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# THE GLENIGAN CONSTRUCTION REVIEW

**EXTENDED EDITION**

*Reflecting activity to the end of September 2023*

- > 32% increase in detailed planning approvals against last year
- > 12% fall in main contract awards compared with the previous year
- > 40% decline in project-starts against 2022 levels

Merrist Wood College (North and South Site)  
Source: Bond Bryan



October 2023

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# Intro

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

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

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Written by **Allan Wilén**  
Glenigan Economics Director

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



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

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



## Executive Summary

- > 32% increase in detailed planning approvals against last year
- > 12% fall in main contract awards compared with previous year
- > 40% decline in project-starts against 2022 levels

**Weak construction-starts performance continued during the three months to September with main contract awards also performing poorly. More positively, detailed planning approvals experienced a strong performance when compared to 2022 levels.**

Averaging £7,024 million per month, work commencing on-site during the three months to September experienced a weak performance, decreasing 9% against the preceding three months and remaining 40% lower than a year ago. Major project-starts (£100 million or more in value) averaging £2,681 million per month, increased 6% against the preceding three months and declined by 51% compared with the previous year. Underlying work (less than £100 million) starting on-site averaged £4,344 million per month, a 16% fall against the preceding three months on a seasonally adjusted (SA) basis to stand 32% down on the previous year.

Main contract awards averaged £11,056 million per month; a 27% decline compared with the preceding three-month period to stand 12% lower than the same time a year ago. Underlying main contract awards, averaging £7,044 million, decreased 20% against the preceding three months (SA) and by 11% against the previous year. Major project contract awards averaged £4,012 million per month; a 33% decrease compared with the preceding three months and a 13% decrease against the previous year.

Detailed planning approvals, averaging £14,187 million per month, increased by 12% against the preceding three months to stand 32% up against a year ago. Major planning approvals increased 33% against the preceding three months and stood 101% up on the previous year to average £7,782 million per month. Underlying detailed planning approvals averaged £6,405 million per month, decreasing by 6% compared with the preceding three months (SA) to stand 7% lower than a year ago.

## CONSTRUCTION ACTIVITY

According to the most recent official data from ONS, construction output decreased in July, falling by 0.5% (SA). The three months to July saw an increase in overall construction output of 2.8% (SA), a 2.5% increase on the previous year.

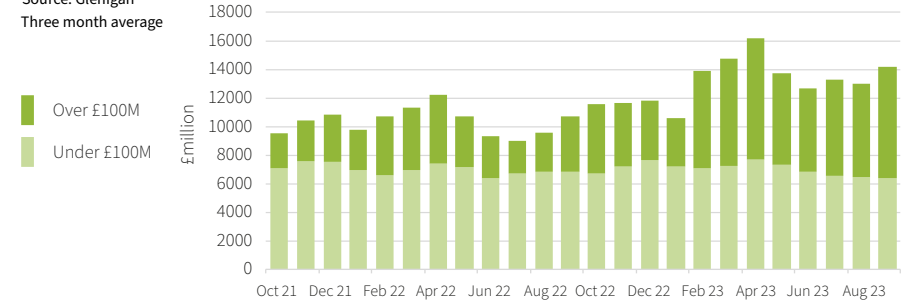
In the three months to July, Repair and Maintenance output decreased by 0.4% (SA) to stand 5.0% up on the previous year. Public housing RM&I decreased by 0.8% (SA) with non-housing R&M increasing by 2.1%. Private housing RM&I decreased 3.2% (SA) during the period.

Overall new work output increased by 0.3% (SA) during the three months to July and increased 0.8% when compared with a year ago. Public non-residential (+0.3% SA) increased against the preceding three months, with infrastructure work (+7.1% SA) also increasing against the preceding three months.

Public new housing experienced a 2.9% increase (SA) with private new housing experiencing a 2.9% decrease against the preceding three months. Commercial (-1.8%) experienced a decrease against the preceding three months with industrial experiencing a 4.7% decrease against the three months to July.

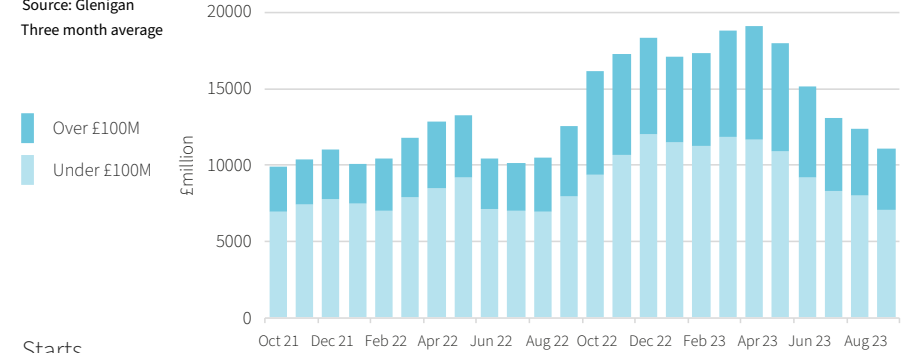
## Detailed Planning Approvals

Source: Glenigan  
Three month average



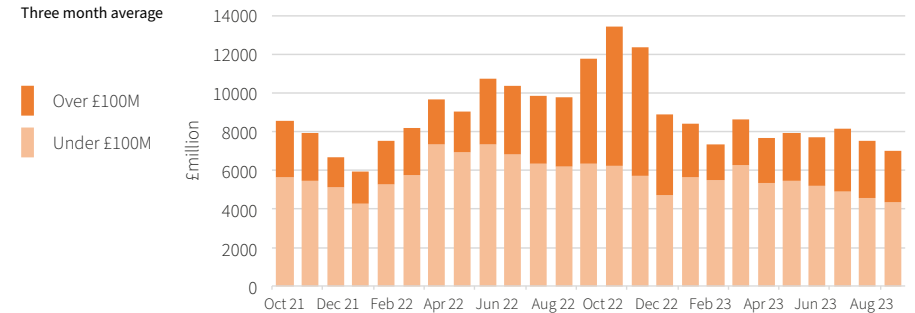
## Main Contract Awards

Source: Glenigan  
Three month average



## Starts

Source: Glenigan  
Three month average



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## Contractors League Tables

Top 50 Contractors - October 2022 to September 2023

Contractors	#	£m	
1 Morgan Sindall	275	1924	0
2 Wates	122	1617	0
3 Kier	104	1570	0
4 Royal BAM	38	1566	1
5 Mace	12	1358	1
6 Bouygues	39	1315	0
7 Balfour Beatty	41	1238	1
8 Galliford Try	100	1199	1
9 Multiplex	6	1114	18
10 Willmott Dixon	82	1008	1
11 United Living	8	1007	NEW
12 Bowmer & Kirkland	30	1002	2
13 ISG	30	938	4
14 Winvic	21	855	1
15 Sir Robert McAlpine	12	756	3
16 VINCI	33	638	20
17 Hill Partnerships	14	636	5
18 Tilbury Douglas	63	615	2
19 RG Group Ltd	5	590	9
20 VolkerWessels	22	578	0
21 Mytilineos	3	571	8
22 Ferrovial	5	568	NEW
23 FCC Serv. Ind. Energeticos SA	1	567	9
24 We Build Group	1	567	6
25 BeMo Tunnelling	1	567	6

Contractors	#	£m	
26 McLaren	12	538	5
27 Graham Construction	19	512	4
28 Hitachi Energy UK	2	501	4
29 Hitachi Zosen Inova	2	500	3
30 CityFibre Holdings	3	435	1
31 Glencar Construction	14	404	3
32 Skanska UK	8	376	13
33 Breyer Group	6	376	4
34 M Group Services	11	364	4
35 Robertson	40	349	4
36 Higgins	5	340	18
37 Farrans Construction	7	333	5
38 GMI Construction	12	330	3
39 McAleer & Rushe Contracts UK	4	292	NEW
40 McLaughlin & Harvey	13	288	0
41 John Sisk & Son	4	282	16
42 CRH	25	275	5
43 Vistry	11	263	8
44 LendLease	3	253	30
45 Readie Construction	10	248	2
46 Costain	8	247	NEW
47 JRL Group	3	243	14
48 Mott Macdonald Group	5	222	2
49 IHP Integrated Health	6	214	NEW
50 Caddick Group	14	209	NEW

Last 12 month totals:  
1,315 projects, £32,756m

Last month totals:  
111 projects, £4,089m

Top 50 Contractors - September 2023

Contractors	#	£m	
1 United Living	3	890	NEW
2 Multiplex	2	650	NEW
3 Ferrovial	2	455	NEW
4 ISG	3	166	30
5 RG Group Ltd	1	139	0
6 Winvic	1	130	33
7 Bowmer & Kirkland	4	129	NEW
8 Morgan Sindall	16	112	NEW
9 Glencar Construction	1	85	36
10 Wates	5	82	3
11 Costain	1	80	NEW
12 Mace	1	75	NEW
13 McAleer & Rushe Contracts UK	1	60	NEW
14 Willmott Dixon	5	57	23
15 Domis Construction	1	56	NEW
16 J W Rihoy & Son	1	53	NEW
17 Mamo Building Services	1	50	NEW
18 Pk Murphy Construction	1	50	NEW
19 Keenans	1	50	NEW
20 Peter O'Hare	1	50	NEW
21 Lowry Building & Civil Engineering	1	50	NEW
22 Arup	1	45	NEW
23 McLaughlin & Harvey	1	40	NEW
24 Galliford Try	7	38	NEW
25 Graham Construction	2	38	6

Contractors	#	£m	
26 Civils Contracting	1	35	NEW
27 Kier	3	32	24
28 Henry Group	1	30	NEW
29 CHC Group	2	28	NEW
30 J W Muir Group	2	27	NEW
31 CHAP Group	1	24	NEW
32 Balfour Beatty	2	23	6
33 Faircloth	2	20	NEW
34 VINCI	2	20	NEW
35 SDC Holdings	1	20	NEW
36 Greystone Joinery & Construction	3	18	NEW
37 CRH	5	16	NEW
38 VolkerWessels	1	16	NEW
39 CCG Construction	2	16	NEW
40 New Ways	1	15	NEW
41 Pellikaan Construction	1	13	NEW
42 Andrew Scott	2	13	NEW
43 Roe Developments	1	12	NEW
44 Rownlinson Construction	1	12	NEW
45 Harbourview Construction	1	12	NEW
46 Clarke Contracts	4	12	NEW
47 FP McCann	3	11	34
48 Klifer Developments	1	11	NEW
49 Gibson Bros Banbridge	2	11	NEW
50 Patrick Keenan	2	11	NEW

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## Clients League Tables

Top 50 Clients - October 2022 to September 2023

Clients	#	£m		Clients	#	£m	
1 Department for Transport	41	3855	0	26 City of London Corporation	15	275	17
2 Department of Health	196	1992	0	27 Gloucestershire County Council	9	274	5
3 Department for Work & Pensions	3	1563	0	28 Homes England	6	270	4
4 Department for Education	99	942	0	29 Kadans Science Partner 2 UK	2	267	3
5 Moat Housing Group	4	860	NEW	30 Notting Hill Genesis	4	266	3
6 Network Rail	54	605	1	31 Vistry	11	260	16
7 Ministry of Defence	41	539	1	32 British Land	8	256	NEW
8 Home Group	4	509	2	33 Scottish Hydro Electric Transmission	2	252	4
9 North Lanarkshire Council	13	500	NEW	34 Panattoni & LU UK V Sarl	2	251	9
10 Anglian Water Group	3	486	1	35 Scottish Power Energy Networks	1	250	4
11 St Johns Wood Square	1	450	NEW	36 Canary Wharf Group	1	250	4
12 Ms. Hannah	4	429	NEW	37 Department for Infrastructure	9	241	9
13 Greater London Authority	13	419	1	38 Stanhope	3	240	4
14 Central Bedfordshire Council	15	406	0	39 Environment Agency	21	240	4
15 National Grid	12	390	6	40 Southern Housing Group	7	239	7
16 London Borough of Brent	8	378	3	41 Zurich Group	4	237	5
17 Northern Ireland Executive	11	358	NEW	42 Buckland Development	1	237	5
18 SSE	3	344	12	43 Cleve Hill Solar Park	1	225	3
19 London Borough of Sutton	6	333	NEW	44 Morrison Civil Engineering	1	225	3
20 London Borough of Hackney	7	311	3	45 Edge	1	225	3
21 Dep. for Digital, Culture, Media & Sport	5	305	NEW	46 London Borough of Croydon	1	221	3
22 Cheshire West & Chester Council	4	304	4	47 Kelda Group	10	216	2
23 Reuben Brothers	2	280	0	48 Devon County Council	10	207	NEW
24 Ministry of Justice	34	280	8	49 London Borough of Southwark	6	207	NEW
25 Peabody Trust	7	276	NEW	50 Pnbj l	1	200	NEW

Top 50 Clients - September 2023

Clients	#	£m		Clients	#	£m	
1 Moat Housing Group	1	853	NEW	26 Oxford Aviation Services	1	35	NEW
2 North Lanarkshire Council	2	452	NEW	27 Department of Health	4	34	24
3 St Johns Wood Square	1	450	NEW	28 Antrim and Newtonabbey Bor. Council	1	33	NEW
4 London Borough of Sutton	1	299	NEW	29 University of Ulster	1	33	NEW
5 Northern Ireland Executive	1	252	NEW	30 Be First Regeneration	1	30	NEW
6 Pnbj l	1	200	NEW	31 Greater Manchester Combined Auth.	1	30	NEW
7 Google	1	150	NEW	32 Yara Capital	1	30	NEW
8 British Land	1	150	NEW	33 Stoke on Trent City Council	1	29	NEW
9 Kinga	1	139	NEW	34 Co-operative Group	3	28	NEW
10 Education Authority Northern Ireland	13	86	NEW	35 Ardgowan Distillery Company	2	27	NEW
11 Severn Trent	1	80	NEW	36 Omnibus Investment Holdings	1	27	NEW
12 Southern Grove	1	75	NEW	37 Investec	1	26	NEW
13 Patron Capital Advisers	1	65	NEW	38 Reed Smith	1	23	NEW
14 First Base	1	65	NEW	39 Blackburn With Darwen Bor. Council	2	21	NEW
15 Longfellow Real Estate Partners	1	60	NEW	40 Vistry	1	21	22
16 Department for Infrastructure	2	57	11	41 Derwent Group	2	20	NEW
17 Queens University Belfast	2	52	NEW	42 Lewisham Homes	1	20	NEW
18 Bridgend College	1	50	NEW	43 Bury Metropolitan Borough Council	1	20	NEW
19 University of Sheffield	1	45	NEW	44 St. Edmund Hall	1	20	NEW
20 Baytree Logistics Properties	1	43	NEW	45 Kainos	1	19	NEW
21 Log Real Sarl	1	43	NEW	46 SSYS Beatties	1	18	NEW
22 Bentley Motors	1	40	NEW	47 Benjamin Property Group	1	17	NEW
23 Ponsarn Investments	1	38	NEW	48 Orsted Energy	1	16	NEW
24 Great Portland Estates	1	38	NEW	49 CHD Living	1	16	NEW
25 Platform Housing Group	2	35	NEW	50 Bridge Road Welwyn	1	15	NEW

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## Glenigan Index

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

Allan Wilen, Glenigan's Economics Director, commented, "The renewed weakening in project starts during the third quarter is disappointing. High interest rates and a stalled economy continue to hold back housing market activity and to deter private sector investment. The renewed weakening in public sector areas such as education and health is especially disappointing and has dampened overall starts. An improvement in civil engineering activity against the previous three months provides a bright spot during the quarter."

### SECTOR ANALYSIS

Residential starts decreased 10% during the three months to September to stand 26% lower than a year ago. Private housing decreased 10% against the preceding three months and weakened 23% compared with the previous year. Social housing work starting on-site performed poorly, falling 13% against the preceding three months and by 37% against the previous year.

Industrial project-starts experienced a poor period, with the value of project starts decreasing 38% during the three months to September and remaining 62% lower than a year ago. Hotel & Leisure experienced a poor period, decreasing by 26% against the preceding three months and 44% against the previous year.

Offices followed a similar trend, with the value of underlying project-starts falling 22% against the preceding three months to stand 41% down on a year ago. Education and Community and Amenity project-starts decreased 35% and 22% respectively against the preceding three months, to stand 13% and 32% down on the previous year respectively.

Health starts experienced a poor period, decreasing 25% against the preceding three months and remained 24% below 2022 levels. Retail followed a similar trend, with the value of project-starts decreasing 14% against the preceding three months, remaining 44% down against the previous year.

Civil engineering work starting on-site increased 8% against the preceding three months to stand 28% down on a year ago. Infrastructure starts drove growth during the period, increasing 48% against the preceding three months but remaining 13% down on the previous year. Utilities starts declined by 32% against the preceding three months to stand 49% down against the previous year.

### REGIONAL ANALYSIS

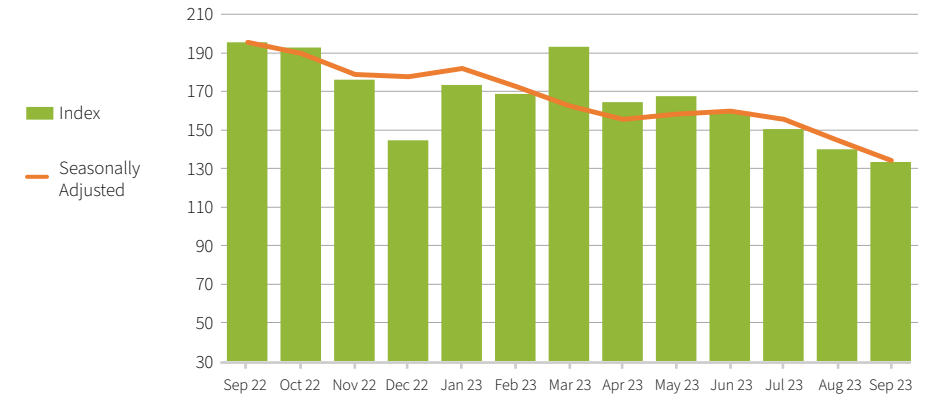
Most areas of the UK saw a weakening in project-starts during the period. Despite this the Capital experienced an increase against the preceding three months (+10%) but remained 5% down against the previous year. The value of project-starts in the South West remained level with the preceding three months but declined 36% against the previous year. The West Midlands experienced a poor performance, with the value of project starts decreasing 23% against the preceding three months and remained 49% down against the previous year.

The value of project-starts in the South East declined 17% against the preceding three months and remained 29% down on the previous year. The East Midlands experienced a decrease against the preceding three months (-31%) and previous year (-52%). The North East and the East of England both experienced a weak period, decreasing by 36% and 33% respectively and remaining 19% and 29% down on 2022 levels.

Project-starts in Northern Ireland and Wales weakened, slipping by 27% and 15% respectively against the preceding three months and were 37% and 27% lower than a year ago. Scotland also experienced a decrease against both the preceding three months (-6%) and previous year (-32%). Yorkshire & the Humber and the North West also suffered falls in project-starts against both the preceding three months and previous year.

## Glenigan Index

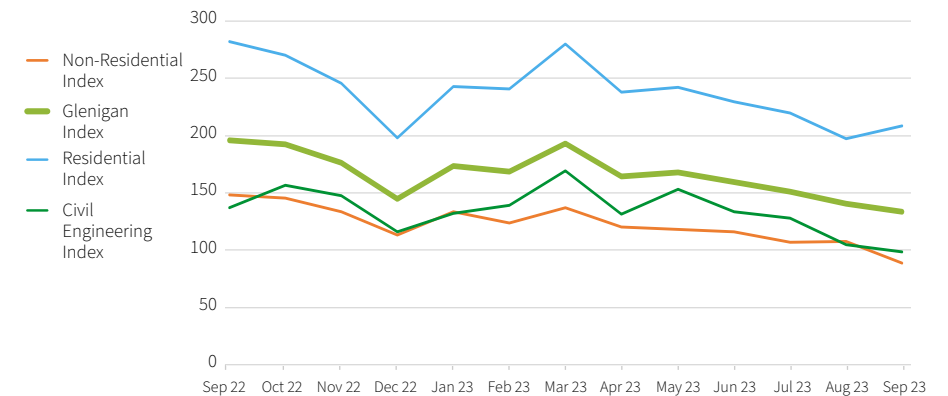
Source: Glenigan



Note: For the Index, 2006 = 100

## Indices Growth

Source: Glenigan



## Economic Outlook

### Sluggish UK economy

- > Weakening in manufacturing output
- > Service sector disrupted by industrial action
- > Labour market cools

The UK economy shrunk by 0.5% in July with all three main sectors, manufacturing, construction and services, declining according to the Office for National Statistics (ONS). The fall reversed a rise in activity during June. Recent survey data points to a further contraction in the economy during the remainder of the third quarter.

Manufacturing output slipped back 0.8% during July, partially reversing a strong 2.4% rise seen during the previous month. Manufacturing output rose 1.7% during the three months to July and was 1.8% higher than a year earlier.

Recent CIPS surveys indicate that July's fall in manufacturing activity continued during August and September. Manufacturers reported a weakening in output, new orders, and employment during September, with the CIPS manufacturing index standing at 44.3, up slightly on the 43.0 seen in August, but remaining below the 50 'no change' level.

Services output fell by 0.5% in July after a smaller rise in June. Overall service sector output grew by 0.1% during the three months to July. A decline in health services due to NHS industrial action was an important driver behind July's fall. Information & communications, education, logistics and wholesaling and retailing also declined during the month.

CIPS survey data points to a further softening in service sector activity during the remainder of quarter three. At 49.3 the Service Index in September was down from 49.5 in July and just below the 50.0 no change value.

### INFLATION, INTEREST RATES AND EMPLOYMENT

The UK's flat economic performance in recent months indicates that successive interest rate rises are curbing domestic demand in the economy.

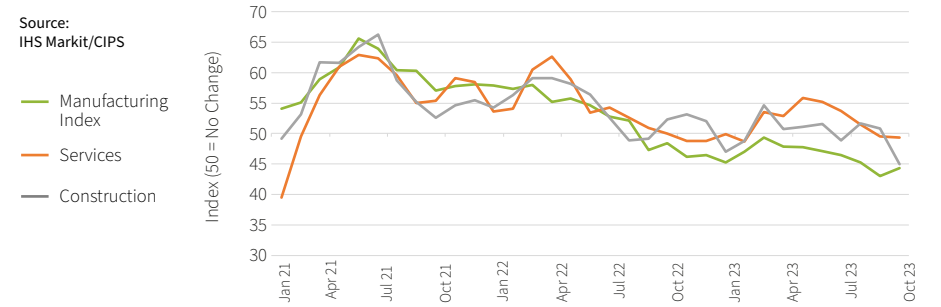
The UK labour market has also cooled. The unemployment rate for May to July 2023 increased by 0.5 percentage points to 4.3%. The inactivity rate also edged higher, while the proportion of the workforce in employment dropped by 0.5 percentage points to 75.5%. The ONS has also recorded a further decline in job vacancies. The estimated number of vacancies dropped by 64,000 or 6% to 989,000 during the three months to August.

Inflation has continued to moderate, slipping to an annual rate of 6.3% in August. A further easing in consumer price inflation is anticipated over the coming months, although inflation remains significantly above the Bank of England's 2% target.

The easing in inflation suggests that interest rates are now at or near the top of the current cycle. However, rates are likely to remain near current rates for some time. There is a risk that high wage settlements may feed through to price rises and renewed inflation. Average earnings during May to July were 7.8% higher than a year ago, despite the recent cooling in the labour market.

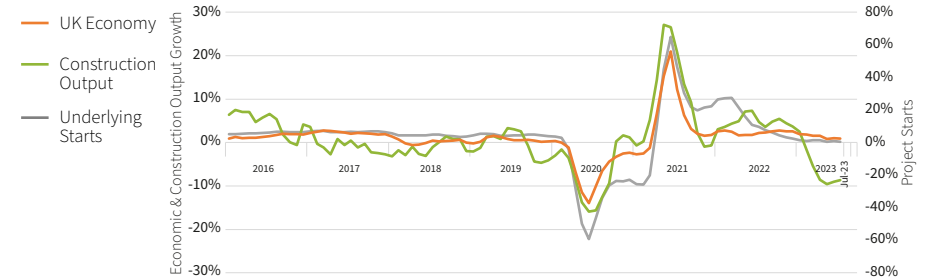
### CIPS Activity Surveys

Source: IHS Markit/CIPS



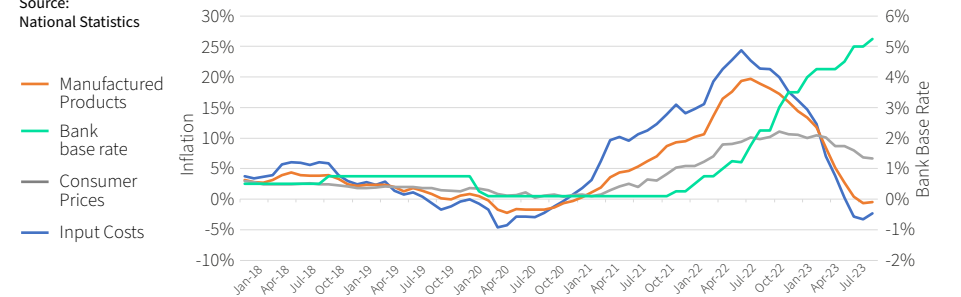
### Construction Activity & The Economy – 3 months against a year earlier

Source: ONS, Glenigan



### Inflation & Interest Rates

Source: National Statistics



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## Housing – Overview

**Project-starts, main contract awards and detailed planning approvals all fell against the previous quarter and last year.**

Totalling £10,274 million, residential work commencing on site during the three months to September fell 24% against the preceding three months to stand 29% lower than a year ago. Major project-starts (£100 million or more in value), at £2,833 million, fell 47% against the preceding three months and were 35% down compared with the previous year. Underlying work starting on site (less than £100 million) totalled £7,441 million, a 10% decline against the preceding three months on a seasonally adjusted (SA) basis and 26% lower than a year ago.

Residential main contract awards decreased 28% against the preceding quarter to stand 24% down compared with the previous year to total £17,430 million. Underlying contract awards, at £12,102 million, decreased 26% (SA) against the preceding quarter and 21% against the previous year. Major awards decreased 33% against the preceding quarter to stand 28% down against the previous year to total £5,328 million.

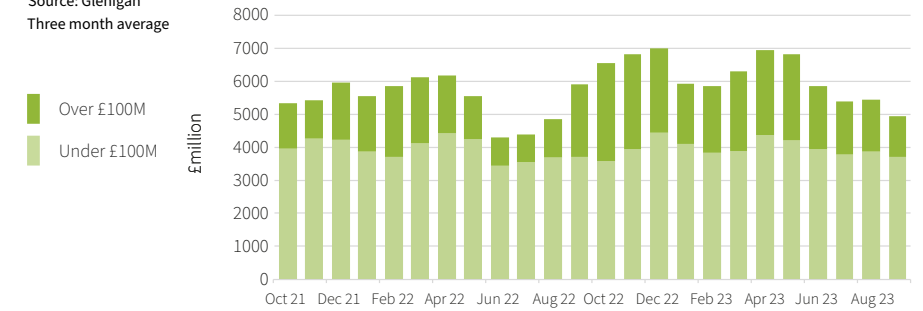
At £14,820 million, detailed planning approvals decreased 16% on both the previous three months and last year. Underlying approvals, totalling £11,137 million, slipped back 4% against the preceding three months (SA) and remained flat against last year. Major project approvals decreased 36% on the preceding quarter and stood 44% down against the previous year to total £3,683 million.

**-29%**

**Decline in the value of residential work starting on-site against the previous year**

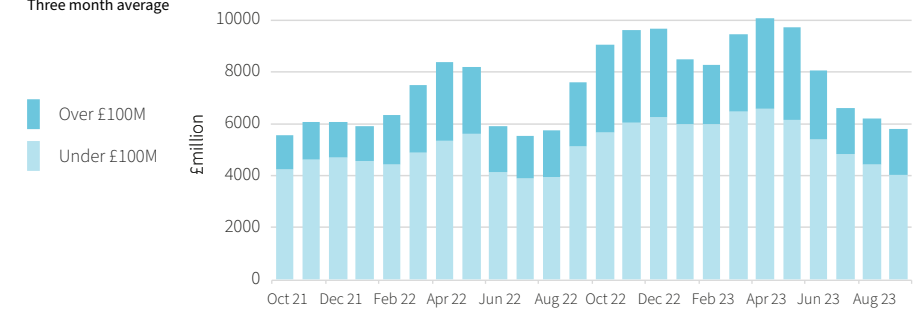
### Housing: Detailed Planning Approvals

Source: Glenigan  
Three month average



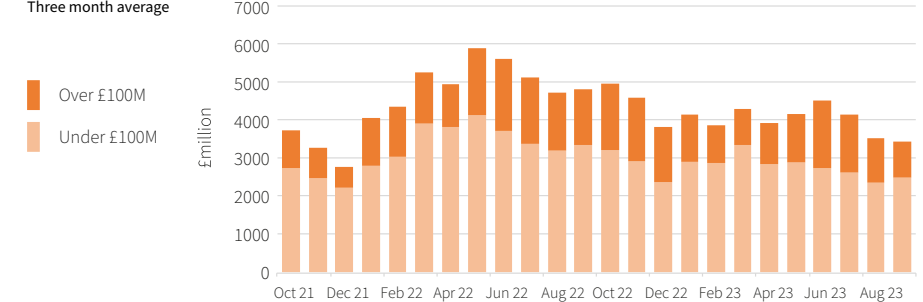
### Housing: Main Contract Awards

Source: Glenigan  
Three month average



### Housing: Starts

Source: Glenigan  
Three month average



## Housing – Types of Projects Started

Private housing accounted for 57% of the total value of work starting on site during the three months to September, with the value totalling £5,840 million. Private housing starts fell 15% against the previous year. Private apartment work starting on site fell 45% against last year to total £1,706 million. The segment accounted for 17% of project-starts during the period. Social sector apartment projects starting on-site decreased 9% to total £1,272 million, accounting for a 12% share of the sector. Accounting for 6%, social housing slipped back 74% to total £582 million.

Private sheltered housing fell 34% to total £266 million, accounting for a 3% share. In contrast, totalling £547 million, student accommodation more than doubled on a year ago to account for 5% of the sector. At £6 million, elderly persons homes also increased compared with last year when no projects started on site.

### Housing: League Tables (October 2022 to September 2023)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Barratt	104	4,523	Barratt	103	3,777
Persimmon	102	3,848	Persimmon	108	3,547
Taylor Wimpey	62	2,716	Vistry	95	2,811
Bellway	73	2,601	Bellway	79	2,585
Vistry	66	2,378	Taylor Wimpey	67	2,497
Redrow	36	1,565	Redrow	38	1,622
Legal & General	38	1,492	Legal & General	49	1,614
Hill Partnerships	23	1,243	Bloor Homes	34	1,290
Bloor Homes	32	1,220	Dandara	19	1,021
Dandara Group	19	1,082	Crest Nicholson	25	914

## Project Spotlight



Image Source: Springfield

### 3042 Residential Units

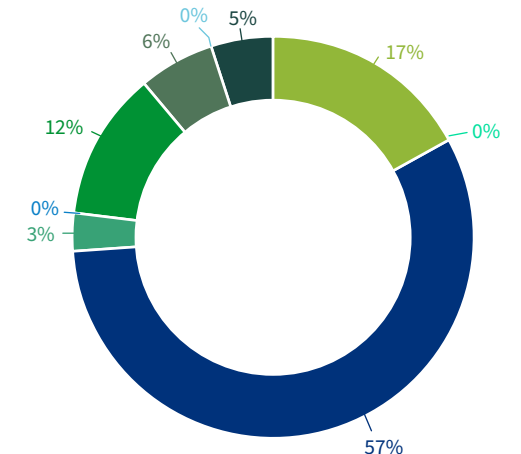
Detailed plans have been approved on the £650 million Durieshill development in Stirling. A main contractor is yet to be appointed on the scheme.

**Project ID: 1800364**

### Types of Housing Projects Started Three Months to September 2023

Source: Glenigan

- Private Apartments
- Elderly Persons Homes
- Private Housing
- Private Sheltered Housing
- Social Sector Sheltered Housing
- Social Sector Apartments
- Social Sector Housing
- Homes, Hostels etc.
- Student Accommodation



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## Housing – Regional

The three months to September was a weak period for starts in most regions in the UK. The South East accounted for the greatest proportion (21%) of residential work during the period, totalling £2,165 million, after a 3% increase compared with the previous year's levels. Project-starts in the region were boosted by the £852.87 million decarbonisation works in Kent (Project ID: 23299961). At £1,413 million, the North West was the only other region that experienced growth, accounting for a 14% share of project-starts, having increased 4% on the preceding year.

Accounting for 15%, London slipped back 34% against the previous year to total £1,557 million. At £902 million the East of England also fell 34% against the previous year, to account for 9% of the sector. The South West (£827 million) accounted for an 8% share, after decreasing 21% against a year ago. The West Midlands faced the steepest decline at 59% against the previous year, bringing its total value down to £601 million, a 6% share of the residential sector.

The South East was the most active region for detailed planning approvals, totalling £2,438 million, a 16% share of the sector. The value of approvals in the region grew 9% against the previous year. Accounting for the same proportion of approvals, Scotland also experienced a strong period with approvals having more than doubled against 2022 levels to total £2,355 million. Projects in Scotland included a £650 million, 3042-unit development in Stirling (Project ID: 18000364).

At £1,640 million, consents in the North West increased 1% to account for an 11% share of the sector. The South West accounted for 10% of residential approvals, after a 44% growth to total £1,440 million. Yorkshire & the Humber, at £1,304 million, also grew 55% on a year ago to account for 9% of the sector.

**-16%**

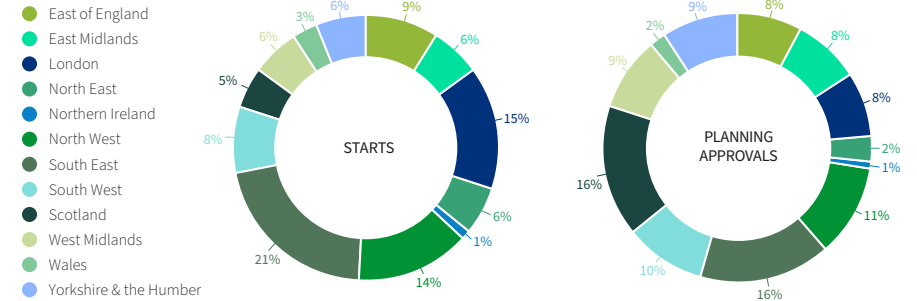
Decrease in the value of detailed planning approvals against the previous year

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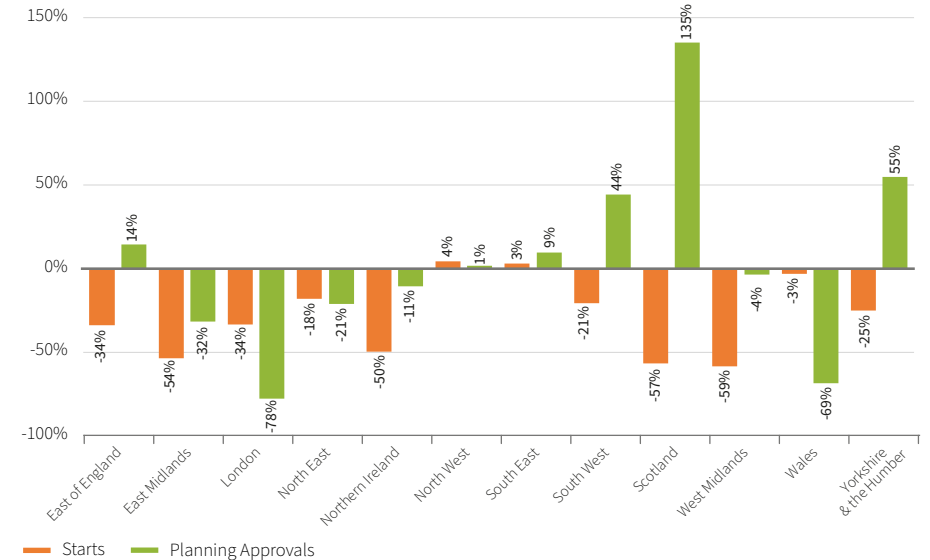
### Share Value of Housing Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



### Changes in Housing Starts and Planning Approvals on a Year Earlier

Source: Glenigan



## Industrial - Overview

**Project-starts, main contract awards and detailed planning approvals all experienced declines against the previous quarter and last year.**

During the three months to September, industrial project-starts fell 35% against the preceding three months to stand 72% down on a year ago, totalling £767 million. There were no major projects (£100 million or more) starting on site during the period, a decrease on the previous quarter and last year levels. Underlying industrial work starting on site (less than £100 million in value) decreased 38% against the previous quarter on a seasonally adjusted (SA) basis to stand 62% lower than a year ago.

Totalling £1,433 million, industrial main contract awards decreased 27% against the preceding quarter and stood 57% down against last year. Underlying industrial main contract awards decreased 32% (SA) against the preceding quarter and remained 31% lower than a year ago. No major projects reached the contract awarded stage, unchanged on the preceding quarter but down on the previous year.

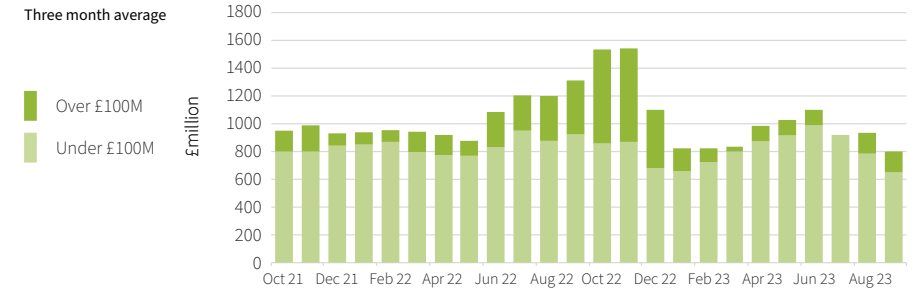
Industrial detailed planning approvals totalled £2,402 million, having fallen 27% on the previous three months, to stand 39% down on last year. Major project approvals increased 34% on the previous quarter but slipped back 61% against the preceding year to total £450 million. Underlying projects totalled £1,952 million, a 29% decrease (SA) on the preceding three months, and 30% lower than the previous year.

**-72%**

Decrease in the value of work starting on-site against the previous year

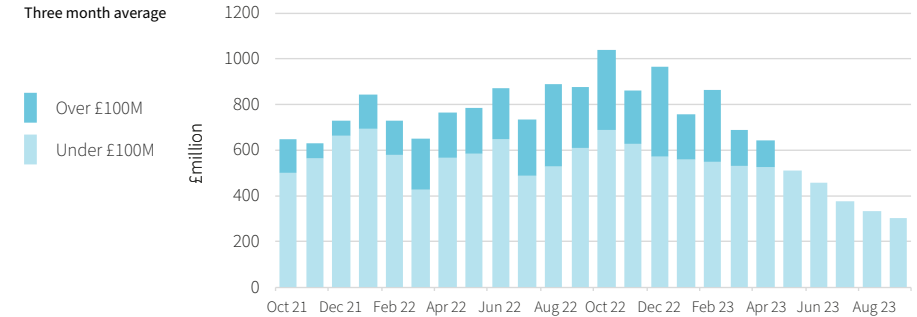
### Industrial: Detailed Planning Approvals

Source: Glenigan  
Three month average



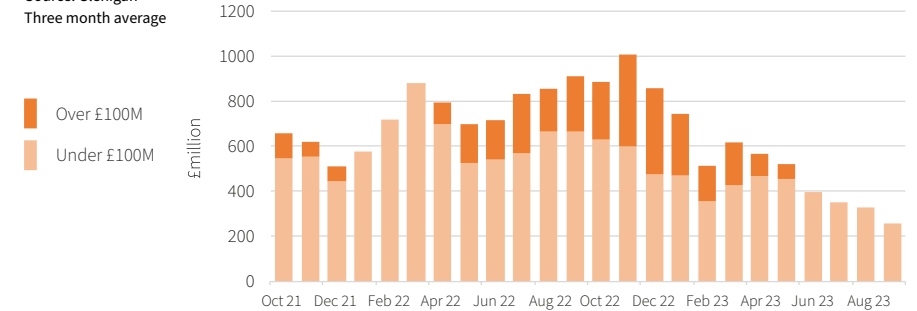
### Industrial: Main Contract Awards

Source: Glenigan  
Three month average



### Industrial: Starts

Source: Glenigan  
Three month average



## Industrial – Types of Projects Started

Manufacturing work starting on site added up to £532 million, a 67% fall compared with the previous year. Despite the decline, manufacturing accounted for 69% of industrial project-starts during the three months to September, making it the most active segment.

Warehousing & logistics project-starts decreased 81% against the previous year to total £187 million, accounting for 25% of the sector. Other industrial projects slipped back 63% against the previous year, which brought it down to a total of £48 million, a 6% share of the whole sector.

### Industrial: League Tables (October 2022 to September 2023)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Winvic	16	727	Panattoni & LU	3	257
Glencar	11	300	Fujifilm Diosynth Biotechnologies	1	200
ISG	3	263	Pharmaron Biologics	1	151
Readie	10	239	Errigal	1	150
McLaren	7	197	Tilstone Glasgow	3	99
WHP Engineering	1	151	Henry Boot	7	83
Errigal Contracts	1	150	St Modwen Properties	6	81
GMI	7	136	Clowes Developments (UK)	6	65
TSL Projects	3	126	Mulberry Property Dev.	1	64
Marbank	9	125	Russell WBHO	1	61

## Project Spotlight



Image Source: Peter Haddon and Partners

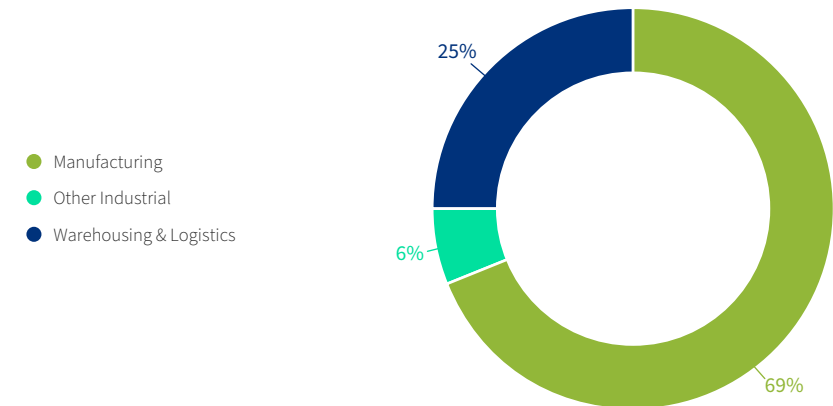
### Storage & Distribution Units

*Detailed plans have been approved for the £82 million development of two storage and distribution units in Buckinghamshire. A main contractor is yet to be appointed to the scheme, with works expected to be completed in Q1 2025.*

**Project ID: 18258018**

### Types of Industrial Projects Started Three Months to September 2023

Source: Glenigan



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## Industrial – Regional

Most regions experienced a slump in industrial project-starts against 2022 levels. Wales was one of the only two regions that bucked the trend. The region accounted for 16% of industrial work starting on site during the three months to September, with the value adding up to £125 million, making it the most active region, thanks to an 82% increase on a year ago. The growth was boosted by a £83.55 million employment unit development in Pontyclun (Project ID: 19446816). Scotland, at £56 million, grew 13% against the previous year, accounting for 7% of the sector.

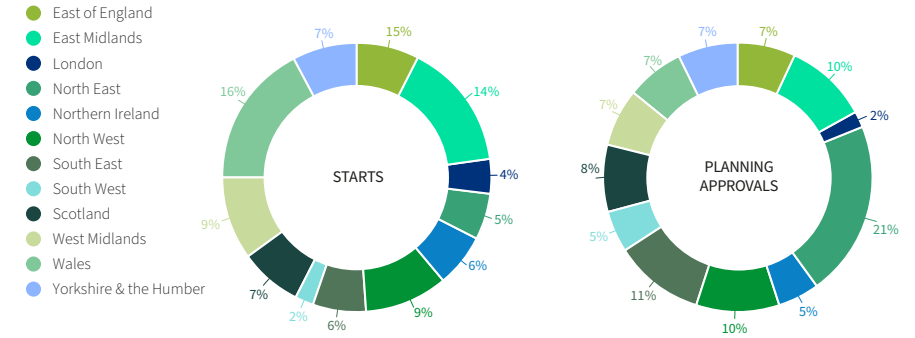
In contrast, despite being the second most active region, the East of England experienced a weak performance with projects commencing on site having slipped back 16% to total £111 million, accounting for 15% of the sector. Totalling £110 million, the East Midlands fell 64% on last year's levels to account for a 14% share of project-starts. Accounting for a 9% share each, project-starts in the North West and the West Midlands decreased 71% and 67% to total £71 million and £72 million respectively.

Detailed planning approvals during the period also experienced a downturn in most regions. The North East was the most active region, accounting for a 21% share of all consents, having grown almost tenfold on last year, bringing its total value up to £513 million. This growth was boosted by the £450 million Nissan Sunderland Plant (Project ID: 20163404). The South East accounted for 11% of industrial approvals, totalling £261 million, a 13% increase on a year ago. Accounting for a 7% share of the sector, consents in Wales were also three times higher than last year, totalling £159 million.

In contrast, consents in the East Midlands and the North West were 38% and 72% down against the preceding year to total £238 million and £251 million respectively, each accounting for a tenth of all industrial approvals. Approvals in Scotland slipped back 14% compared with last year's levels, accounting for 8% of the industrial sector and totalling £185 million.

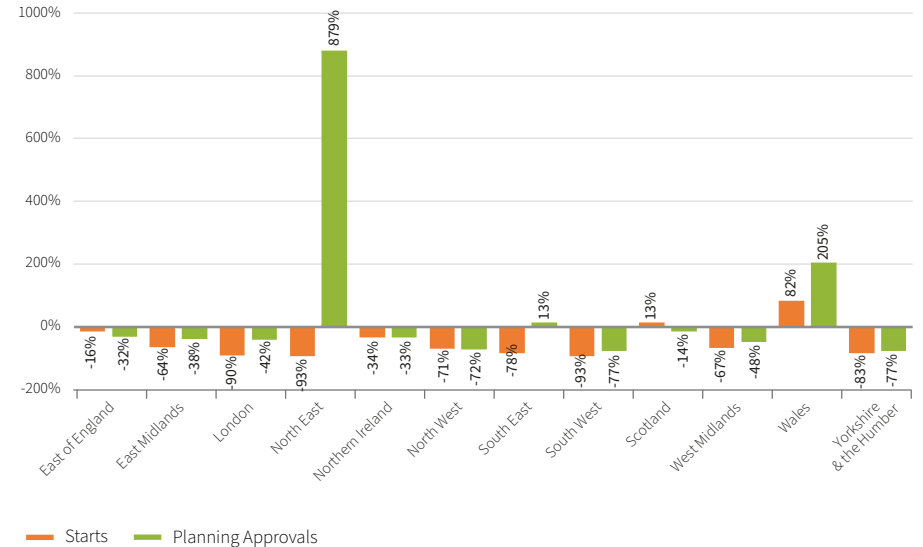
### Share Value of Industrial Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



### Changes in Industrial Starts and Planning Approvals on a Year Earlier

Source: Glenigan



**-27%**

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

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## Offices - Overview

**Project-starts and main contract awards decreased against both the previous quarter and last year. More positively, growth in detailed planning approvals on last year provides a boost to the development pipeline.**

Office work starting on site totalled £920 million during the three months to September, a 33% decrease compared with the preceding quarter and 49% down on the previous year. Major projects (£100 million or more) also fell 74% against both the previous quarter and a year ago to total £110 million. Underlying project-starts (less than £100 million in value) decreased 22% against the preceding three months on a seasonally adjusted (SA) basis to stand 41% down on a year ago, totalling £810 million.

**-49%**

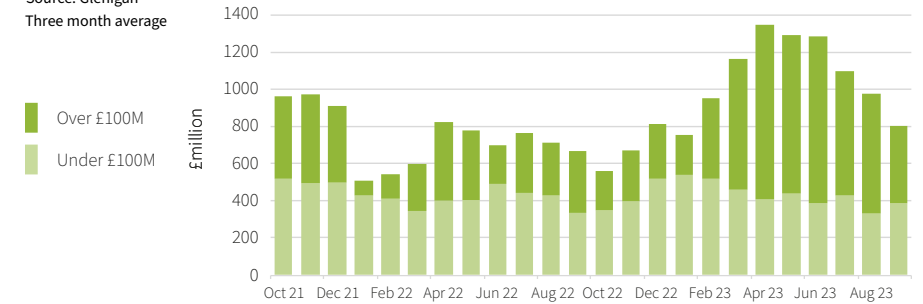
Decrease in the value of office projects starting on-site against the previous year

Totalling £1,560 million, office main contract awards decreased 30% against the preceding quarter to stand 36% down on the previous year. Major projects totalled £350 million during the period, a 63% decrease against the preceding quarter and down 67% on the previous year. Underlying contract awards declined 20% against the preceding quarter (SA) and by 14% against the previous year.

Office detailed planning approvals, totalling £2,409 million, fell 38% on the preceding three months but grew 21% compared with last year. Major project approvals decreased 54% against the preceding three months but grew 25% on a year ago, totalling £1,257 million. At £1,152 million, underlying project approvals were 8% down (SA) against the previous quarter but stood 16% up on a year ago.

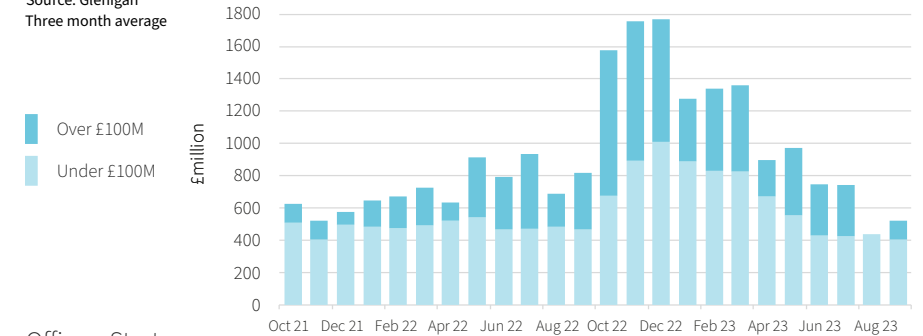
### Offices: Detailed Planning Approvals

Source: Glenigan  
Three month average



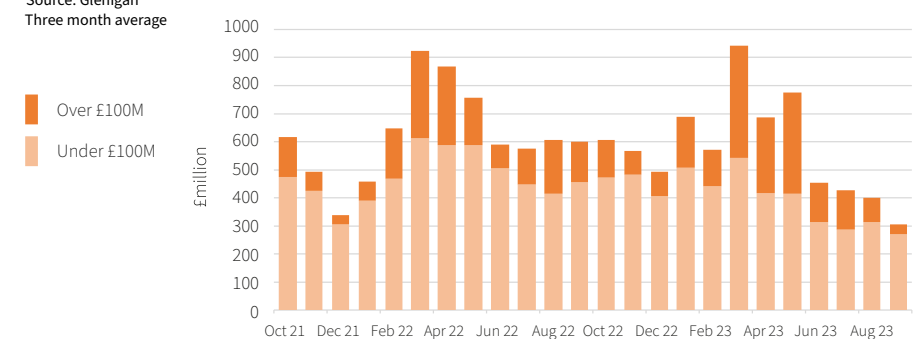
### Offices: Main Contract Awards

Source: Glenigan  
Three month average



### Offices: Starts

Source: Glenigan  
Three month average



## Size of Office Projects

The '£50 million to £100 million' value band totalled £268 million, 22% higher than a year ago. In contrast, the '£20 million to £50 million' value band experienced a 57% decline against the preceding year's levels, totalling £184 million during the period. The '£10 million to £20 million' value band decreased 42% against last year's levels, with project-starts totalling £173 million.

Project-starts in the 'Up to £5 million' value band fell 53% against the previous year to total £120 million. The 'Over £100 million' value band fell 74% against the previous year to total £110 million. Finally, the '£5 million to £10 million' value band slipped back 60% with a total of £65 million.

## Project Spotlight



Image Source: Building Magazine

### 55 Bishopsgate

*Detailed plans have been approved for the new £600 million 55 Bishopsgate development in London. Works are due to be completed in Q3 2029. A main contractor is yet to be appointed for the development.*

**Project ID: 22258325**

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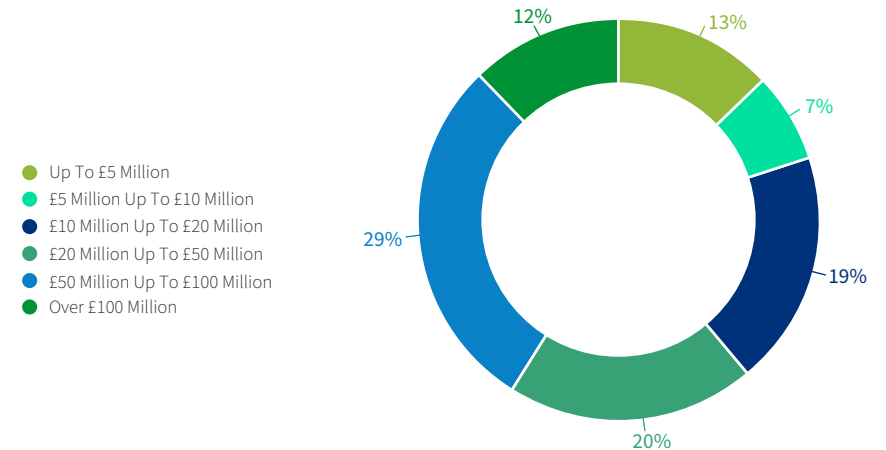
### Offices: League Tables (October 2022 to September 2023)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Mace	9	1,102	British Land	5	233
Morgan Sindall	142	493	Edge	1	225
ISG Construction	7	445	Zurich	1	225
Multiplex	3	424	Pnbj I	1	200
Bowmer & Kirkland	5	392	Royal London Asset Mgmt.	1	200
Royal BAM	7	364	Land Securities	4	194
Wates	56	282	Reuben Brothers	1	180
Skanska UK Plc	2	240	Google	3	169
McLaren	3	225	Precis	1	150
Lendlease	1	180	Great Portland Estates	10	145

### Value of Offices Projects Started Three Months to September 2023

Source: Glenigan





## Offices – Regional

London was the most active area of the UK for office project-starts, accounting for 51% of the total value during the three months to September, despite the value having decreased 55% compared with the previous year's levels. Office work starting in the Capital totalled £469 million and included a £94 million office development in Islington (Project ID: 21333363). At £89 million, the South East also had a weak performance: project-starts slipped back 33% on last year's levels, to account for 10% of the sector.

The West Midlands also fell 14%. The value of projects starting in the region added up to £57 million, accounting for 6% of the office sector. In contrast, the East of England experienced a 28% growth compared with 2022 levels, totalling £134 million, making it the second most active region with a 15% share of projects starting on-site.

London also had the biggest share of detailed planning approvals (59%), with a total value of £1,417 million, which is more than three times as high as last year's figures. Consents in the Capital included the £386.92 million 1 Undershaft development in the City (Project ID: 15014016). In second place was the North West, which doubled against a year ago and accounted for 10% of the sector to total £253 million.

Yorkshire & the Humber also tripled in value to total £192 million, accounting for an 8% share of office approvals. In contrast, accounting for 7%, the East of England slipped back 80% to total £158 million. Totalling £114 million, the South East slipped back 55% against last year to account for a 5% share of consents.

**21%**

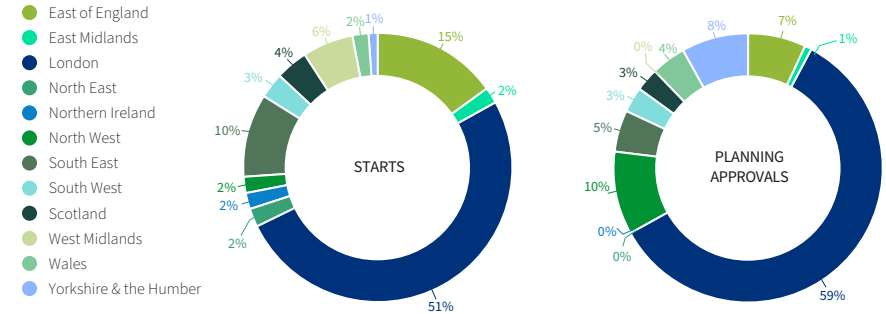
Increase in the value of detailed planning approvals against the previous year

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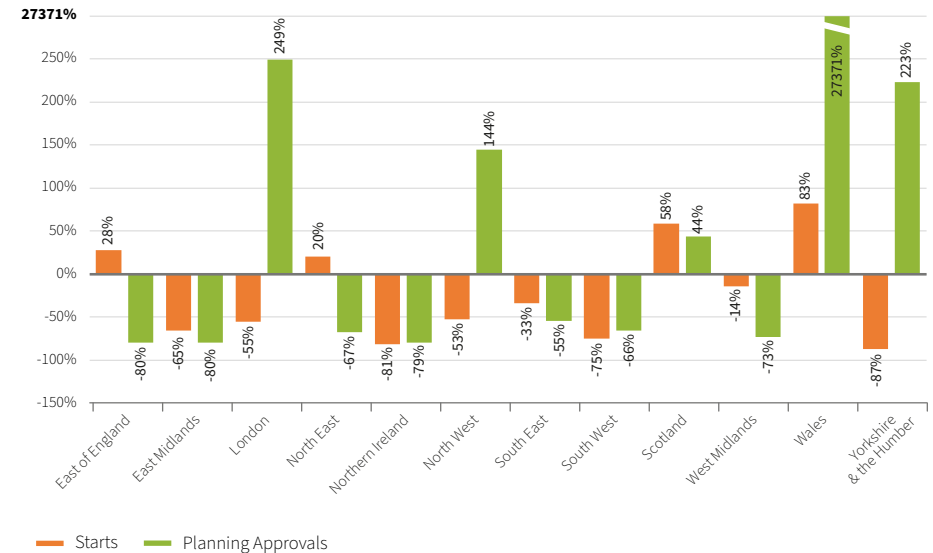
### Share Value of Offices Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



### Changes in Offices Starts and Planning Approvals on a Year Earlier

Source: Glenigan



## Retail – Overview

**Main contract awards slipped back against both the previous three months and last year. In contrast, detailed planning approvals increased on the preceding quarter and a year ago**

Totalling £446 million, retail work starting on site during the three months to September grew 13% against the preceding three months but stood 33% lower than a year ago. Major projects starting on site (£100 million or more) totalled £130 million, an increase compared with the previous quarter when almost no projects started on site, and a 16% increase on a year ago. Underlying project-starts (less than £100 million) experienced a 14% decline against the preceding three months on a seasonally adjusted (SA) basis and fell 43% against the previous year to total £316 million.

**-33%**

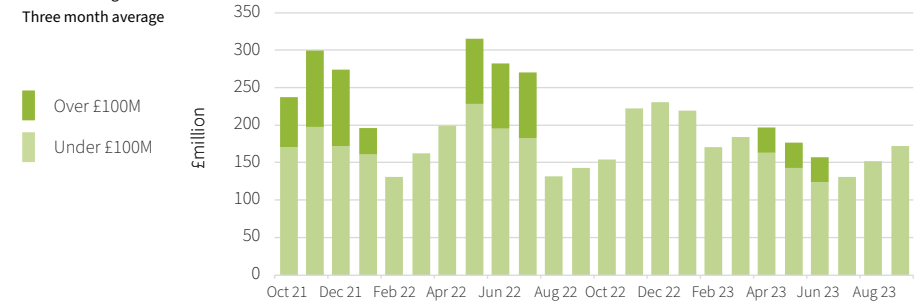
Decline in the value of retail work starting on site against the previous year

Retail main contract awards totalled £156 million, a decrease of 61% against the preceding quarter and a 75% fall against the same period a year ago. No major projects reached the contract awarded stage, down on the previous year but unchanged on the preceding quarter. Underlying contract awards decreased by 54% (SA) against the preceding quarter to stand 64% lower than the previous year.

Detailed planning approvals, totalling £516 million, grew 9% against the preceding three months, to stand 20% up on the previous year. Underlying approvals grew 37% (SA) compared with the preceding three months and increased 20% against the previous year. Similar to last year, but in contrast with the previous quarter, there were no major detailed planning approvals.

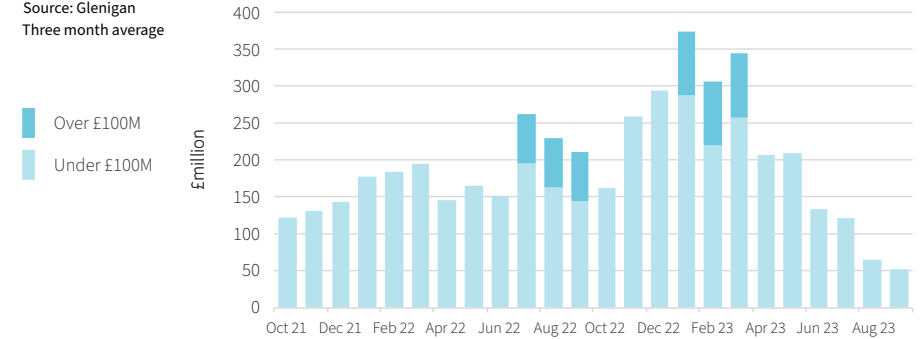
### Retail: Detailed Planning Approvals

Source: Glenigan  
Three month average



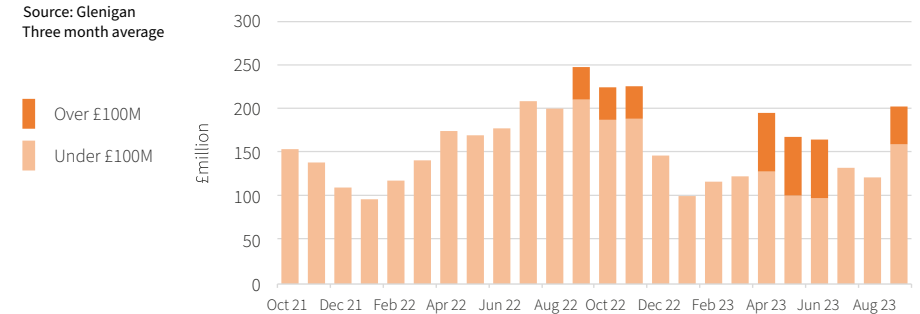
### Retail: Main Contract Awards

Source: Glenigan  
Three month average



### Retail: Starts

Source: Glenigan  
Three month average



## Retail – Types of Projects Started

The value of shop starts fell 24%, to total £274.5 million, accounting for 61% of all retail starts. Supermarket project-starts totalled £107.7 million, standing 52% lower than a year ago to account for a 24% share of retail project-starts. Petrol filling stations totalled £7.9 million, a 22% decline against last year to account for 2%.

Retail warehousing also experienced an 83% decline against 2022 levels to total £2.7 million. On the other hand, shopping centre projects commencing on site during the three months to September added up to £7.8 million, having tripled against the previous year to account for 2% of the sector.

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### Retail: League Tables (October 2022 to September 2023)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Mace	1	130	London Borough of Sutton	1	299
Caddick	2	66	BNP Paribas Securities Serv.	1	130
DSP	11	42	Aldi	74	104
Galliford Try	1	35	Wm Morrison	62	45
Henry Boot	1	32	Tesco	79	41
Lendlease	1	30	Fenwicks	1	40
Portal	1	28	Lidl	12	35
Faircloth	4	24	Vortex Business Park	1	28
Kier	2	18	Marks & Spencer	20	26
Bowmer & Kirkland	2	16	Bruntwood Estates	1	25

## Project Spotlight



Image Source: Halliday Fraser Munro Planning

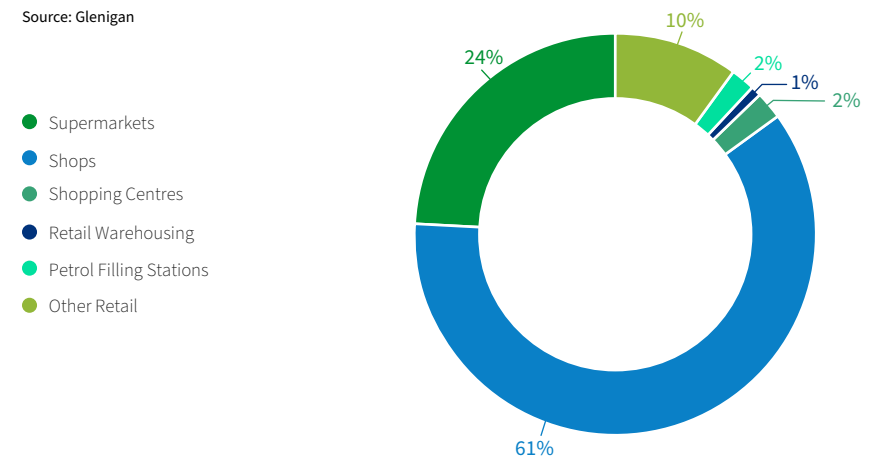
### Aberdeen Market

*Detailed plans have been approved for the Aberdeen Market development. A main contractor is yet to be appointed for the £75 million development. Works are due to be completed in Q4 2024.*

**Project ID: 17464585**

### Types of Retail Projects Started Three Months to September 2023

Source: Glenigan



## Retail – Regional

London was the most active region accounting for 38% of all retail project-starts nationwide, due to the value increasing 5% against the previous year to total £170 million. The growth was boosted by the £130 million Woolgate Exchange development in the City (Project ID: 22182271). The North West, at £66 million, also grew 29% on a year ago, accounting for a 15% share of the sector. At £35 million, the West Midlands was another region experiencing growth during the period, with project-starts having increased 90% compared with a year ago to account for 8% of the retail sector.

In contrast, accounting for 7% each, project-starts in the South West and Yorkshire & the Humber fell 77% and 51% respectively compared with a year ago, to total £31 million each. The South East faced a 63% decline against the previous year to total £22 million, accounting for 5% of the sector.

Scotland had the highest proportion of retail approvals, with a 20% share, having almost quadrupled against last year's levels, to total £101 million. The growth was boosted by the £75 million Aberdeen Market Development (Project ID: 17464585). The North West accounted for 17% of retail approvals, totalling £88 million, which is a 64% increase on a year ago. London also experienced an increase in planning approvals, having grown 67% against the previous year, accounting for 13% of the sector and totalling £68 million.

Approvals in the East of England jumped 68% against the previous year and totalled £58 million, accounting for 11% of the sector. The West Midlands, on the other hand, experienced a decline. Totalling £39 million, detailed planning approvals in the region slipped back 31% against 2022 levels to account for a 7% share of retail consents.

**20%**

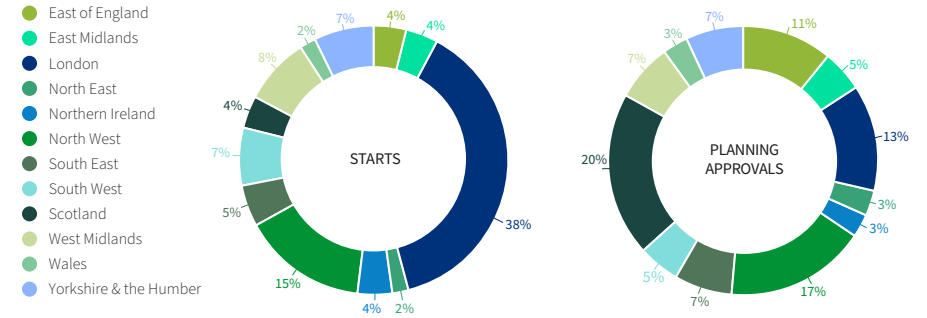
Increase in the value of detailed planning approvals against the previous year

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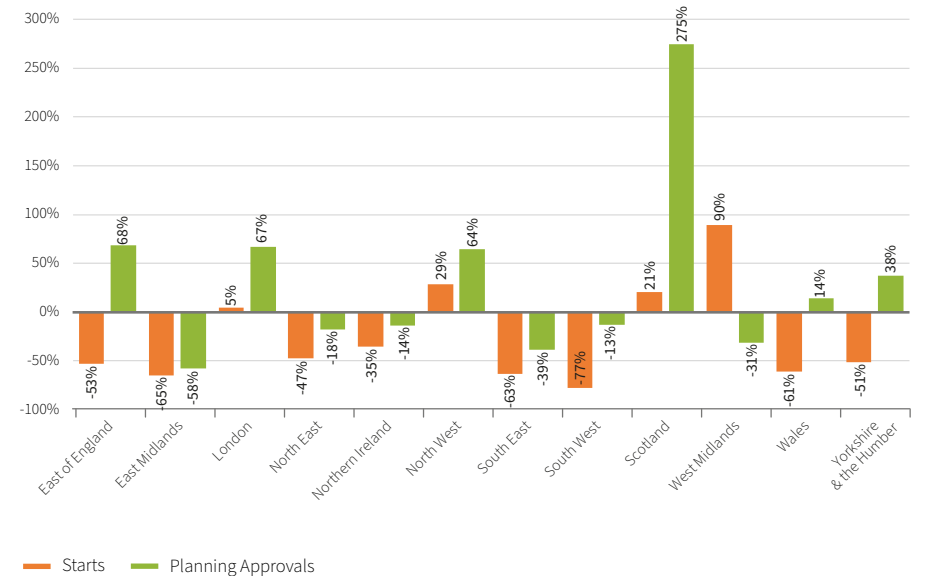
### Share Value of Retail Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



### Changes in Retail Starts and Planning Approvals on a Year Earlier

Source: Glenigan



## Hotel & Leisure – Overview

**Project-starts suffered declines on the previous quarter and last year. More positively, detailed planning approvals experienced growth against both the preceding three months and a year ago.**

Totalling £563 million, hotel & leisure projects starting on site during the three months to September fell 36% against the preceding three months to stand 59% down on the previous year. Unlike the previous quarter and last year, there were no major projects (£100 million or more in value) commencing on site. Underlying starts (less than £100 million) slipped back 26% against the preceding three months on a seasonally adjusted (SA) basis and fell 44% compared with last year.

At £1,005 million, hotel & leisure main contract awards decreased 40% against the preceding quarter but increased 31% against the previous year. Major projects, at £500 million experienced a 79% increase on the preceding quarter, up on the previous year where there were no major projects. Underlying contract awards decreased 57% (SA) against the preceding quarter and by 34% compared with a year ago.

At £2,296 million, hotel & leisure detailed planning approvals grew 51% during the quarter to stand 44% up on the previous year. Underlying approvals remained flat (SA) against the preceding three months and decreased 9% against the previous year, totalling £1,159 million. Major projects totalled £1,137 million during the period, a 94% increase on the previous quarter and more than three times higher than a year ago.

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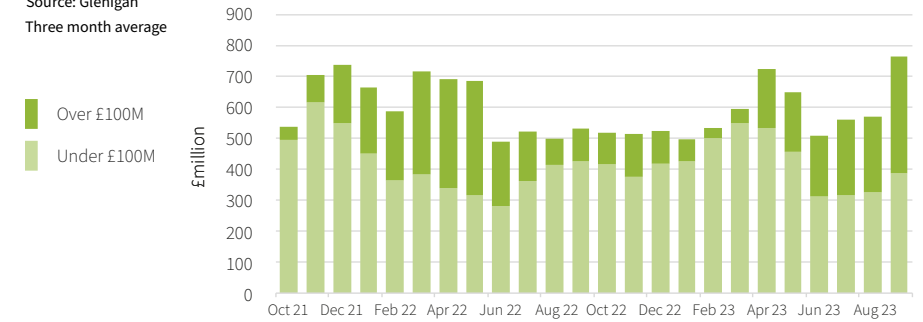
Civil Engineering

**-59%**

Decrease in the value of hotel & leisure work starting on site against the previous year

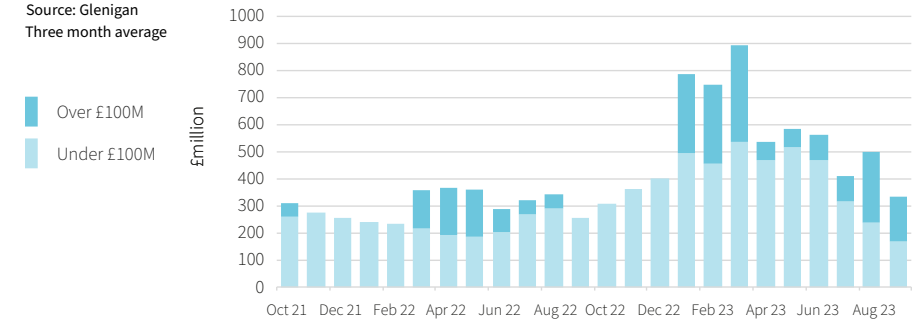
### Hotel & Leisure: Detailed Planning Approvals

Source: Glenigan  
Three month average



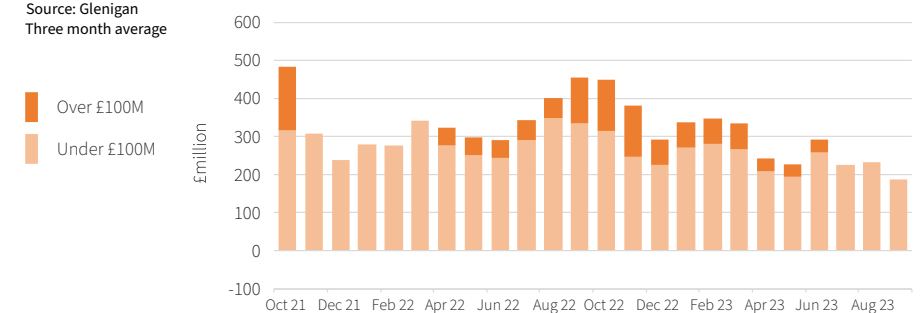
### Hotel & Leisure: Main Contract Awards

Source: Glenigan  
Three month average



### Hotel & Leisure: Starts

Source: Glenigan  
Three month average



## Hotel & Leisure – Types of Projects Started

Hotels & guest houses accounted for the greatest proportion (36%) of sector starts during the three months to September, with the value adding up to £206 million. The segment fell 71% compared with last year's levels. Sport facility project-starts also decreased 20% against the previous year to total £116 million, accounting for 21% of the sector.

Accounting for 8% of the sector: cafés, restaurants and fast-food outlets slipped back 69% on last year's levels to total £43 million. Indoor leisure facilities also experienced a steep decline at 93% against the preceding year. The segment accounted for 2% of the sector with a total value of £9 million. Accounting for the same share, cinemas & theatres decreased 87% against 2022 levels to total £11 million.

### Hotel & Leisure: League Tables (October 2022 to September 2023)

Source: Glenigan

Contractors			Clients		
Contractors	Projects	£m	Clients	Projects	£m
Newarthill	3	477	City of London Corporation	3	234
John Sisk & Son	2	225	Great Lakes	1	200
Royal BAM	3	185	Kirklees Metropolitan Council	2	160
Kier	8	157	Reuben Brothers	1	100
Lendlease	1	150	Ask Patrizia (gq)	2	98
Morgan Sindall	8	135	Hyperion Investments	1	78
Willmott Dixon	25	132	Sefton Council	1	73
Gilbert Ash	3	119	Whitbread	2	70
Knight Build	1	100	Falcon House Property	1	50
Bamfords Trust	1	78	Patrazia Immobilien	1	50

## Project Spotlight



Image Source: Therme Manchester

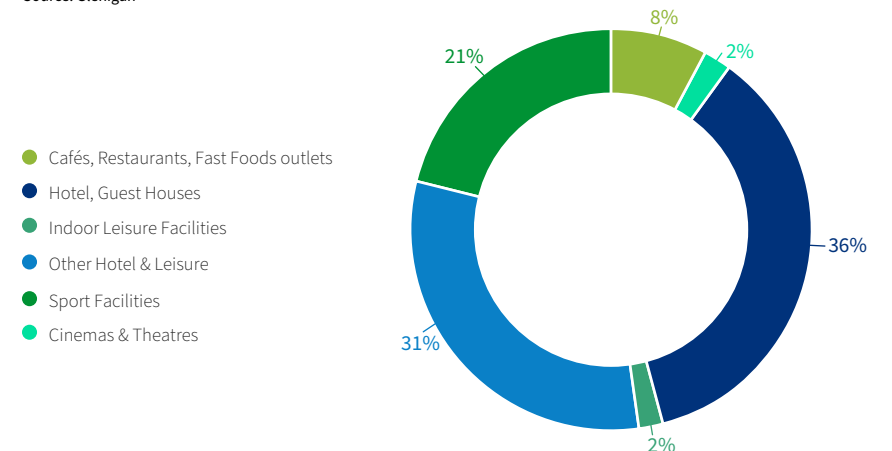
### Therme Manchester

Detailed plans have been approved for the £250 million development of Therme Manchester. Therme UK has been appointed as the main contractor on the scheme, with works due to be completed in Q4 2025.

**Project ID: 19255727**

### Types of Hotel & Leisure Projects Started Three Months to September 2023

Source: Glenigan



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## Hotel & Leisure – Regional

London accounted for 47% of hotel & leisure work starting on site, despite the value falling 59% against the previous year to total £264 million. The South East accounted for a 13% share, with the value of work adding up to £71 million, having slipped back 44% compared with last year's levels. Further decline was prevented by the £23.88 million Butlins Bognor Regis Activity Centre in West Sussex ([Project ID: 20497255](#)).

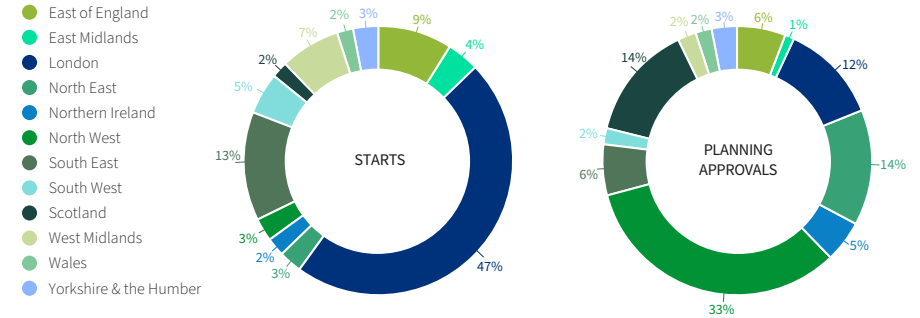
The West Midlands accounted for 7% of projects commencing on-site, totalling £43 million. The region fell 67% in value compared with last year. The South West accounted for a 5% share of hotel & leisure project-starts totalling £26 million, 66% lower than a year ago. In contrast, at £48 million, project-starts in the East of England nearly tripled against the previous year, accounting for 9% of the sector.

The North West accounted for the highest share of project approvals (33%), having increased ten times against the previous year to total £758 million, boosted by the £300 million development of the Etihad Stadium North Stand in Manchester ([Project ID: 22361678](#)). Consents in the North East also increased almost five times compared with 2022 levels, adding up to £326 million, accounting for a 14% share of the sector. Projects in the region included the Sage International Conference Centre worth £150 million in Gateshead ([Project ID: 06021815](#)). Accounting for the same share, Scotland also experienced a strong performance, with approvals having doubled on a year ago, totalling £310 million.

In contrast, London suffered a 14% decline on a year ago to total £274 million, a 12% share of hotel & leisure consents during the three months to September. At £21 million, the East Midlands experienced the steepest decline. The region slipped back 88% against last year to account for just 1% of all hotel & leisure approvals.

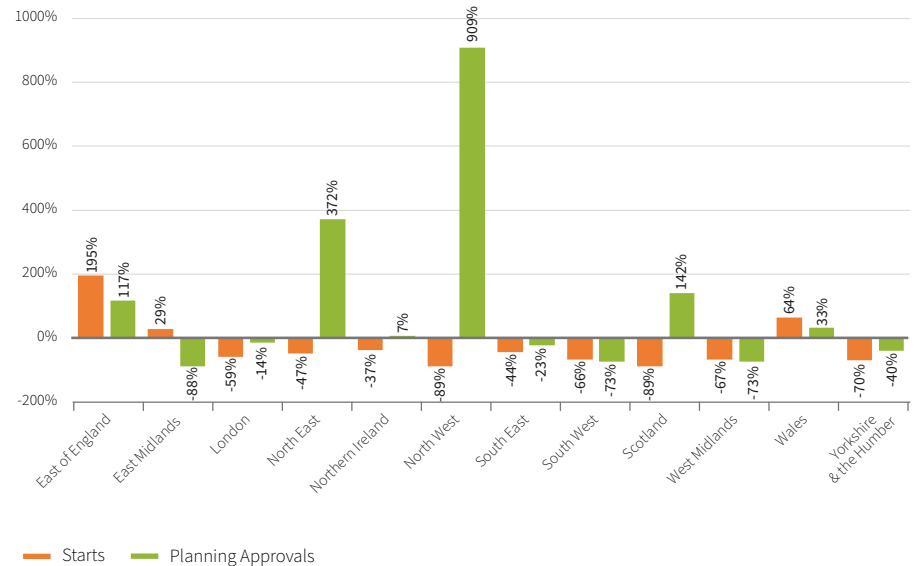
### Share Value of Hotel & Leisure Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



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

Source: Glenigan



**44%**

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

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## Health – Overview

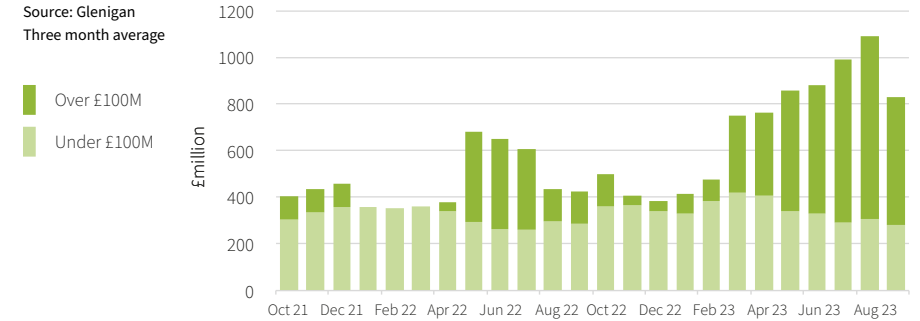
**Project-starts, main contract awards and detailed planning approvals all increased against the previous year, with project-starts and main contract awards increasing against the preceding three months also.**

Adding up to £618 million, underlying health work starting on site (less than £100 million in value) during the three months to September declined 25% against the preceding three months on a seasonally adjusted (SA) basis and stood 24% down against the previous year. Major projects (£100 million or more) starting on site totalled £510 million, unlike the previous quarter and last year when there were no major project-starts. Overall, health project-starts increased 42% against the previous quarter and grew 38% on a year ago.

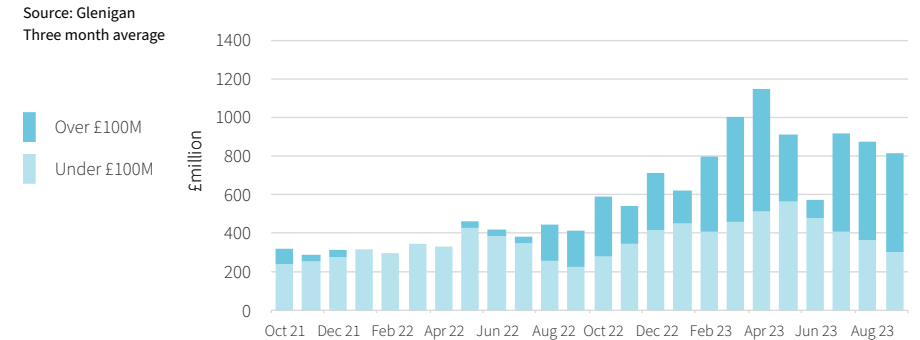
Totalling £2,440 million, health main contract awards were up 42% against the preceding three months and stood 97% up against a year ago. Major projects, at £1,534 million experienced a 444% increase against the previous three months and increased 173% on the previous year. Underlying contract awards experienced a mixed performance, decreasing 13% against the preceding three months (SA) to stand 34% up against the previous year to total £906 million.

Detailed planning approvals, totalling £2,488 million, experienced 6% decline against the preceding quarter but almost doubled (+96%) against the previous year. Major project approvals, totalling £1,654 million, remained flat against the previous quarter to stand 295% higher than a year ago. Underlying approvals at £834 million experienced a 13% (SA) decline compared with the preceding three months to stand 2% down on a year ago.

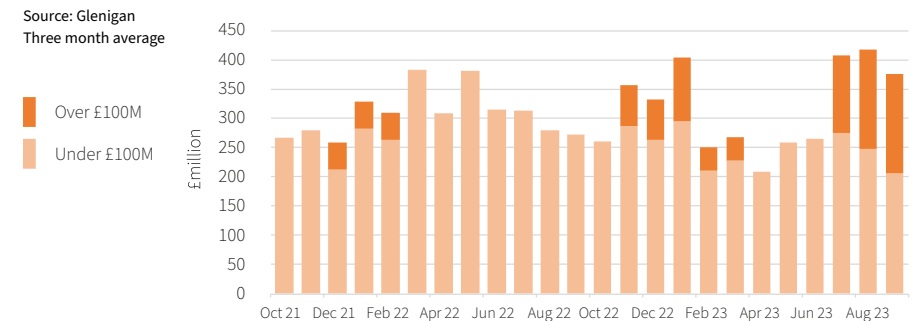
### Health: Detailed Planning Approvals



### Health: Main Contract Awards



### Health: Starts



**42%**

Increase in the value of health work starting on-site against the preceding three months

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## Health – Types of Projects Started

Unsurprisingly, hospitals accounted for the greatest proportion (67%) of health work starting on site during the three months to September, with the value having increased 226% against the previous year's levels to total £760 million.

In contrast, nursing homes faced a 66% decline on a year ago to total £85 million, an 8% share of all health project-starts. Dental, health, and veterinary centre project-starts, accounting for 8% of the sector, decreased 19% compared with the previous year to total £91 million. No day centre projects commenced on-site.

### Health: League Tables (October 2022 to September 2023)

Source: Glenigan

Contractors			Clients		
Contractors	Projects	£m	Clients	Projects	£m
Canary Wharf	1	500	Department of Health	171	1,895
Kier	19	334	Acorn Consortium	1	281
Balfour Beatty	3	331	Welsh Government	1	281
Bouygues	2	310	Kadans Science Partner 2 UK	2	267
Tilbury Douglas	8	220	Canary Wharf Group plc	1	250
IHP Integrated Health	6	214	Oxford Science Park Joint Venture	1	160
Acorn Consortium	1	187	University College London	2	101
Sacyr	1	187	Queens University Belfast	3	97
Andrew Scott Ltd	1	187	LNT Group	10	87
Mace	1	160	Moderna	2	64

## Project Spotlight



### Tolworth Hospital

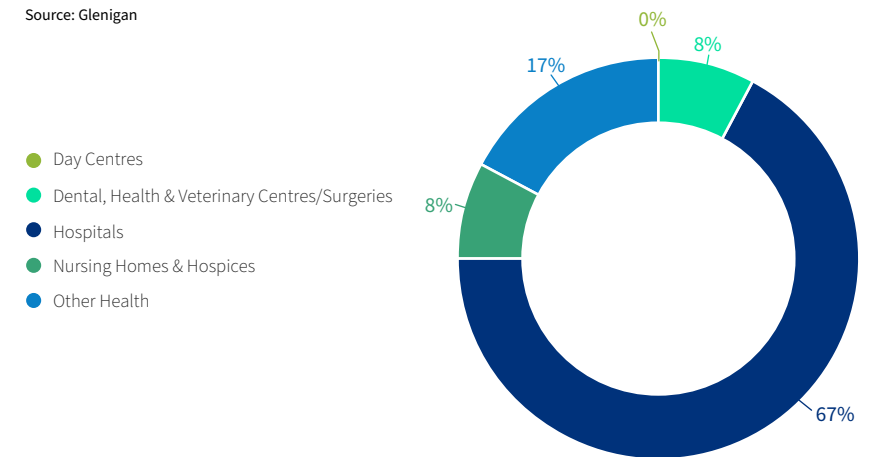
*Detailed plans have been approved for an extension to Tolworth Hospital in South West London. Sir Robert McAlpine has been appointed as the main contractor on the £80 million scheme, with works expected to be completed in Q2 2026.*

**Project ID: 14319127**

Image Source: Ryder Architecture

### Types of Health Projects Started Three Months to September 2023

Source: Glenigan



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## Health – Regional

Totalling £367 million, London was the most active region for health project-starts during the three months to September, having increased 751% against the previous year, to account for 33% of health project-starts, making it the most active region. This growth was boosted by the £300 million Oriol - New Hospital Programme development in Camden (Project ID: 18203935). At £235 million, the South East accounted for a 21% share. The value of starts in the region grew 27% compared with 2022 levels.

At £145 million, the North West accounted for 13% of projects starting on site during the period. The value grew 256% against last year. Wales experienced a poor period, with the value of starts in the area falling 65%, the sharpest decrease of any area, to total £17 million.

With a total value of £1,022 million, the East of England was the most active region for detailed planning approvals, having experienced four-digit growth on a year ago to account for 41% of the health sector. This growth was mostly driven by the £900 million Elevate Quarter development in Stevenage (Project ID: 21330577). Accounting for a 30% share, health approvals in London doubled against the previous year to total £740 million.

Project approvals in the North East also performed well, growing 486% against the previous year to total £37 million, accounting for a 1% share. Accounting for 6%, approvals in the East Midlands increased 91% to total £144 million. In contrast, accounting for 1%, the North West faced a 72% slump compared with the previous year to total £36 million.

**96%**

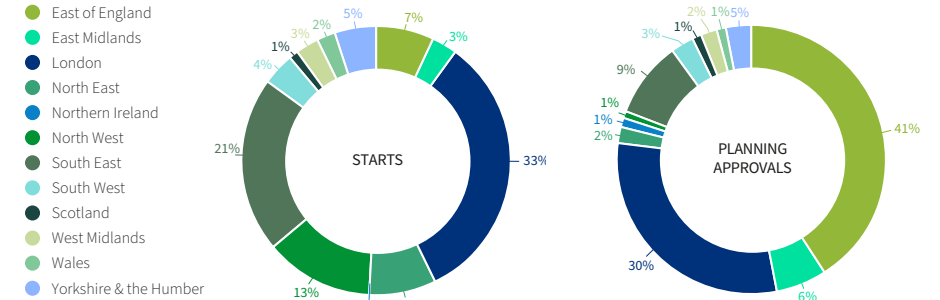
Increase in the value of projects reaching the detailed planning approval stage against the previous year

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or visit [www.glenigan.com/pipeline](http://www.glenigan.com/pipeline)

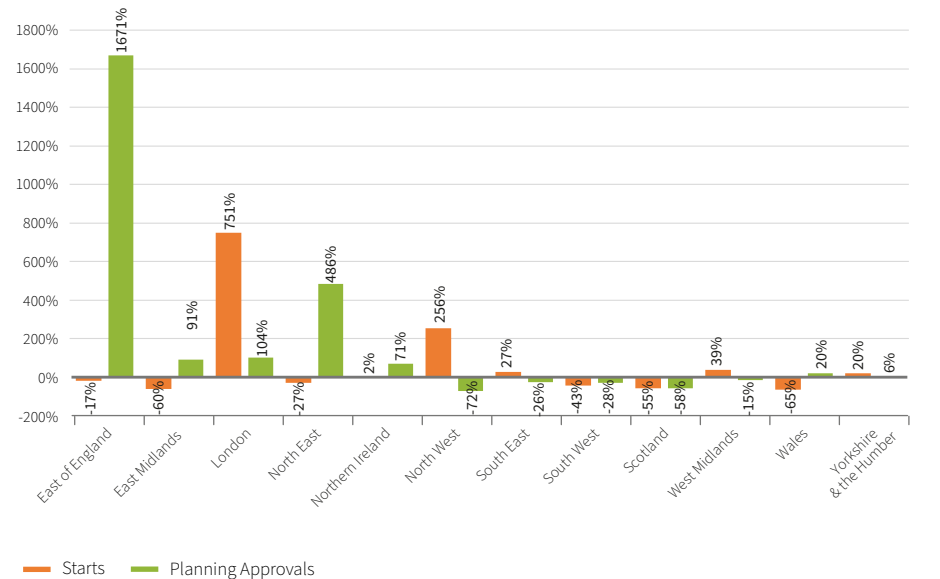
### Share Value of Health Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



### Changes in Health Starts and Planning Approvals on a Year Earlier

Source: Glenigan



## Education – Overview

**Project-starts fell against both the previous quarter and last year. More positively, main contract awards grew on a year ago, while detailed planning approvals increased against the preceding three months.**

Totalling £1,065 million, education work starting on site experienced a 29% decrease on the preceding three months to stand 13% down on the previous year. There were no major projects (£100 million or more) starting during the period, unlike the preceding quarter but unchanged from a year ago. Underlying education work starting on site (less than £100 million in value) experienced a 35% decline against the preceding three months on a seasonally adjusted (SA) basis and was 13% down on a year ago.

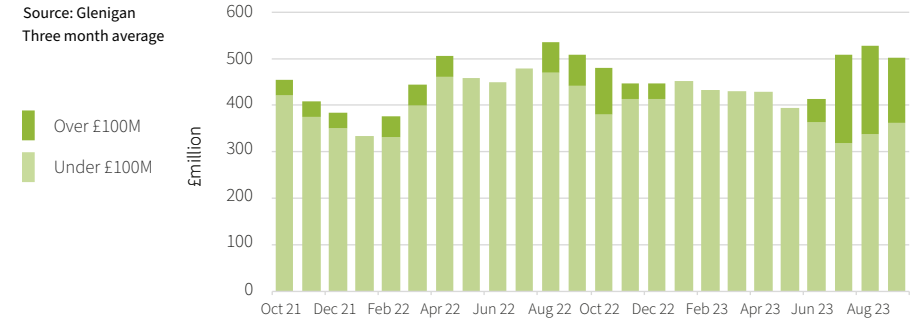
**-13%**

Decrease in the value of education work starting on-site against the previous year

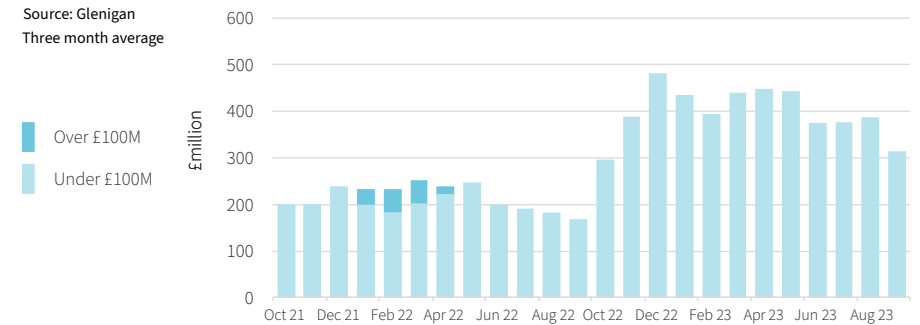
Education main contract awards decreased 16% against the preceding quarter to total £1,883 million, with the value remaining 86% higher than the previous year. Underlying contract awards decreased 7% (SA) against the preceding quarter to stand 86% up against the previous year. There was an absence of major projects reaching the contract awarded stage, remaining unchanged against the preceding quarter and previous year.

Totalling £1,507 million, detailed planning approvals grew 21% against the preceding three months but were 1% lower than last year. Major project approvals totalled £420 million, having almost tripled against the previous quarter, and also twice as high as last year's levels. Underlying project approvals decreased 2% (SA) against the previous three months and were also 18% down on a year ago to total £1,087 million.

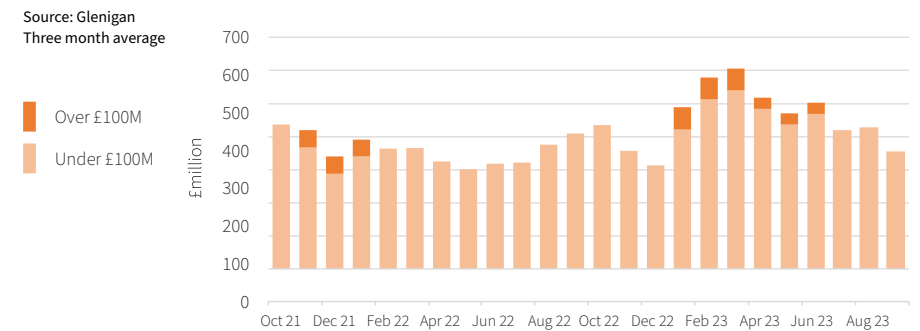
### Education: Detailed Planning Approvals



### Education: Main Contract Awards



### Education: Starts



## Education – Types of Projects Started

School project-starts totalled £818 million during the three months to September and accounted for the largest share of education construction starts (77%), despite a 4% decline on the previous year.

College project-starts also experienced a weak period, with the value having fallen 32% against the previous year to total £130 million, accounting for a 12% share of education work starting on site.

Universities slipped back 30% against last year to total £90 million, accounting for 8% of the total value.

## Project Spotlight



Image Source: Wilkinson Eyre Architects Ltd

### College Campus

Detail plans have been approved for the development of a new campus at the College of North West London. A main contractor is yet to be appointed on the £140 million scheme, with works due to be completed in Q4 2026.

**Project ID: 23073180**

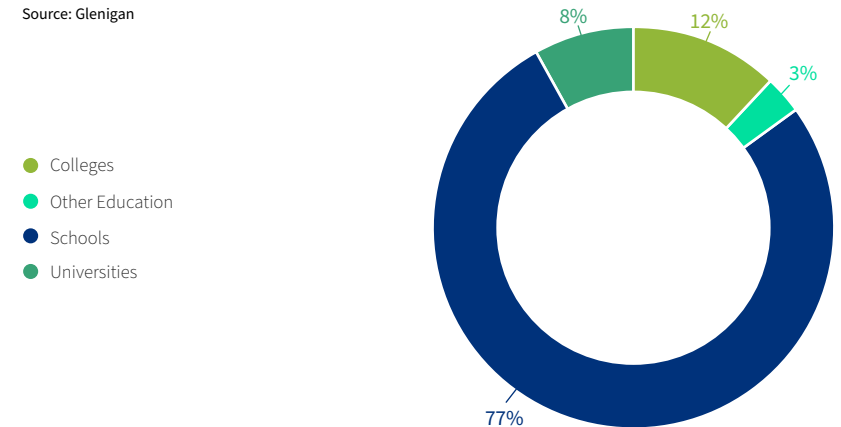
### Education: League Tables (October 2022 to September 2023)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Morgan Sindall	68	499	Department for Education	111	1,022
Kier	26	441	Education Auth. North. Ireland	30	163
Royal BAM	17	435	Ministry of Defence	1	83
Bowmer & Kirkland	20	391	Fife Council	1	80
Willmott Dixon	21	369	University of Edinburgh	5	73
Galliford Try	16	197	Royal BAM	5	70
Wates	9	144	Kier	5	64
Tilbury Douglas	21	115	University of London	12	62
ISG	13	107	City of Edinburgh Council	6	61
McLaughlin & Harvey	3	97	West Sussex County Council	6	60

### Types of Education Projects Started Three Months to September 2023

Source: Glenigan



**21%**

Increase in the value of detailed planning approvals against the preceding three months

## Education – Regional

Scotland was the most active region for education project-starts during the three months to September, accounting for a 21% share of the sector to total £225 million, having doubled on last year's levels. The region was boosted by the £64.5 million Galashiels Community Campus development (Project ID: 21027691). The South East accounted for 15% of starts in the sector and increased 16% against the previous year, to total £158 million. Totalling £130 million, project-starts in the North West were also 7% higher than a year ago. The region accounted for a 12% share.

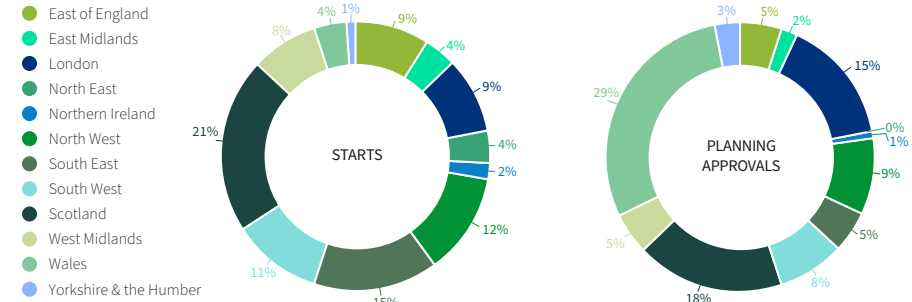
The South West also performed well, with the value of project-starts growing five times against the previous year, totalling £114 million and accounting for 11% of the sector. In contrast, accounting for 9% each, the East of England and London declined 41% and 55% to total £97 million and £92 million respectively.

Wales was the most active region for detailed planning approvals in the education sector, accounting for a 29% share, thanks the value having increased almost six times on a year ago to total £433 million. This growth was boosted by the Bridgend College Redevelopment project worth £279.91 million (Project ID: 20059411). Scotland was another area to experience growth. The value of consents there grew 84% compared with last year's levels, totalling £272 million, to account for 18% of the sector.

Consents in London doubled on 2022 levels to total £220 million, a 15% share of education approvals. Planning approvals in the Capital include the £140 million UCG College of North West London (Project ID: 23073180). In contrast, accounting for 9%, consents in the North West totalled £133 million, which is 37% lower than a year ago. The North East suffered the steepest decline at 91%, which brought the total value of detailed planning approvals in the region down to £7 million.

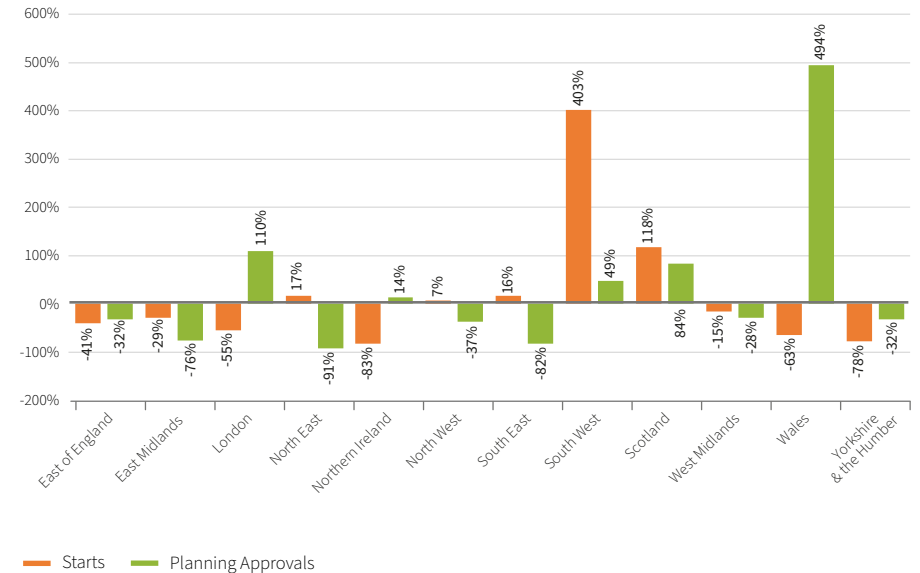
### Share Value of Education Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



### Changes in Education Starts and Planning Approvals on a Year Earlier

Source: Glenigan



## Community & Amenity – Overview

**Project-starts and detailed planning approvals fell against both last year and the previous three months. More positively, main contract awards grew on the previous three months and previous year.**

Community & amenity work starting on site totalled £297 million during the three months to September, an 8% decrease compared with the preceding three months, and 76% down on the previous year. Like the previous three months but unlike the previous year, no major projects started on site (£100 million or more). Underlying project-starts (less than £100 million in value) fell 22% against the preceding three months on a seasonally adjusted (SA) basis to stand 32% down against last year's levels.

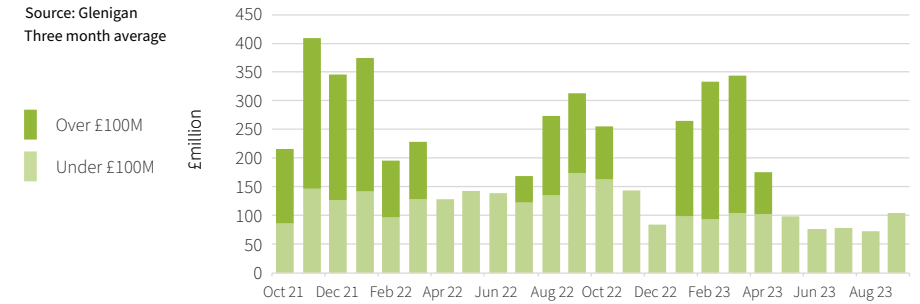
Community & amenity main contract awards, adding up to £1,072 million, increased 177% against the preceding three months and stood 39% up on the previous year. Underlying contract awards grew 70% against the preceding three months (SA) but were 72% up on 2022 levels, totalling £634 million. At £438 million, major projects grew on the previous three months when no major projects reached the contract awarded stage and increased 10% against last year.

Detailed planning approvals increased 37% against the previous three months to stand 67% down against last year, totalling £312 million. Like project-starts, there were no major approvals. Underlying project approvals increased 19% (SA) on the previous three months but fell 40% against a year ago.

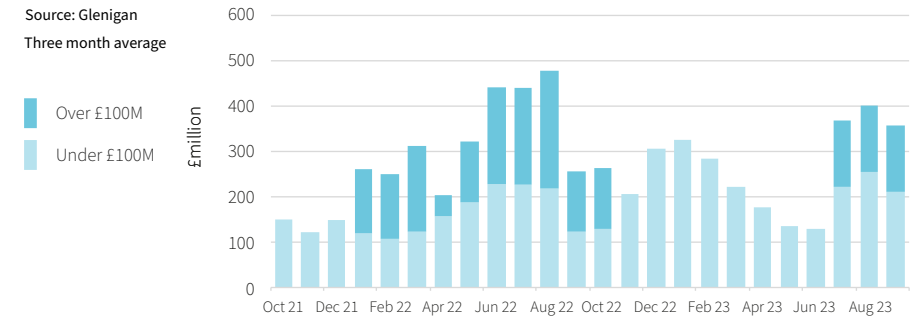
**-76%**

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

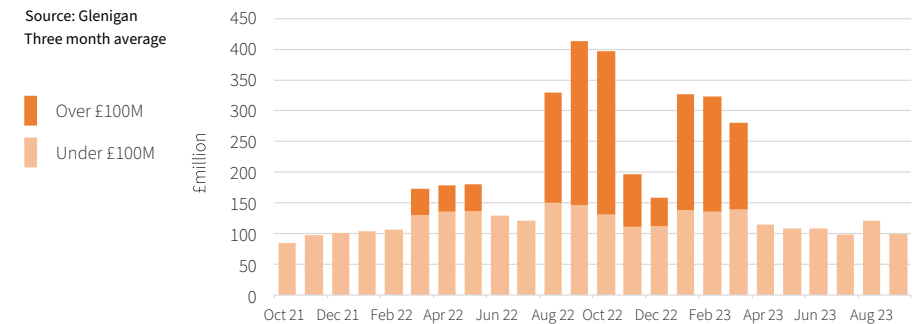
### Community & Amenity: Detailed Planning Approvals



### Community & Amenity: Main Contract Awards



### Community & Amenity: Starts



## Community & Amenity – Types of Projects Started

Totalling £72 million, prisons accounted for the highest proportion (24%) of community & amenity project-starts, the value was 89% lower than a year ago. Local facilities, at £60 million, accounted for the second highest share (20%). Despite this the value decreased 36% against 2022 levels.

Blue light projects worth £41 million started during the three months to September, 29% lower than the same period last year, accounting for 14% of sector starts. Law courts were the only segment to experience triple digit growth during the period, adding up to £24 million, increasing 270% compared to last year and accounting for a 8% share of the sector. Places of worship totalled £23 million, a 54% decrease. Military projects, totalling £59 million, decreased 81% compared with last year, accounting for 20% of the sector.

### Community & Amenity: League Tables (October 2022 to September 2023)

Source: Glenigan

Contractors			Clients		
	Projects	£m		Projects	£m
Wates	16	196	Ministry of Defence	23	334
Kier	16	127	Ministry of Justice	25	265
Skanska	2	120	Home Office	19	119
Willmott Dixon	6	80	Secretary of State for Defence	1	110
Dandara	1	57	States Of Jersey	1	57
Lendlease	1	43	Dep. for Levelling Up, Housing & Communities (DLUHC)	12	45
Tilbury Douglas	5	35	Sunderland City Council	1	27
ISG Construction	4	28	The Gov. Property Agency (GPA)	1	23
Speller Metcalfe	2	25	Shree Kutch Leva Patel (SKLPC)	1	20
Reds10	2	25	Leeds City Council	2	16

## Project Spotlight



Image Source: Hawkins Brown

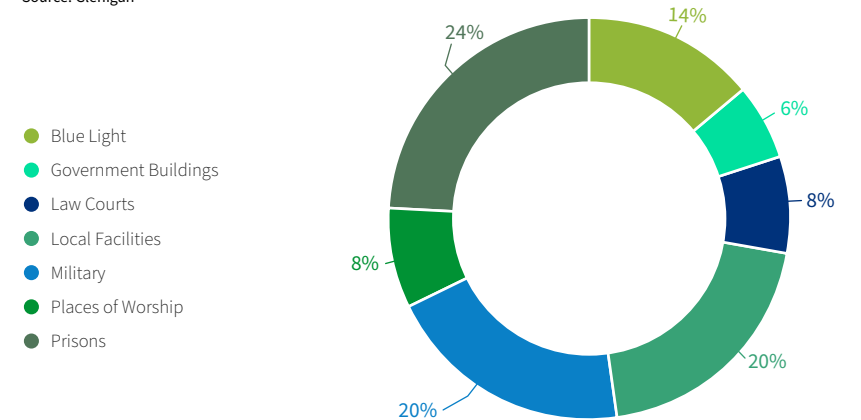
### Haringey Civic Centre

Detail plans have been approved for the redevelopment of Haringey Civic Centre. A main contractor is yet to be appointed on the £54 million scheme, with works due to be completed in Q3 2025.

Project ID: 23161783

### Types of Community & Amenity Projects Started Three Months to September 2023

Source: Glenigan



## Community & Amenity – Regional

The South East of England dominated community & amenity starts, accounting for 30% of work starting on site at £88 million. The value was 34% up on the previous year. The East of England accounted for 23% of sector starts and increased 130% against the previous year to total £68 million. At £10 million, accounting for 3% of community & amenity starts, Yorkshire and the Humber experienced the sharpest decrease of any region (-98%) to total £10 million.

The North East was another region to experience growth against 2022 levels. Starts in the region totalled £11 million, accounting for a 4% share of the total value, with the value increasing 24% against the previous year.

At £70 million, London was the most active region, accounting for 23% of the total value. The value of approvals in the region increased 188% against 2022 levels. Approvals in the North East also experienced triple-digit growth (+104%) to total £23 million, accounting for 4% of the sector. At £38 million, the South East was the second most active region for community & amenity detailed planning approvals. Accounting for a 22% share, the value of consents decreased by 57% against 2022 levels.

Approvals in Northern Ireland experienced a strong period. The value of approvals increased 150% against the previous year to total £4 million, a 1% share of the total value. The East of England at £9 million, experienced the sharpest decrease (-97%) of any region, accounting for 3% of the total.

**37%**

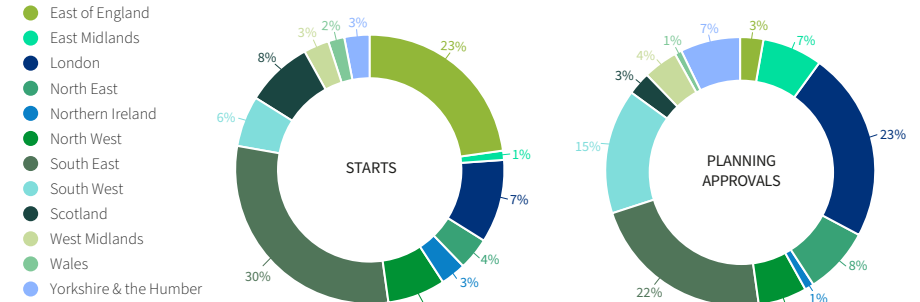
Increase in the value of projects reaching the detailed planning approval stage against the preceding three months

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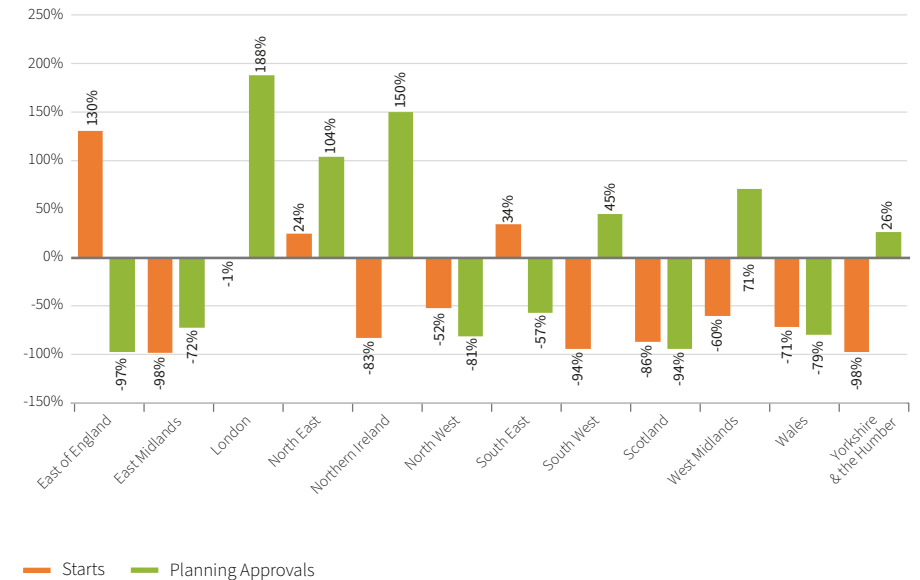
### Share Value of Community & Amenity Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



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

Source: Glenigan





## Civil Engineering – Overview

**Project-starts fell against the previous year and main contract awards decreased against the previous quarter. In contrast, detailed planning approvals grew on the preceding three months and on a year ago.**

Totalling £5,612 million, civil engineering work starting on site during the three months to September grew 77% against the preceding three months but faced a 50% decline against the previous year. Major projects (£100 million or more), totalling £4,459 million, nearly tripled against the preceding three months but stood 53% lower than last year. Underlying project-starts (less than £100 million in value) climbed 8% against the preceding three months on a seasonally adjusted (SA) basis but were 28% down compared with last year, totalling £1,153 million.

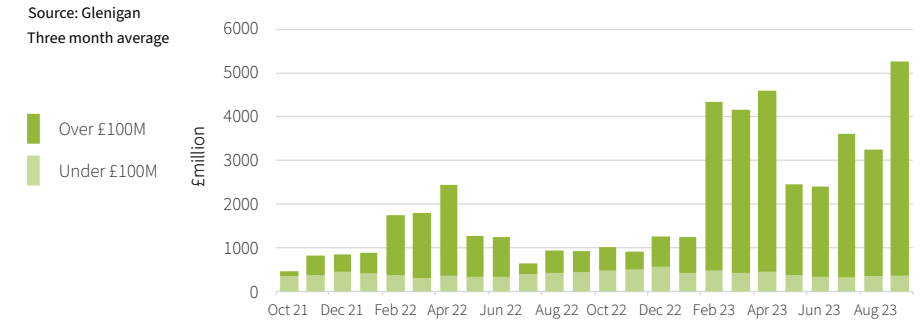
At £6,189 million, civil engineering main contract awards decreased 42% during the period to stand 27% up on the previous year. Major project contract awards, which at £3,886 million, experienced a 54% decrease on the preceding quarter, stood 24% up against the previous year. Underlying contract awards, at £2,303 million increased 30% against the preceding quarter (SA) to stand 33% up against the previous year.

Totalling £15,811 million, civil engineering detailed planning approvals doubled compared with the previous quarter and jumped almost six times on a year ago. Major project approvals, at £14,745 million, doubled against the preceding three months, and grew ten times on the previous year. Underlying approvals increased 15% (SA) against the previous three months but were 17% lower than a year ago, totalling £1,067 million.

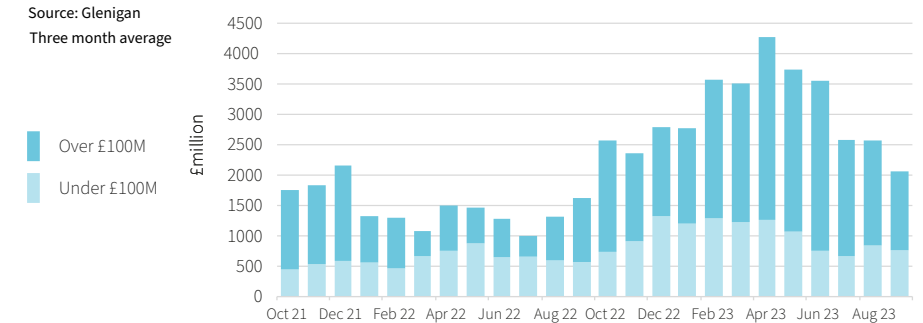
**-50%**

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

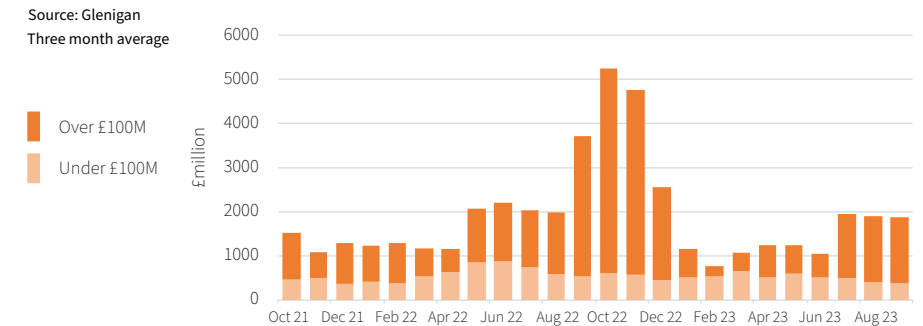
### Civil Engineering: Detailed Planning Approvals



### Civil Engineering: Main Contract Awards



### Civil Engineering: Starts



## Civil Engineering – Types of Projects Started

At £4,411 million, other civils accounted for the greatest share (79%) of civil engineering starts during the three months to September having increased seven times on the previous year. Rail projects also performed relatively well, with starts increasing 19% against the previous year to total £417 million. The segment accounted for a 7% share of starts. In contrast, accounting for the same share, roads fell 65% against a year ago to total £369 million.

Energy accounted for a 5% share of the sector and slipped back 96% compared with a year ago, totalling £282 million. Airport and harbour/port projects decreased 64% and 89% with starts totalling £40 million and £49 million respectively, each accounting for 1% of the sector. The remaining segments accounted for an insignificant proportion of civil engineering project-starts.

### Civil Engineering: League Tables (October 2022 to September 2023)

Source: Glenigan

Contractors			Clients		
Contractors	Projects	£m	Clients	Projects	£m
NeuConnect Britain	1	2,404	Department for Transport	41	3,854
Royal BAM	18	878	NeuConnect Britain	1	2,404
Galliford Try	60	698	Dep. for Work & Pensions	1	1,555
Mytilineos	3	571	Network Rail	55	618
Balfour Beatty	35	569	Anglian Water	4	487
Ferrovial	5	568	North Lanarkshire Council	3	461
We Build	1	567	Ms. Hannah	4	429
Alpine BeMo Tunnelling	1	567	National Grid	12	390
FCC Serv. Ind. Y Energeticos SA	1	567	SSE	2	343
Hitachi Energy	2	501	Dep. for Digital, Culture, Media & Sport	5	305

## Project Spotlight



Image Source: Terence O'Rourke Ltd

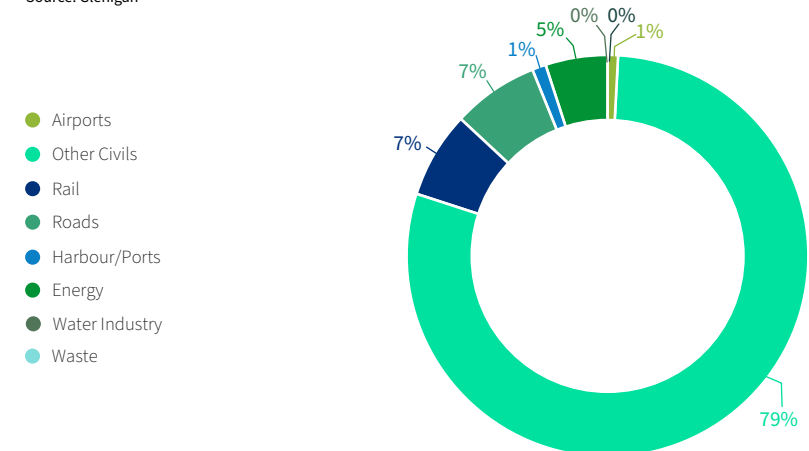
### Energy Recovery Facility

Detailed plans have been approved for the development of the £300 million Tees Valley Energy Recovery Facility. Works are expected to be completed in Q2 2027. Hitachi Zosen Inova has been appointed as the main contractor on the scheme.

**Project ID: 19330892**

### Types of Civil Engineering Projects Started Three Months to September 2023

Source: Glenigan



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## Civil Engineering – Regional

Most regions experienced a decline in civil engineering starts during the three months to September. However, the South East bucked the trend with the value of projects commencing on site increasing almost six times against the previous year to total £2,473 million. As a result, the region accounted for 44% of starts during the period, the highest of any area. However, this growth was almost solely driven by the £2,404 million NeuConnect Interconnector Cable between the UK and Germany (Project ID: 19414719). Accounting for 34% of project-starts, London grew 46% to total £1,892 million. Growth in the Capital was accelerated by a £1,555 million DWP fit-out (Project ID: 23243190).

Northern Ireland was the only other region where civil engineering project-starts grew. Totalling £118 million, the value of projects commencing in the region doubled to account for 2% of the sector. In contrast, the East of England declined 66% on a year ago to total £290 million, accounting for 5% of the sector. Yorkshire & the Humber accounted for a 4% share of the sector, with the value of starts declining 94% against the previous year to total £248 million

The East of England, at £5,892 million, was the most active region for civil engineering planning approvals, with a share of 37%. The value increased more than seven times against the previous year and was boosted by the commencement of the £4,033 million Norfolk Boreas offshore wind farm in North Walsham (Project ID: 18349480) and the Luton Airport expansion worth £1,400 million (Project ID: 21110220). Yorkshire & the Humber grew more than 20 times against the previous year to total £3,792 million, a 24% share of the sector, making it the second most active region. The growth in Scotland was boosted by the £2,688 million Hornsea Project Four offshore wind farm (Project ID: 16095472).

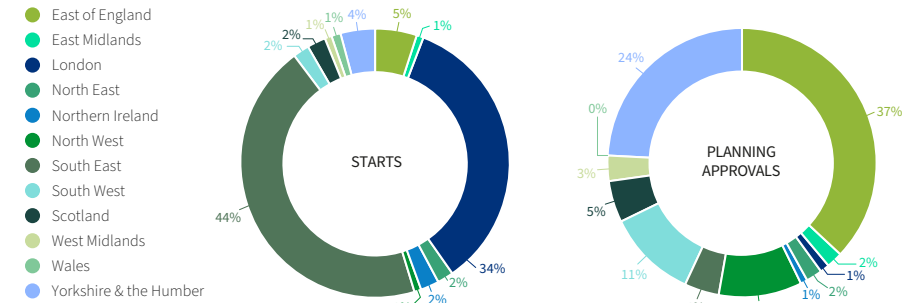
The South West was also a strong region, with the value of approvals increasing nearly 20 times compared with last year's figures to total £1,756 million, an 11% share of the sector. This growth was mainly due to the approval of the A303 Stonehenge dual carriageway road tunnel worth £1,700 million (Project ID: 93148284). At £1,552 million, the North West more than tripled on the 2022 levels to account for 10% of civil engineering approvals.

**472%**

Growth in the value of civil engineering detailed planning approvals against the previous year

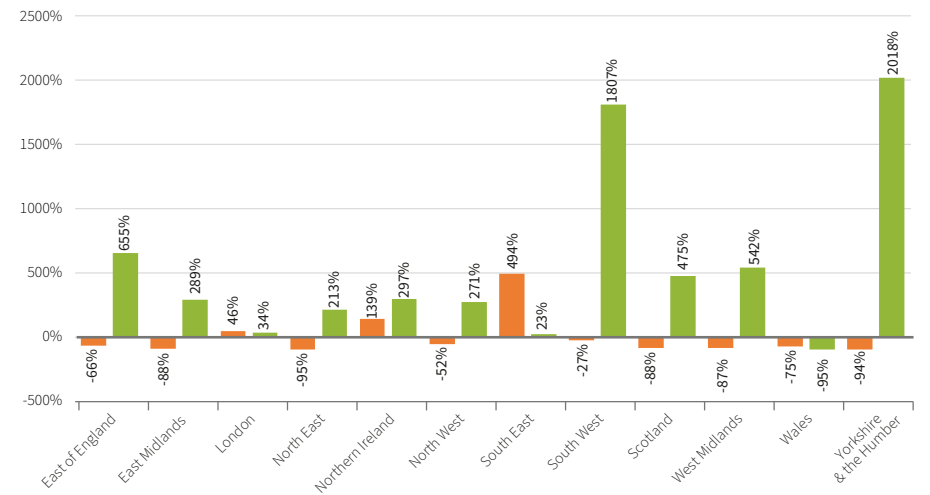
### Share Value of Civil Engineering Starts and Planning Approvals in the Last 3 Months

Source: Glenigan



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

Source: Glenigan



Starts Planning Approvals

EXECUTIVE SUMMARY

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