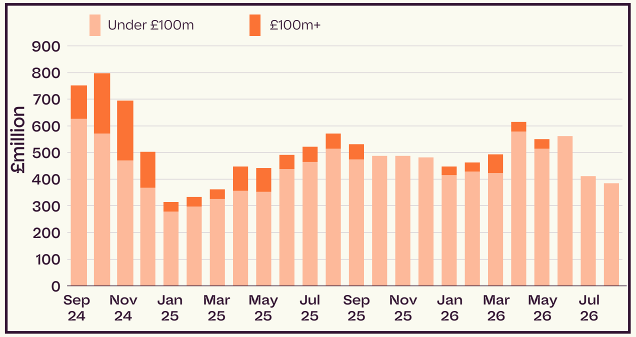


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	877	120	**997**
YoY	99%	20%	**84%**
Prev. 3 months	-21%	-4%	**-19%**
Prev. 3 months (SA)	-7%		

Education Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,154	-	**1,154**
YoY	-25%	-100%	**-33%**
Prev. 3 months	-25%	-100%	**-30%**
Prev. 3 months (SA)	-38%		

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Education

Types of projects started

- Schools dominated activity, accounting for almost four-fifths (79%) of total project starts despite a 34% decline against the previous year.
- University projects represented the second largest area of activity, rising 68% year-on-year and accounting for 11% of starts.
- Colleges accounted for 5% of activity, falling 72% compared with the previous year.

Project Spotlight

Patchway Community School

Plans have been approved for the Patchway Community School development. BAM have been appointed as main contractors on the £39 million scheme, with works due to complete in Q1 2028.

PROJECT ID: 21339578

IMAGE SOURCE: STRIDE TREGLOWN

Types of Education Projects Started

Three months to August 2026

	£ million	Percentage
Colleges	58	**5%**
Other Education	66	**6%**
Schools	908	**79%**
Universities	122	**11%**
Total	1,154	**100%**

Education League Tables

September 2025 to August 2026

Contractors	Projects	£m
Bowmer & Kirkland	15	549
Willmott Dixon	28	488
Morgan Sindall	27	442
Royal BAM	11	423
Kier	19	420
Graham Construction	5	237
Galliford Try	15	230
Tilbury Douglas	12	148
Wates	2	136
Robertson	4	115

Clients	Projects	£m
Dep. for Education	79	1,617
London Met. Univer.	2	126
Aberdeen CC.	3	113
Univ. of Portsmouth	3	101
Northumbria Univ.	3	69
Univ. of Edinburgh	3	66
WEPco L	2	57
Univ. of Hertfordshire	1	55
Educ. Auth. N. Ireland	8	52
Midlothian Council	2	48

Education

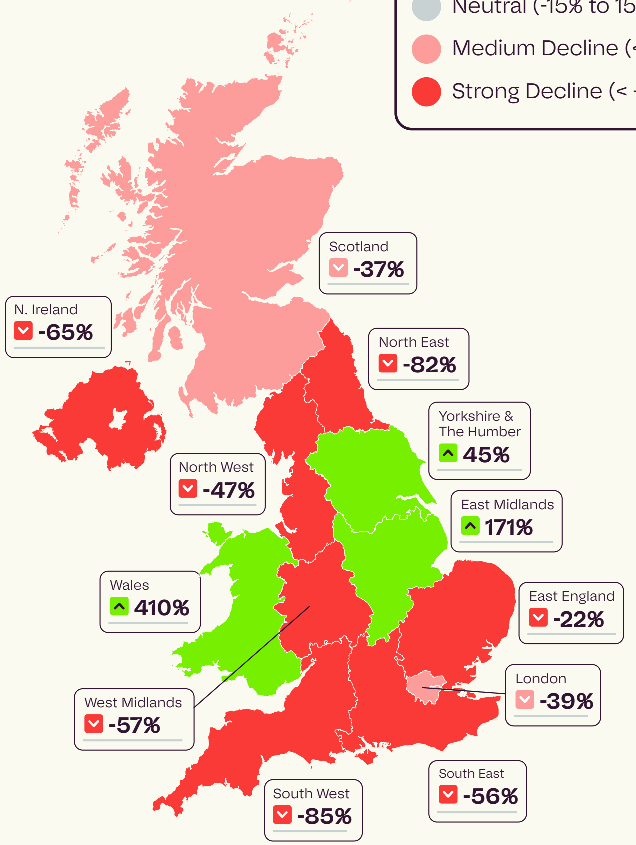
Regional

- Scotland was the most active region for project starts, totalling £227 million.
- The East Midlands and East of England also recorded significant levels of starts, at £213 million and £167 million respectively.
- The North West accounted for the highest level of planning approvals at £246 million.

Scotland was the largest market for education project starts, accounting for £227 million of activity and almost one-fifth of the UK total. Although activity remained below the level recorded a year earlier, the region maintained its position as the leading starts market. The East Midlands followed with £213 million of starts, benefiting from growth of 171% year-on-year, while the East of England recorded £167 million despite a moderate decline compared with the previous year.

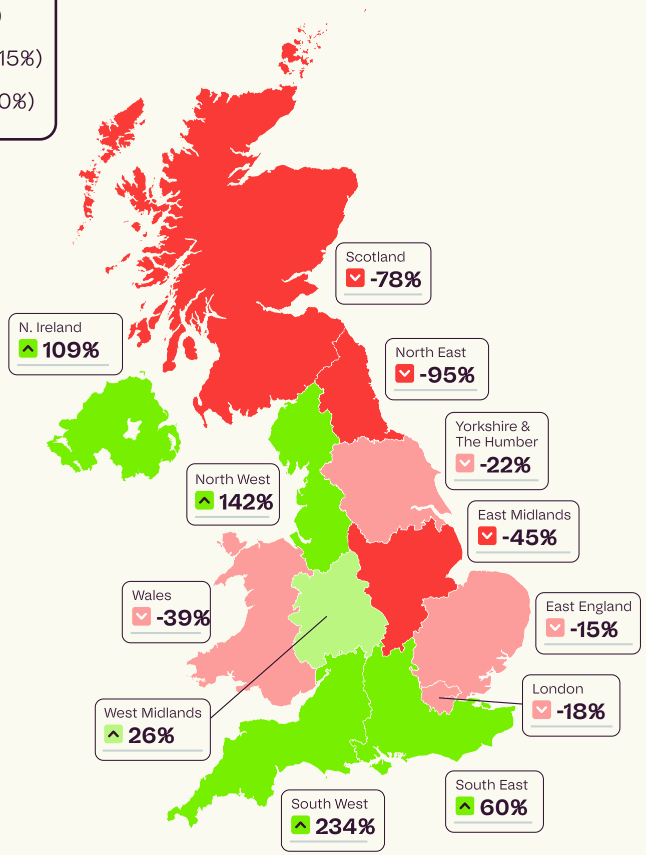
In the approvals market, the North West led all regions with £246 million of detailed planning approvals, rising 142% against the previous year. The South East and East of England also reported significant approval levels at £177 million and £163 million respectively, reflecting continued investor confidence in the future education pipeline. The South West recorded the strongest growth among the larger approval markets, with approvals increasing 234%.

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



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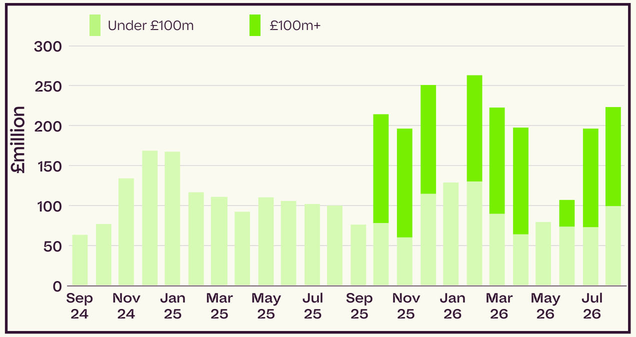
Community & Amenity

Overview

- **25% increase** in project starts year-on-year.
- **14% decrease** in main contract awards from last year.
- **123% increase** in detailed planning approvals compared to 2025.

Community & amenity activity strengthened during the period, driven by growth in project starts and a substantial increase in planning approvals. Although contract awards declined compared with last year, they improved markedly against the previous quarter. The sharp rise in approvals points to a strengthening pipeline of future public and civic projects.

Detailed Planning Approvals

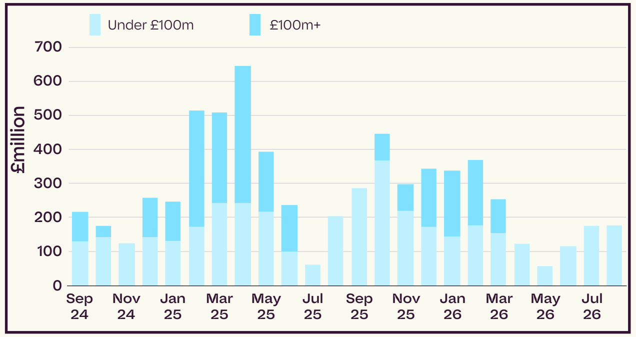


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	298	371	**669**
YoY	-1%		**123%**
Prev. 3 months	25%		**181%**
Prev. 3 months (SA)	52%		

Main Contract Awards

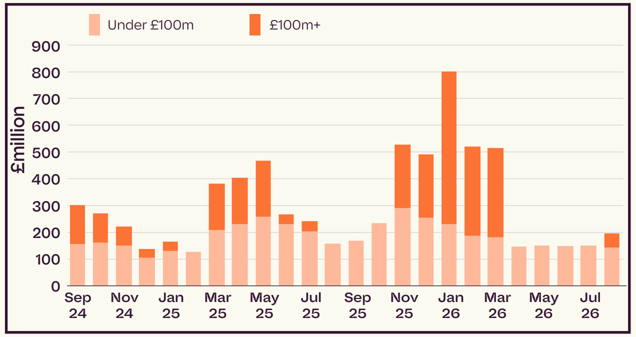


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	527	-	**527**
YoY	-14%		**-14%**
Prev. 3 months	209%		**209%**
Prev. 3 months (SA)	121%		

Community & Amenity Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	430	159	**589**
YoY	-9%		**25%**
Prev. 3 months	-4%		**31%**
Prev. 3 months (SA)	11%		

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Community & Amenity

Types of projects started

Growth was driven by three sub-sectors

- Military projects accounted for the largest share (34%), having increased more than tenfold year on year to total £200 million.
- Prisons increased 13% against the previous year, totalling £178 million.
- Blue Light projects rose 86% year on year to total £113 million.

Project Spotlight

Highgate Cemetery

Detailed plans have been approved for the Highgate Cemetery development. A main contractor is yet to be appointed on the £18 million development, with works due to be completed in Q3 2030.

PROJECT ID: 20471792

IMAGE SOURCE: HOPKINS ARCHITECTS

Types of Community & Amenity Projects Started

Three months to August 2026

	£ million	Percentage
Blue Light	150	**31%**
Government Buildings	31	**6%**
Law Courts	-	**0%**
Local Facilities	33	**7%**
Military	126	**26%**
Places of Worship	12	**3%**
Prisons	126	**26%**
Total	478	**100%**

Community & Amenity League Tables

September 2025 to August 2026

Contractors	Projects	£m
Corrigenda	1	300
Bowmer & Kirkland	6	235
Willmott Dixon	6	87
Wates	6	63
Galliford Try	2	63
Kier	2	58
Morgan Sindall	8	57
Graham Construction	2	56
BMR Construction	1	23
Hill Group	1	21

Clients	Projects	£m
Ministry of Defence	18	672
Ministry of Justice	25	329
Hampshire CC.	1	300
Home Office	34	90
Liverpool City Region	2	65
Ridge And Partners	1	59
UK Parliament	1	59
The Guinness Prtnrs.	1	53
The Church Of Jesus Christ Of Lat. Day Sai.	1	48
Reuben Brothers	1	46

Community & Amenity

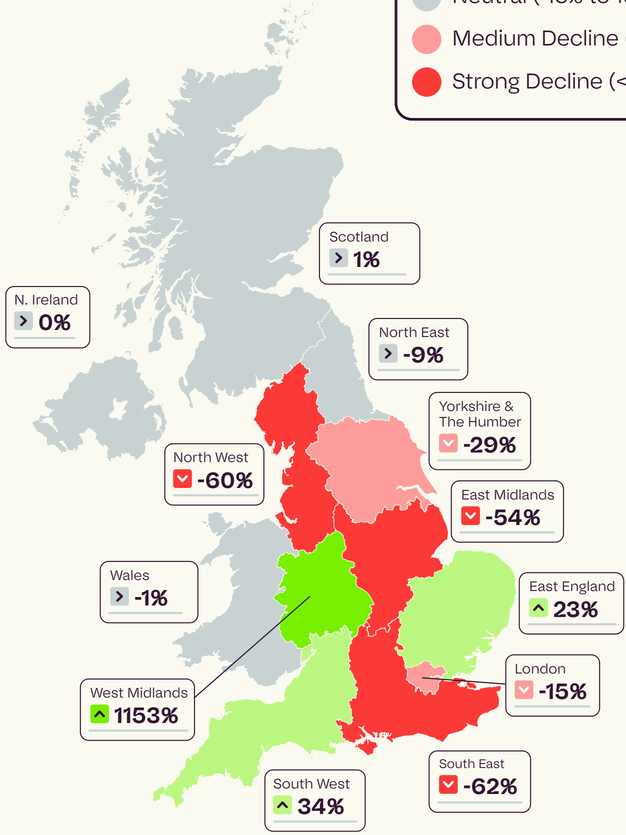
Regional

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

The West Midlands dominated community & amenity activity, with starts increasing more than 12 times year on year to £222 million. London remained the second largest regional market despite a moderate decline, while the East of England recorded 23% growth. Elsewhere, activity weakened across the North West, South East and East Midlands, highlighting a mixed regional picture.

Changes in Community & Amenity Starts

on a Year Earlier

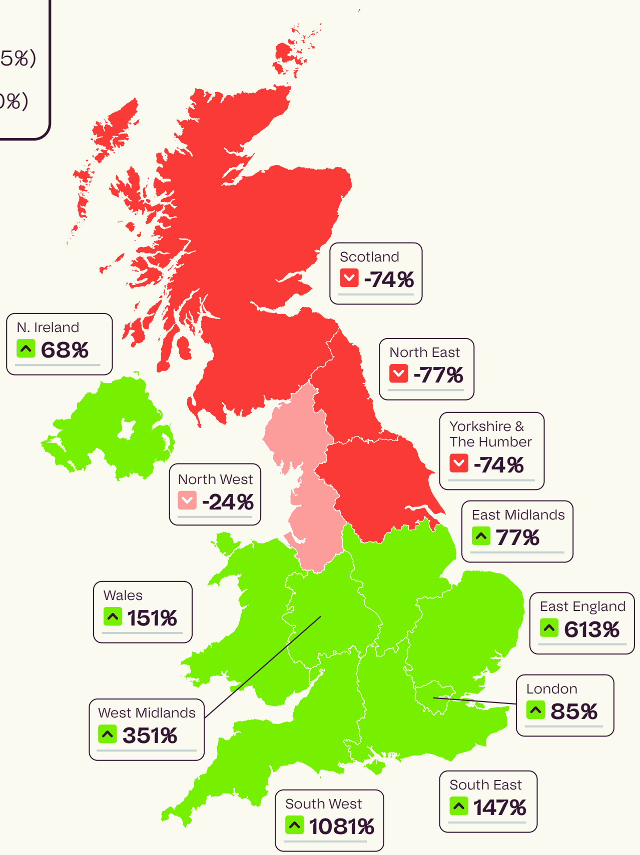


Growth or Decline

- 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

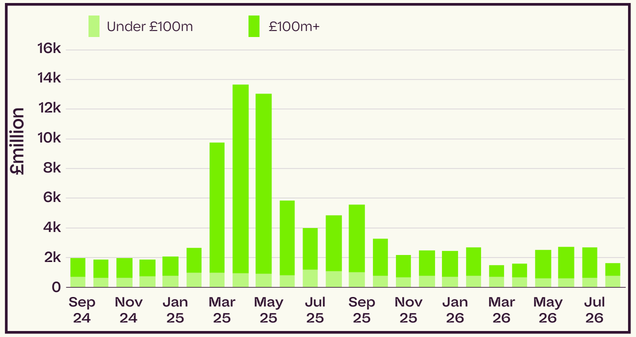
Overview

- **28% decline** in project starts against the previous year.
- **35% fall** in main contract awards year-on-year.
- **67% fall** in detailed planning approvals compared to the previous year.

Civil engineering activity weakened during the period, with starts, contract awards and planning approvals all recording declines against the previous year. The sharp reduction in approvals suggests a softer development pipeline, while lower awards point to reduced near-term workload visibility. Compared with the previous three months, starts fell 80%, awards declined 28% and approvals dropped 36%.

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

Detailed Planning Approvals

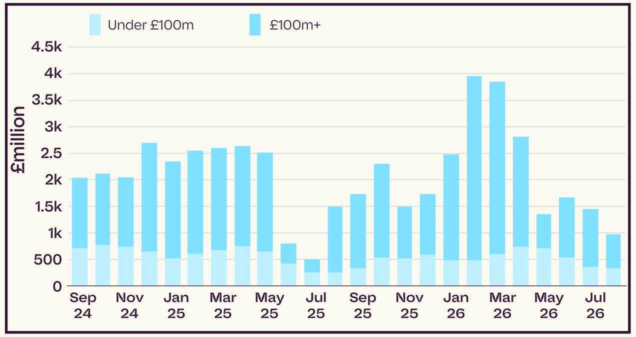


Source: Glenigan

Change year-on-year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	2,271	2,582	4,853
YoY	-30%	-77%	-67%
Prev. 3 months	24%	-55%	-36%
Prev. 3 months (SA)	37%		

Main Contract Awards

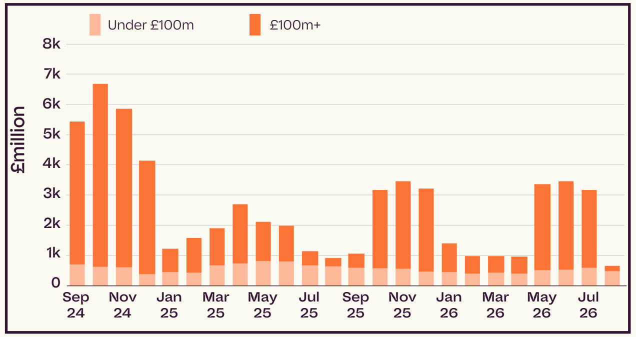


Source: Glenigan

Change year-on-year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	982	1,933	2,915
YoY	32%	-48%	-35%
Prev. 3 months	-54%	0%	-28%
Prev. 3 months (SA)	-21%		

Civil Engineering Starts



Source: Glenigan

Change year-on-year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,433	545	1,978
YoY	-24%	-37%	-28%
Prev. 3 months	-5%	-94%	-80%
Prev. 3 months (SA)	23%		

Civil Engineering

Types of projects started

- Roads projects recorded the highest level of activity, accounting for 33% of total starts and rising 22% against the previous year.
- Harbour/Ports projects accounted for 20% of starts and recorded strong growth of 130% compared with the previous year.
- Energy projects represented a further 19% of activity, although values were significantly lower than a year earlier.

Project Spotlight

A40 Bus Lanes & Active Travel

Detailed plans have been approved for the £126 million A40 Bus Lanes & Active Travel development. A main contractor is yet to be appointed on the scheme, with works expected to complete in Q4 2030.

PROJECT ID: 24341651

IMAGE SOURCE: OXFORD MAIL

£126m

Types of Civil Engineering Projects Started

Three months to August 2026

	£ million	Percentage
Airports	1	**0%**
Other Civils	433	**22%**
Rail	3	**0%**
Roads	647	**33%**
Harbours/Ports	391	**20%**
Energy	381	**19%**
Water Industry	74	**4%**
Waste	49	**2%**
Total	1,978	**100%**

Civil Engineering League Tables

September 2025 to August 2026

Contractors	Projects	£m
VINCI Construction	7	1,387
Kier Group	46	528
Marlborough Surf.	6	525
Worley Europe	1	500
M GROUP Services	6	342
Balfour Beatty	10	311
Tusker Cons. Group	1	300
VolkerWessels	13	288
Costain Group	6	261
Galliford Try	46	232

Clients	Projects	£m
Trafford Met.	1	1,330
Westminster CC	3	1,277
United Utilities	8	563
Cadent Gas	1	500
Network Rail	22	375
Manby BGE	1	300
Dep. for Transport	24	291
Statkraft UK	3	255
Kemble Water	23	253
Tribus Clean Energy	1	250

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Civil Engineering

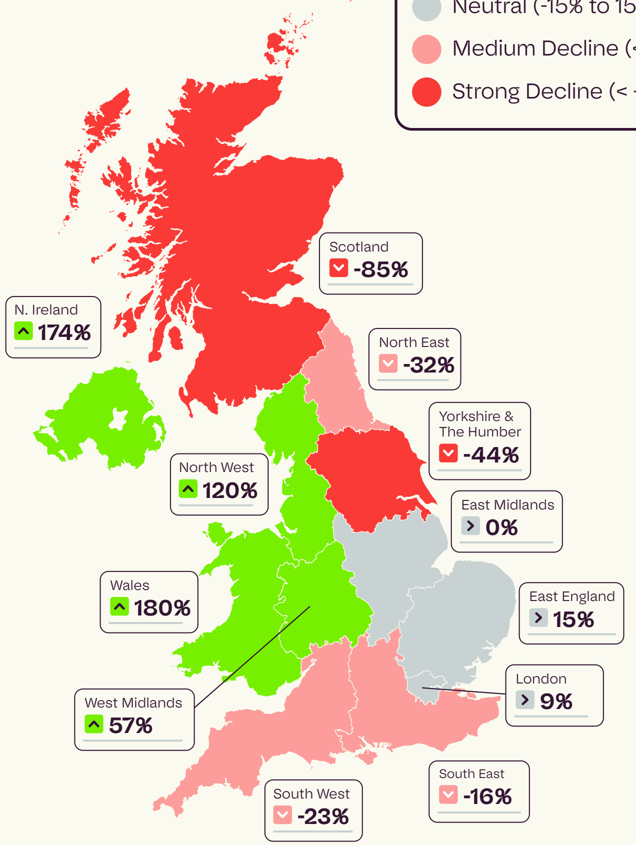
Regional

- The West Midlands recorded the highest level of project-start activity at £274 million.
- The East Midlands was the dominant approvals market, totalling £1,866 million.
- Yorkshire & the Humber recorded the second highest level of approvals at £648 million.

The West Midlands recorded the highest level of civil engineering project starts, accounting for £274 million of activity and benefiting from year-on-year growth of 57%. The South West and South East followed closely, with project starts of £269 million and £266 million respectively, although both regions remained below the levels seen a year earlier.

Approvals activity was heavily concentrated in the East Midlands, where detailed planning approvals totalled £1.87 billion and increased by 338% compared with the previous year. Yorkshire & the Humber was the second largest approvals market at £648 million, while the North West recorded approvals of £575 million. Despite these concentrations of activity, the broader approvals picture was considerably weaker, with most regions registering substantial declines against the previous year.

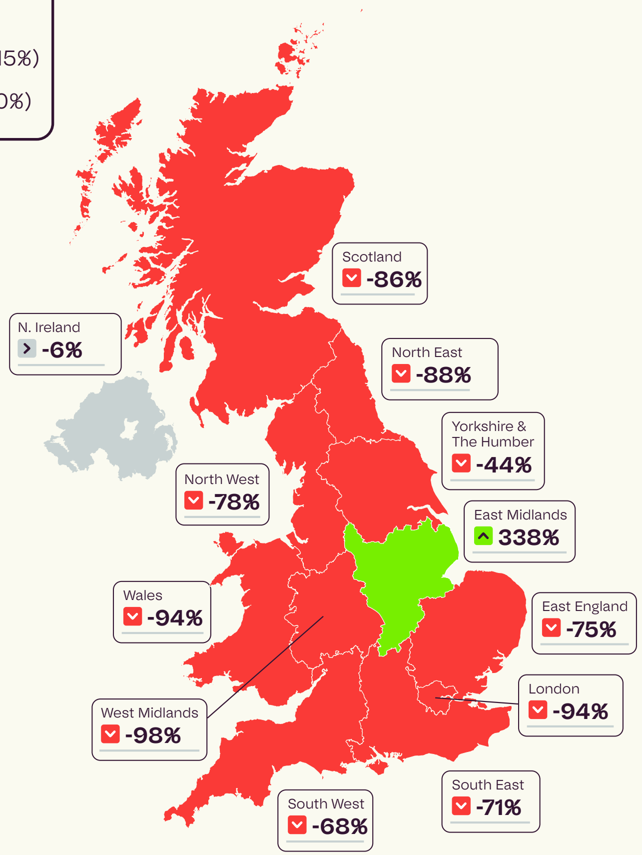
Changes in Civil Engineering Starts
on a Year Earlier



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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