

Construction Review

Reflecting activity to the end of February 2025

March 2025

- ✓ Detailed **planning approvals** decreased 14% against the preceding three months
- ✓ **18% decrease in main contract awards** against the preceding three months
- ✓ **39% decrease in project starts** against the preceding three months



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Led by Allan Wilen, a construction industry expert with over 30 years of market analysis experience, our team provides extensive expertise on the UK construction and built environment markets. Allan, previously Economics Director at the Construction Products Association for 20 years, offers valuable insights and in-depth analysis. He is supported by seasoned economists Yuliana Ivanykovych and Drilon Baca, who enable businesses to make informed strategic decisions through rigorous research and analysis.

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Executive Summary

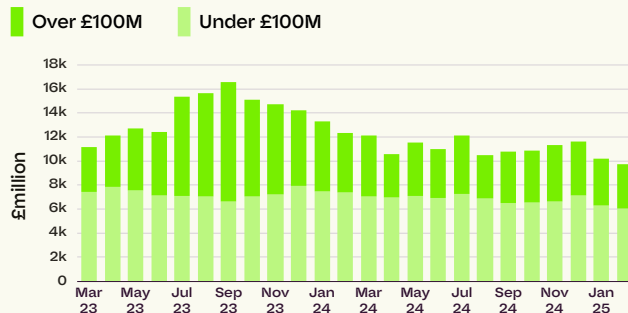
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-  Detailed planning approvals dropped **21%** compared to the previous year.
-  Main contract awards declined **14%** year-on-year.
-  Project starts fell **32%** from the previous year.

Few major projects (£100 million or more) started in the three months to February, causing a 32% drop in total project start value year-on-year. Weak underlying project starts (under £100 million) and a declining development pipeline further contributed to the downturn, with fewer main contract awards and planning approvals than both the previous quarter and last year.

While major contract awards (£100 million+) rose 35%, a decline in smaller awards offset this growth, raising concerns about future project starts. However, rising private sector confidence and government-funded projects could drive recovery later in the year.

Detailed Planning Approvals

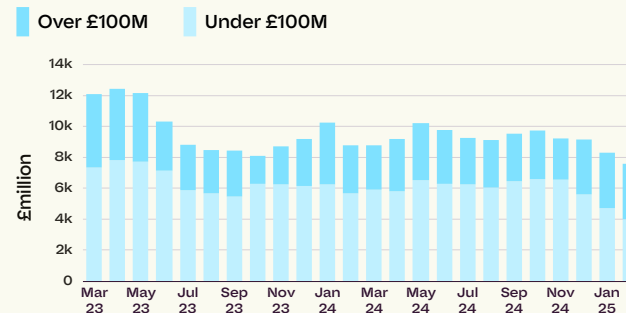


Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	18,179	11,066	29,245
YoY	-18%	-26%	-21%
Prev. 3 months	-8%	-22%	-14%
Prev. 3 months (SA)	-12%		

Source: Glenigan. Three month average

Main Contract Awards

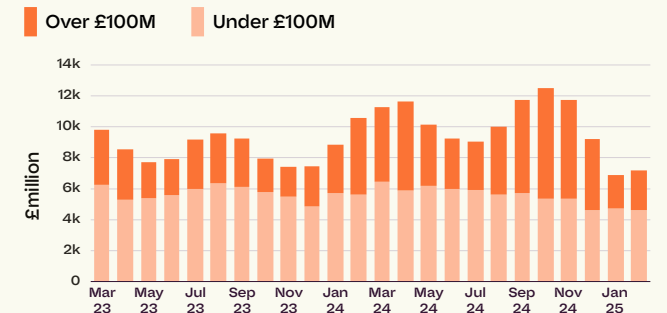


Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	11,997	10,731	22,728
YoY	-29%	15%	-14%
Prev. 3 months	-39%	35%	-18%
Prev. 3 months (SA)	-32%		

Source: Glenigan. Three month average

Starts



Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	13,928	7,660	21,588
YoY	-17%	-49%	-32%
Prev. 3 months	-13%	-60%	-39%
Prev. 3 months (SA)	-6%		

Source: Glenigan. Three month average

Economic Outlook

Rising cost pressures and uncertainty dent confidence and economic growth

- ❑ Manufacturing activity declines further during January and February
- ❑ Stalled service sector output
- ❑ Decline in job vacancies as firm's trim workforce

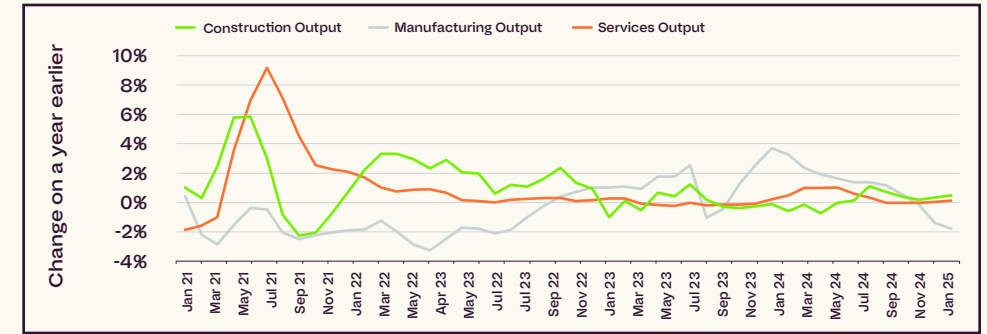
Faltering confidence and cost pressures continue to slow UK growth. In the final quarter of last year, a drop in manufacturing output and weak service sector growth kept economic expansion to just 0.1%.

CIPS industry surveys suggest a similar trend in early 2025, with manufacturing activity declining further and the service sector remaining flat. In February, survey respondents noted that cautious customers were delaying purchase decisions.

Rising cost pressures were also highlighted, with firms raising prices ahead of expected labour cost increases in April. In response to weak sales and higher costs, businesses are cutting recruitment and reducing staff, easing labour market pressures. Job vacancies fell sharply in 2024 and have now returned to pre-pandemic levels.

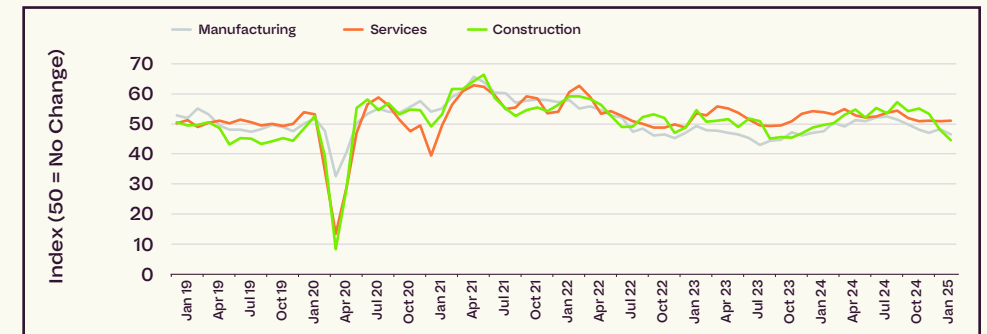


UK Economic Growth by Sector



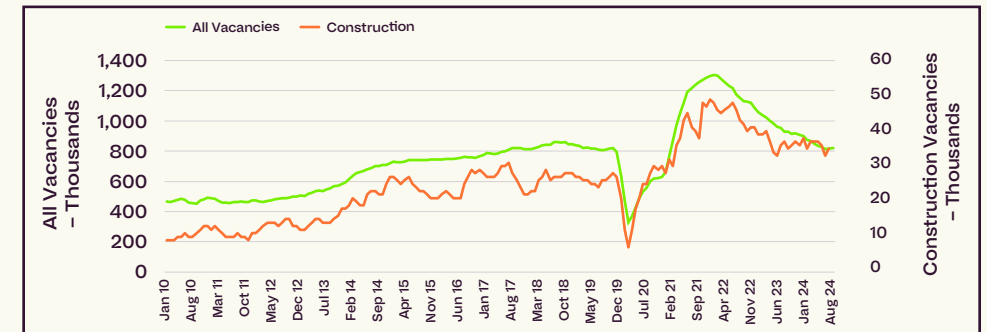
Source: ONS

CIPS Activity Surveys



Source: IHS Markit/CIPS

Job Vacancies



Source: ONS

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Top 50 Contractors

Last 12 month totals: **966 projects**
£34,663m

Last month totals: **94 projects**
£3,483m

March 2024 to February 2025

Contractors	#	£m	★	Contractors	#	£m	★
1 Kier	107	2886	2	26 Costain	3	443	-2
2 Royal BAM	43	2833	0	27 Spencer Group	5	363	3
3 Morgan Sindall	225	2788	-2	28 Octavius Infrastructure	8	357	3
4 Ferrovial	3	1617	1	29 Enka	2	356	3
5 Sir Robert McAlpine	6	1410	-1	30 VolkerWessels	16	347	4
6 Laing O'Rourke	4	1265	2	31 Keltbray Group	9	330	4
7 Balfour Beatty	42	1234	0	32 Caddick Group	14	317	6
8 Galliford Try	94	1115	1	33 Lend Lease	3	311	-4
9 Winvic	19	1020	1	34 United Living	7	307	2
10 John Sisk & Son	11	942	4	35 VINCI	28	302	NEW
11 Bouygues	28	941	1	36 Bauer	1	300	1
12 Multiplex	5	932	-6	37 Skanska UK	2	287	-11
13 McLaren	13	891	0	38 Taziker Industrial	4	281	3
14 Bowmer & Kirkland	33	863	1	39 AtkinsRealis	4	271	4
15 Mace	11	846	-4	40 Hawthorned M&E Services	1	269	8
16 JRL Group	7	833	3	41 CK Rail Solutions	1	269	3
17 Graham Construction	20	806	4	42 Trackwork	1	269	4
18 Wates	29	579	-1	43 Amey Consulting & Rail Prop.	1	269	2
19 RG Group Ltd	5	553	1	44 Amco	1	269	3
20 Murphy	5	497	3	45 Lowery	1	269	4
21 Robertson	45	493	1	46 HG Construction	6	259	-4
22 Willmott Dixon	53	492	-6	47 TSL Projects	5	255	-8
23 Story Contracting	8	464	4	48 Ringway Group	2	252	2
24 Hochtief Group	2	463	1	49 Hill Group	17	250	NEW
25 McAleer & Rushe Contracts	5	448	-7	50 Aecon	1	250	NEW

★ Change in ranking since the previous period

February 2025

Contractors	#	£m	★	Contractors	#	£m	★
1 Kier	11	962	5	26 MCS Group	1	22	NEW
2 Royal BAM	6	268	29	27 RE: GEN Group	1	22	NEW
3 Graham Construction	3	249	NEW	28 Glencar Construction	2	21	NEW
4 Bouygues	2	223	-2	29 Caddick Group	1	19	-8
5 VINCI	4	122	24	30 Thomas Sinden	1	19	NEW
6 BeMo Tunnelling	1	115	NEW	31 Wilten Construction	1	18	NEW
7 Ferrovial	1	115	NEW	32 BCS Electrical & Building	2	18	NEW
8 Tilbury Douglas	5	102	NEW	33 PFL Electrical	2	18	NEW
9 Winvic	2	101	19	34 Ease	1	17	NEW
10 Ian Williams	2	98	NEW	35 Murphy	1	16	NEW
11 Galliford Try	3	98	NEW	36 Beard	2	16	NEW
12 Bowmer & Kirkland	3	93	-4	37 Clegg Group	1	16	NEW
13 M C P	1	87	NEW	38 JG Hale Group	1	13	NEW
14 McLaren	1	75	NEW	39 Inside	1	12	NEW
15 Ogilvie	3	73	NEW	40 E G Carter & Co	1	12	-8
16 Castle Building Services	1	60	NEW	41 Wates	1	11	-32
17 Legendre Construction	1	38	NEW	42 Geda Construction Co.	1	11	NEW
18 Costain	1	37	NEW	43 Zenith	1	10	NEW
19 Strabag	1	37	NEW	44 Brims Construction	1	10	NEW
20 Skanska UK	1	37	NEW	45 Roof	1	10	NEW
21 Morgan Sindall	5	30	-11	46 Mixbrow	1	10	NEW
22 Knights Brown Construction	1	30	NEW	47 Neilcott Construction	1	10	NEW
23 Story Contracting	1	29	NEW	48 Klifer Developments	1	9	NEW
24 GMI Construction	1	25	NEW	49 Willmott Dixon	2	9	NEW
25 Magrock	2	24	NEW	50 TSL Contractors	2	8	NEW

Top 50 Clients

March 2024 to February 2025

Clients	#	£m	★
1 Department for Transport	54	4625	0
2 Network Rail	45	4277	0
3 Department of Health	189	2431	0
4 Tata Steel Group	1	1250	0
5 National Grid	8	1049	0
6 Ministry of Defence	27	733	0
7 Scottish Prison Service	3	685	NEW
8 Department for Education	73	653	-1
9 North Lanarkshire Council	7	504	0
10 Amazon	3	501	0
11 Kingsway Solar Farm	1	500	0
12 GE Hitachi Nuclear Energy	1	500	0
13 Cons. and Procurement	12	400	18
14 Peabody Trust	6	362	0
15 Greystar Developments	5	343	1
16 John Lewis Partnership	4	342	9
17 GLP	3	339	0
18 Scottish Government	5	324	0
19 University of Glasgow	4	315	0
20 Greater London Authority	6	303	-5
21 Ardersier Port	1	300	-1
22 Mitsubishi Estate London	1	300	-1
23 Land Securities Group	4	274	0
24 Milton Keynes Bor. Council	5	254	0
25 Anchor Housing	4	250	NEW

Clients	#	£m	★
26 Kingston-Upon-Thames	5	247	0
27 Rolls-Royce	4	244	0
28 Ministry of Justice	26	242	NEW
29 SSE	9	242	-16
30 Home Office	29	235	10
31 Aberdeen City Council	18	233	-3
32 Northern Ireland Executive	16	220	-2
33 Ass. British Ports Holdings	4	208	-11
34 London & Quadrant Housing	2	206	-1
35 Middlesbrough Bor. Council	4	205	-3
36 North Ayrshire Council	8	200	0
37 Siemens	5	200	11
38 Southwark Charities	1	200	NEW
39 JTRE London	1	200	NEW
40 Havisham Sarl	1	200	-3
41 Welsh Government	8	193	-2
42 British Land	6	183	5
43 Unite Group	4	164	0
44 City of Edinburgh Council	21	164	-2
45 Tritax Group	3	162	-1
46 London Borough of Barnet	3	154	0
47 Univ.of the West of England	5	153	2
48 London Bor. of Camden	4	151	NEW
49 Carlton Power	3	151	NEW
50 Crystal Palace Football Club	1	150	NEW

February 2025

Clients	#	£m	★
1 Scottish Prison Service	1	684	NEW
2 National Grid	1	230	NEW
3 Department of Health	7	202	NEW
4 Anchor Housing	1	197	NEW
5 Cons. and Procurement	1	195	NEW
6 Ministry of Defence	2	130	NEW
7 Skanska UK	1	110	NEW
8 Brighter Places	1	94	NEW
9 Department for Education	4	61	NEW
10 South Tyneside College	1	60	NEW
11 HM Prison & Probation Service	1	58	NEW
12 Ministry of Justice	1	58	NEW
13 Stockport Met. Bor. Council	2	55	NEW
14 Stockport May. Dev. Corp.	1	50	NEW
15 Clarion Housing Group	1	50	NEW
16 Surrey County Council	1	42	NEW
17 Richmond Upon Thames	1	40	NEW
18 Myriad Housing	1	33	NEW
19 CHP	1	33	NEW
20 CWP Property Development	1	31	NEW
21 Firethorn Trust	1	31	NEW
22 Cumberland Council	2	30	NEW
23 Harwin	1	30	NEW
24 Herefords Bluecoat School	1	28	NEW
25 Leicester City Council	2	25	NEW

Clients	#	£m	★
26 GS Trust	1	25	NEW
27 Wosc 1 Nom./ Wosc 2 Nom.	1	25	NEW
28 British Land	1	25	NEW
29 Norges Bank Invest. Mngmt.	1	25	NEW
30 Borough of Hillingdon	1	23	NEW
31 He2 Uk Enterprises 12 Gp	1	22	NEW
32 Sheffield City Council	2	22	NEW
33 Bicester Motion	2	22	NEW
34 Univ. Northumb. at Newcastle	1	20	NEW
35 Brundell Property	1	19	NEW
36 Cross Stone Homes	1	19	NEW
37 Babcock Int. Group	1	19	NEW
38 Siemens	1	19	NEW
39 East Suffolk Council	1	18	NEW
40 Bromford Group	2	18	NEW
41 Fairview New Homes	1	18	NEW
42 Hearts Together	1	17	NEW
43 Kirklees Met. Council	3	17	NEW
44 University of Sheffield	1	16	NEW
45 HW Octagon Properties	1	14	NEW
46 Carmelite Priory	1	14	NEW
47 Greater London Authority	2	13	NEW
48 Coventry City Council	1	13	NEW
49 University of Warwick	1	13	NEW
50 Coast & Glens Bor. Council	1	13	NEW

★ Change in ranking since the previous period

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Glenigan Index

A decline across most sectors led to an overall drop in the value of underlying project starts (under £100 million) in the three months to February, with total starts falling **6%** and **17% below** 2024 levels. However, industrial project starts performed relatively well during the period.

- **Residential construction starts** fell **10%** from the previous three months and were **14% lower** than in 2024.
- **Non-residential project starts** declined **2%** from the previous three months and stood **18% below** last year's levels.
- **Industrial project starts** rose **50%** compared to the previous three months and were **1% higher** than a year ago.

Sector Analysis

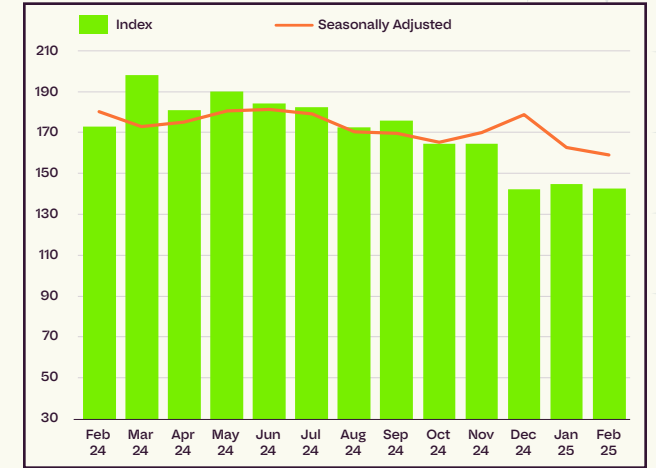
	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
Residential	7,237	-11%	-10%	-14%
Industrial	1,271	38%	50%	1%
Offices	859	-21%	-20%	-28%
Retail	299	-4%	8%	-37%
Hotel & Leisure	640	-38%	-29%	-14%
Education	936	-34%	-31%	-25%
Health	917	-10%	29%	-18%
Community & Amenity	474	0%	10%	-11%
Civil Engineering	1,297	-23%	-4%	-30%
Total	13,928	-13%	-6%	-17%

Regional Analysis

	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
East of England	1,451	-20%	-19%	-15%
East Midlands	1,371	1%	24%	13%
London	1,645	-4%	-9%	-40%
North East	675	22%	11%	-10%
North West	1,018	-37%	-33%	-52%
Northern Ireland	424	14%	44%	76%
Scotland	1,402	5%	11%	-18%
South East	2,005	-22%	-21%	-14%
South West	1,319	-10%	15%	18%
Wales	491	-39%	-24%	4%
West Midlands	1,051	-19%	-16%	-27%
Yorkshire & the Humber	1,077	-7%	-6%	9%

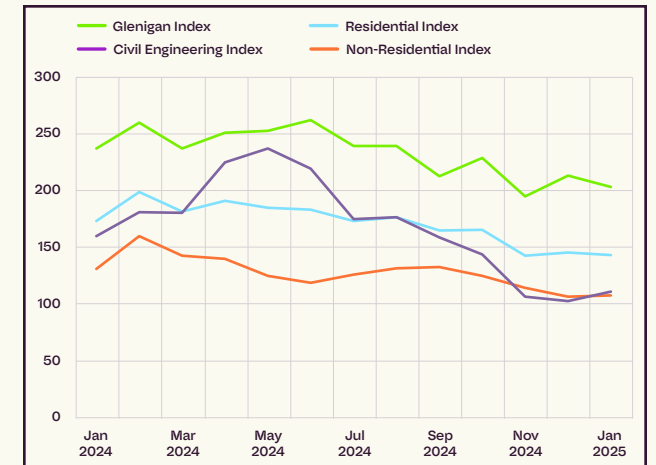
N.B. Index 2006 =100

Glenigan Index



Source: Glenigan

Indices Growth



Source: Glenigan

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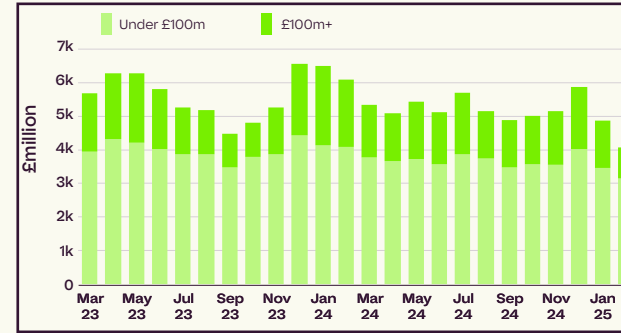
Overview

- ▼ **26% decrease** in project starts year-on-year
- ▼ **5% decrease** in main contract awards from last year
- ▼ **33% decrease** in detailed planning approvals compared to a year ago

The three months to February were sluggish for the residential sector, with project starts, main contract awards and detailed planning approvals all decreasing both on a year ago and compared with the preceding quarter. However, there was a 39% increase in major project starts (£100 million or more) quarter-on-quarter.

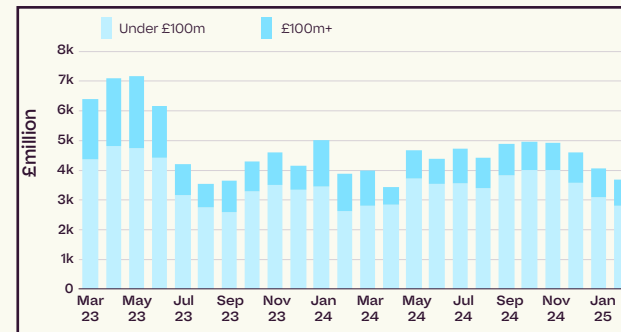
The housing market is facing challenges, with an unexpected decline of average property prices in February, and a looming stamp duty increase in April. But we expect a boost in Social Housing in the future, as the government pledged to invest an extra £300 million into the Affordable Homes Programme.

Detailed Planning Approvals



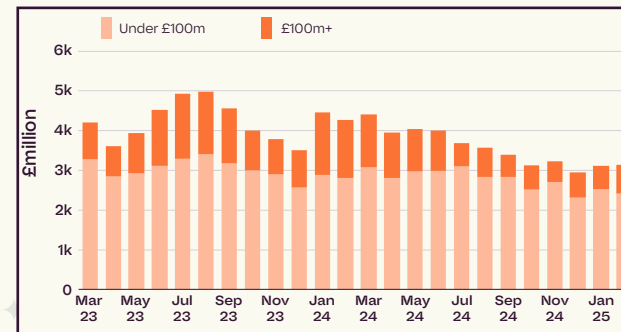
Source: Glenigan

Main Contract Awards



Source: Glenigan

Housing Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	9,461	2,731	12,192
YoY	-23%	-55%	-33%
Prev. 3 months	-11%	-43%	-21%
Prev. 3 months (SA)	-14%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	8,412	2,646	11,058
YoY	6%	-29%	-5%
Prev. 3 months	-30%	-3%	-25%
Prev. 3 months (SA)	-19%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	7,237	2,167	9,404
YoY	-14%	-50%	-26%
Prev. 3 months	-11%	39%	-3%
Prev. 3 months (SA)	-10%		

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Housing

Types of projects started

Most residential categories declined, except for private sheltered housing and homes, hostels, etc., which saw year-on-year growth.

- Private housing was the largest segment (58% share), despite a 2% drop to £5,411 million
- Private apartments fell 45% to £1,927 million
- Social sector housing declined 42% to £1,052 million

Types of Housing Projects Started

Three months to February 2025

	£ million	Percentage
Private Apartments	1,927	20%
Elderly Persons Homes	2	0%
Private Housing	5,411	58%
Private Sheltered Housing	193	2%
Social Sector Sheltered Housing	28	0%
Social Sector Apartments	182	2%
Social Sector Housing	1,052	11%
Homes, Hostels Etc.	43	0%
Student Accommodation	568	6%
Total	9,404	100%

Project Spotlight

Devonshire Place

Detailed plans have been approved for the £200 million Devonshire Place student accommodation development in London. Regal has been appointed as the main contractor on the scheme, with work due to be completed in Q1 2027.

PROJECT ID: 23081707

IMAGE SOURCE: JTP ARCHITECTS

£200m



Housing League Tables

March 2024 to February 2025

Contractors	Projects	£m
Morgan Sindall	148	2,894
Wates	84	2,376
Bouygues UK	61	1,756
Vistry	53	1,578
JRL	18	1,541
Graham Construction	29	1,524
Willmott Dixon	69	1,369
Winvic	17	1,301
HG Construction	28	1,301
Hill Partnerships	39	1,264

Clients	Projects	£m
Barratt Redrow	99	2,339
Persimmon	86	1,952
Taylor Wimpey	60	1,731
Vistry	63	1,543
Bloor Homes	38	1,183
Bellway	51	1,131
Hill Group	17	760
Berkeley DeVeer	23	741
Ferguson Bidco	39	600
Apollo Management	25	519

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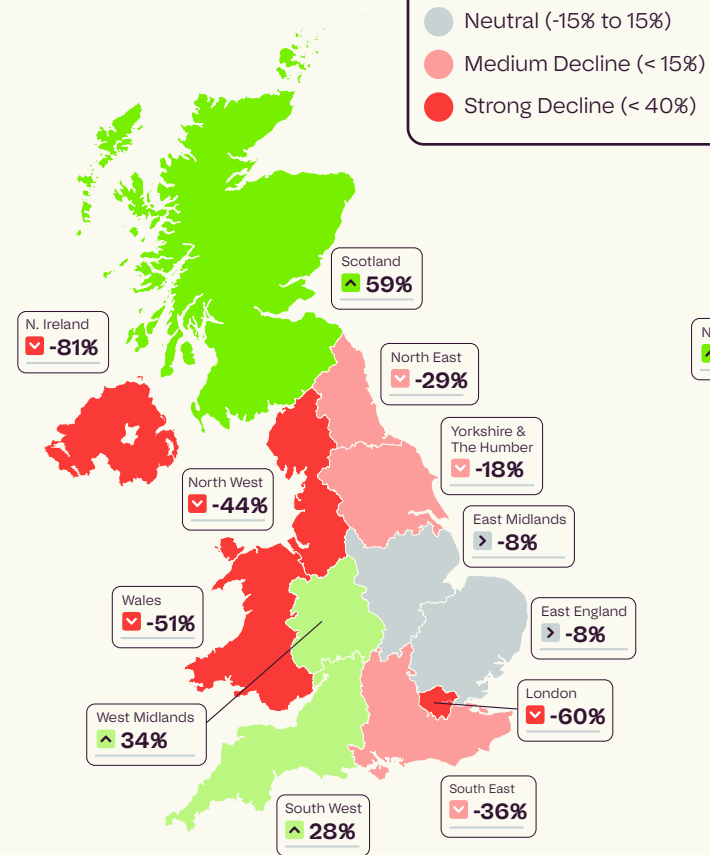
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- Most regions saw declines in project starts and planning approvals
- Project starts increased in the South West, Scotland, and the West Midlands
- Planning approvals grew in the East of England, Northern Ireland, and Wales

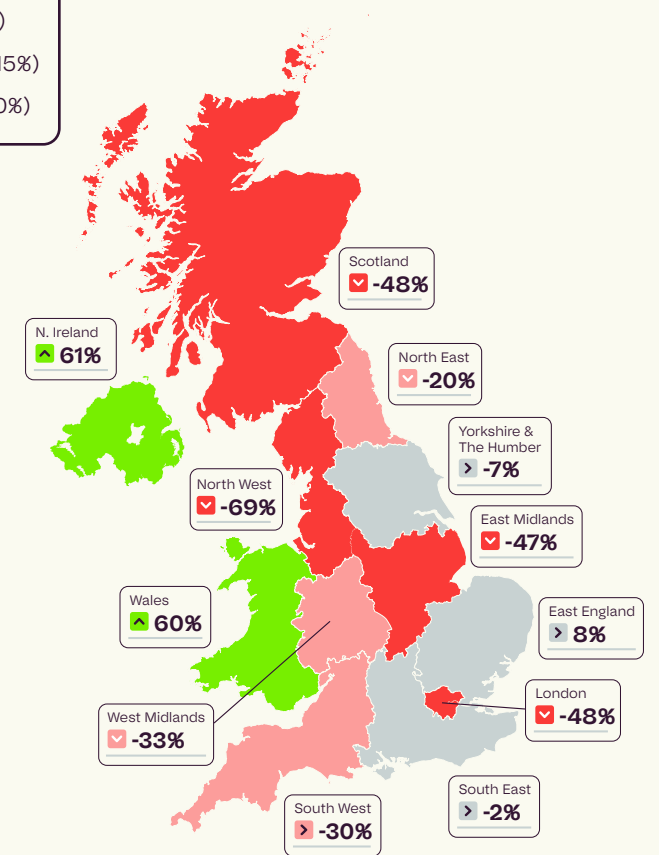
Scotland led residential project starts, rising 59% year-on-year to £1,289 million, while London saw a 60% decline to £1,279 million. The South East accounted for a 12% share, down 36% to £1,158 million.

For planning approvals, London led with £2,890 million (24% share) despite a 48% drop. The South East accounted for 16% of approvals but fell 2% to £1,980 million. The East of England bucked the trend, rising 8% to £1,195 million (10% share).

Changes in Housing Starts
on a Year Earlier



Changes in Housing Planning Approvals
on a Year Earlier



Industrial Overview

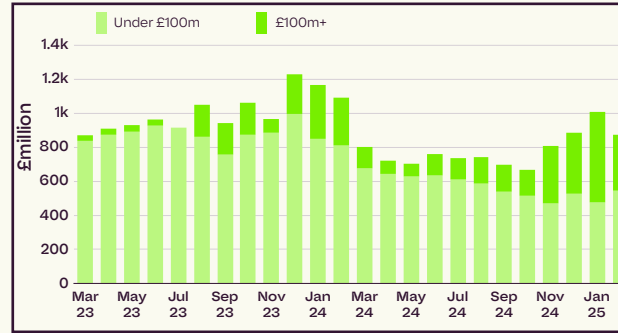
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- ▲ **16% increase** in project starts year-on-year
- ▼ **29% decrease** in main contract awards from last year
- ▼ **20% decrease** in detailed planning approvals compared to a year ago

The industrial sector performed well, with both major (£100 million or more) and underlying (less than £100 million) project starts increasing year-on-year. However, main contract awards saw a sharp drop.

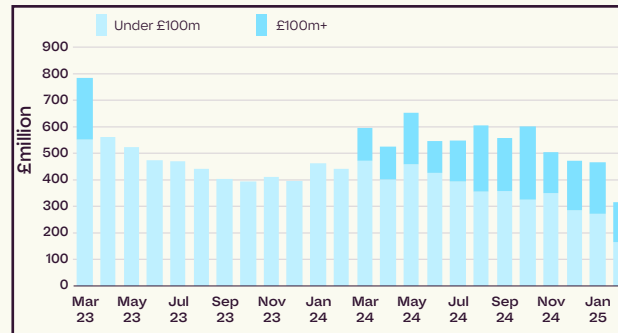
Stronger economic conditions are expected to drive further expansion this year. Additionally, the £300 million Carrington Cryogenic Energy Storage Facility was approved and is set to begin construction later this year.

Detailed Planning Approvals



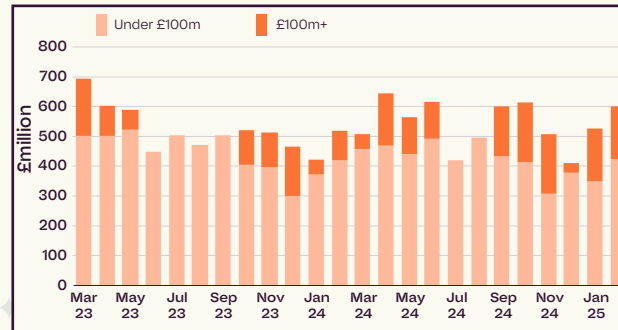
Source: Glenigan

Main Contract Awards



Source: Glenigan

Industrial Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,637	985	2,622
YoY	-33%	18%	-20%
Prev. 3 months	16%	-3%	8%
Prev. 3 months (SA)	6%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	495	450	945
YoY	-63%		-29%
Prev. 3 months	-53%	-2%	-37%
Prev. 3 months (SA)	-50%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,271	531	1,801
YoY	1%	76%	16%
Prev. 3 months	38%	-12%	18%
Prev. 3 months (SA)	50%		

Industrial

Types of projects started

The industrial sector experienced a relatively strong period ending February 2025, with two categories out of three having grown year-on-year

- Warehousing & logistics accounted for 48% of industrial project starts, 70% up on a year ago to total £872 million
- Manufacturing fell 14% year-on-year, totalling £840 million, a 47% share of the sector
- Totalling £90 million, other industrial projects accounted for the remaining 5%, a 42% increase

Types of Industrial Projects Started

Three months to February 2025

	£ million	Percentage
Manufacturing	840	47%
Other Industrial	90	5%
Warehousing & Logistics	872	48%
Total	1,801	100%

Project Spotlight

Panattoni Park

Detailed plans have been approved on the £44 million Panattoni Park development in Swindon. A main contractor is yet to be appointed on the scheme with work due to be completed in Q2 2026.

PROJECT ID: 24212921

IMAGE SOURCE: UMC ARCHITECTS

£44m



Industrial League Tables

March 2024 to February 2025

Contractors	Projects	£m
Winvic	9	402
Enka	2	356
McLaren	8	299
TSL Projects	5	255
Kier	7	242
Balfour Beatty	1	211
Glencar	9	179
Benniman	6	156
Bowmer & Kirkland	4	155
A & H Cons. & Dev.	11	129

Clients	Projects	£m
Amazon UK	1	500
Rolls-Royce	2	219
GLP	2	139
Tritax	3	127
Watts Solar	1	126
Segro	1	123
Vertex Hydrogen	1	88
Essar Oil (UK)	1	88
Progressive Energy	1	88
Johnson Matthey	1	88

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Industrial

Regional

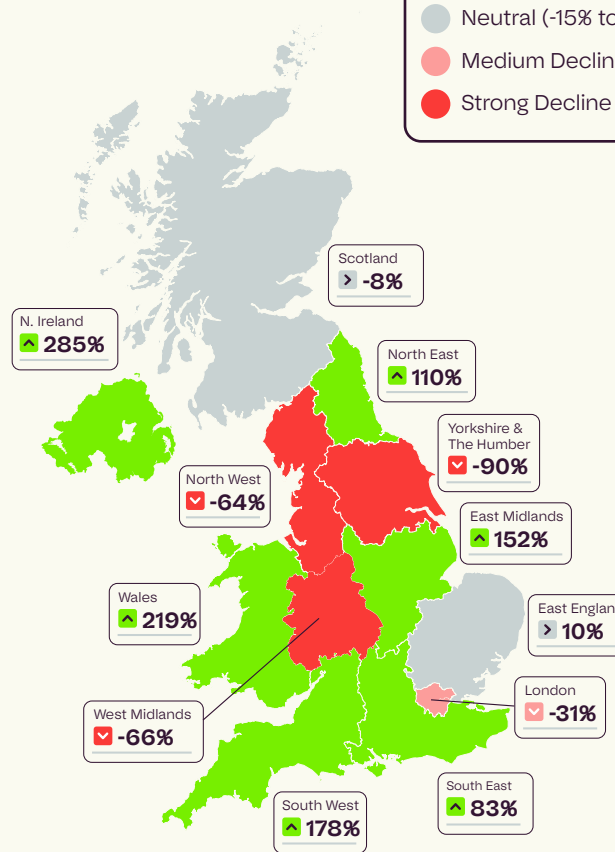
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- Most regions experienced an increase in project starts, in line with the sector trend
- Only four regions saw an increase in detailed planning approvals
- The South West performed well in both project starts and approvals

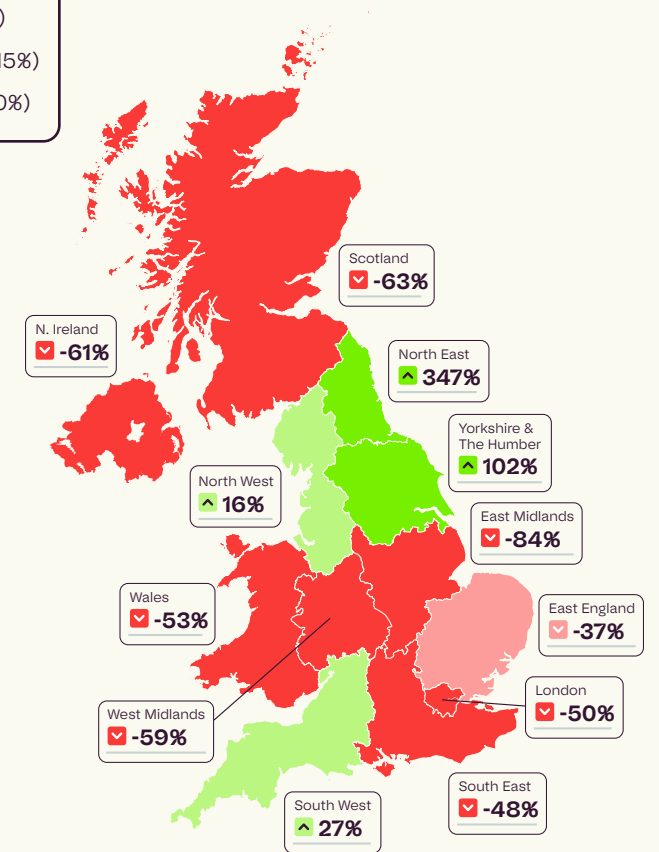
The South East led industrial project starts, rising 110% year-on-year to £563 million, driven by the £280.88 million PLP South Coldecotte development in Milton Keynes. The East Midlands also saw strong growth, up 152% to £220 million.

For planning approvals, the North West had the highest share, increasing 16% year-on-year to £565 million, supported by the £300 million Carrington Cryogenic Energy Storage Facility in Manchester.

Changes in Industrial Starts
on a Year Earlier



Changes in Industrial Planning Approvals
on a Year Earlier



Offices

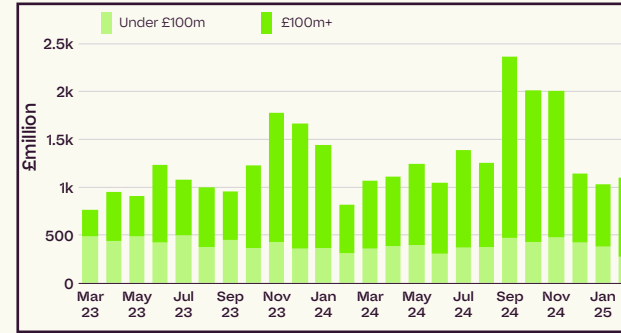
Overview

- ▼ **17% decrease** in project starts year-on-year
- ▼ **56% decrease** in main contract awards from last year
- ▲ **35% increase** in detailed planning approvals compared to a year ago

Project starts in the office sector experienced a decline on a year ago. However, there was an 18% increase quarter-on-quarter driven by major projects (£100 million or more), which more than doubled against the previous quarter. Major detailed planning approvals also grew 64% on a year ago

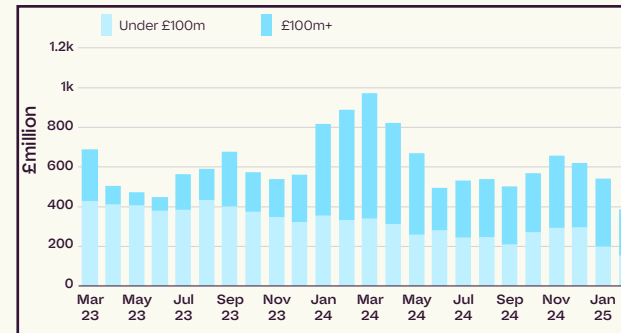
With AI infrastructure investment increasing, demand for data centres is expected to drive office construction in the coming months.

Detailed Planning Approvals



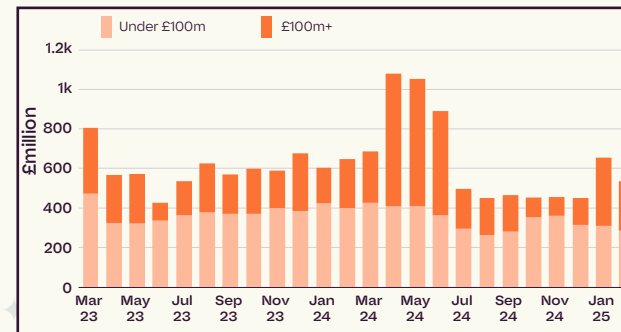
Source: Glenigan

Main Contract Awards



Source: Glenigan

Office Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	816	2,486	3,302
YoY	-12%	64%	35%
Prev. 3 months	-43%	-46%	-45%
Prev. 3 months (SA)	-30%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	459	700	1,159
YoY	-54%	-58%	-56%
Prev. 3 months	-48%	-36%	-41%
Prev. 3 months (SA)	-43%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	859	750	1,609
YoY	-28%	1%	-17%
Prev. 3 months	-21%	163%	18%
Prev. 3 months (SA)	-20%		

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Offices

Types of projects started

Only two value bands saw year-on-year growth.

- Projects over £100 million rose 1% to £750 million
- Projects between £50 million and £100 million surged 96% to £358 million
- Projects from £20 million to £50 million fell 66% to £178 million

Types of Office Projects Started

Three months to February 2025

	£ million	Percentage
Up to £5 million	90	6%
£5 million up to £10 million	63	4%
£10 million up to £20 million	170	11%
£20 million up to £50 million	178	11%
£50 million up to £100 million	358	22%
Over £100 million	750	47%
Total	1609	100%

Project Spotlight

60 Gracechurch Street

Detailed plans have been approved for the £500 million 60 Gracechurch Street office development in London. Works are due to be completed in Q3 2029. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 24112367

IMAGE SOURCE: 3XN

£500m



Office League Tables

March 2024 to February 2025

Contractors	Projects	£m
Mace	6	914
Morgan Sindall	119	834
McLaren	4	673
Multiplex Cons.	3	627
JRL	3	560
Royal BAM	3	289
Skanska UK	1	250
Wates	5	185
Structure Tone	3	164
Faithdean	1	130

Clients	Projects	£m
Mitsubishi Estate	1	300
Land Securities	2	271
Rocket Investments	1	215
Havisham Sarl	1	200
JTRE London	1	200
Southwark Charities	1	200
GLP	1	200
A & O Shearman	2	145
British Land	3	140
Lazari Investments	1	130

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Regional

- Performance in project starts was mixed
- More than half of the regions saw growth in detailed planning approvals
- The West Midlands recorded strong growth in both starts and approvals

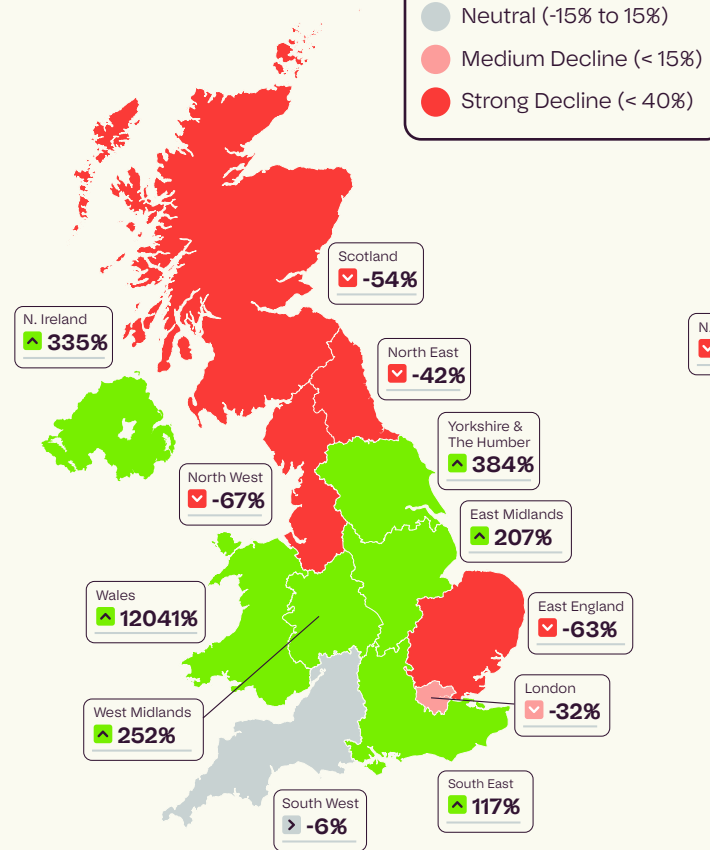
London had the highest share of office project starts (54%) despite a 32% drop, supported by the £500 million Project Vista development in Lambeth. The South East doubled its total value to £257 million.

Planning approvals surged in the West Midlands, climbing 55x year-on-year to £1,096 million, primarily due to the £1,078 million Frasers Campus in Coventry.

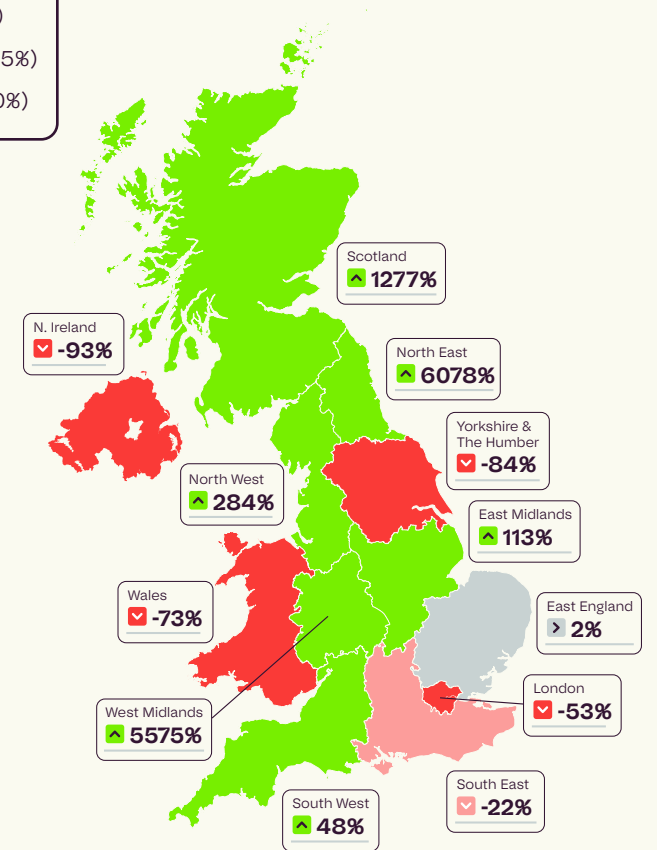


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Changes in Office Starts
on a Year Earlier



Changes in Office Planning Approvals
on a Year Earlier



Retail

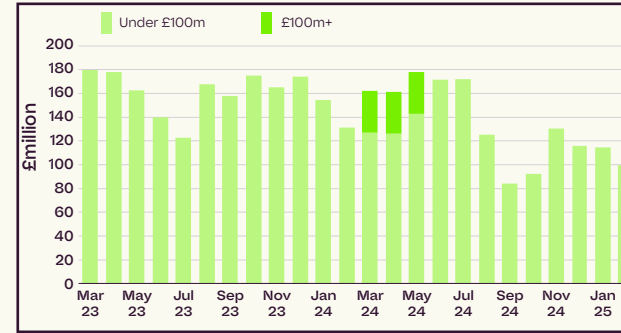
Overview

- ✓ **37% decrease** in project starts year-on-year
- ✓ **87% decrease** in main contract awards from last year
- ✓ **24% decrease** in detailed planning approvals compared to the previous year

The retail sector continued its downward trend in the three months to February, with project starts, main contract awards, and planning approvals all falling both year-on-year and quarter-on-quarter. There were no major projects (£100 million or more) across all three contract stages.

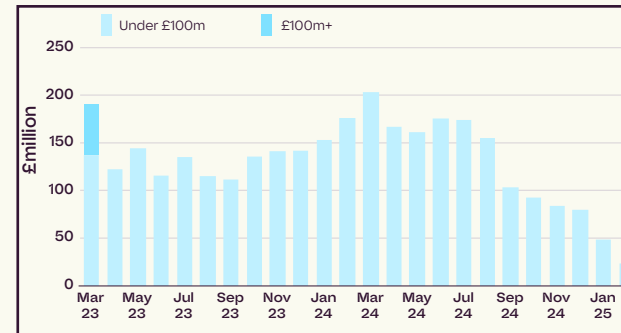
The sector remains under pressure, with weak consumer spending and upcoming tax increases creating uncertainty. Private sector firms anticipate further declines in activity over the next quarter.

Detailed Planning Approvals



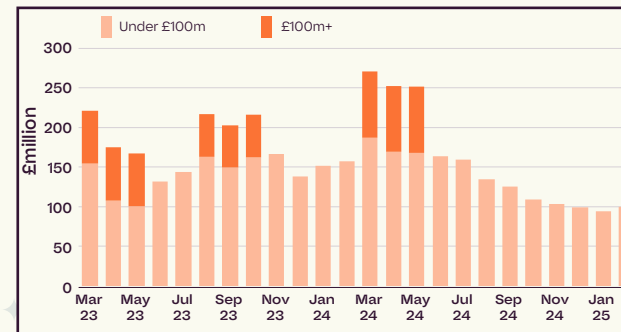
Source: Glenigan

Main Contract Awards



Source: Glenigan

Retail Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	299	-	299
YoY	-24%		-24%
Prev. 3 months	-24%		-24%
Prev. 3 months (SA)	1%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	69	-	69
YoY	-87%		-87%
Prev. 3 months	-72%		-72%
Prev. 3 months (SA)	-65%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	299	-	299
YoY	-37%		-37%
Prev. 3 months	-4%		-4%
Prev. 3 months (SA)	8%		

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Retail

Types of projects started

Despite the overall decline, performance varied across categories, with three experiencing growth.

- Supermarkets accounted for 63% of retail project starts, growing 12% year-on-year to £189 million
- Shop projects fell 70% year-on-year to £73 million
- Petrol filling stations increased 22% year-on-year to £18 million

Types of Retail Projects Started

Three months to February 2025

	£ million	Percentage
Other Retail	7	2%
Petrol Filling Stations	18	6%
Retail Warehousing	-	0%
Shopping Centres	11	4%
Shops	73	24%
Supermarkets	189	63%
Total	299	100%

Project Spotlight

St David's Cardiff City Square

Detailed plans have been approved for the £17 million St David's Cardiff City Square development. A main contractor is yet to be appointed on the scheme, with work due to be completed in Q3 2026.

PROJECT ID: 24238547

IMAGE SOURCE: CHAPMAN TAYLOR

£17m



Retail League Tables

March 2024 to February 2025

Contractors	Projects	£m
Conamar Building	1	91
DSP Construction	14	50
Kier	3	49
Princebuild	2	24
G F Tomlinson Group	1	23
Robertson Group	3	21
BibbEgan Demolition	1	21
Wilten Construction	3	21
VINCI Construction	1	20
Speller Metcalfe	3	20

Clients	Projects	£m
Aldi	91	150
John Lewis	3	92
Lidl UK	27	82
Marks & Spencer	25	45
Mansfield Dis.Council	1	38
Tesco	66	38
TJ Morris	6	32
J Sainsbury	22	25
Hammerson	1	22
Asda	30	19

Retail

Regional

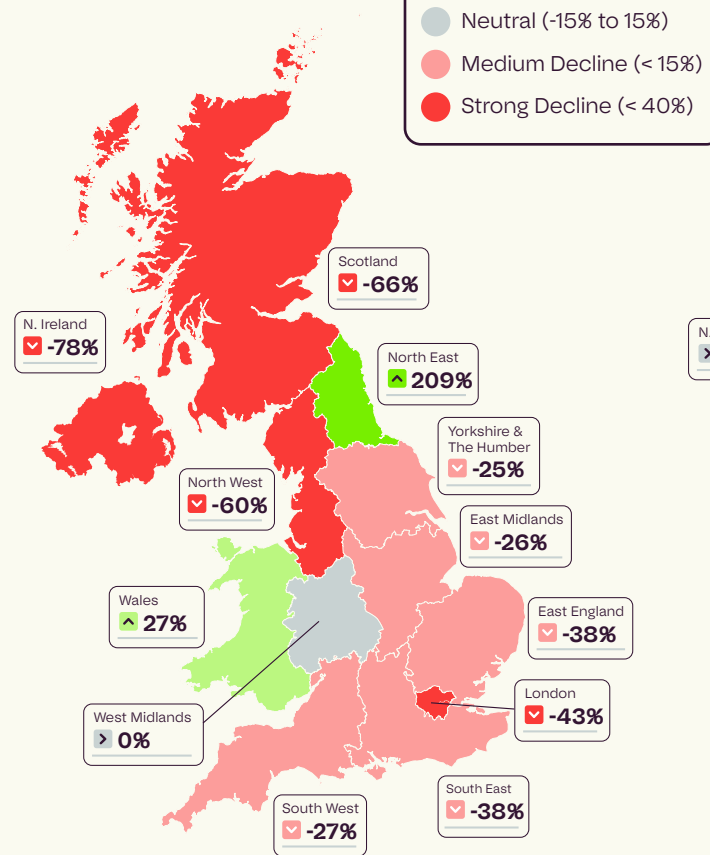
- Performance was weak, with project starts and planning approvals down in most regions
- The North East and Wales saw growth in project starts
- Planning approvals increased in the North East, the South West, and Wales

London was the largest contributor to retail project starts, despite a 43% decline year-on-year, accounting for 17% (£50 million). The West Midlands held steady at £29 million (10% share). Meanwhile, the North East saw strong growth, tripling in value from last year.

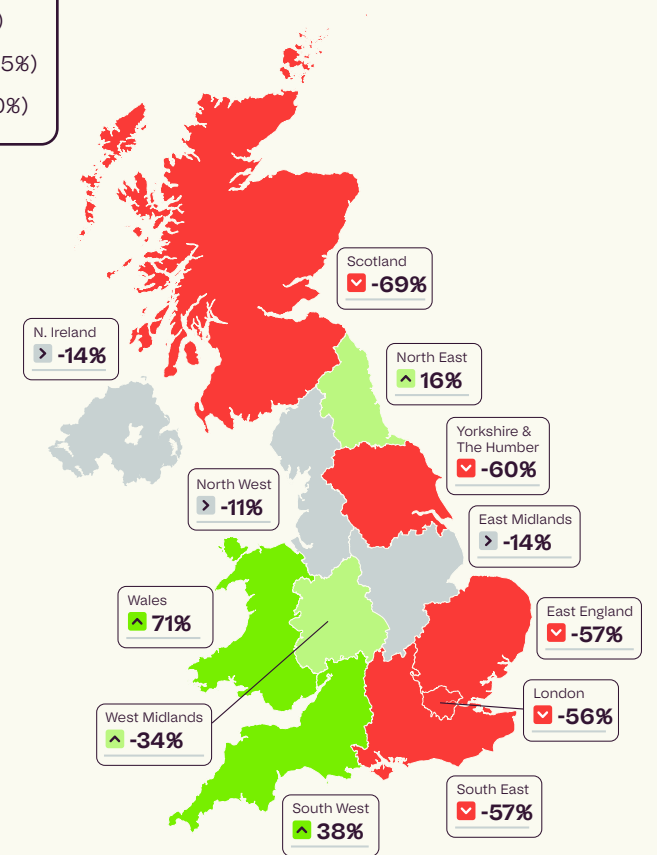
Detailed planning approvals also struggled, but the South West bucked the trend, leading with a 26% share (£77 million, up 38%). Wales also performed well, rising 71% year-on-year to £37 million.



Changes in Retail Starts
on a Year Earlier



Changes in Retail Planning Approvals
on a Year Earlier



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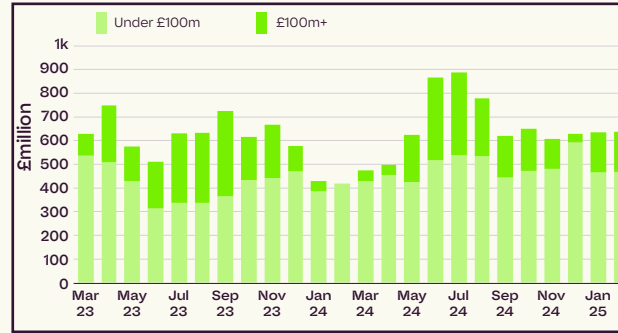
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- ▲ **108% increase** in project starts year-on-year
- ▼ **65% decrease** in main contract awards from last year
- ▲ **52% increase** in detailed planning approvals compared to a year ago

The hotel & leisure sector had a strong quarter ending February 2025, with project starts and planning approvals rising both quarter-on-quarter and year-on-year, driven by major (£100 million or more) projects. However, main contract awards declined across both periods.

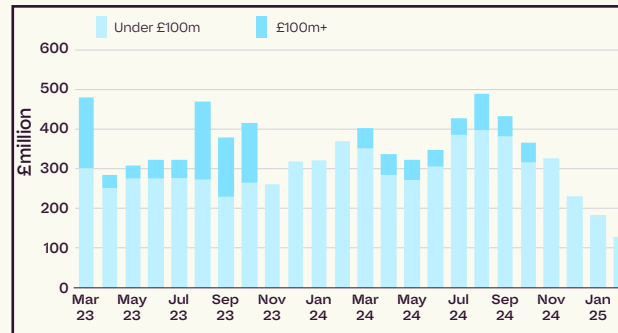
Investment in hotels surged in 2024, tripling year-on-year. Combined with the strong performance of the luxury hotel sector, this supports forecasts of 6% growth in hotel & leisure project starts for 2025 as demand continues to recover.

Detailed Planning Approvals



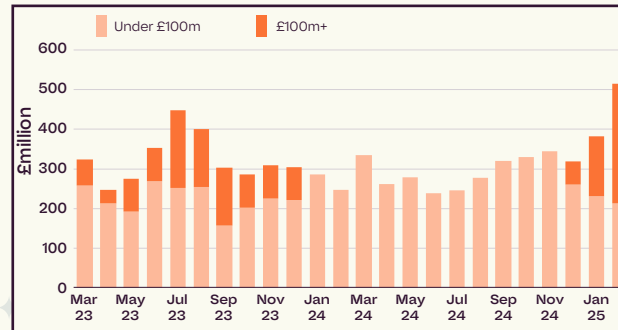
Source: Glenigan

Main Contract Awards



Source: Glenigan

Hotel & Leisure Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,407	504	1,911
YoY	12%		52%
Prev. 3 months	-2%	33%	5%
Prev. 3 months (SA)	6%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	385	-	385
YoY	-65%		-65%
Prev. 3 months	-61%		-61%
Prev. 3 months (SA)	-56%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	640	905	1,545
YoY	-14%		108%
Prev. 3 months	-38%		50%
Prev. 3 months (SA)	-29%		

Hotel & Leisure

Types of projects started

The sector performed well, with most sub-sectors experiencing growth.

- Hotels & guest houses accounted for the largest share (46%), more than doubling year-on-year to £708 million
- Sports facilities surged 213% year-on-year, accounting for 22% of total project starts
- Indoor leisure facilities declined 3% year-on-year, representing 12% of the sector

Types of Hotel & Leisure Projects Started

Three months to February 2025

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	44	3%
Cinemas & Theatres	82	5%
Hotels, Guest Houses	708	46%
Indoor Leisure Facilities	181	12%
Other Hotel & Leisure	192	12%
Sport Facilities	337	22%
Total	1,545	100%

Project Spotlight

Eastwood Park Leisure Centre

Detailed plans have been approved for the £56 million Eastwood Park Leisure Centre development in Glasgow. BAM has been appointed as the main contractor on the scheme, with work expected to be completed in Q3 2028.

PROJECT ID: 21009680

IMAGE SOURCE: STALLAN-BRAND

£56m



Hotel & Leisure League Tables

March 2024 to February 2025

Contractors	Projects	£m
YTL Developments	1	155
Lendlease	1	150
McAleer & Rushe	2	128
Morgan Sindall	8	123
Robertson	8	109
Galliford Try	6	106
Pellikaan Cons.	2	105
Graham Construction	3	92
GMI Construction	2	85
Piccadilly Cons.	2	60

Clients	Projects	£m
YTL Developments	1	155
Crystal Palace FC	1	150
Mrp Hammersmith	1	125
Kingston-on-Thames	1	80
Nat. Galleries Of Scot.	1	75
Criterion Capital	3	68
Lockwood 2002	1	58
City of London Corp.	4	57
Fermanagh Dis. Council	1	52
Manchester United	1	50

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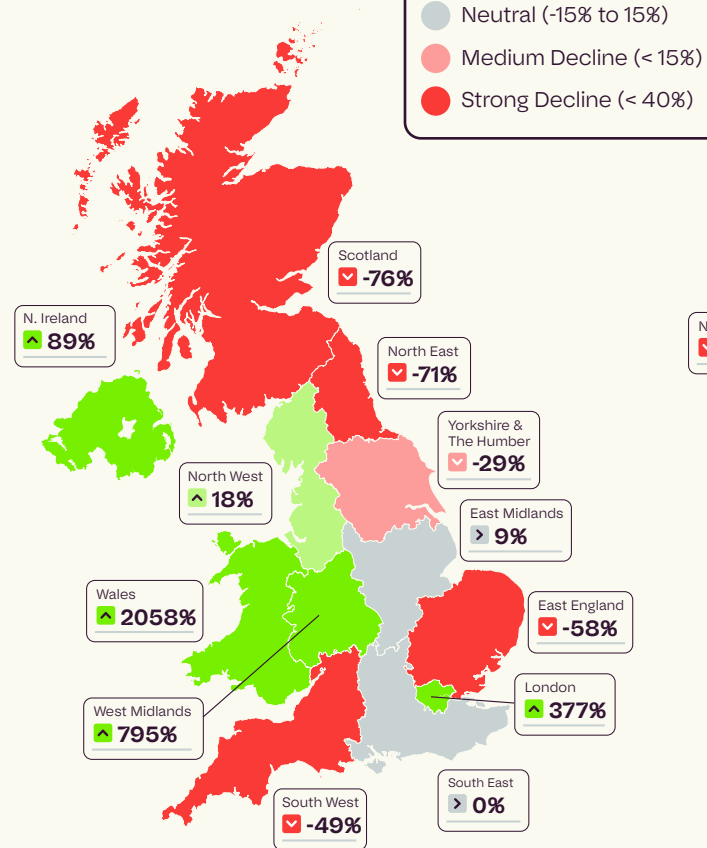
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- Despite growth in project starts overall, regional performance was mixed
- Most regions experienced strong growth in detailed planning approvals
- London led in both project starts and planning approvals

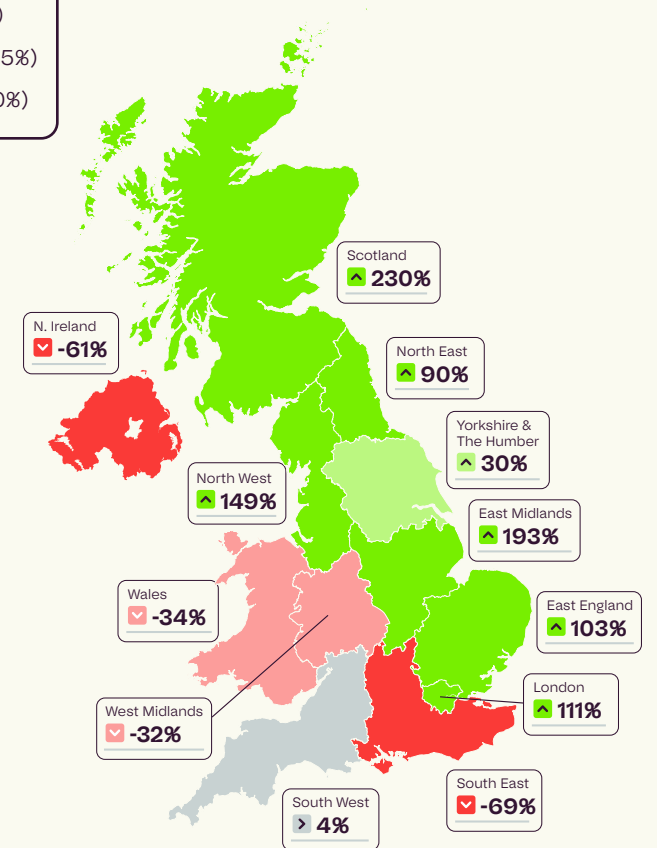
London dominated hotel & leisure project starts, rising 377% year-on-year to £813 million, driven by the £450 million 380 Kensington High Street hotel development. Wales also saw significant growth, increasing more than 20 times to £334 million, supported by the £280 million Cardiff Arena & Hotel Atlantic Wharf Phase 1 development.

The capital also led planning approvals, growing 111% year-on-year to £662 million (37% share). This increase was boosted by the £400 million Haymarket House development in Westminster.

Changes in Hotel & Leisure Starts
on a Year Earlier



Changes in Hotel & Leisure Planning Approvals
on a Year Earlier



Health

Overview

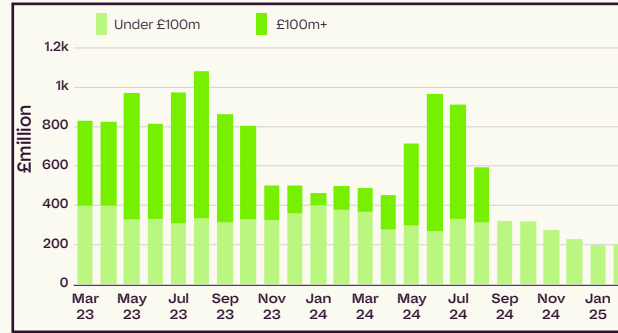
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- Project starts **remained flat** year-on-year
- ❌ **21% decrease** in main contract awards from last year
- ❌ **26% decrease** in detailed planning approvals compared to the preceding three months

The health sector had a weak three-month period to February, with project starts, main contract awards, and planning approvals all declining quarter-on-quarter. Year-on-year, main contract awards and approvals also fell, though a 186% increase in major projects (£100 million or more) helped keep project starts level with the previous year.

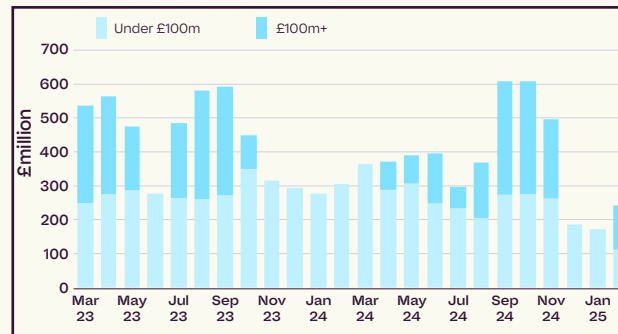
A boost for the sector comes from the launch of 17 new clinics as part of the “Our Future Health” research programme. Looking ahead, the sector is expected to grow 1% in 2025.

Detailed Planning Approvals



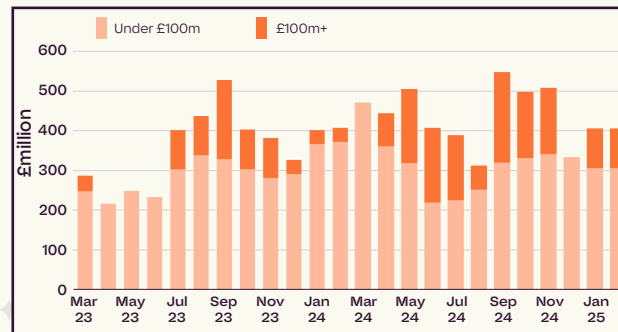
Source: Glenigan

Main Contract Awards



Source: Glenigan

Health Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	605	-	605
YoY	-47%	-100%	-60%
Prev. 3 months	-26%		-26%
Prev. 3 months (SA)	-34%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	337	389	726
YoY	-63%		-21%
Prev. 3 months	-57%	-44%	-51%
Prev. 3 months (SA)	-62%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	917	300	1,217
YoY	-18%	186%	0%
Prev. 3 months	-10%	-40%	-20%
Prev. 3 months (SA)	29%		

Health

Types of projects started

While most health sector categories saw declines, hospitals and day centres performed strongly.

- Hospitals accounted for the largest share (56%), rising 15% year-on-year to £678 million
- Dental, Health & Veterinary Centres/Surgeries declined 21% year-on-year, totalling £205 million
- Day centres saw four-digit growth, making them the standout category

Types of Health Projects Started

Three months to February 2025

	£ million	Percentage
Day Centres	47	4%
Dental, Health & Veterinary Centres/ Surgeries	205	17%
Hospitals	678	56%
Nursing Homes & Hospices	147	12%
Other Health	139	11%
Total	1,217	100%

Project Spotlight

St Georges Hospital

Detailed plans have been approved for the St Georges Hospital Renal Unit development in London. IHP has been appointed as the main contractor on the £48 million scheme, with work expected to be completed in Q3 2026.

PROJECT ID: 24224351

IMAGE SOURCE: MURPHY PHILIPPS ARCHITECTS LTD

£48m



Health League Tables

March 2024 to February 2025

Contractors	Projects	£m
Laing O'Rourke	2	890
John Sisk & Son	4	340
Royal BAM	6	253
Winvic	1	250
Graham Cons.	3	220
Morgan Sindall	14	184
Shepherd Building	5	99
IHP Integrated Health	6	93
Newarthill	2	86
Kier	10	85

Clients	Projects	£m
Dep. of Health	169	2,381
Cons. and Procurement	3	206
Tritax	1	125
Siemens	1	125
Smith & Nephew	1	82
Bruntwood Estates	1	63
Welsh Government	4	63
Univ. of Birmingham	1	50
ARC Oxford	1	39
LNT Group	7	38

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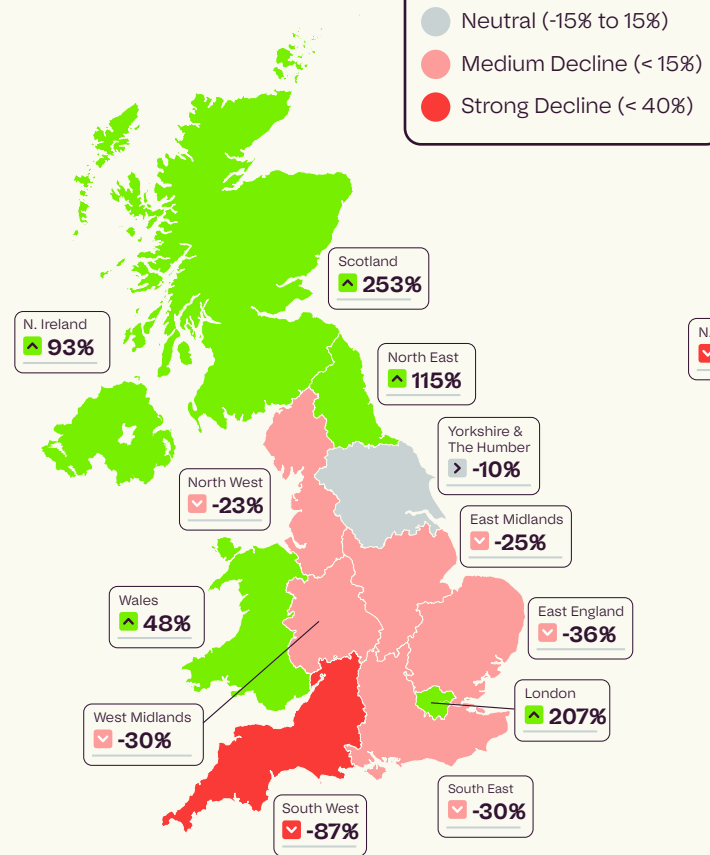
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- Most regions saw weak planning approvals, while project-start performance was mixed
- London led project starts, tripling year-on-year
- Scotland bucked the trend in planning approvals, rising four-digits year-on-year

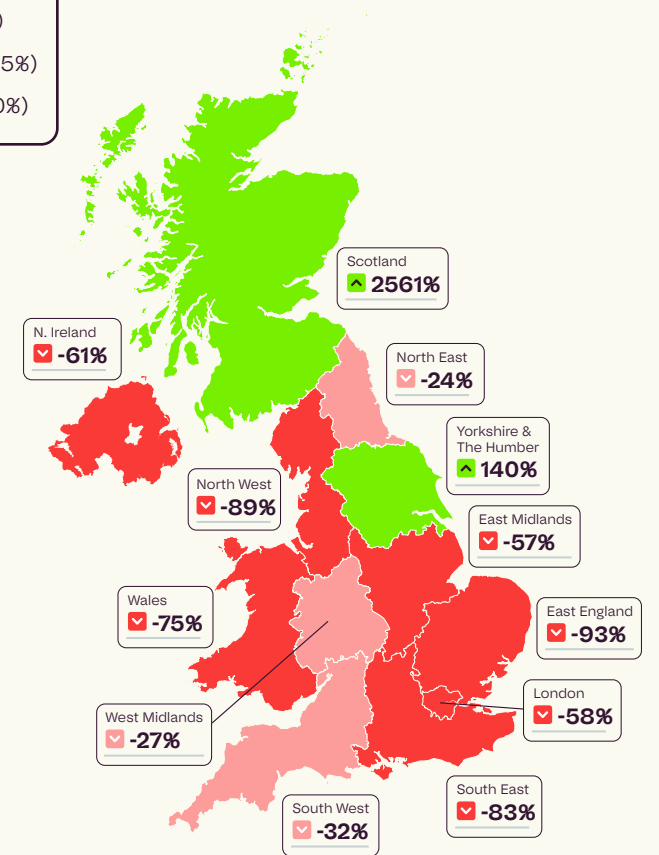
London was the most active region for project starts, with a 207% increase year-on-year to £420 million, accounting for 35% of the total value. Scotland also performed well, tripling year-on-year (+253%) to £80 million (7% share).

In planning approvals, the West Midlands led with a 21% share, though approvals declined 27% year-on-year. Scotland saw the sharpest growth, increasing four-digits year-on-year to £34 million (6% share).

Changes in Health Starts
on a Year Earlier



Changes in Health Planning Approvals
on a Year Earlier



Education

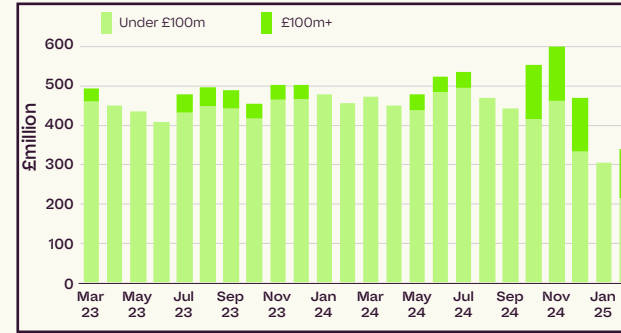
Overview

- ▼ **31% decrease** in project starts year-on-year
- ▼ **12% decrease** in main contract awards from last year
- ▼ **26% decrease** in detailed planning approvals compared to the previous year

The education sector had a poor three-month period to February, with declines in project starts, main contract awards, and planning approvals both quarter-on-quarter and year-on-year.

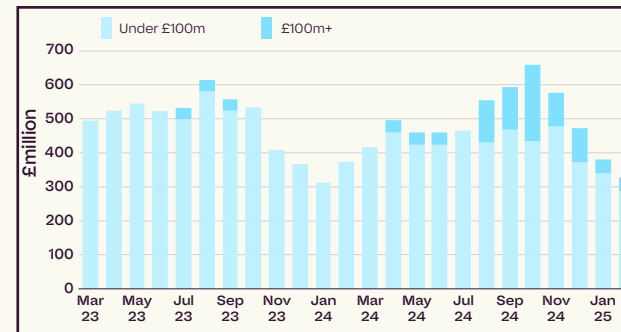
A weak development pipeline signals further declines in both major and smaller project starts in the coming months. However, the sector is expected to grow by 3% in 2025, with school building projects driving activity.

Detailed Planning Approvals



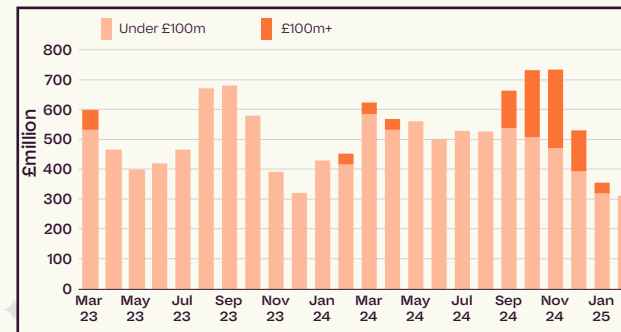
Source: Glenigan

Main Contract Awards



Source: Glenigan

Education Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	643	375	1,018
YoY	-53%		-26%
Prev. 3 months	-54%	-9%	-43%
Prev. 3 months (SA)	-49%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	863	120	983
YoY	-23%		-12%
Prev. 3 months	-40%	-60%	-43%
Prev. 3 months (SA)	-30%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	936	0	936
YoY	-25%	-100%	-31%
Prev. 3 months	-34%	-100%	-57%
Prev. 3 months (SA)	-31%		

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Education

Types of projects started

Despite the overall decline, universities performed well year-on-year.

- Schools accounted for the largest share (60%), totaling £558 million, but fell 44% year-on-year
- Universities, the second-largest category (31%), rose 78% year-on-year to £287 million
- Colleges declined 52% year-on-year, totalling £63 million

Types of Education Projects Started

Three months to February 2025

	£ million	Percentage
Colleges	63	7%
Other Education	28	3%
Schools	558	60%
Universities	287	31%
Total	936	100%

Project Spotlight

University of Edinburgh School of Biological Sciences

Detailed plans have been approved for the University of Edinburgh School of Biological Sciences development. A main contractor is yet to be appointed on the £90 million scheme, with work due to be completed in Q2 2028.

PROJECT ID: 17378881

IMAGE SOURCE: BMJ ARCHITECTS

£90m



Education League Tables

March 2024 to February 2025

Contractors	Projects	£m
Kier	33	628
Bowmer & Kirkland	26	477
Morgan Sindall	44	455
Multiplex Constr.	1	300
Robertson	13	251
Royal BAM	10	224
Woodvale Constr.	3	189
Lowry Build. & Civil Eng.	2	188
Willmott Dixon	14	170
Tilbury Douglas	14	169

Clients	Projects	£m
Dep. for Education	88	809
Univ. of Glasgow	3	314
CPD	1	188
Aberdeen CC	6	135
Univ. of the W. of Eng.	2	133
Bowmer & Kirkland	9	104
Univ. of East Anglia	3	97
King's Coll. London	4	90
Kier Group	6	87
Hampshire C.C.I	13	83

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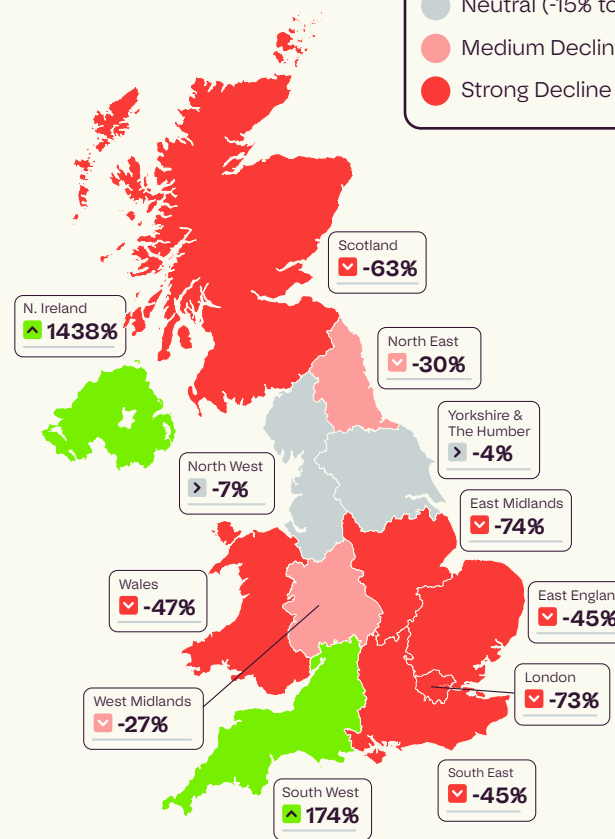
Regional

- Most regions saw declines in project starts and planning approvals
- Northern Ireland experienced four-digit growth in both categories
- London had a poor period for both starts and approvals

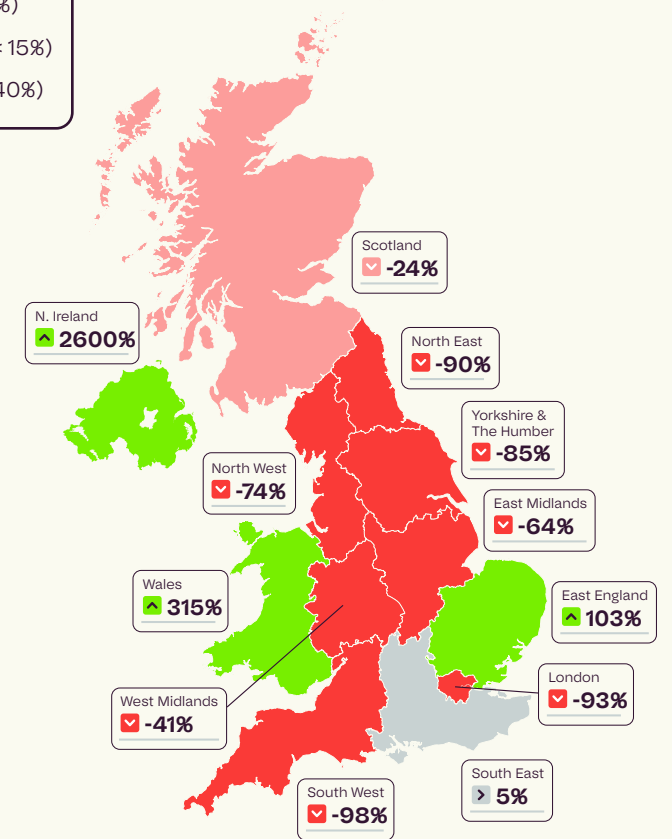
The North East led in project starts at £122 million (13% share), though this marked a 30% decline year-on-year. Northern Ireland performed exceptionally well, rising 15 times year-on-year to £93 million (10% share).

In planning approvals, Northern Ireland dominated with a 38% share, increasing 27 times year-on-year. The East of England also bucked the trend, doubling year-on-year to £105 million (10% share).

Changes in Education Starts on a Year Earlier



Changes in Education Planning Approvals on a Year Earlier



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Community & Amenity

Overview

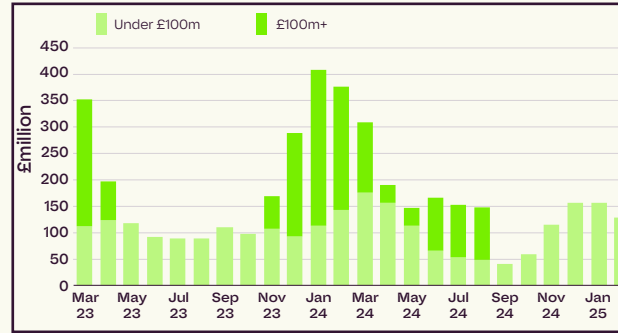
- ▲ **8% increase** in project starts year-on-year
- ▼ **44% decrease** in main contract awards from last year
- ▼ **66% decrease** in detailed planning approvals compared to 2023

The community & amenity sector performed well quarter-on-quarter, with growth in project starts, main contract awards, and planning approvals. However, year-on-year, main contract awards and approvals declined.

The government's £2.3 billion investment in prisons has boosted construction activity, and the £500 million British Library Extension is set to start this year. Additionally, defense spending is increasing, making the military sector one to watch.

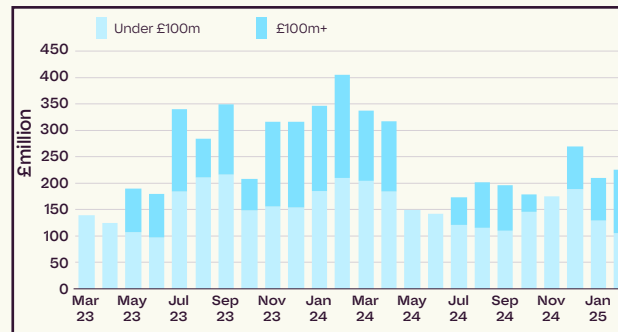
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Detailed Planning Approvals



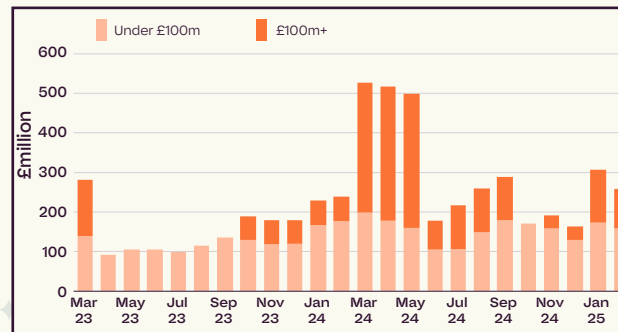
Source: Glenigan

Main Contract Awards



Source: Glenigan

Community & Amenity Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	387	-	387
YoY	-10%	-100%	-66%
Prev. 3 months	12%		12%
Prev. 3 months (SA)	-12%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	317	359	675
YoY	-50%	-39%	-44%
Prev. 3 months	-40%		28%
Prev. 3 months (SA)	-44%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	474	300	774
YoY	-11%	61%	8%
Prev. 3 months	0%	196%	34%
Prev. 3 months (SA)	10%		

Community & Amenity

Types of projects started

Growth in the community & amenity sector was driven by three key areas, while the rest declined.

- Prison project starts surged over 200 times year-on-year to £543 million, driven by a £300 million prison development in Leicestershire
- Government buildings more than doubled, reaching £153 million
- Places of worship (4% share) rose 82% year-on-year to £27 million

Types of Community & Amenity Projects Started

Three months to February 2025

	£ million	Percentage
Blue Light	20	3%
Government Buildings	153	20%
Law Courts	-	0%
Local Facilities	29	4%
Military	1	0%
Places of Worship	27	4%
Prisons	543	70%
Total	774	100%

Project Spotlight

Ashbourne Community Link Hub

Work has started on-site for the Ashbourne Community Link Hub development in Ashbourne, Derbyshire. Messenger Construction has been appointed as main contractor on the £6.4 million scheme, with work due to be completed in Q2 2026.

PROJECT ID: 19178712

IMAGE SOURCE: DESIGN AND ACCESS STATEMENT

£6.4m



Community & Amenity League Tables

March 2024 to February 2025

Contractors	Projects	£m
Kier	17	1,118
Galliford Try	20	254
Lendlease	1	159
Bowmer & Kirkland	2	96
Morgan Sindall	10	56
John Sisk & Son	1	54
Neilcott Constr.	5	33
Story Contracting	1	29
Speller Metcalfe	5	28
Andrew Scott	3	27

Clients	Projects	£m
Scottish Prison Serv.	3	685
Ministry of Defence	13	533
Ministry of Justice	26	242
Home Office	23	111
HM Customs & Excise	1	96
Science of The Soul	1	80
HM Prison & Probation	1	58
Borough of Haringey	1	54
Gosport Bor. Council	1	51
Ministry of Housing, Com. and Local Gov.	8	39

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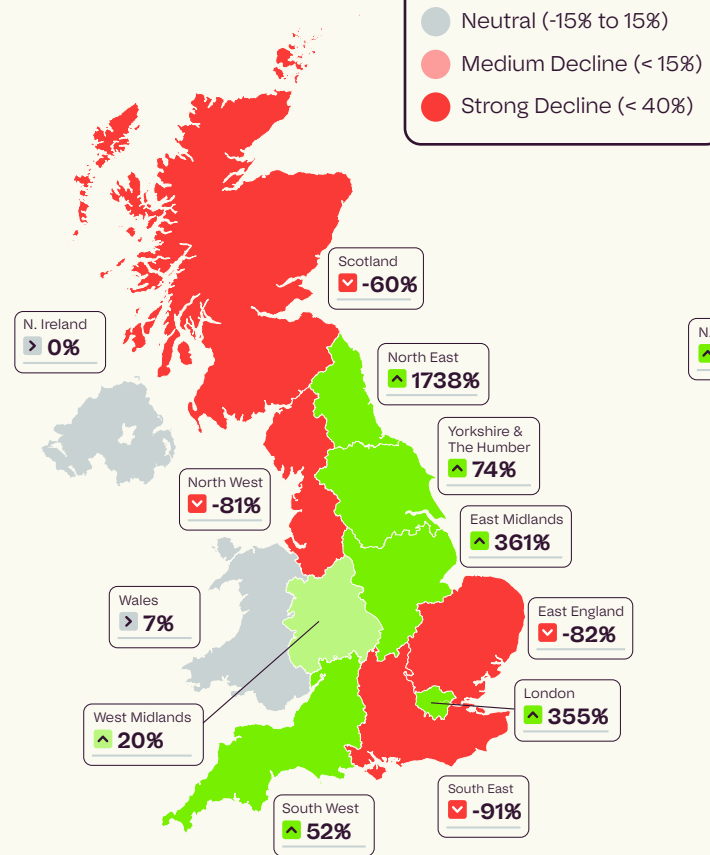
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- Most regions experienced growth in project starts
- Only four regions saw growth in detailed planning approvals
- Yorkshire & the Humber showed strong growth in both starts and approvals

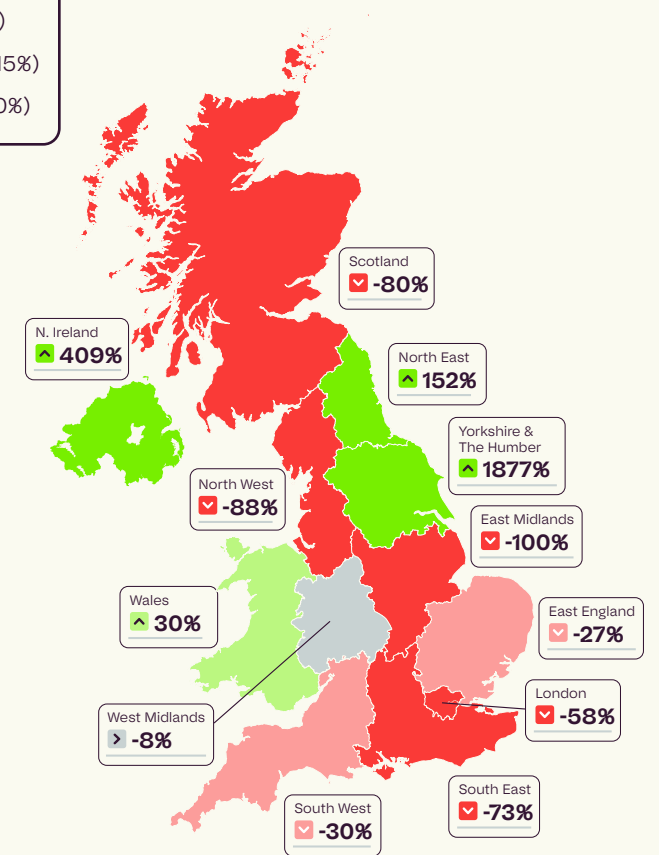
The East Midlands led project starts, totaling £347 million, largely due to the £300 million HMP Gartree 2 prison. This pushed regional starts up 361% year-on-year. The North East (15% share) also grew more than 18 times, primarily due to the £96 million Newcastle Government Hub Design & Build Fit Out project.

The South East dominated planning approvals, despite a 73% decrease in value. Yorkshire & the Humber, however, saw the strongest growth, with approvals rising nearly 20 times year-on-year to £81 million (21% share).

Changes in Community & Amenity Starts on a Year Earlier



Changes in Community & Amenity Planning Approvals on a Year Earlier



Civil Engineering Overview

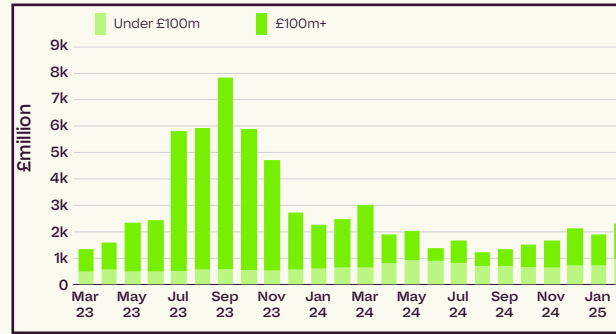
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- ▼ **63% decrease** in project starts year-on-year
- ▲ **51% increase** in main contract awards against the preceding three months
- ▲ **39% increase** in detailed planning approvals compared to the preceding three months

The civil engineering sector had a challenging period, with project starts declining sharply year-on-year and quarter-on-quarter. However, main contract awards and planning approvals saw strong growth compared to the previous quarter, with main contract awards also rising year-on-year.

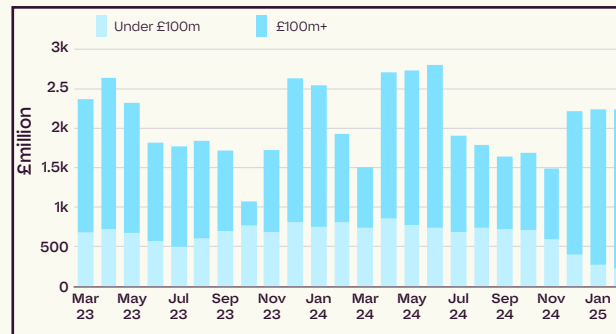
Growth in main contract awards was driven by major projects (£100 million or more), which surged 125% quarter-on-quarter and 81% year-on-year. The infrastructure sector helped fuel this growth, while the utilities sector supported the increase in planning approvals.

Detailed Planning Approvals



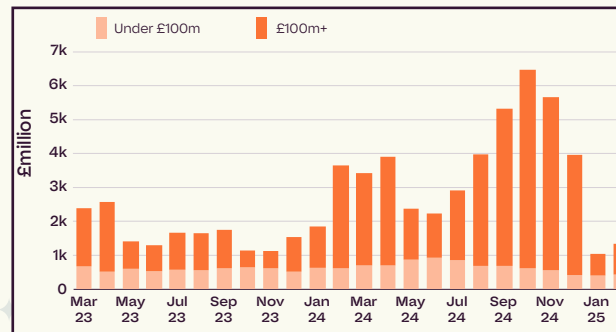
Source: Glenigan

Main Contract Awards



Source: Glenigan

Civil Engineering Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	2,925	3,984	6,909
YoY	50%	-27%	-7%
Prev. 3 months	50%	31%	39%
Prev. 3 months (SA)	11%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	660	6,067	6,727
YoY	-73%	81%	16%
Prev. 3 months	-63%	125%	51%
Prev. 3 months (SA)	-61%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,297	2,707	4,004
YoY	-30%	-70%	-63%
Prev. 3 months	-23%	-82%	-76%
Prev. 3 months (SA)	-4%		

Civil Engineering

Types of projects started

Project-starts in the civil engineering sector saw a broad decline across all categories.

- Roads accounted for the largest share (12%) at £462 million, but declined 63% year-on-year
- Energy projects (11% share) totalled £426 million, a 34% decline from the previous year
- Waste projects dropped 66% year-on-year, totalling £75 million

Types of Civil Engineering Projects Started

Three months to February 2025

	£ million	Percentage
Airports	-	0%
Other Civils	2,972	74%
Rail	27	1%
Roads	462	12%
Harbours/Ports	8	0%
Energy	459	11%
Water Industry	-	0%
Waste	75	2%
Total	4,004	100%

Project Spotlight

Tata Steel Port Talbot

Detailed plans have been approved for the £1.25 billion Tata Steel Port Talbot development. Sir Robert McAlpine has been appointed as civil contractor on the project, with work expected to be completed in Q4 2028.

PROJECT ID: 14349430

IMAGE SOURCE: TATA STEEL

£1.25b



Civil Engineering League Tables

March 2024 to February 2025

Contractors	Projects	£m
Royal BAM	24	2,365
Ferrovial	3	1,617
Downing	17	1,318
Newarthill	1	1,250
Balfour Beatty	40	988
Morgan Sindall	14	760
Bouygues UK	11	591
Kier	23	581
Murphy	6	511
Hemiko	1	500

Clients	Projects	£m
Dep. for Transport	54	4,614
Network Rail	39	4,229
SSE Plc	10	2,258
Statoil (U.K.)	1	2,017
Tata Steel	1	1,250
National Grid	5	1,044
SSEN Transmission	8	904
Hemiko	1	500
Kingsway Solar Farm	1	500
GE Hitachi Nuclear	1	500

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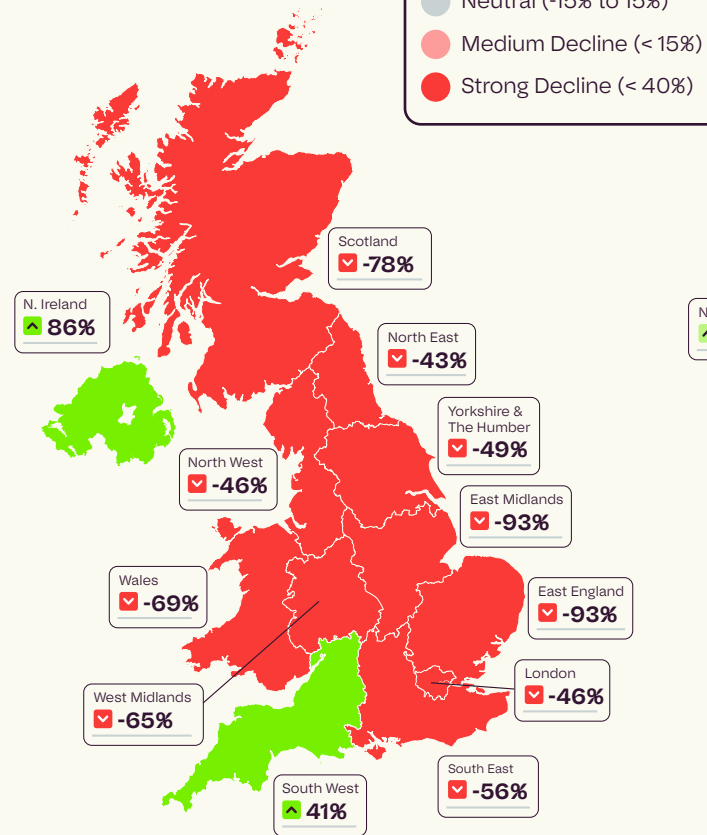
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- Northern Ireland defied the national trend, showing growth in both project starts and planning approvals
- London saw declines in both project starts and planning approvals
- Wales and the East Midlands saw sharp growth in planning approvals

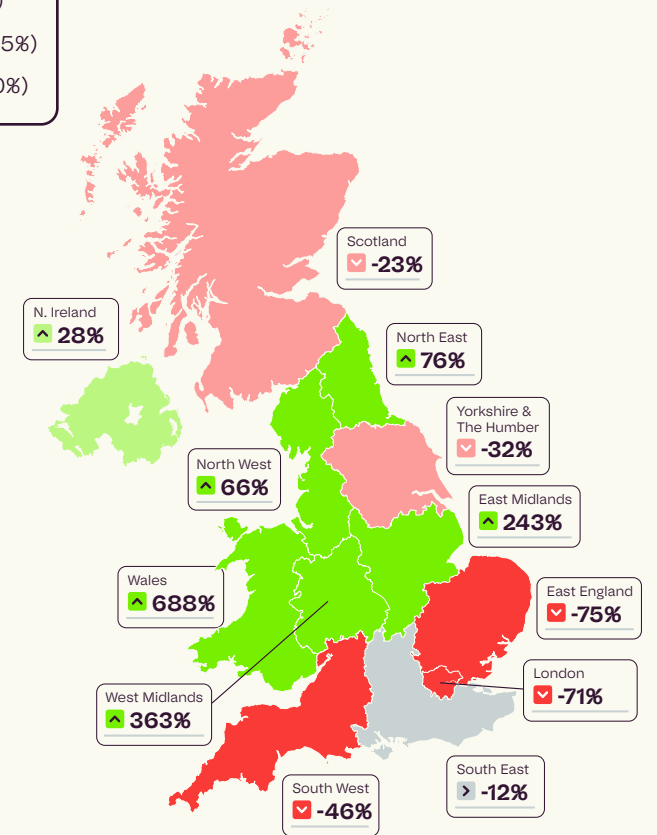
Yorkshire & the Humber was the most active region for project starts, accounting for 66% of the total at £2,626 million, despite a 49% decline year-on-year. Northern Ireland bucked the national trend, rising 86% to £41 million.

For planning approvals, Wales accounted for the largest share (21%), experiencing 688% growth year-on-year to £1,427 million, almost entirely due to the Tata Steel Port Talbot development. The East Midlands followed closely (20% share), tripling in value to £1,406 million.

Changes in Civil Engineering Starts
on a Year Earlier



Changes in Civil Engineering Planning Approvals
on a Year Earlier





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