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Construction Review

Reflecting activity to the end of March 2025

April 2025

- Detailed **planning approvals increased 8%** against the preceding three months
- **20% decrease in main contract awards** against the preceding three months
- **4% 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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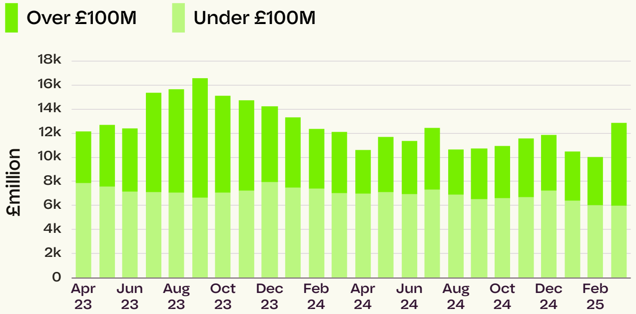
Executive Summary

- Detailed planning approvals increased **6%** against the previous year.
- **12%** decrease in main contract awards against the previous year.
- **21%** decrease in project starts against the previous year.

A scarcity of major projects (over £100 million) commencing on-site lead to an overall 21% decline in project starts against a year ago. Underlying projects (under £100 million) also fared poorly, declining both against the preceding three months and a year earlier. Overall main contract awards were also weak, despite major main contract awards being up sharply on a year ago. More encouragingly, a strong rise in detailed planning approvals will provide a much-needed boost to the development pipeline, with a marked increase in major planning approvals overshadowing a decline in underlying project approvals.

Whilst geopolitical uncertainty over US tariff policy and the adverse impact on economic growth are likely to dampen investor activity near term, the strengthening of the development pipeline will enable a swift upturn in project starts as confidence returns.

Detailed Planning Approvals

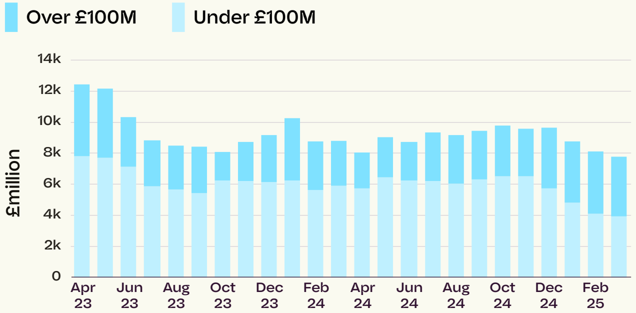


Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£million	17,901	20,628	**38,529**
YoY	-15%	35%	**6%**
Prev. 3 months	-17%	48%	**8%**
Prev. 3 months (SA)	-8%		

Source: Glenigan. Three month average

Main Contract Awards

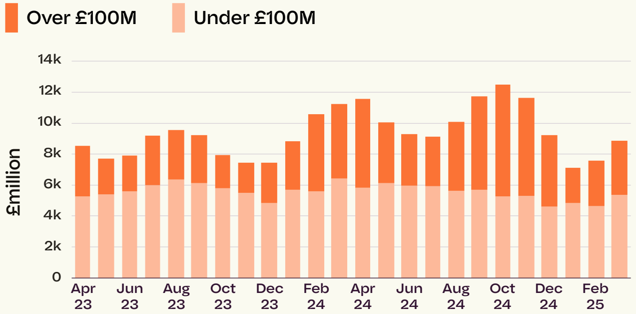


Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	11,847	11,438	**23,285**
YoY	-33%	32%	**-12%**
Prev. 3 months	-31%	-2%	**-20%**
Prev. 3 months (SA)	-27%		

Source: Glenigan. Three month average

Starts



Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	16,100	10,463	**26,563**
YoY	-16%	-28%	**-21%**
Prev. 3 months	17%	-25%	**-4%**
Prev. 3 months (SA)	-19%		

Source: Glenigan. Three month average

Economic Outlook

US tariffs cast a shadow over global and UK growth prospects

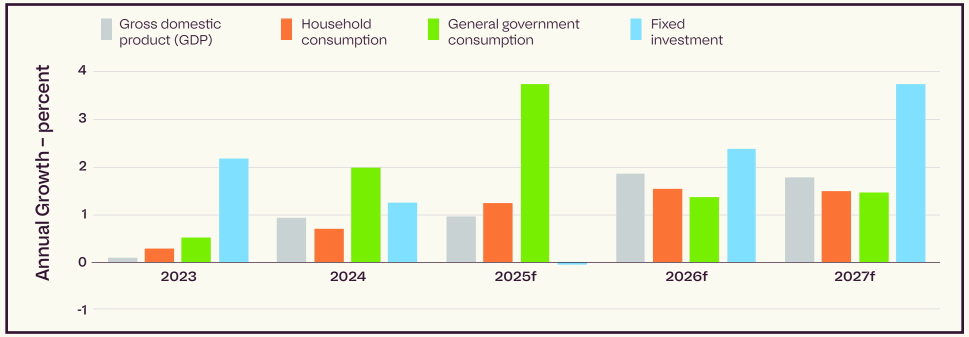
- Chancellor's spring statement confirms increased government investment
- US tariffs undermine UK growth forecasts and government finances
- UK construction product exports vulnerable to tariff rises

The Chancellor confirmed a substantial 13% increase in departmental capital budgets during 2025/26. Important construction related areas such as health, education and housing are among those benefitting from the increase in capital funding. The accompanying OBR economic forecast downgraded expected UK economic growth to just 1% this year but anticipated a progressive improvement in economic activity for 2026 onwards.

Unfortunately, both the Spring Statement and OBR forecast have been overshadowed by the barrage of US tariffs which are set to damage global and UK economic growth. The tariffs will also impact UK construction markets. The UK exports around £1 billion of construction products to the US annually, accounting for 12% of export sales.

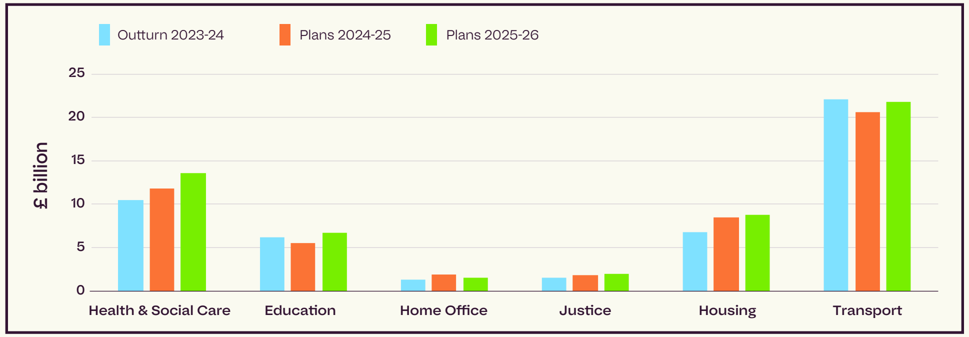
In addition, UK construction markets will be disrupted, as overseas manufacturers target alternative markets such as the UK. This threatens to intensify competition and destabilise prices. UK manufacturers will need to work quickly and hard to win specifications and lock-in their products' use on planned projects, while contractors will need to be alert to potential price volatility when costing and bidding for work.

UK Economy



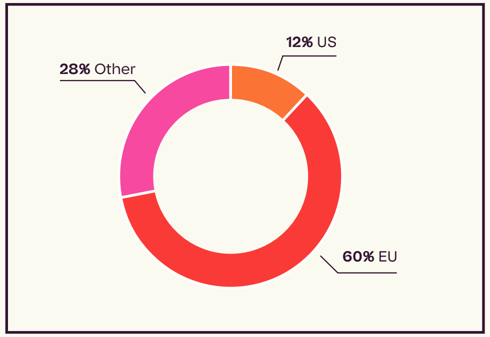
Source: xxx

Government Departmental Capital Funding



Source: Budget Autumn 2024

UK Exports of Construction Products



Source: Department for Business & Trade

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Top 50 Contractors

Last 12 month totals:	989 projects	£35,961m

Last month totals:	90 projects	£5,654m

April 2024 to March 2025

	Contractors	#	£m	★
1	Kier	111	3122	0
2	Royal BAM	43	2634	0
3	Morgan Sindall	217	1924	0
4	Mace	15	1788	11
5	Sir Robert McAlpine	5	1617	0
6	Ferrovial	3	1617	-2
7	Ringway Group	3	1407	41
8	Multiplex	5	1285	4
9	Laing O'Rourke	4	1265	-3
10	Galliford Try	95	1260	-2
11	Balfour Beatty	45	1252	-4
12	McLaren	16	1051	1
13	M Group Services	16	946	NEW
14	Graham Construction	21	857	3
15	Bouygues	23	855	-4
16	Winvic	14	844	-7
17	JRL Group	5	708	-1
18	Bowmer & Kirkland	33	691	-4
19	Costain	6	648	7
20	John Sisk & Son	10	647	-10
21	RG Group Ltd	5	550	-2
22	Wates	27	500	-4
23	Robertson	39	482	-2
24	TSL Projects	4	467	23
25	Hochtief Group	2	463	-1
26	Hitachi	2	450	NEW
27	McAleer & Rushe Contracts	5	430	-2
28	G W Highways	1	400	NEW
29	Enka	2	356	0
30	Spencer Group	4	327	-3
31	Willmott Dixon	44	321	-9
32	VolkerWessels	13	312	-2
33	Caddick Group	14	312	-1
34	HG Construction	8	312	12
35	LendLease	3	311	-2
36	Bauer	1	300	0
37	VINCI	29	295	-2
38	United Living	6	269	-4
39	Hill Group	17	250	10
40	Aecon	1	250	10
41	Glencar Construction	14	238	NEW
42	Tilbury Douglas	26	229	NEW
43	Breyer Group	7	227	NEW
44	PMC Construction & Dev	3	222	NEW
45	Axis Group UK	10	219	NEW
46	OCU Group	3	217	NEW
47	G2 Design	1	216	NEW
48	Zhejiang Construction	1	210	NEW
49	Lowry Building	3	209	NEW
50	Vistry	4	199	NEW

March 2025

	Contractors	#	£m	★
1	Ringway Group	1	1155	NEW
2	M Group Services	1	840	NEW
3	Mace	3	692	NEW
4	G W Highways	1	400	NEW
5	Hitachi	1	300	NEW
6	Kier	14	268	-5
7	Costain	1	196	11
8	Bowmer & Kirkland	3	189	4
9	Galliford Try	8	162	2
10	Legendre Construction	2	103	7
11	Axis Group UK	1	86	NEW
12	Bouygues	3	81	-8
13	Goldbeck Bower	1	78	NEW
14	PHS Home Solutions	1	57	NEW
15	Esh Group	1	57	NEW
16	RE: GEN Group	1	57	11
17	Morgan Sindall	6	55	4
18	Glencar Construction	5	54	10
19	HG Construction	2	53	NEW
20	Watkin Jones	1	50	NEW
21	Thomas Sinden	1	46	9
22	Graham Construction	2	45	-19
23	Root Power (South)	1	40	NEW
24	Cfield Construction	1	35	NEW
25	Howard Civil Engineering	1	33	NEW
26	Andrew Scott	2	32	NEW
27	Royal BAM	2	31	-25
28	John Sisk & Son	1	30	NEW
29	GMI Construction	1	30	-5
30	E Manton	1	30	NEW
31	Huyton Asphalt	1	25	NEW
32	The Dodd Group	1	25	NEW
33	Graham Asset Management	1	25	NEW
34	Dowhigh	1	25	NEW
35	Jones Bros	1	24	NEW
36	Willmott Dixon	1	21	13
37	Faircloth	1	20	NEW
38	C G Fry & Son	1	20	NEW
39	E G Carter & Co	1	19	1
40	Building Services NOW	1	18	NEW
41	Nordex	1	17	NEW
42	OCU Group	1	17	NEW
43	Walker Construction UK	1	16	NEW
44	Seddon Group	1	16	NEW
45	JSSH	1	15	NEW
46	PLP Construction	1	14	NEW
47	Road Safety Contracts	1	14	NEW
48	Contract Services	1	14	NEW
49	Greentown Environmental	1	14	NEW
50	Henry Group	1	13	NEW

★ Change in ranking since the previous period

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Top 50 Clients

April 2024 to March 2025

	Clients	#	£m	★
1	Department for Transport	50	4302	0
2	Department of Health	181	2012	1
3	Tata Steel Group	1	1250	1
4	Hertfordshire County Council	2	1166	NEW
5	Oxfordshire County Council	11	911	NEW
6	Ministry of Defence	31	804	0
7	British Land	6	758	35
8	National Grid	8	725	-3
9	Scottish Prison Service	3	685	-2
10	Network Rail	38	666	-8
11	Department for Education	67	639	-3
12	Axa Insurance	2	584	NEW
13	Amazon	4	523	-3
14	North Lanarkshire Council	7	504	-5
15	Kingsway Solar Farm	1	500	-4
16	GE Hitachi Nuclear Energy	1	500	-4
17	Kent County Council	8	437	NEW
18	Tritax Group	3	422	27
19	Cons and Procurement	12	400	-6
20	Peabody Trust	5	346	-6
21	Greystar Developments	5	343	-6
22	John Lewis Partnership	4	342	-6
23	Greater London Authority	6	334	-3
24	Scottish Government	4	323	-6
25	University of Glasgow	4	315	-6

	Clients	#	£m	★
26	SSE	7	314	3
27	MVV Environment Devonport	1	300	NEW
28	Ardersier Port	1	300	-7
29	Mitsubishi Estate London	1	300	-7
30	Marriott International	1	300	NEW
31	GLP	2	284	-14
32	Ministry of Justice	30	265	-4
33	Milton Keynes Bor Council	5	254	-9
34	Anchor Housing	4	250	-9
35	Land Securities Group	4	249	-12
36	Kingston-Upon-Thames	5	247	-10
37	The City of Cardiff Council	11	244	NEW
38	Aberdeen City Council	19	233	-7
39	Home Office	26	230	-9
40	Rolls-Royce	2	219	-13
41	Elements Green	1	216	NEW
42	London & Quadrant Housing	2	206	-8
43	Middlesbrough Bor Council	3	203	-8
44	JTRE London	1	200	-5
45	Southwark Charities	1	200	-7
46	Havisham Sarl	1	200	-6
47	Urenco UK	1	196	NEW
48	Ass. British Ports Holdings	3	196	-15
49	Siemens	4	195	-12
50	Welsh Government	6	187	-9

March 2025

	Clients	#	£m	★
1	Hertfordshire County Council	1	1155	NEW
2	Oxfordshire County Council	1	840	NEW
3	British Land	1	600	25
4	Kent County Council	3	407	NEW
5	MVV Environment Devonport	1	300	NEW
6	Urenco UK	1	196	NEW
7	CCLRC	1	85	NEW
8	Fc100	1	82	NEW
9	The City of Cardiff Council	1	78	NEW
10	Ministry of Defence	5	71	-4
11	Scottish Borders Council	2	57	NEW
12	King's College London	1	50	NEW
13	Donard (Bristol)	1	48	NEW
14	Metropolitan Housing	1	46	NEW
15	Midlothian Council	1	45	NEW
16	Dept for Infrastructure	1	41	NEW
17	YLEM energy	1	40	NEW
18	London Bor of Havering	1	39	NEW
19	Sandwell Met Bor Council	3	36	NEW
20	Dalata Cardiff	1	35	NEW
21	Mill Rig Wind Farm	1	33	NEW
22	Ivel	1	33	NEW
23	Cardiff and Vale College	1	33	NEW
24	WEPco	1	33	NEW
25	Kirklees Met Council	2	32	18

	Clients	#	£m	★
26	Ministry of Justice	3	29	-14
27	Department of Health	7	27	-24
28	SeaHives	1	25	NEW
29	Betteshanger Sustainable Pks	1	25	NEW
30	Coopervision	1	25	NEW
31	Ryger Maidenhead	1	24	NEW
32	Amazon UK Services	2	21	NEW
33	Clarion Housing Group	1	21	NEW
34	Harwell Science & Innovation	1	21	-18
35	Together Housing Group	2	20	NEW
36	Taunton School	1	20	NEW
37	Wiltshire Council	1	19	NEW
38	Essex County Council	1	18	NEW
39	Shepway District Council	1	16	NEW
40	Efficiency North	1	15	NEW
41	Prosper	1	15	NEW
42	Fife Council	1	15	NEW
43	Trent & Dove Housing	1	15	NEW
44	Oxford Diocesan Schools	1	13	NEW
45	Bank of New York Mellon	1	13	NEW
46	Swansea City Council	1	12	NEW
47	Nth Yorkshire County Council	1	11	NEW
48	Bridgend County Bor Council	1	10	NEW
49	Tilbury Douglas	1	10	NEW
50	Awen Cultural Trust	1	10	NEW

★ Change in ranking since the previous period

Glenigan Index

Construction starts suffered in the three months to March, poor performances across key sectors accelerated the decline. However, community and amenity was a relative bright spot, rising against the preceding three months and previous year.

- The value of underlying work starting on-site during the three months to March **decreased 19%** and remained 16% below 2024 levels.
- Residential construction starts **decreased 12%** on the preceding three months and decreased 12% against 2024 figures.
- Non-residential project-starts **decreased 24%** against the preceding three months to stand 22% down on a year ago.
- Civils work starting on-site **declined 28%** against the preceding three months and decreased 18% against the previous year.

Sector Analysis

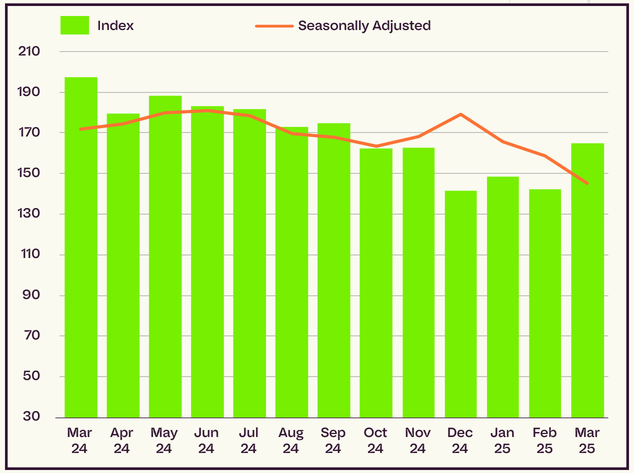
	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
Residential	8,109	19%	-12%	-12%
Industrial	1,283	12%	-28%	-7%
Offices	1,318	42%	-8%	3%
Retail	353	8%	-34%	-37%
Hotel & Leisure	720	-3%	-30%	-28%
Education	1,068	-1%	-24%	-39%
Health	907	-2%	-35%	-36%
Community & Amenity	563	31%	5%	1%
Civil Engineering	1,779	25%	-28%	-16%
Total	**16,100**	**17%**	**-19%**	**-16%**

Regional Analysis

	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
East of England	1,591	-7%	-23%	-1%
East Midlands	1,535	22%	-23%	16%
London	1,852	37%	-10%	-40%
North East	872	78%	6%	17%
North West	1,539	17%	-10%	-35%
Northern Ireland	362	-24%	-43%	-11%
Scotland	1,379	1%	-30%	-21%
South East	2,132	13%	-11%	-18%
South West	1,630	16%	-14%	3%
Wales	606	8%	-28%	-3%
West Midlands	1,410	54%	-11%	-21%
Yorkshire & the Humber	1,193	10%	-24%	-14%

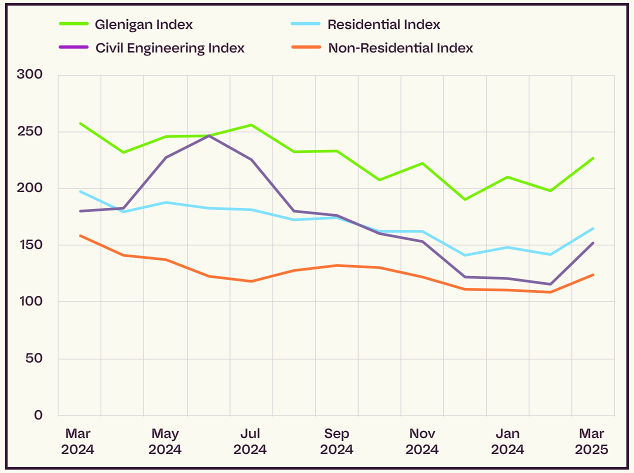
N.B. Index 2006 =100

Glenigan Index



Source: Glenigan

Indices Growth



Source: Glenigan

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Expert Insights
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Economic Outlook
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Glenigan Index
Sector Analysis
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Industrial
Offices
Retail
Hotel & Leisure
Health
Education
Community & Amenity
Civil Engineering

Housing

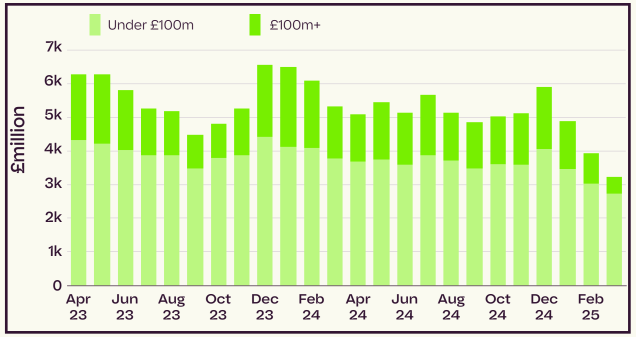
Overview

- **19% decrease** in project starts year-on-year
- **20% decrease** in main contract awards from last year
- **39% decrease** in detailed planning approvals compared to 2024

The residential sector had a weak first quarter of 2025, with project starts, main contract awards and detailed planning approvals all declining against 2024. However, there was a 24% uptick in projects starting on site against the previous quarter.

The housing market faces continued uncertainty, with stamp duty rising from April alongside a weak economic environment. UK house prices remained flat in March, and buyer demand has weakened in February. But a boost in Social Housing is expected in the future, with the Chancellor recently announcing a £2bn investment plan to support construction of 18,000 new homes.

Detailed Planning Approvals

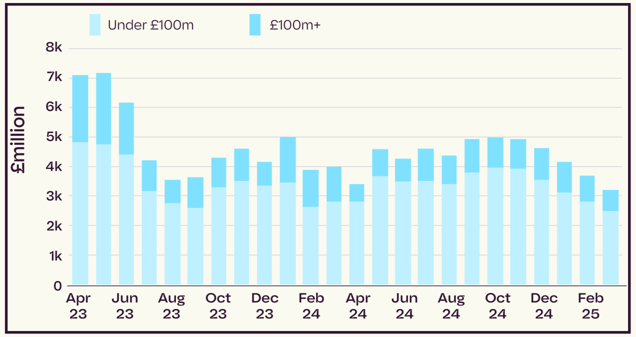


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	8,181	1,524	**9,705**
YoY	-28%	-67%	**-39%**
Prev. 3 months	-33%	-72%	**-45%**
Prev. 3 months (SA)	-23%		

Main Contract Awards

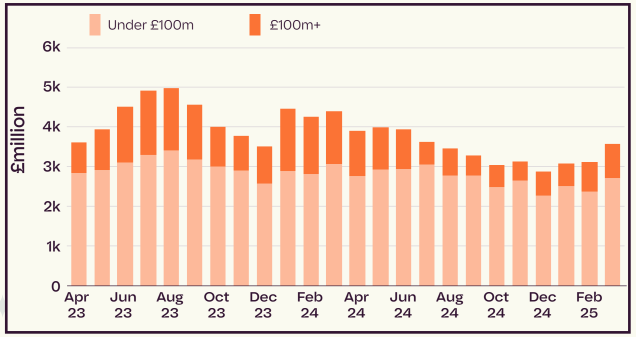


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	7,461	2,135	**9,596**
YoY	-12%	-40%	**-20%**
Prev. 3 months	-30%	-35%	**-31%**
Prev. 3 months (SA)	-24%		

Housing Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	8,109	2,600	**10,710**
YoY	-12%	-35%	**-19%**
Prev. 3 months	19%	42%	**24%**
Prev. 3 months (SA)	-12%		

Housing

Types of projects started

Most categories in the residential sector experienced a decline, with only three having grown on a year ago.

- Private housing accounted for the largest share (57%), having increased 5% year-on-year to total £6,128 million.
- Totalling £1,990 million, private apartments starting on site decreased 50% on a year ago.
- Social sector housing also fell 34% against the previous year, totalling £1,191 million

Project Spotlight

Town Quay, Southampton

Detailed plans have been approved for the £230 million Town Quay, Southampton development. A main contractor is yet to be appointed on the scheme, with work due to be completed in Q3 2027.

PROJECT ID: 23017238

IMAGE SOURCE: HGP ARCHITECTS

Types of Housing Projects Started

Three months to March 2025

	£ million	Percentage
Private Apartments	1,990	**19%**
Elderly Persons Homes	2	**0%**
Private Housing	6,128	**57%**
Private Sheltered Housing	166	**2%**
Social Sector Sheltered Housing	62	**1%**
Social Sector Apartments	336	**3%**
Social Sector Housing	1,191	**11%**
Homes, Hostels Etc.	42	**0%**
Student Accommodation	794	**7%**
Total	10,710	**100%**

Housing League Tables

April 2024 to March 2025

Contractors	Projects	£m
Barratt Redrow	91	2,894
Persimmon	82	2,376
Bloor Homes	39	1,756
Hill	31	1,578
Bellway	52	1,541
Vistry	36	1,524
Taylor Wimpey	36	1,369
Bouygues	10	1,301
RG	6	1,301
Wates	18	1,264

Clients	Projects	£m
Barratt Redrow	100	2,331
Persimmon	89	1,998
Taylor Wimpey	54	1,569
Vistry	61	1,554
Bloor Homes	39	1,449
Bellway	54	1,101
Hill Group	16	759
Berkeley DeVeer	22	597
Ferguson Bidco	38	576
Apollo Management	24	452

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Housing

Regional

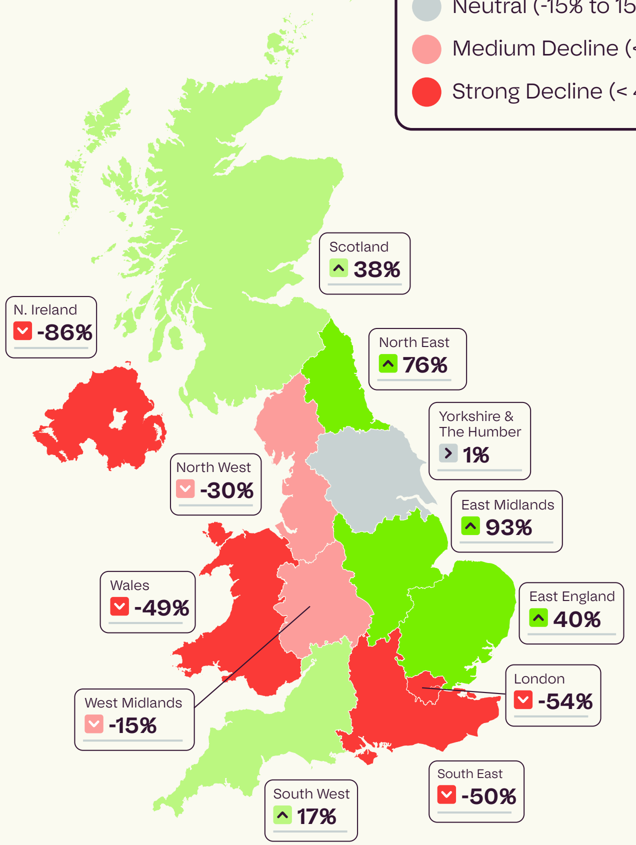
- Despite the nationwide decline, half of the regions experienced growth in project starts
- Regional performance was weak for detailed planning approvals, with only one region increasing year-on-year
- The North East grew in both project starts and detailed planning approvals

London led residential project starts, despite a 54% decline to total £1,373 million. The North West also fell 30% to total £1,271 million. Further decline was prevented by the £570 million Crown Street Phase 3 development in Manchester. The East Midlands, on the other hand, jumped 93% to total £1.336 million.

The capital was also the most active region for detailed planning approvals, accounting for an 18% share, despite a 55% slump year-on-year. The South East accounted for 17%, having slipped back 20%. The North East was the only region to experience growth at 2%, totalling £399 million.

Changes in Housing Starts

on a Year Earlier

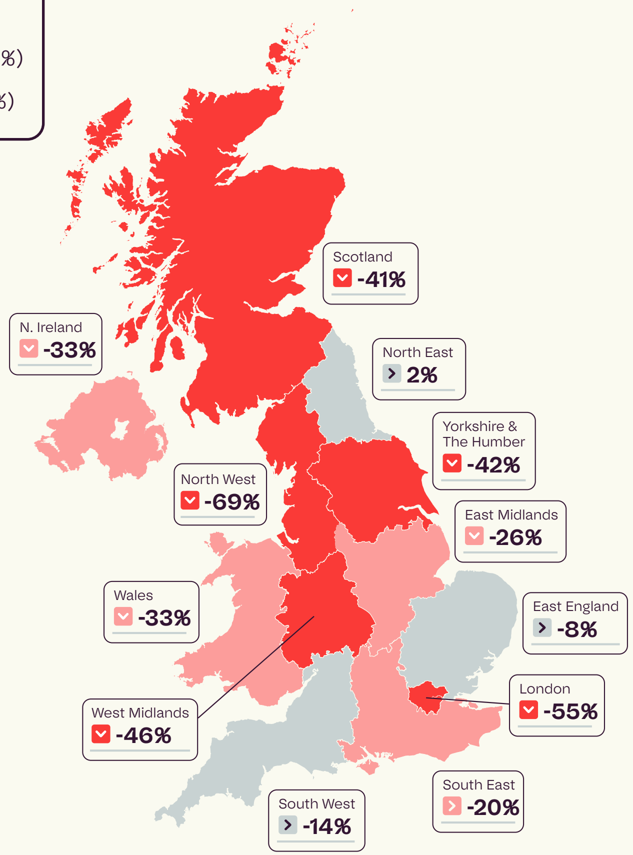


Growth or Decline

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

Changes in Housing Planning Approvals

on a Year Earlier



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Industrial

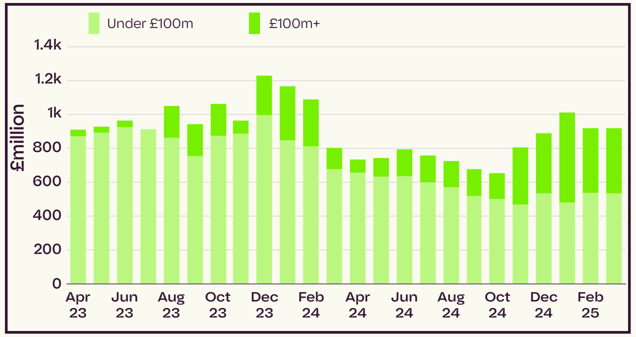
Overview

- **66% increase** in project starts year-on-year
- **45% decrease** in main contract awards from last year
- **15% increase** in detailed planning approvals compared to 2024

Despite the gloomy economic outlook, industrial sector project starts rose sharply against both the previous quarter and a year earlier, driven by strong increases in major projects. Main contract awards, on the other hand, fell against both periods.

The rise in major project starts has been boosted by two major logistics facilities, highlighting the continued appetite for such facilities, despite the current uncertain geo-political landscape.

Detailed Planning Approvals

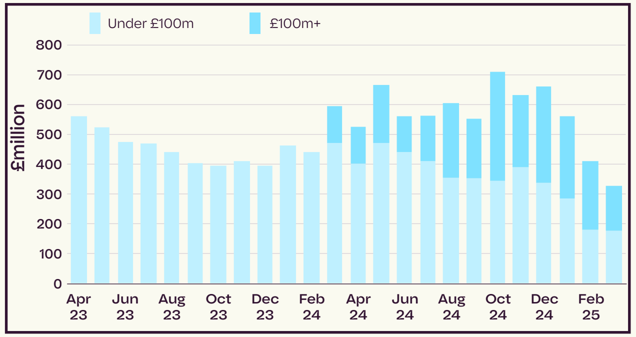


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,604	1,155	**2,759**
YoY	-21%	206%	**15%**
Prev. 3 months	0%	8%	**3%**
Prev. 3 months (SA)	26%		

Main Contract Awards

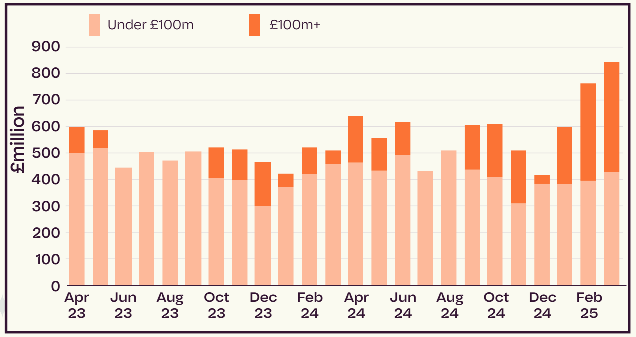


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	531	450	**981**
YoY	-62%	21%	**-45%**
Prev. 3 months	-47%	-54%	**-50%**
Prev. 3 months (SA)	-42%		

Industrial Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,283	1,242	**2,525**
YoY	-7%	722%	**66%**
Prev. 3 months	12%	1142%	**102%**
Prev. 3 months (SA)	-28%		

Industrial

Types of projects started

The overall growth of project starts in the sector was driven by warehousing & logistics, with the remaining two categories having declined year-on-year.

- Warehousing & logistics accounted for 62% of industrial project starts, 298% up on a year ago to total £1,572 million
- Manufacturing fell 15% year-on-year, totalling £896 million, a 35% share of the sector
- Totalling £57 million, other industrial projects accounted for the remaining 2%, a 29% decrease

Project Spotlight

Greene King Brewery

Work has started on the £40 million Greene King Brewery in Bury St Edmunds in Suffolk. A main contractor is yet to be appointed on the scheme with work due to be competed in Q1 2027.

PROJECT ID: 24128313

IMAGE SOURCE: NIRAS ARCHITECTS

Types of Industrial Projects Started

Three months to March 2025

	£ million	Percentage
Manufacturing	896	**35%**
Other Industrial	57	**2%**
Warehousing & Logistics	1,572	**62%**
Total	2,525	**100%**

Industrial League Tables

April 2024 to March 2025

Contractors	Projects	£m
McLaren	11	459
TSL Projects	3	385
Enka	2	356
Winvic	6	244
Balfour Beatty	2	242
Kier	5	228
Bowmer & Kirkland	3	227
Glencar	11	184
Benniman	6	156
Magrock	9	143

Clients	Projects	£m
Amazon	1	500
Tritax	3	387
Rolls-Royce	2	219
T J Morris	1	140
Watts Solar	1	126
Progressive Energy	1	88
Essar Oil	1	88
Vertex Hydrogen	1	88
Johnson Matthey	1	88
GLP	1	84

Glenigan
Powered by Hubexo

Industrial

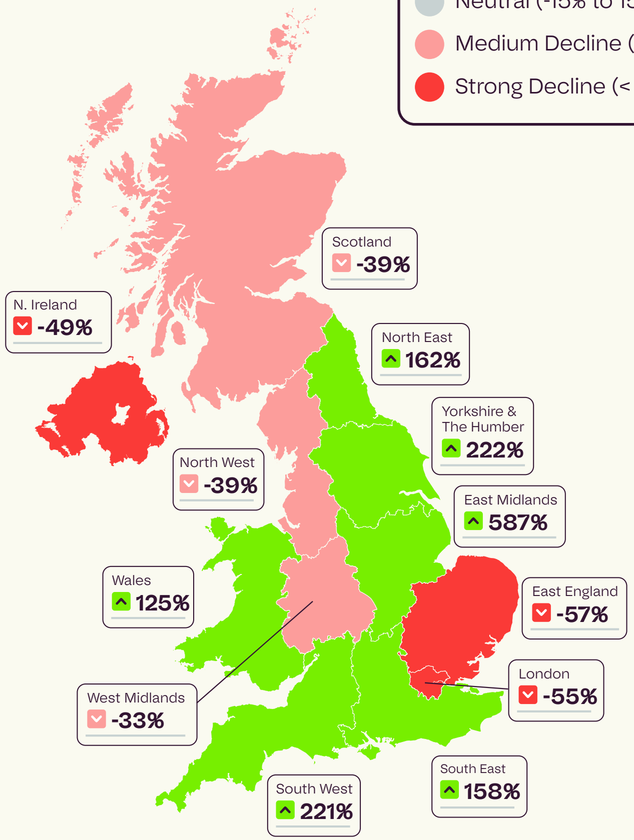
Regional

- Mixed regional performance in project starts, with half of the regions experiencing a decline
- Most regions faced a decline in detailed planning approvals
- The South West, Yorkshire & the Humber and the North East had a strong performance in both project starts and approvals

The South East led project starts in the industrial sector, having tripled on a year ago, totalling £699 million. This growth was boosted by the £280 million PLP South Coldecotte development in Milton Keynes. The East Midlands also jumped nearly seven times, totalling £698 million. Activity in the region was driven by the £269 million Symmetry Park Kettering Phase Unit 01 Plot 1 development.

Yorkshire & the Humber dominated detailed planning approvals. Totalling £671 million, the region grew almost nine times on a year ago, boosted by the £223 million Alexandra Dock, Hull Buildings Development.

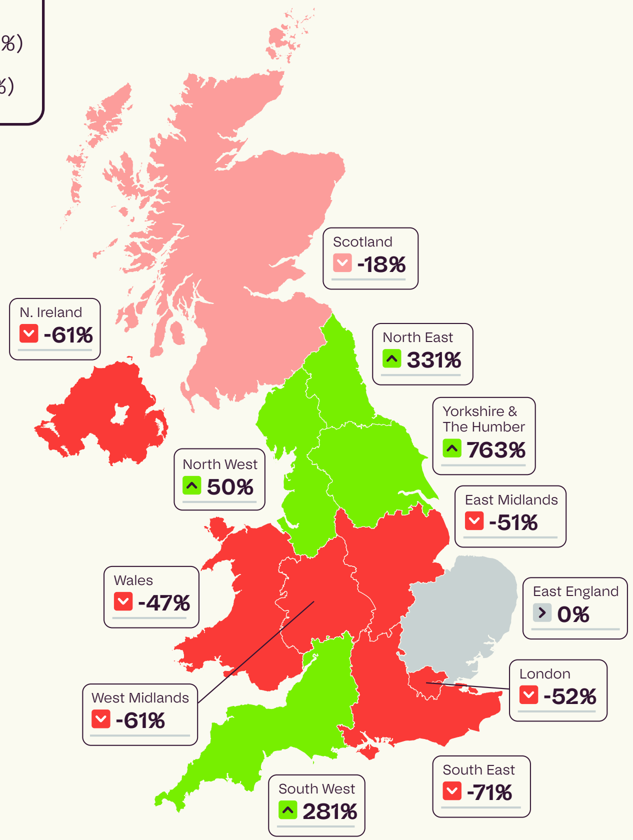
Changes in Industrial Starts
on a Year Earlier



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



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Offices

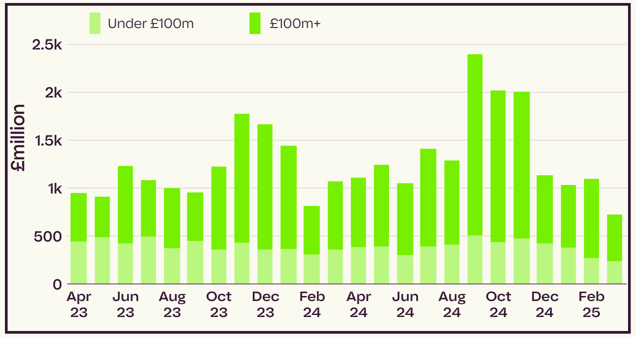
Overview

- **28% increase** in project starts year-on-year
- **41% decrease** in main contract awards from last year
- **32% decrease** in detailed planning approvals compared to 2023

The first quarter of 2025 was strong for office starts, with the sector having grown both year-on-year and quarter-on-quarter. This growth was primarily driven by major projects (£100 million or more). Main contract awards and detailed planning approvals, on the other hand, decreased against both periods.

Data centres are a relatively small but fast expanding segment of the office sector. The surge of investment in AI development, alongside rising demand from more established uses of processing capacity is spurring investment in new data centres. This is expected to help drive sector growth over the next two years. Furthermore, construction of the £360.29 million Epic Long Ashton office campus in Bristol was approved and is due to start in the last quarter of 2025.

Detailed Planning Approvals

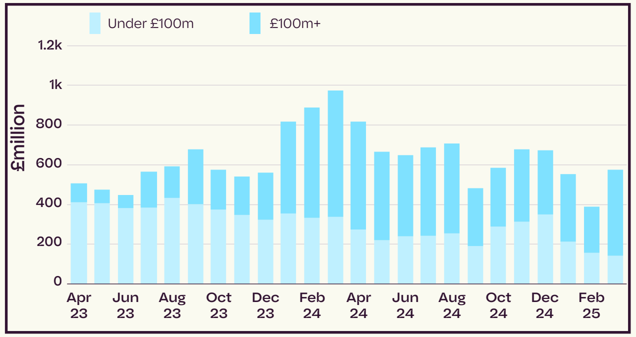


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	704	1,479	**2,184**
YoY	-34%	-31%	**-32%**
Prev. 3 months	-44%	-31%	**-36%**
Prev. 3 months (SA)	-39%		

Main Contract Awards

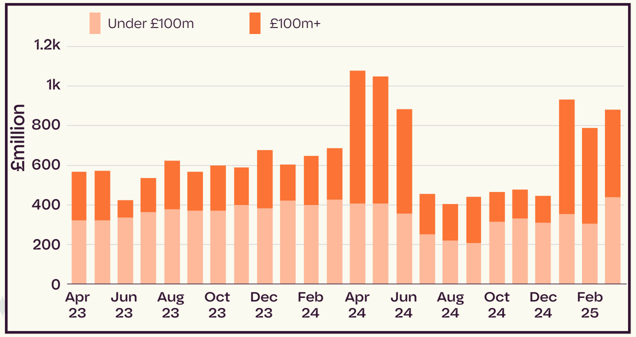


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	424	1,300	**1,724**
YoY	-58%	-32%	**-41%**
Prev. 3 months	-60%	34%	**-15%**
Prev. 3 months (SA)	-53%		

Office Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,318	1,325	**2,643**
YoY	3%	69%	**28%**
Prev. 3 months	42%	223%	**97%**
Prev. 3 months (SA)	-8%		

Offices

Types of projects started

Despite overall sector growth, only the two higher value bands experienced a rise in project starts.

- Project starts in the over £100 million value band totalled £1,325 million, having jumped 69% on a year ago
- The £50 million to £100 million value band recorded a 153% increase year-on-year, totalling £806 million
- The £20 million to £50 million faced a 43% decline year-on-year, totalling £253 million

Project Spotlight

Manchester Digital Campus

Detailed plans have been approved for the £310 million Manchester Digital Campus development on the former Central Retail Park. Works are due to be completed in Q1 2030. A main contractor is yet to be appointed on the scheme.

PROJECT ID: 13021292

IMAGE SOURCE: ATKINS REALIS

Types of Office Projects Started

Three months to March 2025

	£ million	Percentage
Up to £5 million	116	**4%**
£5 million up to £10 million	0	**0%**
£10 million up to £20 million	142	**5%**
£20 million up to £50 million	253	**10%**
£50 million up to £100 million	806	**31%**
Over £100 million	1,325	**50%**
Total	2643	**100%**

Office League Tables

April 2024 to March 2025

Contractors	Projects	£m
Mace	7	1,550
Multiplex	3	980
Morgan Sindall	119	816
McLaren	4	673
JRL	3	560
Royal BAM	3	299
Wates	4	161
Faithdean	1	130
Laing O'Rourke	1	125
John Sisk & Son	1	125

Clients	Projects	£m
British Land	4	750
Axa Insurance	1	480
Mitsubishi Estate	1	300
Land Securities	2	246
JTRE London	1	200
Havisham	1	200
Southwark Charities	1	200
GLP	1	200
A & O Shearman	1	145
Lazari Investments	1	130

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Offices

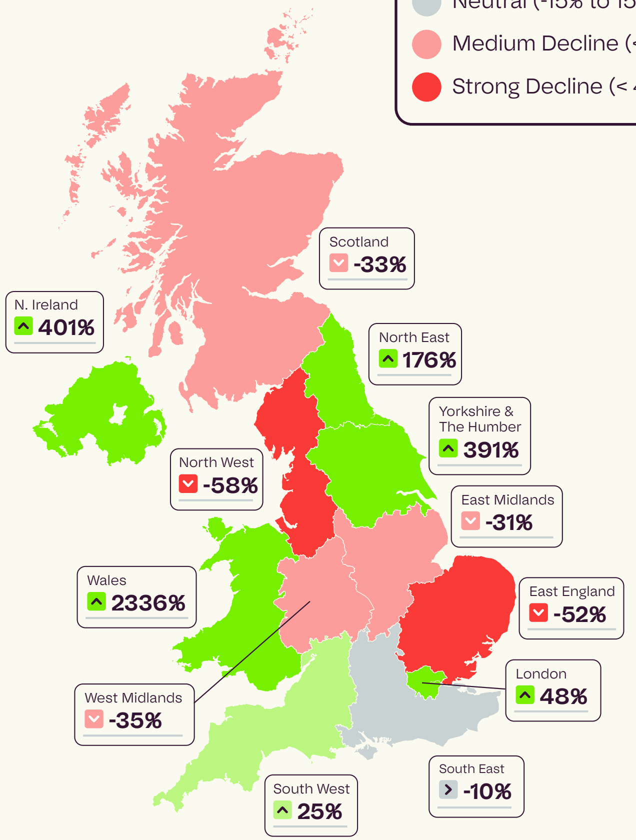
Regional

- Project starts performance was mixed and most regions faced a decline in detailed planning approvals
- London, Wales, Yorkshire & the Humber, the North East and Northern Ireland experienced strong growth in project starts
- Detailed planning approvals grew in the East of England, the South West, the North West, Scotland and the North East

London had the highest share (70%) of project starts during the period, thanks to a 48% increase, boosted by the £500 million Project Vista development in Lambeth in January. Totalling £101 million, starts in Wales jumped more than 24 times on a year ago, driven by the £88 million Microsoft Imperial Park data centre in Newport. The South East, on the other hand, fell 10% to total £253 million.

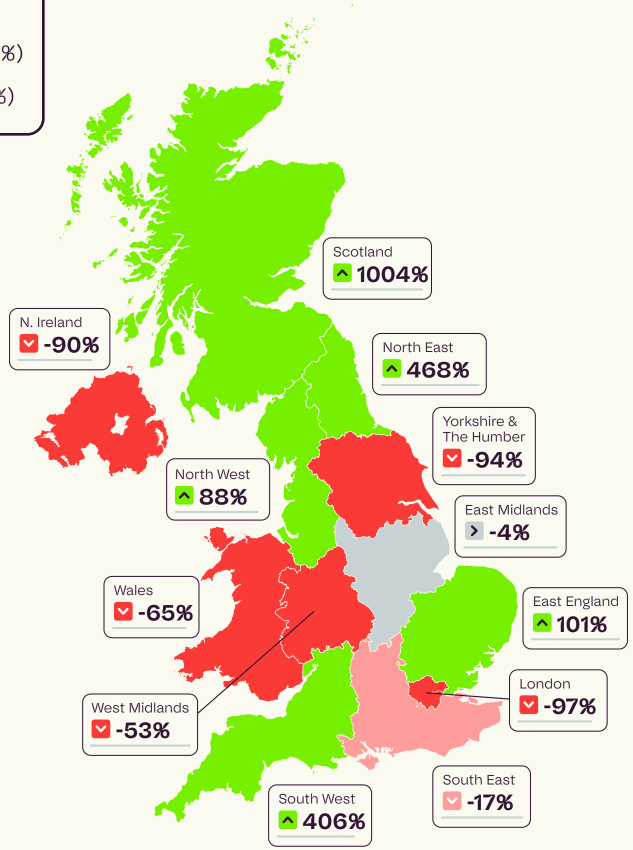
The East of England led detailed planning approvals having doubled year-on-year to total £513 million. The South West also jumped 406% against 2025 to total £492 million.

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

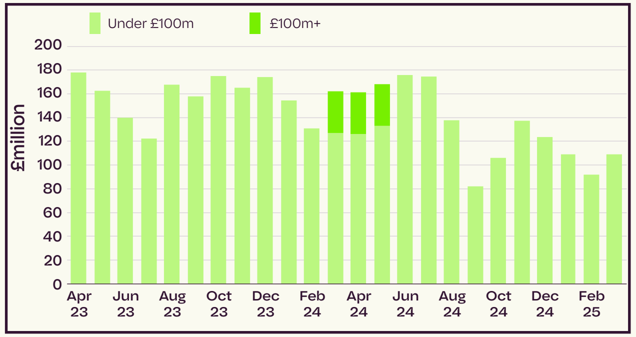
Overview

- **56% decrease** in project starts year-on-year
- **94% decrease** in main contract awards against a year ago
- **33% decrease** in detailed planning approvals compared to the previous year

Performance in the retail sector remained weak with project starts, main contract awards and detailed planning approvals all down year-on-year. No major projects reached any of the three stages of the development pipeline. More positively, there was an 8% growth in project starts quarter-on-quarter.

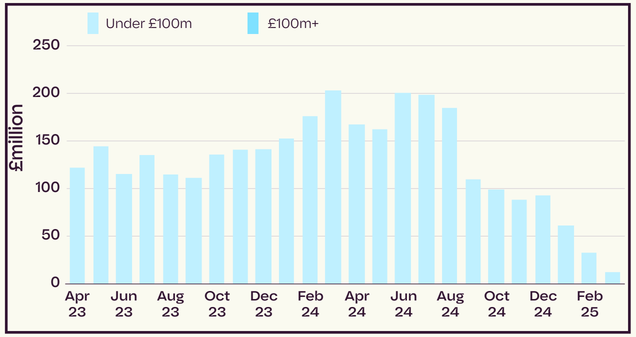
The retail industry is facing increased cost pressures including higher labour costs and vacant retail premises which is deterring investment in retail construction.

Detailed Planning Approvals



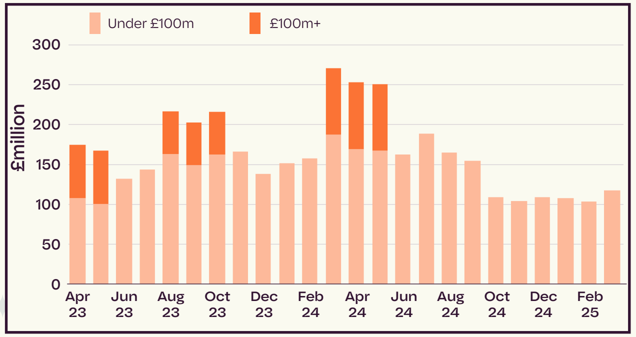
Source: Glenigan

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	327	-	327
YoY	-14%	-100%	-33%
Prev. 3 months	-12%		-12%
Prev. 3 months (SA)	20%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	38	-	38
YoY	-94%		-94%
Prev. 3 months	-87%		-87%
Prev. 3 months (SA)	-86%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	353	-	353
YoY	-37%	-100%	-56%
Prev. 3 months	8%		8%
Prev. 3 months (SA)	-34%		

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Retail

Types of projects started

Most categories in the retail sector faced a decline, with only shopping centres and supermarkets bucking the trend

- Supermarkets accounted for the largest share (72%) again, having grown 39% year-on-year to total £254 million
- Totalling £66 million, shop projects starting on site decreased 88% on a year ago
- Totalling £16 million, shopping centres were 45% higher year-on-year

Project Spotlight

Supermarket

Detailed plans have been approved for a £13.7 million retail development in Broadbridge Heath, West Sussex. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q2 2026.

PROJECT ID: 20517380

IMAGE SOURCE: ATKINS

£13.7m

Types of Retail Projects Started

Three months to March 2025

	£ million	Percentage
Other Retail	5	**2%**
Petrol Filling Stations	11	**3%**
Retail Warehousing	-	**0%**
Shopping Centres	16	**5%**
Shops	66	**19%**
Supermarkets	254	**72%**
Total	353	**100%**

Retail League Tables

April 2024 to March 2025

Contractors	Projects	£m
Conamar Building	1	91
Kier	2	54
DSP Construction	14	46
Princebuild	2	24
G F Tomlinson	1	23
BibbEgan Demolition	1	21
VINCI	1	20
Jem Build	1	18
Leck Construction	1	18
Robertson	2	17

Clients	Projects	£m
Aldi	76	125
John Lewis	3	92
Lidl	24	81
The Crown Estate	1	53
Tesco	56	39
Marks & Spencer	20	38
Scarborough	1	32
TJ Morris	6	29
Hammerson	1	22
J Sainsbury	18	21

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Retail

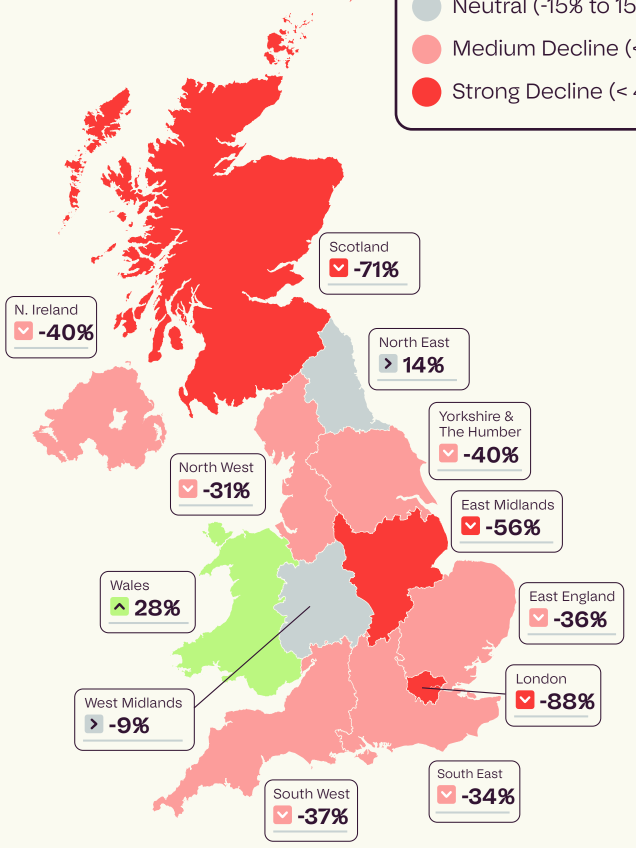
Regional

- Project starts were down in most regions
- Mixed performance in detailed planning approvals, with half of the regions down year-on-year
- The North East and Wales experienced growth in both project starts and approvals

The North West dominated retail project starts, despite a 31% decrease on a year ago. The region accounted for 13% of starts at £47 million. London fell 88% compared to last year, totalling £40 million and accounting for 11% of the sector. The North East, on the other hand, grew 14% against last year to total £34 million.

The South West led detailed planning approvals, having grown 76% to total £82 million, accounting for a quarter of the sector. Accounting for 18%, the North West also jumped 91% to total £59 million. The South East grew 35% year-on-year to total £38 million.

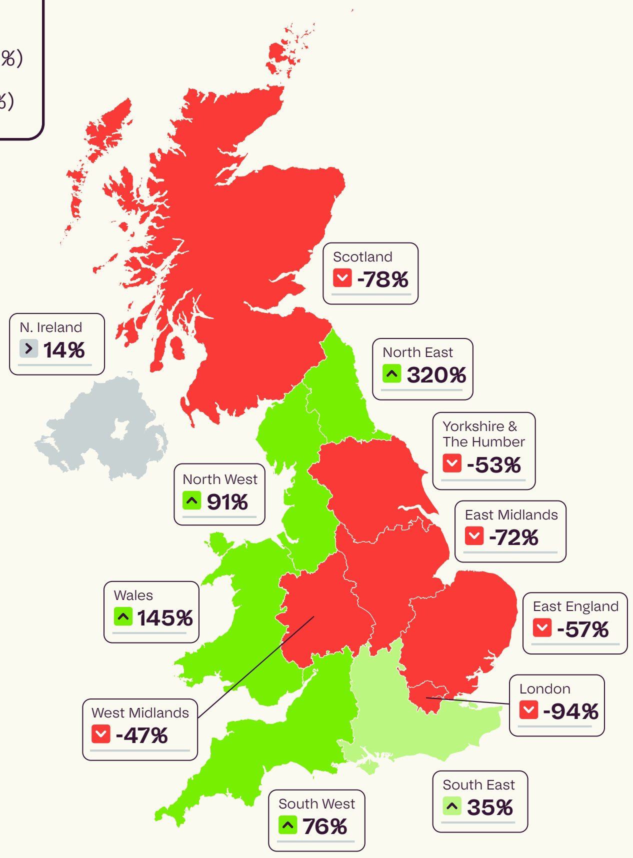
Changes in Retail Starts
on a Year Earlier



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



Hotel & Leisure

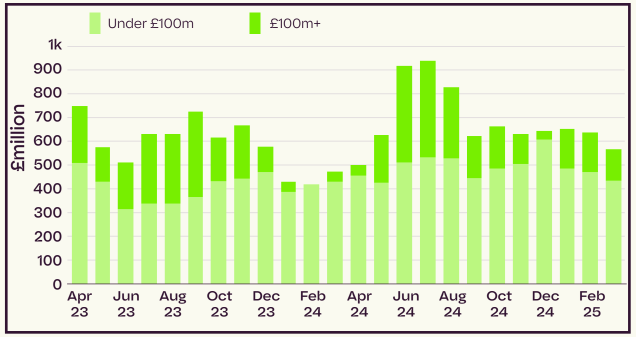
Overview

- **61% increase** in project starts year-on-year
- **52% decrease** in main contract awards from last year
- **20% increase** in detailed planning approvals compared to a year ago

Despite the economic and geopolitical uncertainty, performance in the hotel & leisure sector remained strong in the first quarter of 2025, with project starts up year-on-year and quarter-on-quarter. The growth was driven by an increase in major projects (£100 million or more). Main contract awards, on the other hand, declined against both periods.

2024 saw a surge of hotel investment, with starts three times higher than during the previous year. Hotel investment remains strong and is expected to support a forecast 6% rise in hotel & leisure project starts this year 2025.

Detailed Planning Approvals

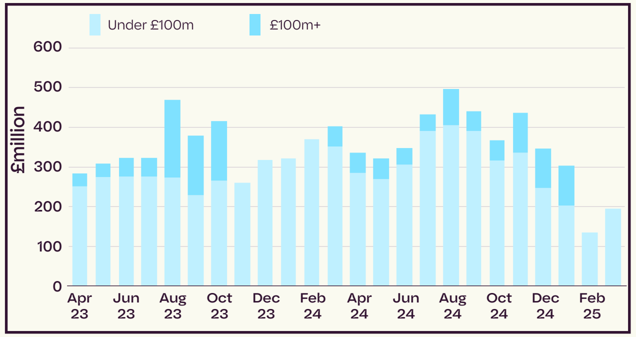


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,303	400	1,703
YoY	1%	208%	20%
Prev. 3 months	-29%	284%	-12%
Prev. 3 months (SA)	-24%		

Main Contract Awards

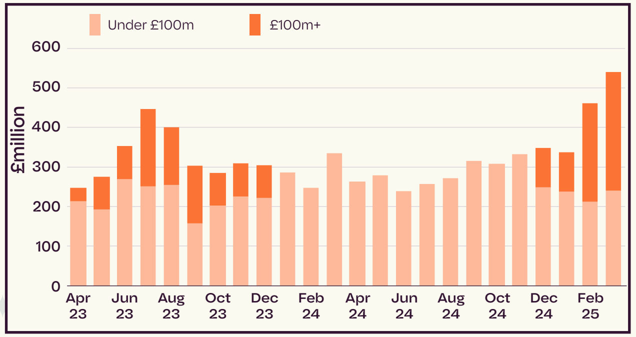


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	585	-	585
YoY	-45%	-100%	-52%
Prev. 3 months	-21%	-100%	-44%
Prev. 3 months (SA)	-9%		

Hotel & Leisure Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	720	900	1,620
YoY	-28%		61%
Prev. 3 months	-3%	200%	55%
Prev. 3 months (SA)	-30%		

Glenigan
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Hotel & Leisure

Types of projects started

The hotel & leisure sector had a strong performance, with most sub-sectors experiencing an increase.

- Hotels & guest houses accounted for the largest share (38%), having jumped 68% on a year ago to total £614 million
- Accounting for 9%, sport facilities grew 11% year-on-year
- Indoor leisure facilities, on the other hand, fell 20% against the previous year, accounting for a 10% share

Project Spotlight

Kingston Leisure Centre

Detailed plans have been approved for the £79.5 million Kingston Leisure Centre development in Kingston upon Thames, south west London. Pellikaan Construction has been appointed as main contractors on the scheme, with works expected to be completed in Q2 2027.

PROJECT ID: 21447120

IMAGE SOURCE: ROBERTS LIMBRICK LTD

£79.5m

Types of Hotel & Leisure Projects Started

Three months to March 2025

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	88	**5%**
Cinemas & Theatres	85	**5%**
Hotels, Guest Houses	614	**38%**
Indoor Leisure Facilities	155	**10%**
Other Hotel & Leisure	532	**33%**
Sport Facilities	145	**9%**
Total	1,620	**100%**

Hotel & Leisure League Tables

April 2024 to March 2025

Contractors	Projects	£m
Newarthill	2	313
Lendlease	1	150
McAleer & Rushe	2	128
GMI Construction	3	115
Robertson	7	109
Galliford	7	107
Pellikaan	2	105
Graham Construction	3	92
Morgan Sindall	6	88
Legendre	1	82

Clients	Projects	£m
Marriott Int.	1	300
Crystal Palace FC	1	150
Mrp Hammersmith	1	125
Fc100 Ltd	1	82
Kingston-on-Thames	1	80
Nat. Gal.Of Scotland	1	75
Lockwood 2002	1	58
Criterion Capital	2	55
Fermanagh District	1	52
Whitbread	8	49

Glenigan
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Hotel & Leisure

Regional

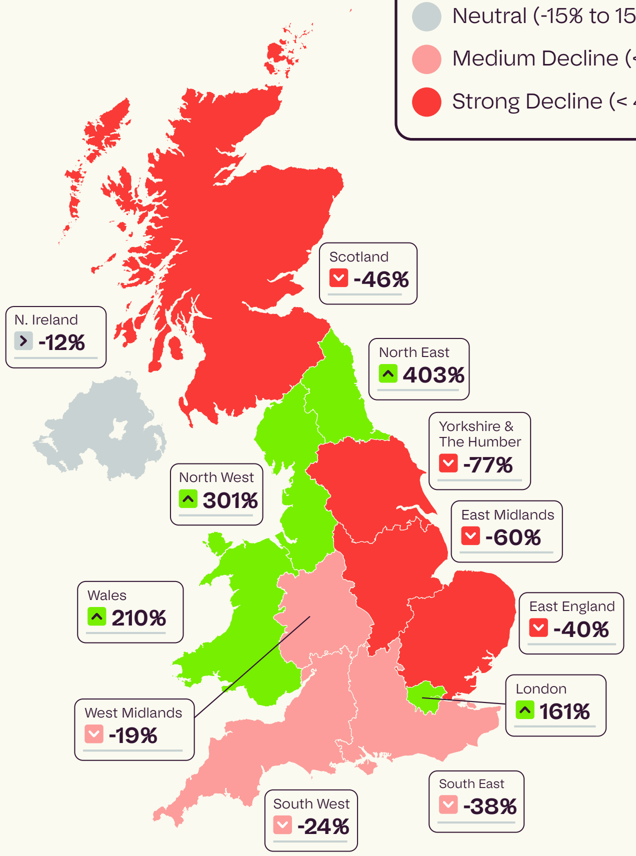
- Despite overall growth in project starts, most regions experienced a decline
- Most regions experienced growth in detailed planning approvals
- London performed exceptionally well, with growth in both starts and consents

London was the leader in hotel & leisure project starts, thanks to 161% growth year-on-year to total £611 million. This growth was boosted by the £450 million 380 Kensington High Street London Hotel Development. The North East also jumped five times to total £374 million, mainly driven by The Sage International Conference Centre development worth £350 million.

The capital also dominated detailed planning approvals, with 19% growth on the previous year. The region totalled £636 million and accounted for 37%. Activity in the region was boosted by the £400 million Haymarket House Development in Westminster.

Changes in Hotel & Leisure Starts

on a Year Earlier

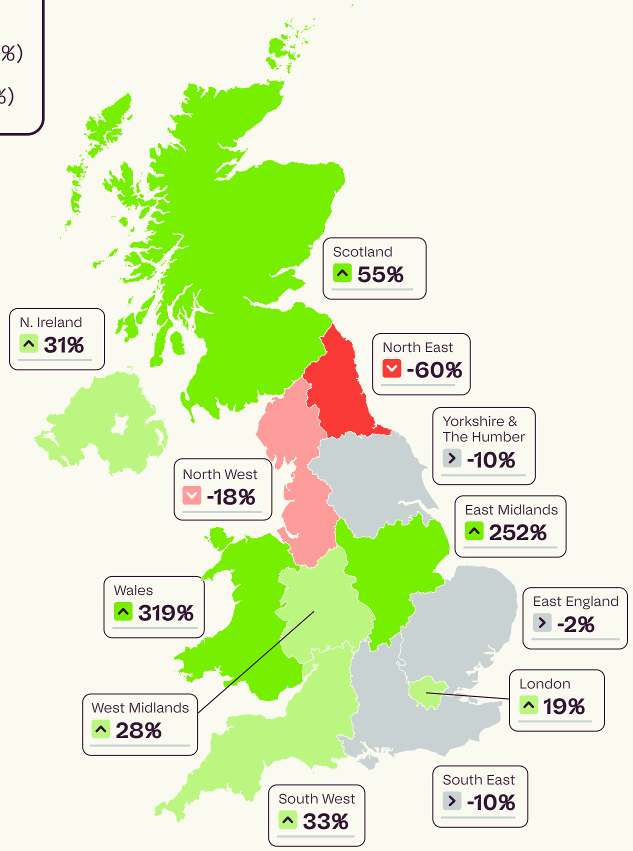


Growth or Decline

- 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



Glenigan
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Health

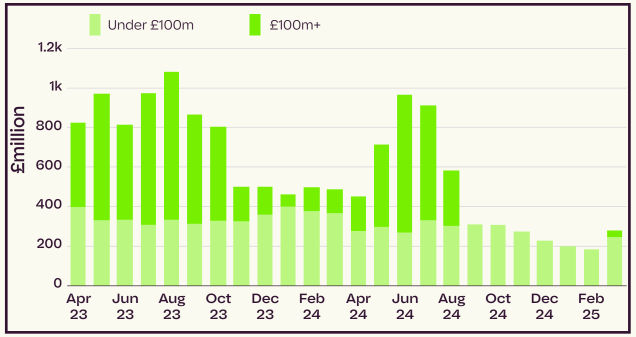
Overview

- Project starts **increased 41%** against the preceding three months
- **28% increase** in main contract awards against the preceding three months
- **23% increase** in detailed planning approvals compared to the preceding three months

The health sector picked up in the three months to March. Project-starts, main contract awards and detailed planning approvals all experienced increases compared to the previous three months. Despite this strong performance, all three measures were lower than a year ago.

The rise in contract awards and approvals bodes well for sector activity over the next twelve months. The Spring Statement in March also confirmed a substantial 15.2% increase in capital funding for the Department of Health and Social Care during 2025/26 to £13.6 billion.

Detailed Planning Approvals

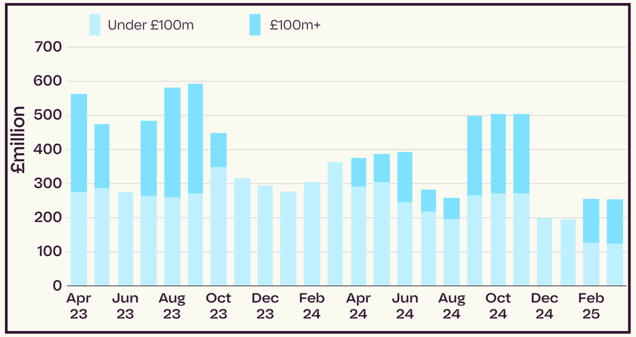


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	739	100	**839**
YoY	-33%	-72%	**-43%**
Prev. 3 months	8%		**23%**
Prev. 3 months (SA)	13%		

Main Contract Awards

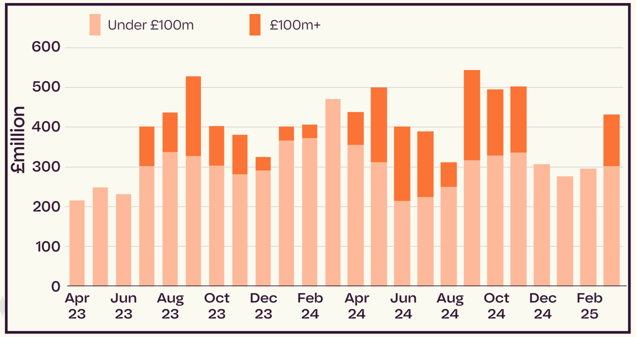


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	376	389	**765**
YoY	-65%		**-30%**
Prev. 3 months	-37%		**28%**
Prev. 3 months (SA)	-52%		

Health Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	907	389	**1,296**
YoY	-36%		**-8%**
Prev. 3 months	-2%		**41%**
Prev. 3 months (SA)	-35%		

Health

Types of projects started

Despite the upturn in starts against the preceding quarter, the health sector performed poorly compared to a year ago. Hospital starts were relative bright spot, being the only segment to experience growth against the previous year.

- Hospitals accounted for the largest share (62%), having grown 5% year-on-year to total £809 million
- Totalling £53 million, the value of Dental, Health & Veterinary Centres/ Surgeries starting on site decreased 73% on a year ago
- Nursing Homes & Hospices experienced a 56% decline against the previous year

Types of Health Projects Started

Three months to March 2025

	£ million	Percentage
Day Centres	-	**0%**
Dental, Health & Veterinary Centres/ Surgeries	53	**4%**
Hospitals	809	**62%**
Nursing Homes & Hospices	98	**8%**
Other Health	336	**26%**
Total	1,296	**100%**

Project Spotlight

Torbay Hospital Clinical Hub

Detailed plans have been approved for a new Clinical Hub at Torbay Hospital in Devon. A main contractor is yet to be appointed on the £100 million scheme, with works expected to be completed in Q1 2026.

PROJECT ID: 24007584

IMAGE SOURCE: KTA ARCHITECTS LTD

Health League Tables

April 2024 to March 2025

Contractors	Projects	£m
Laing O'Rourke	2	890
Royal BAM	7	268
Winvic	1	250
Graham Cons.	3	220
Morgan Sindall	14	204
Mace	2	108
Shepherd Building	5	98
IHP Integrated Health	4	86
Kier	9	84
TSL Projects	1	82

Clients	Projects	£m
Dep. of Health	163	1,984
Cons. and Procurement	3	206
Tritax	1	125
Siemens	1	125
Cen. Lab. of Research	1	85
Smith & Nephew	1	82
Welsh Government	3	58
Univ. of Birmingham	1	50
ARC Oxford	1	39
LNT	7	38

Health

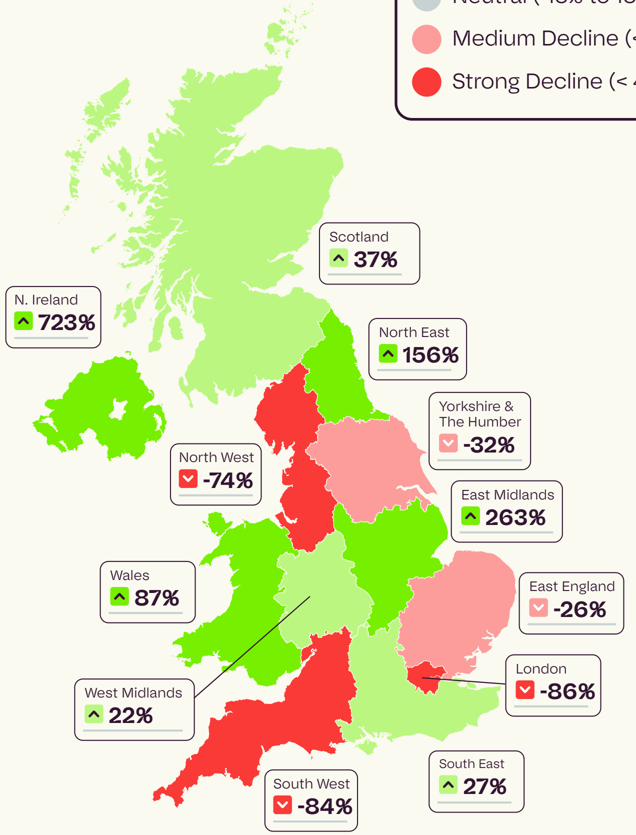
Regional

- Performance across project-starts and detailed planning approvals was varied, with some regions experiencing sharp growth while others declined
- Northern Ireland accounted for the largest share of project-starts and experienced the sharpest growth against the previous year
- The South West accounted for the largest share of approvals and experienced moderate growth against the previous year

Northern Ireland with £417 million worth of project starts was the most active region, accounting for 32% of the total, and an increase of 723% against the previous year. Growth in the area was boosted by the £389 million Belfast Royal Victoria Hospital. The East Midlands at £109 million also experienced a strong period, more than tripling against the previous year (+263%) to account for 8% of the total value.

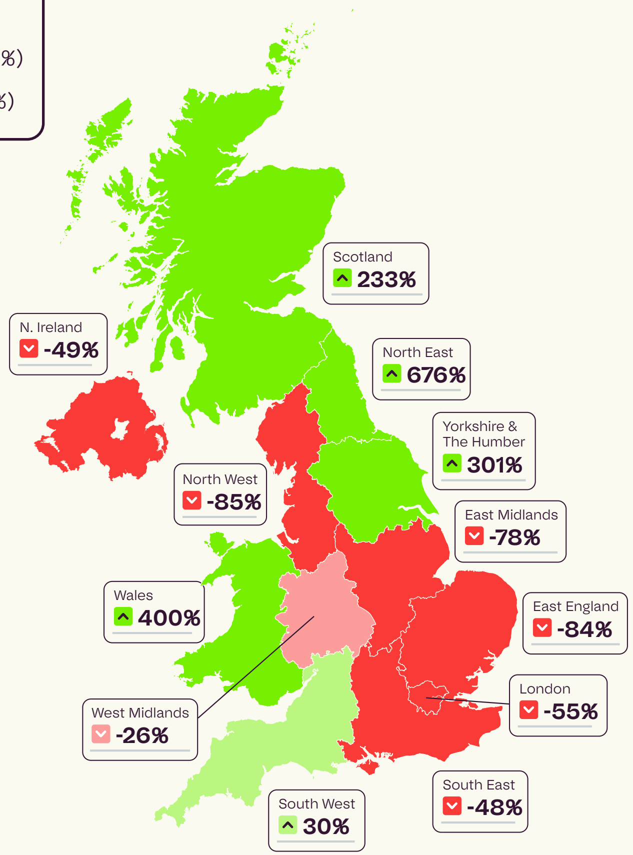
A 30% jump in the value of planning approvals, boosted the development pipeline in the South West, with the region accounting for the largest share of approvals (22%) during the quarter.

Changes in Health Starts
on a Year Earlier



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

Changes in Health Planning Approvals
on a Year Earlier



Education

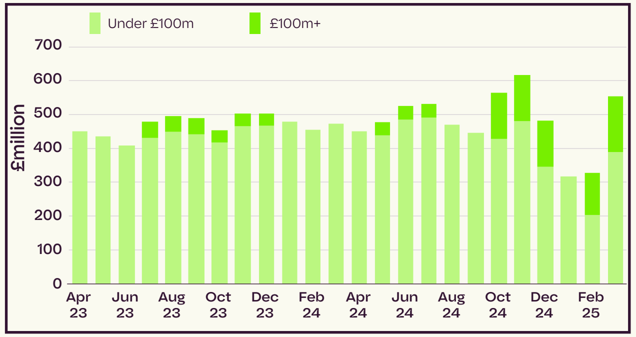
Overview

- **37% decrease** in project starts year-on-year
- **11% decrease** in main contract awards against a year ago
- **17% increase** in detailed planning approvals compared to the previous year

The education sector experienced a mixed three months to March, however poor performances in project-starts and main contract awards were countered by an increase in the value of detailed planning approvals against the previous year and preceding three months.

The rise in detail planning approvals bodes well for sector activity over the coming months. This combined with a 21% rise in capital funding for the Department for Education during 2025/26 should help lift starts during the second half of 2025.

Detailed Planning Approvals

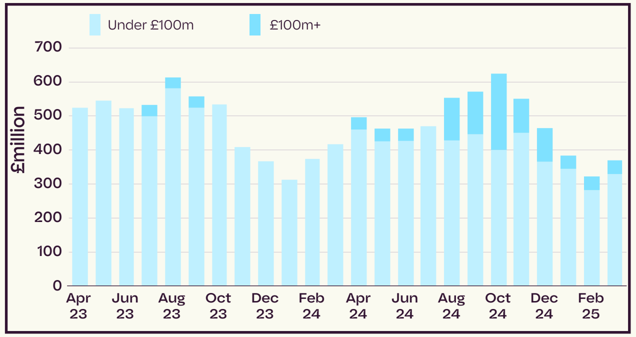


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,167	495	1,662
YoY	-18%		17%
Prev. 3 months	13%	21%	15%
Prev. 3 months (SA)	9%		

Main Contract Awards

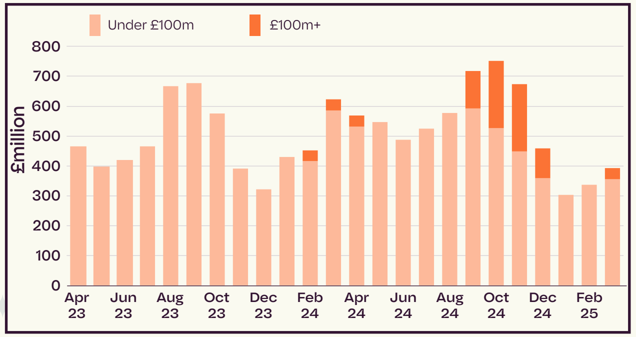


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	989	120	1,109
YoY	-21%		-11%
Prev. 3 months	-10%	-60%	-20%
Prev. 3 months (SA)	-5%		

Education Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,068	110	1,178
YoY	-39%	0%	-37%
Prev. 3 months	-1%	-63%	-14%
Prev. 3 months (SA)	-24%		

Education

Types of projects started

Project-starts experienced a poor performance; however, universities experienced a strong period against the previous year.

- Schools accounted for the largest share of starts (63%), totalling £740 million, but declined 44% against the previous year
- Universities, the second largest category (23%), increased 44% year-on-year to £267 million
- Colleges declined 87% against the previous year to total £37 million

Project Spotlight

Beeslack Community High School Replacement

Detailed plans have been approved for the Beeslack Community High School Replacement development in Roslin, in Lothian, Scotland. A main contractor is yet to be appointed on the £120 million scheme, with works due to be completed in Q3 2026.

PROJECT ID: 19316062

IMAGE SOURCE: ARCHITYPE

Types of Education Projects Started

Three months to March 2025

	£ million	Percentage
Colleges	37	**3%**
Other Education	135	**11%**
Schools	740	**63%**
Universities	267	**23%**
Total	1,178	**100%**

Education League Tables

April 2024 to March 2025

Contractors	Projects	£m
Kier	33	630
Bowmer & Kirkland	25	409
Morgan Sindall	43	386
Multiplex	1	300
Galliford Try	19	290
Robertson	10	233
Royal BAM	11	227
Woodvale Cons	3	189
Lowry Build. & Civil	2	188
Tilbury Douglas	13	166

Clients	Projects	£m
Dep. for Education	82	795
Univ. of Glasgow	2	301
Con. and Procure.	1	188
Aberdeen CC	6	135
Bowmer & Kirkland	9	104
Univ.of East Anglia	3	97
King's Col. London	4	90
Kier	5	88
Univ. of Cambridge	2	87
Hampshire CC.	12	83

Glenigan
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Education

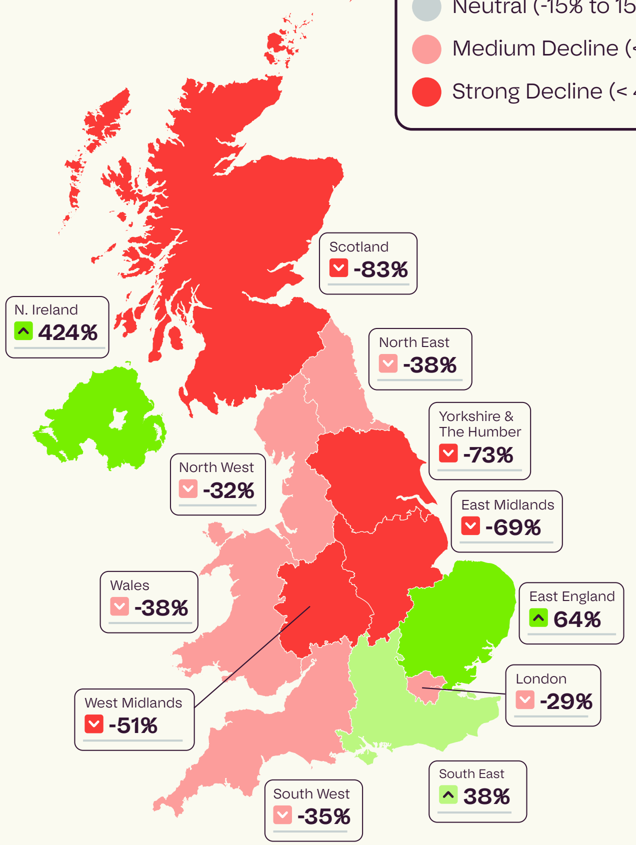
Regional

- Most regions saw declines in project-starts
- Northern Ireland experienced sharp growth for project-starts and detailed planning approvals against the previous year
- London had a poor period for both starts and approvals

Sector starts in the South East rose by 38% against a year ago to £179 million and at 15% of starts the region was most active during the quarter. Northern Ireland at £32 million experienced a strong period, increasing 5 times against the previous year to account for 3% of the total value.

In planning approvals, Northern Ireland accounted for the largest share of approvals (25%), as with project starts the area experienced sharp growth, rising 378% against the previous year. Growth in the area was accelerated by the £375 million Strule Shared Education Campus development. Wales at £153 million experienced the sharpest increase of any area, rising 7 times on the previous year to account for 9% of the total value.

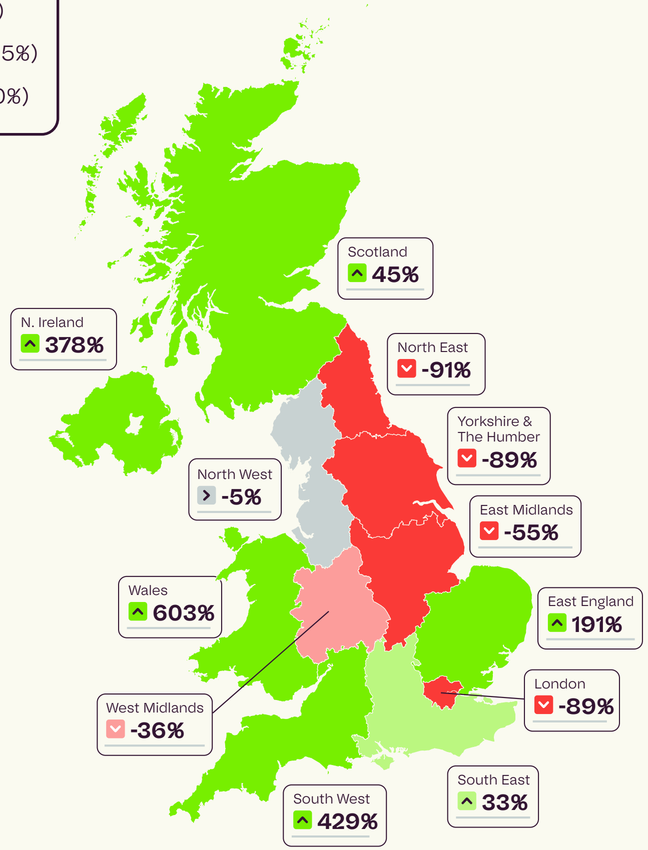
Changes in Education Starts
on a Year Earlier



Growth or Decline

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

Changes in Education Planning Approvals
on a Year Earlier



Community & Amenity

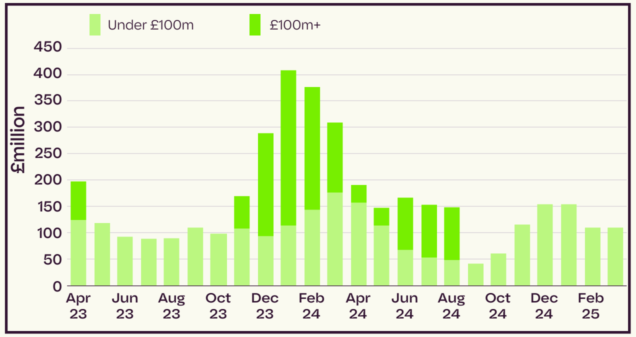
Overview

- **25% decrease** in project starts year-on-year
- **26% increase** in main contract awards from last year
- **65% decrease** in detailed planning approvals compared to 2024

The sector performed well in main contract awards, having grown 26% year-on-year and 70% quarter-on-quarter, driven by a strong increase in major (£100 million or more) projects. However, detailed planning approvals faced a decline against both periods, with no major projects approved in the first quarter of 2025.

Prison projects dominated sector starts during the first quarter and given the government's pledge to invest £2.3 billion in prisons buildings we expect the category to be an important driver for sector growth over the next two years. Increased defence funding should also help to drive sector activity over the medium term.

Detailed Planning Approvals

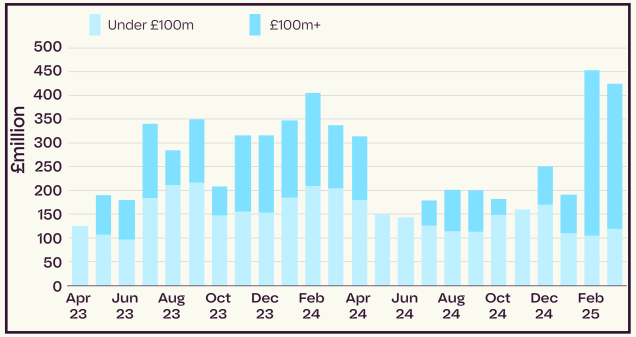


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	328	-	328
YoY	-38%	-100%	-65%
Prev. 3 months	-29%		-29%
Prev. 3 months (SA)	-53%		

Main Contract Awards

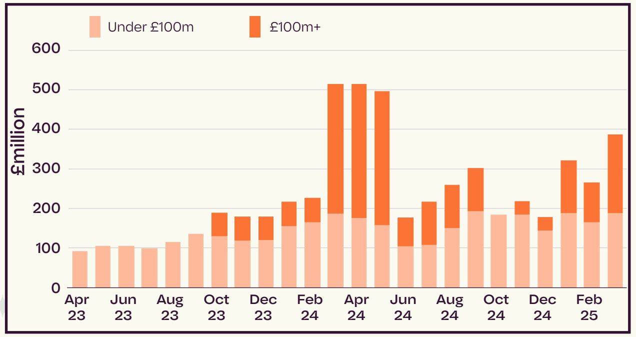


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	357	918	1,274
YoY	-42%	129%	26%
Prev. 3 months	-30%	278%	70%
Prev. 3 months (SA)	-39%		

Community & Amenity Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	563	600	1,163
YoY	1%	-39%	-25%
Prev. 3 months	31%	491%	118%
Prev. 3 months (SA)	5%		

Community & Amenity

Types of projects started

Performance in the community & amenity sector was weak, with only two sub-sectors having grown year-on-year.

- Prison project starts accounted for the largest share (68%), despite a 14% decline
- Accounting for 18%, local facilities totalled £213 million, 25% up year-on-year
- Government buildings grew 13% on a year ago, totalling £142 million

Project Spotlight

Alloa West Wellbeing Hub & Lochies School

Detailed plans have been approved for the Alloa West Wellbeing Hub & Lochies School development in Alloa, Scotland. Roberson construction has been appointed as the main contractor on the £77.5 million scheme, with works due to be completed in Q2 2027.

PROJECT ID: 23318974

IMAGE SOURCE: JM ARCHITECTS

£77.5m

Types of Community & Amenity Projects Started

Three months to March 2025

	£ million	Percentage
Blue Light	4	0%
Government Buildings	142	12%
Law Courts	-	0%
Local Facilities	213	18%
Military	1	0%
Places of Worship	16	1%
Prisons	786	68%
Total	1,163	100%

Community & Amenity League Tables

April 2024 to March 2025

Contractors	Projects	£m
Kier	20	1,239
Galliford Try	21	268
Lendlease	1	159
Bowmer & Kirkland	2	96
John Sisk & Son	1	54
Morgan Sindall	8	48
Neilcott	5	33
Speller Metcalfe	4	29
Story Contracting	1	29
Andrew Scott	3	27

Clients	Projects	£m
Scottish Pris. Service	3	685
Ministry of Defence	17	603
Ministry of Justice	27	259
Home Office	21	112
HM Rev & Customs	1	96
LB of Haringey	1	54
Gosport Bor. Council	1	51
Sandwell Met BC	1	50
Ministry of Housing, Com. and Local Gov.	1	51
Cumberland Council	2	33

Community & Amenity

Regional

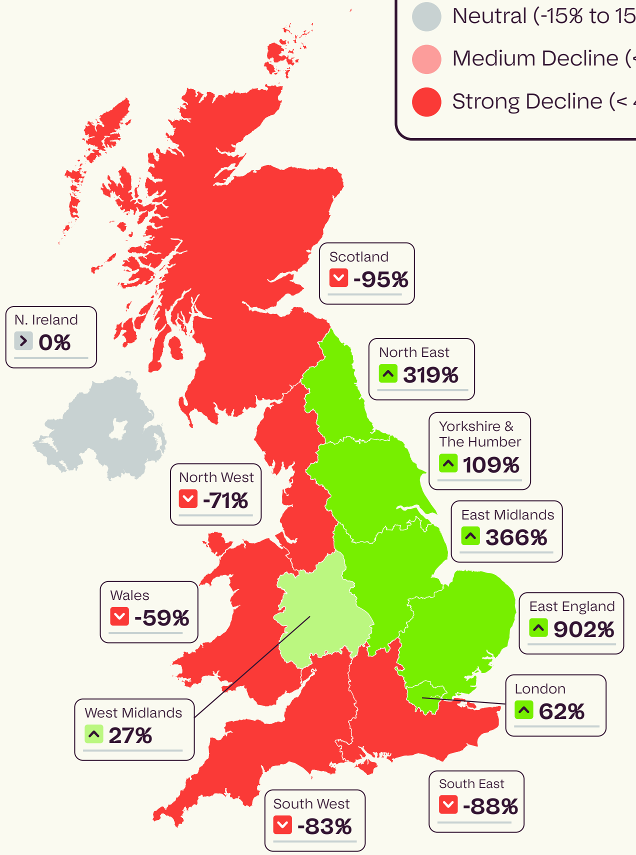
- Mixed performance in project starts, with half of the regions experiencing growth despite the overall decline in the sector
- Reflecting the overall downward trend, detailed planning approvals grew only in four regions
- Yorkshire & the Humber experienced growth in both starts and consents

The East Midlands accounted for the highest share of project starts, having grown 366% to total £349 million. Activity in the region was driven by the £300 million HMP Gartree 2. Accounting for 28%, the East of England grew tenfold on a year ago, mainly due to the £300 million HMP Highpoint South development in Newmarket.

Scotland dominated detailed planning approvals, having grown more than 125 times in value to total £122 million. Activity in the region was boosted by the £77 million Alloa West Wellbeing Hub & Lochies School.

Changes in Community & Amenity Starts

on a Year Earlier

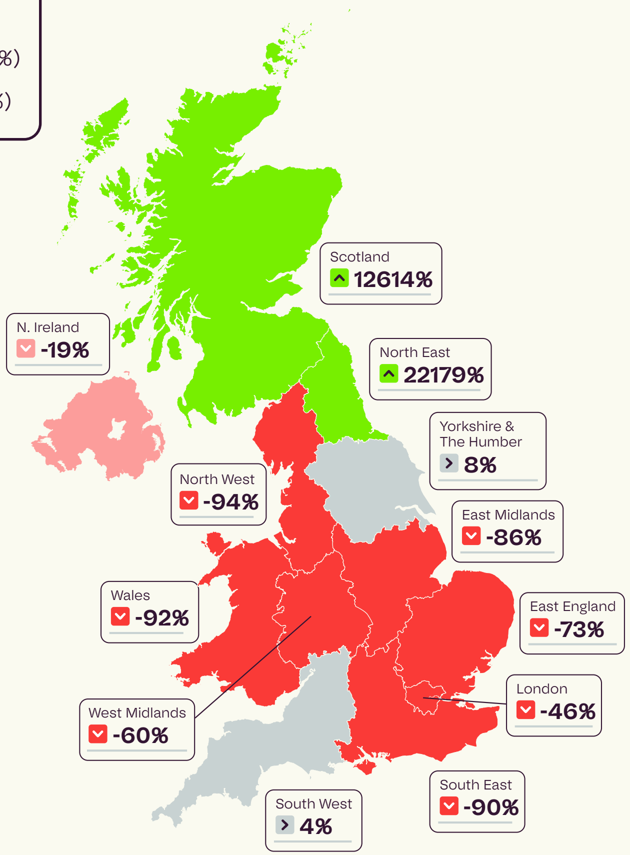


Growth or Decline

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

Changes in Community & Amenity Planning Approvals

on a Year Earlier



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Civil Engineering

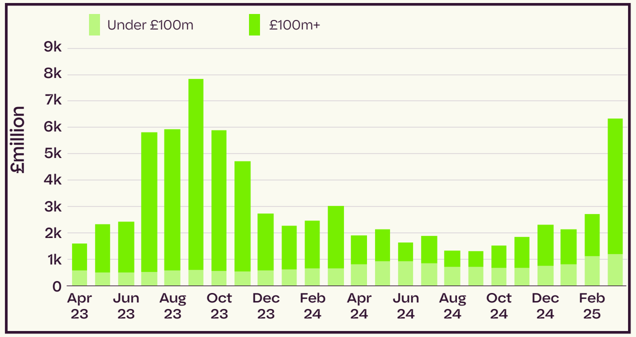
Overview

- **51% decrease** in project starts year-on-year
- **60% increase** in main contract awards against the previous year
- **176% increase** in detailed planning approvals compared to the preceding three months

Civil Engineering project-starts experienced a poor three months to March, declining sharply against the preceding three months and previous year. Elsewhere, main contract awards and detailed planning approvals increased against the preceding three months and previous year, providing a boost to the development pipeline.

The development pipeline is strengthening, with growth in main contract awards and detailed planning approvals supported by a strong performance in major projects (£100 million or more). In addition, April heralds the start of the new AMP programme in the water industry, with a sharp increase in capital spending scheduled for the next five years. The strengthening pipeline is expected to support a recovery in major and underlying project-starts in the coming months.

Detailed Planning Approvals

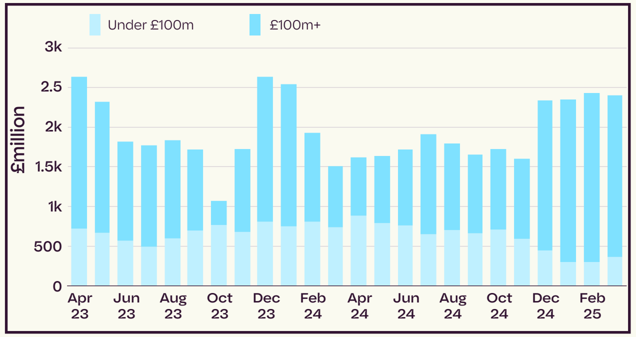


Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	3,549	15,474	**19,023**
YoY	82%	118%	**110%**
Prev. 3 months	61%	229%	**176%**
Prev. 3 months (SA)	66%		

Main Contract Awards

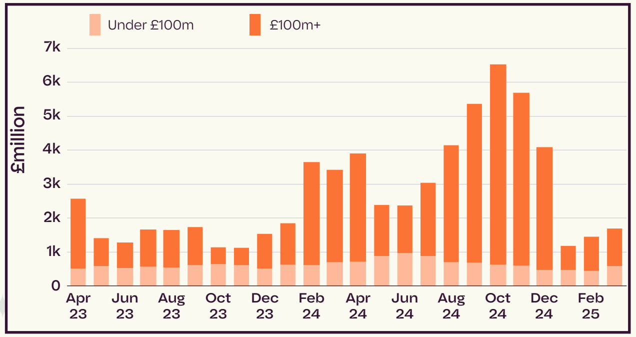


Source: Glenigan

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	1,086	6,126	**7,212**
YoY	-51%	166%	**60%**
Prev. 3 months	-19%	8%	**3%**
Prev. 3 months (SA)	-16%		

Civil Engineering Starts



Source: Glenigan

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,779	3,297	**5,076**
YoY	-16%	-60%	**-51%**
Prev. 3 months	25%	-70%	**-59%**
Prev. 3 months (SA)	-28%		

Civil Engineering

Types of projects started

Project-starts in the civils sector performed poorly, with five out of seven categories declining against a year ago.

- Roads at £699 million accounted for the largest share of starts (14%), the sector increased by 21% against a year ago
- Energy accounted for the second largest share of starts (6%), the sector declined 84% against the previous year
- Airports increased 176% to total £140 million

Project Spotlight

Lower Thames Crossing Tunnels and Approaches

£10.2b

Detailed plans have been approved for the £10.2 billion Lower Thames Crossing Tunnels and Approaches development. J Murphy & Sons Ltd and Bouygues have been appointed as civil contractors on the project, with works expected to complete in Q4 2032.

PROJECT ID: 91161081

IMAGE SOURCE: BBC

Types of Civil Engineering Projects Started

Three months to March 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%

Civil Engineering League Tables

April 2024 to March 2025

Contractors	Projects	£m
Royal BAM	21	2,123
Ferrovial	3	1,617
Ringway	3	1,407
Downing	17	1,318
Newarthill	1	1,250
Balfour Beatty	42	975
M GROUP Services	13	940
Costain	6	648
Kier	22	586
Bouygues UK	10	510

Clients	Projects	£m
Dep. for Transport	51	4,291
Tata Steel	1	1,250
Hertfordshire CC	2	1,166
SSEN Transmission	8	904
Oxfordshire CC	5	888
Downing	10	813
National Grid	5	719
Network Rail	34	641
GE Hitachi Nuclear	1	500
Kingsway Solar Farm	1	500

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Expert Insights
Executive Summary
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Top 50 Contractors
Top 50 Clients
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Sector Analysis
Housing
Industrial
Offices
Retail
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Health
Education
Community & Amenity
Civil Engineering

Civil Engineering

Regional

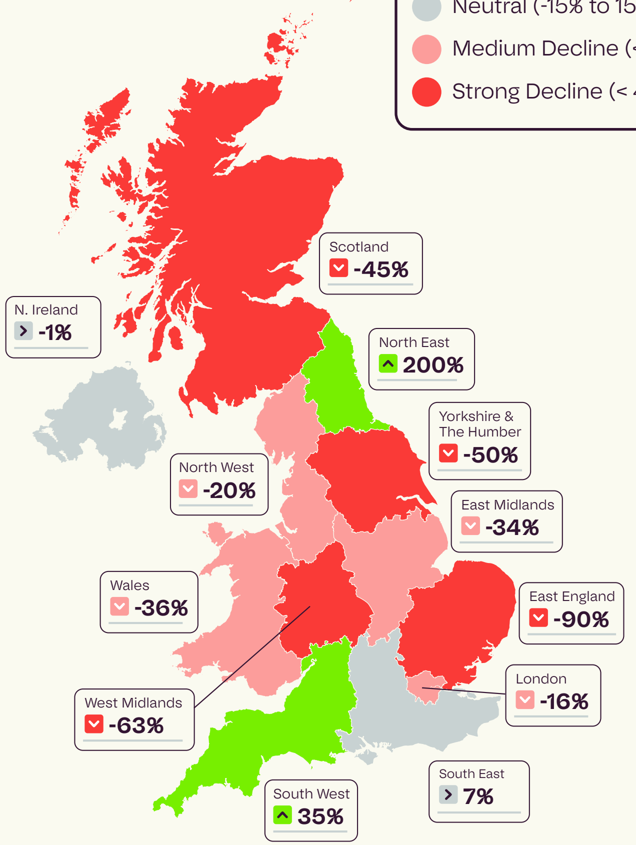
- Yorkshire & the Humber accounted for the largest share of sector starts, despite falling sharply against a year ago
- The South East accounted for the largest share of sector approvals, the region also experienced the sharpest increase for approvals
- North East experienced triple digit growth for project starts and planning approvals

Yorkshire & the Humber at £2,618 million stayed the most active region, accounting for 52% of project starts despite a 50% decline against the previous year. Elsewhere, the North East at £181 million bucked the national trend, rising 200% against the previous year.

In planning approvals, the South East accounted for the largest share of approvals (58%), with the area experiencing 610% growth against the previous year to total £11,081 million. Growth in the area was almost exclusively due to the £10.2 billion Lower Thames Crossing Tunnels and Approaches project. The East Midlands accounted for the second largest share of approvals (11%); the sector increased 396% against the previous year to total £2,127 million.

Changes in Civil Engineering Starts

on a Year Earlier

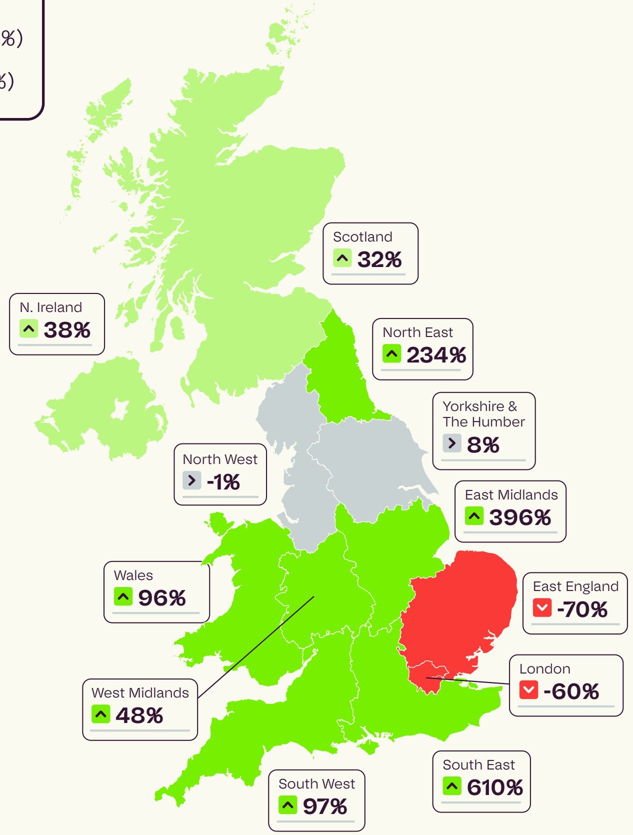


Growth or Decline

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

Changes in Civil Engineering Planning Approvals

on a Year Earlier



Glenigan

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