Regional Construction Hotspots in Great Britain 2021

A forward-looking analysis of construction activity by region and by sector.

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UK Construction Hotspots REPORT 2021

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About Barbour ABI and the CPA

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Our dedicated construction companies database is flexible to your needs. We gather the intelligence you need to target decision makers, at the precise moment they require your services. We are proud to play a part in significantly increasing the amount of new business won for clients across the UK.

Barbour ABI is the chosen provider of Construction New Orders estimates data to the ONS, and partner of the HM Government Infrastructure and Projects Authority in providing the National Infrastructure and Construction Pipeline, which outlines future construction and infrastructure projects where public funding is agreed.

We provide data for all sectors, including:

- Residential
- Infrastructure
- Commercial & retail
- Hotel, leisure & sport
- Industrial
- Medical & health
- Education

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- tracking and advising on government policies and regulations
- engaging policy makers to develop effective, evidence-based policies and solutions
- driving consensus with members and the wider construction industry on major issues
- representing our members across industry-wide organisations and events
- producing authoritative economic, technical and sustainability commentary and publications

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OVERVIEW…

The UK Construction Industry

London is the UK's largest regional economy and construction gross value added (GVA) in 2019 (the latest available from the ONS) was £22.6 billion, accounting for 18.5% of the UK construction total. With a construction GVA of £19.4 billion, the South East accounts for a similar proportion of UK construction (15.7%). Given the relative size of the London and South East economies, populations and concentration of the services-based industry, it is easy to think that the majority of construction work is taking place in these regions.

By using ONS regional economic data, it becomes clear that despite its overall dominance, there were only three London sub-regions in the top ten largest local authority areas for construction activity in 2019: Camden and City of London, Harrow and Hillingdon, and Westminster. Similarly, two sub-regions in the South East feature in this ranking. However, it is Hertfordshire, in the East of England, that remains as the

Yet again, Hertfordshire recorded the largest value of construction activity with over £4 billion in 2019

sub-region with the largest value of construction activity in 2019. The South West, Yorkshire and the Humber, and the East of England complete the top ten list, underscoring the fact that there are large areas of activity beyond the traditional engines of growth.

This piece of work seeks to analyse construction contract awards at a high level of regional granularity, firstly to identify pockets of growth or contraction – hotspots and coldspots – in regional activity and secondly, to offer a forward-looking indication of growth by region and by sector. One of the challenges in using such granular data is the large lags in reporting of official output data, as evidenced by the most recent macroeconomic data published by the ONS being for 2019. By using data on contract awards over 2020, this will

London was still the UK's largest regional economy and construction gross value added (GVA) in 2019 at £22.6 billion

highlight construction work ahead, rather than reporting on activity is past periods that may not be relevant. Economic developments were unprecedented in 2020, with national and regional lockdowns due to Covid-19, which led to disrupted activity across sectors of the economy and elevated levels of uncertainty. Nevertheless, on a national level, contract award values in the first half of 2020, which was most severely impacted by these events, were only around 5.0% lower than the second half of the year.

Construction GVA in 2019	£m
London	22,606
South East	19,358
East of England	15,104
North West	11,404
South West	9,992
West Midlands	8,991
Scotland	8,928
Yorkshire and the Humber	8,118
East Midlands	7,904
Wales	4,279
North East	3,363

FIG 1.1

Source: ONS

Construction GVA in 2019 – Top 10	£m	Region
Hertfordshire	4,300	East of England
West Surrey	2,420	South East
Gloucestershire	2,162	South West
Westminster	2,151	London
Camden and City of London	2,113	London
Berkshire	2,029	South East
Harrow and Hillingdon	1,963	London
Leeds	1,773	Yorkshire and the Humber
Suffolk	1,739	East of England
Heart of Essex	1,715	East of England

FIG 1.2

Source: ONS

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What is a hotspot or a coldspot?

Hotspots and coldspots seek to identify regions where contract awards in 2020 were significantly above or below previous years, highlighting pockets of activity or contraction in construction activity over the near-term horizon.

As discussed, some regions of the country host more construction activity than others. Westminster and Tower Hamlets were in the top 10 largest regions in terms of the value of contracts awarded in 2020. However, the value of contracts awarded in these areas was 45% and 21% lower than in the previous year, respectively, so whilst they provide a large source of construction work, they are not hotspot regions.

Large growth rates or contractions themselves do not necessarily signify a hotspot or coldspot, which is a key consideration for regions hosting small volumes of construction work, where growth rates on annual basis can be volatile. This is particularly highlighted for the Shetland Islands, where contract awards totalled £551 million in 2020, compared to a long-term average of £23 million. This was heavily influenced by the award of the contract for the Viking offshore windfarm, the fourth largest contract award nationally in 2020.

Shetland Islands recorded the largest growth in contract awards in 2020, with an increase of 8,120%, with a value of contract awards at £551 million

There are clear hotspots for upcoming construction activity over the next 6-12 months in Great Britain. Wirral and Swindon were the only broad hotspots in 2020 – where contract awards in each of the three main construction sectors of residential, commercial and infrastructure, are significantly above the long-term average. Where hotspots were restricted to a single construction sector, they were spread across the regions of Great Britain.

The value of contract awards in 2020 – Top 10	£m	Annual % change
Kingston upon Hull, City of	107	2,220%
Manchester	1,114	69%
Bexley and Greenwich	319	471%
Camden and City of London	981	68%
Westminster	2,392	-45%
Leicestershire CC and Rutland	636	102%
Hertfordshire	1,117	12%
Birmingham	1,041	17%
Tower Hamlets	1,512	21%
Greater Manchester South West	676	60%

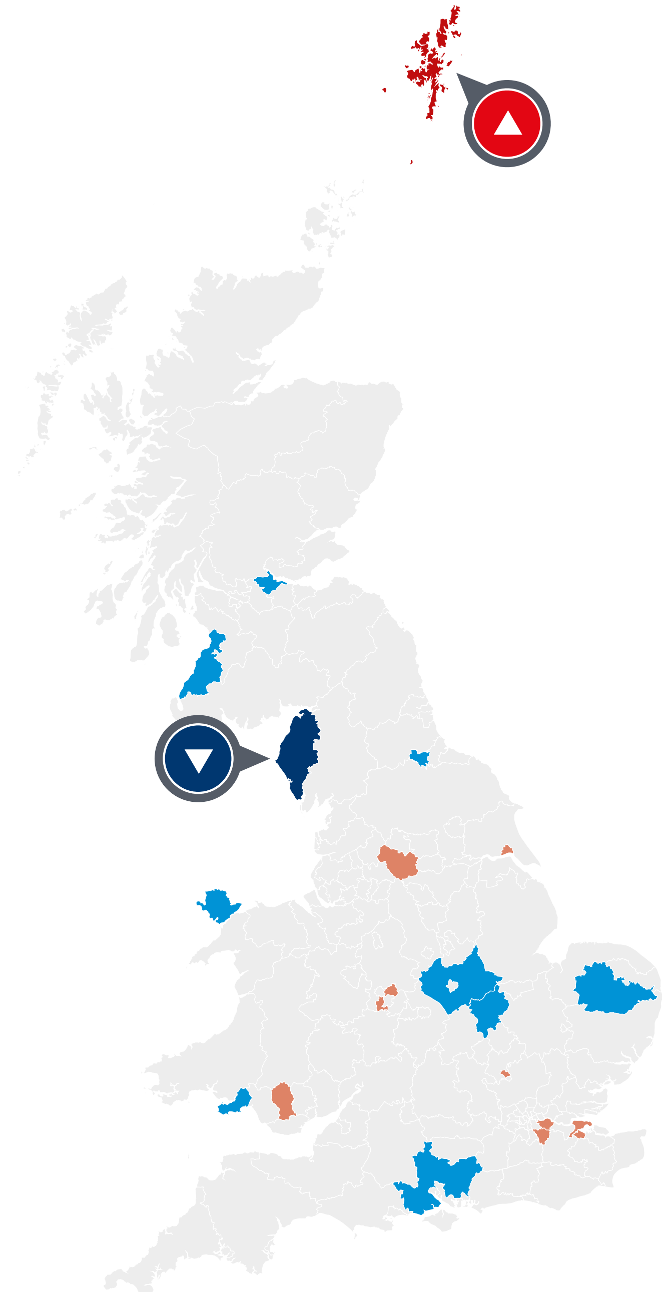
FIG 1.3

Source: Barbour ABI

Growth in contract awards in 2020 – Top 10	£m	Annual % change
Shetland Islands	551	8,120%
Kingston upon Hull, City of	2,477	2,220%
Dudley	414	820%
Bexley and Greenwich	1,821	471%
Central Valleys	575	376%
Walsall	118	254%
Luton	75	192%
Bromley	126	191%
Calderdale and Kirklees	580	187%
Medway	212	174%

FIG 1.4

Source: Barbour ABI



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Given the varying nature in the size of construction projects, construction hotspots may also show due to a single large project in one sector (see table below). Although these may be viewed as skewing results, they still represent a significant driver of regional growth and activity and were a key driver of hotspots throughout the country. These tend to be high-value transport or utilities projects in the infrastructure sector where contracts are awarded, but take time to build out. In smaller sub-regions, single, large offices, retail and residential projects can also generate hotspots.

Construction coldspots also feature across Great Britain and across the three main construction sectors, but surprisingly, given the unprecedented economic shock and heightened uncertainty during 2020, there were almost double the number of hotspots than coldspots across Great Britain.

Despite being 2nd and 3rd, both Central Hampshire and Darlington recorded falls in contract awards in 2020 with decreases of 81% and 80% respectively

Falls in contract awards in 2020 – Top 10	£m	Annual % change
West Cumbria	142	-92%
Central Hampshire	221	-81%
Darlington	36	-80%
Falkirk	59	-78%
Breckland and South Norfolk	143	-78%
Isle of Anglesey	11	-73%
Swansea	85	-71%
North Northamptonshire	184	-70%
South Ayrshire	43	-68%
Leicester	116	-67%

FIG 1.5

Source: Barbour ABI

Top 10 highest value contracts in 2020	£m	Area
Dogger Bank Creyke Beck Offshore Wind Farm	2,000	Kingston upon Hull, City of
Silvertown Tunnel	1,000	Bexley and Greenwich
A465 Heads Of The Valley Dualling Sections 5 & 6	514	Central Valleys
Viking Wind Farm 457Mw	500	Shetland Islands
Plumstead/West Thamesmead - Plots 2, 3, 4, 7, 8	500	Bexley and Greenwich
Consort Place, Alpha Square - South Quay	470	Tower Hamlets
40 Leadenhall - Gotham City	400	Camden and City of London
M25 Junctions 10-16 Smart Motorway	400	Hertfordshire
M62 Junctions 20-25 Smart Motorway	392	Calderdale and Kirklees
A63 Castle Street Improvements	355	Kingston upon Hull, City of

FIG 1.6

Source: Barbour ABI

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EXECUTIVE SUMMARY…

Key Regional Hotspots by Sector

A summary of key regional hotspots by sector is shown here.

North East	
Darlington	Infrastructure
Durham CC	Infrastructure
Hartlepool and Stockton-on-Tees	Commercial Infrastructure
South Teesside	Commercial
Sunderland	Residential
Tyneside	Commercial

North West	
Cheshire East	Commercial
East Lancashire	Residential
Greater Manchester South West	Residential
Lancaster and Wyre	Infrastructure
Manchester	Commercial
Wirral	Residential Commercial Infrastructure

Yorkshire & Humber	
Bradford	Commercial
Calderdale and Kirklees	Infrastructure
Kingston upon Hull, City of	Infrastructure
Wakefield	Commercial
York	Residential Infrastructure

East Midlands	
East Derbyshire	Infrastructure
Leicester	Infrastructure
South Nottinghamshire	Infrastructure

West Midlands	
Dudley	Commercial Infrastructure
Shropshire CC	Residential
Solihull	Commercial
Staffordshire CC	Infrastructure
Worcestershire	Residential

East of England	
Cambridgeshire CC	Infrastructure
Essex Thames Gateway	Residential
Hertfordshire	Infrastructure
North and West Norfolk	Infrastructure
Suffolk	Residential
West Essex	Commercial

London	
Barnet	Infrastructure
Bexley and Greenwich	Residential Infrastructure
Bromley	Residential Infrastructure
Enfield	Commercial
Haringey and Islington	Commercial
Hounslow and Richmond upon Thames	Commercial
Kensington & Chelsea and Hammersmith & Fulham	Residential
Redbridge and Waltham Forest	Residential
Wandsworth	Commercial

South East	
East Surrey	Residential
Kent Thames Gateway	Infrastructure
Milton Keynes	Commercial
Southampton	Infrastructure
West Sussex (South West)	Residential Infrastructure

South West	
Bristol, City of	Commercial
Cornwall and Isles of Scilly	Residential Infrastructure
Dorset CC	Residential Infrastructure
Gloucestershire	Infrastructure
Plymouth	Infrastructure
Swindon	Residential Commercial Infrastructure
Torbay	Residential

Wales	
Bridgend and Neath Port Talbot	Residential
Central Valleys	Infrastructure
Gwynedd	Residential Infrastructure
Isle of Anglesey	Residential
Monmouthshire and Newport	Infrastructure
Powys	Residential Commercial
Swansea	Commercial

Scotland	
East Dunbartonshire, West Dunbartonshire and Helensburgh & Lomond	Infrastructure
East Lothian and Midlothian	Commercial
Falkirk	Commercial
North Lanarkshire	Residential Infrastructure
Scottish Borders	Residential Infrastructure Commercial
Shetland Islands	Infrastructure

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Key Regional Coldspots by Sector

A summary of key regional coldspots by sector is shown here.

North East	
Durham CC	Residential

North West	
Cheshire East	Residential
Sefton	Residential

Yorkshire & Humber	
North Yorkshire CC	Residential
Sheffield	Infrastructure
Wakefield	Infrastructure

East Midlands	
Derby	Residential
North Nottinghamshire	Residential
South and West Derbyshire	Residential

West Midlands	
Warwickshire	Residential
Birmingham	Commercial
Stoke-on-Trent	Commercial
Worcestershire	Commercial

East of England	
Norwich and East Norfolk	Residential
Peterborough	Residential
Southend-on-Sea	Residential
Thurrock	Residential

London	
Ealing	Residential
Hackney and Newham	Residential Commercial
Harrow and Hillingdon	Residential
Hounslow and Richmond upon Thames	Residential
Merton, Kingston upon Thames and Sutton	Residential
Redbridge and Waltham Forest	Commercial
Tower Hamlets	Commercial
Wandsworth	Residential

South East	
Brighton and Hove	Infrastructure
Buckinghamshire CC	Infrastructure
Central Hampshire	Residential
Kent Thames Gateway	Residential Commercial
Mid Kent	Residential
North Hampshire	Residential
Portsmouth	Infrastructure
South Hampshire	Residential
West Sussex (North East)	Residential

South West	
Bath and North East Somerset, North Somerset and South Gloucestershire	Residential Infrastructure
Devon CC	Residential
Wiltshire	Commercial
Somerset	Infrastructure

Wales	
South West Wales	Commercial

Scotland	
Angus and Dundee City	Residential
City of Edinburgh	Residential
Dumfries & Galloway	Commercial
East Dunbartonshire, West Dunbartonshire and Helensburgh & Lomond	Residential Commercial
East Lothian and Midlothian	Residential
Glasgow City	Residential
Lochaber, Skye & Lochalsh, Arran & Cumbrae and Argyll & Bute	Commercial

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FOCUS ON…

East of England

The East of England region accounts for 8.2% of total UK GVA and key sectors of regional economic activity are industrial production and manufacturing, distribution and transport, public administration and business services. Construction GVA grew 3.5% in 2019. The value of contracts awarded in the region totalled £4.6 billion in 2020, a decrease of 19.7% from the previous year. There were no overall hotspots, but Bedford and Southend-on-Sea were coldspots.

Luton recorded the largest growth in contracts awarded in 2020, increasing by 191.6%

	GVA per head	GVA growth 2014-2019	Unemployment rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
East of England	27,015	21.6%	3.8	15,104	5.1%	-19.7%
Peterborough	33,088	27.7%	5.5	339	10.8%	-40.8%
Cambridgeshire CC	31,084	20.1%	3.4	1,294	1.3%	12.3%
Suffolk	25,397	15.1%	3.8	1,739	7.7%	-24.2%
Norwich and East Norfolk	25,574	17.4%	6.0	610	8.5%	-51.3%
North and West Norfolk	18,349	9.7%	4.9	342	8.2%	-14.8%
Breckland and South Norfolk	18,797	12.2%	3.8	498	1.4%	-77.9%
Luton	29,617	19.6%	5.8	331	2.5%	191.6%
Hertfordshire	34,947	26.2%	3.4	4,300	4.8%	12.1%
Bedford	25,159	22.8%	3.2	381	14.1%	-16.9%
Central Bedfordshire	21,499	23.1%	2.3	582	-8.6%	-42.4%
Southend-on-Sea	17,266	16.0%	4.3	216	-8.1%	-22.4%
Thurrock	25,262	34.0%	4.7	455	17.3%	-50.8%
Essex Haven Gateway	20,122	27.6%	4.0	1,010	9.0%	30.8%
West Essex	28,069	27.4%	2.7	1,173	4.7%	-40.1%
Heart of Essex	30,448	22.5%	3.4	1,715	2.3%	-4.1%
Essex Thames Gateway	22,633	16.5%	3.5	890	12.5%	-11.8%

Source: Barbour ABI, CPA, ONS

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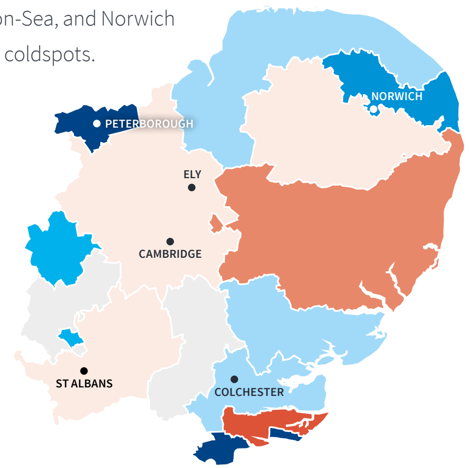
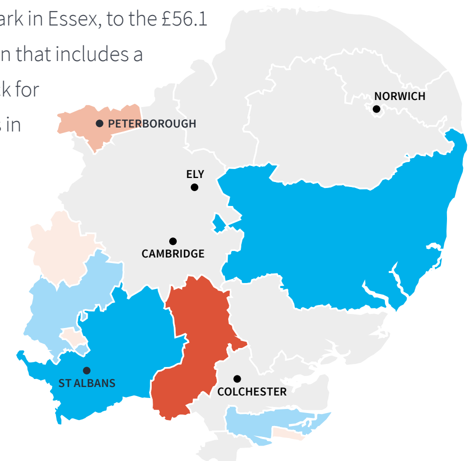
Residential

£1.6 billion worth of residential contracts were awarded in the East of England in 2020, 22.1% lower than the value awarded in 2019. Essex Thames Gateway and Suffolk were hotspots, whilst Peterborough, Thurrock, Southend-on-Sea, and Norwich and East Norfolk were coldspots.



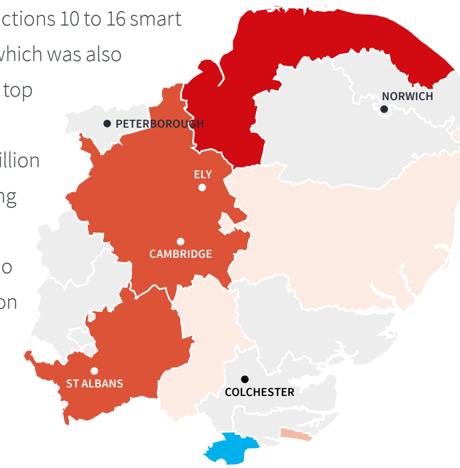
Commercial

Commercial contract awards totalled £489 million in 2020, 29.7% lower than in 2019. West Essex was the only hotspot for commercial activity and there were no coldspots. The top ten contract awards were spread across the region, from the £65.0 million Stane Retail Park in Essex, to the £56.1 million project Einstein that includes a two-storey office block for Roxhill Developments in Cambridgeshire.



Infrastructure

Contract awards for infrastructure projects in the East of England totalled £1.1 billion in 2020, which was 9.0% lower than in 2019 and the lowest value in eight years. North and West Norfolk, Cambridgeshire CC and Hertfordshire were hotspots. Key projects in the region include the £400 million M25 Junctions 10 to 16 smart motorway scheme, which was also among the country's top ten contracts for the year, and the £125 million Gull Wing Lake Lothing Third Crossing in Suffolk. There were no coldspots in the region in 2020.



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
Ridgeons Site	295	£61m	Jan 20	Jan 22
Former Shredded Wheat Factory	208	£50m	Jan 20	Jan 22
Kenilworth Close Phase A	144	£40m	Jun 20	Feb 23
Tudor Nurseries	360	£36m	Jul 20	Jul 23
Civic Centre - South Victoria Street	98	£34m	Apr 20	Apr 23
Nether Mayne Phase 2	315	£32m	Jan 21	Sep 23
Houghton Regis North Area	309	£31m	Nov 20	Nov 22
Meadows 3 - Phase 2B & 2C	-	£30m	Mar 20	Mar 23
Land North East Of Bury St Edmunds - Phase 1	-	£29m	Oct 20	-
South Oxhey Phase 3	345	£29m	Sep 20	Jan 25

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
Stane Park - B&Q, Aldi, M&S	Retail	£65m	Sep 20	Sep 22
Roxhill Developments Project Einstein	Offices	£56m	Jan 22	Apr 25
One Cambridge Square	Offices	£25m	Nov 20	-
Tesco Welwyn Garden City Campus	Retail	£25m	Jul 20	Dec 20
Fletton Quays Plot 2 - Offices	Offices	£24m	Jun 20	Nov 21
Bircherley Green Shopping Centre	Retail	£22m	Jul 20	-
Tri Sail Towers	Offices	£19m	Aug-19	Dec 20
Queensgate Shopping Centre	Retail	£19m	-	Jan 22
Bridge Nursery Horticultural Building	Offices	£18m	Mar 20	-
Portway Building Granta Park	Offices	£17m	Jan 21	Jul 22

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
M25 J10-16 Smart Motorway	£400m	Mar 21	Mar 24
The Gull Wing Lake Lothing Third Crossing	£125m	Jan 21	Jul 23
Walpole Bank - 40Mw Solar Farm	£40m	Jun 22	Dec 26
M11 Junction 7A	£39m	May 20	Oct 22
Kings Dyke Level Crossing Replacement	£32m	Oct 20	Sep 22
A605 Kings Dyke Level Crossing	£18m	May 20	May 22
Gilden Way Upgrading - LGF 3	£18m	Jun 20	Oct 22
Wintringham Park - Eastern Primary Route	£15m	Sep 20	-
New River Bridge Replacement - Hoddesdon	£12m	Jan 20	Apr 21
Hitchin Road/Stopsley Way/Vauxhall Way	£10m	Jan 20	Aug 20

Source: Barbour ABI, CPA

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East Midlands

The East Midlands region accounts for 5.6% of total UK GVA. Key sectors of regional economic activity are industrial production and manufacturing, business services, public administration and distribution and transport. Construction gross value added grew 6.5% in 2019 and the value of contracts awarded in the region totalled £3.3 billion in 2020, a decrease of 26.7% from the previous year. In terms of overall contract awards, there was only one hotspot in Leicestershire CC and Rutland. Leicester and North Nottinghamshire were coldspots.

Leicestershire CC and Rutland had the largest growth in contracts awarded in 2020, dominating the region and increasing by 101.8%

	GVA per head	GVA growth 2014-2019	Unemployment Rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
East Midlands	23,476	17.9%	4.7	7,904	6.5%	-26.7%
Derby	28,873	12.6%	4.9	403	7.5%	-31.6%
East Derbyshire	20,915	23.6%	7.2	458	19.9%	13.8%
South and West Derbyshire	20,372	14.8%	3.7	883	10.4%	-16.3%
Nottingham	31,713	15.6%	6.3	373	-13.7%	-61.8%
North Nottinghamshire	19,779	17.2%	4.5	933	8.2%	-66.6%
South Nottinghamshire	18,745	20.6%	5.3	505	10.3%	-48.8%
Leicester	25,656	21.9%	5.9	313	1.6%	-66.9%
Leicestershire CC and Rutland	24,848	18.2%	3.2	1,648	3.5%	101.8%
West Northamptonshire	30,741	21.2%	5.9	1,252	7.7%	-6.7%
North Northamptonshire	21,252	20.5%	1.4	547	10.5%	-69.5%
Lincolnshire	20,407	15.4%	5.8	1,101	6.4%	-51.6%

Source: Barbour ABI, CPA, ONS

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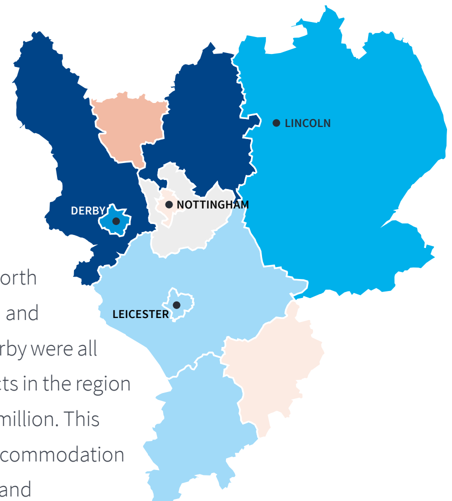
Residential

£1.0 billion worth of residential contracts were awarded in the East Midlands region in 2020, one-third lower than the value awarded in 2019. There were no hotspots and North Nottinghamshire, South and West Derbyshire and Derby were all coldspots. All key projects in the region were valued below £50 million. This includes two student accommodation projects in Nottingham and Loughborough and the redevelopment of a former Leicester City Football club.

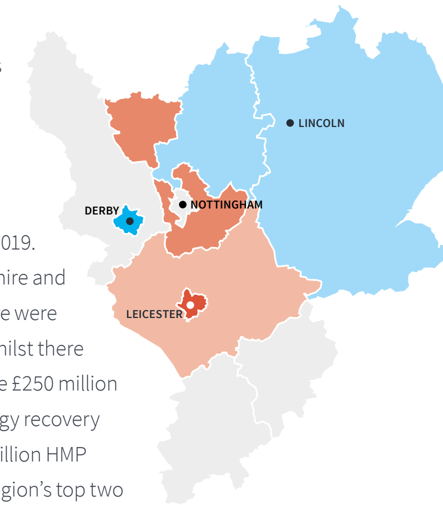


Commercial

Commercial contract awards totalled £201 million in 2020, 65.2% lower than in 2019. The value of commercial contract awards were below the long-term average in most sub-regions, and only significantly above the long-term average in East Derbyshire. Despite this, there were no hotspots or coldspots. All key projects in the East Midlands region were valued below £20.0 million, apart from the £50.0 million Crocus Place office development scheme in Nottingham.

Infrastructure

Contract awards for infrastructure projects in the East Midlands region totalled £736 million in 2020, which was 10.2% higher than the value awarded in 2019. Leicester, East Derbyshire and South Nottinghamshire were hotspots of activity, whilst there were no coldspots. The £250 million Newhurst Quarry energy recovery facility and the £170 million HMP Glen Parva were the region's top two largest projects.



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
Peashill Road, Whiteley Road	400	£40m	Oct 20	Oct 28
Chesterfield Road - Holmewood Ph 2	128	£33m	Jan 21	Jan 25
Deakins Place Student Accommodation	702	£32m	Oct 20	Oct 22
Former Leicester City Football	361	£30m	Nov 20	Jul 23
Kettering Road Phase 1	164	£27m	Mar 21	Mar 24
Leicester Road, Melton Mowbray	266	£27m	Oct 20	Jun 23
Brackenborough Road, Louth	250	£25m	Feb 21	Feb 26
Aumberry Gap Student Accommodation	-	£25m	Feb 20	Aug 21
Glenvale Park Ph 1 Parcel R8A & R8B	238	£24m	Jan 21	Jan 24
Bowling Green Road	135	£22m	Mar 20	Dec 23

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
Crocus Place	Offices	£50m	Nov 21	Feb 25
The Glass Yard - Mixed Development	Retail	£15m	Oct 20	Jul 22
Sainsburys Northampton Road	Retail	£11m	Oct 20	-
Chesterfield Waterside Development	Offices	£8m	Oct 20	Aug 21
The Northern Tower Retail Park	Retail	£6m	Apr 20	Apr 21
Woods Mill Development - Lidl	Retail	£6m	Jun 20	Feb 21
Aldi Store - Rugby Road, Lutterworth	Retail	£5m	Aug 21	Sep 22
Chesterfield Enterprise Centre	Offices	£5m	Mar 20	Mar 21
Lincs & Notts Air Ambulance HQ	Offices	£4m	Mar 20	Nov 20
Vesuvius Works Phase 1A	Offices	£4m	Jan 21	Nov 21

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
Newhurst Quarry Energy Recovery Facility 33Mw Shepshed	£250m	Jul 20	Nov 23
Glen Parva Prison	£170m	-	-
Gedling Access Road	£41m	Jan 20	Jul 21
Daventry International Rail Freight Interchange	£29m	Jun 20	Jun 21
Northampton North West Relief Road (Phase 1)	£16m	Dec 20	May 22
Drakelow C - 15Mw Renewable Energy Centre	£15m	Jul-19	-
Clay Cross Biwater Industries - Infra Works	£15m	Apr-18	Apr 28
Top Wighay Farm Development Infra Works	£10m	Jan 20	Apr 21
Whaley Bridge Dam - Toddbrook Reservoir	£10m	Jun 20	Mar 21
Ashton Green - Highways Infrastructure	£10m	Jan 20	Jan 23

Source: Barbour ABI, CPA

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London

London is the largest regional economy, accounting for 22.7% of total UK GVA and the highest GVA per head. Construction GVA increased 4.4% in 2019. Key sectors of economic activity are focused in real estate activities, financial and insurance services, professional, scientific and technical activities and business services. The value of contracts awarded in the region totalled £12.4 billion in 2020, 4.4% lower than the previous year. Overall hotspots were in Bexley and Greenwich, Enfield, and Redbridge and Waltham Forest. Croydon, Hounslow and Richmond upon Thames, Merton, Kingston upon Thames and Sutton, and Westminster were coldspots.

Despite having average growth in contracts awarded in 2019 for the region, in 2020 Enfield had the largest growth at 129%

	GVA per head	GVA growth 2014-2019	Unemployment rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
London	52,239	22.3%	5.9	22,606	6.4%	-4.4%
Camden and City of London	374,290	29.9%	4.6	2,113	-0.5%	68.0%
Westminster	277,041	26.3%	12.2	2,151	5.7%	-44.7%
"Kensington & Chelsea and Hammersmith & Fulham"	64,189	17.5%	6.7	415	1.5%	-17.0%
Wandsworth	24,052	12.3%	2.9	230	-10.9%	-64.0%
Hackney and Newham	24,819	35.7%	6.2	1,017	15.2%	-5.8%
Tower Hamlets	106,209	16.1%	5.6	1,193	-7.3%	-21.0%
Haringey and Islington	47,122	17.0%	5.2	1,144	16.9%	34.8%
Lewisham and Southwark	40,974	29.3%	6.5	1,144	0.4%	-24.1%
Lambeth	40,293	15.7%	8.9	499	10.9%	-12.1%
Bexley and Greenwich	23,452	20.9%	5.5	1,505	9.1%	471.2%
Barking & Dagenham and Havering	20,295	12.0%	6.5	1,222	8.0%	-35.7%
Redbridge and Waltham Forest	16,659	18.0%	5.9	848	1.4%	20.9%
Enfield	24,442	21.5%	5.6	1,153	12.2%	129.0%
Bromley	24,683	16.0%	3.2	930	9.8%	191.0%
Croydon	25,178	17.9%	5.7	640	-1.7%	-36.9%
Merton, Kingston upon Thames and Sutton	26,371	12.8%	5.7	1,397	11.4%	-36.4%
Barnet	23,499	16.2%	4.6	1,101	10.2%	-62.3%
Brent	27,588	19.5%	5.0	1,256	16.1%	45.5%
Ealing	27,971	10.5%	6.8	853	-5.1%	-51.5%
Harrow and Hillingdon	37,486	16.6%	8.1	1,963	7.0%	-11.0%
Hounslow and Richmond upon Thames	54,886	23.6%	3.7	1,281	16.5%	-10.7%

Source: Barbour ABI, CPA, ONS

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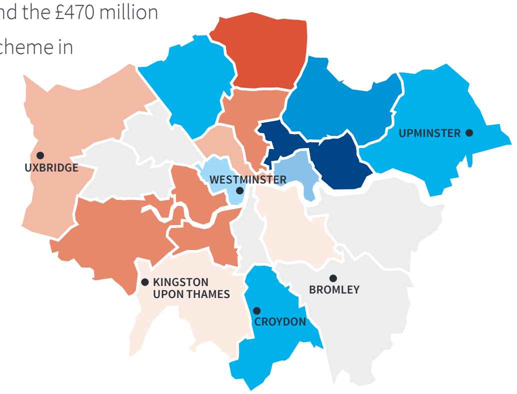
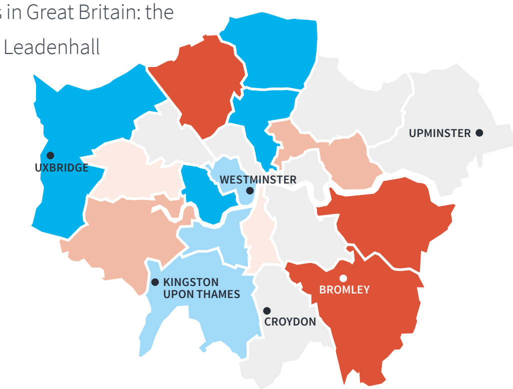
Residential

£4.8 billion worth of residential contracts were awarded in London in 2020, 18.2% lower than the value awarded in 2019. Nevertheless, there were four hotspots: Redbridge and Waltham Forest, Bexley and Greenwich, Bromley and Lambeth. The region hosted two of the country's top ten largest contracts: £500 million for plots 2-4, 7 & 8 at West Thamesmead and the £470 million Consort Place scheme in Tower Hamlets.



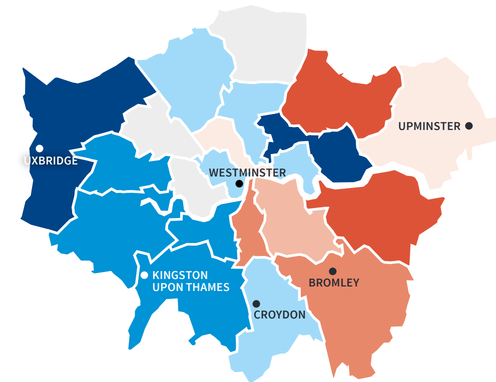
Commercial

At £3.5 billion in 2020, the total value of commercial contracts awarded in London were broadly flat (-0.1%) when compared with 2019. Hotspots for commercial activity were Haringey and Islington, Enfield, Wandsworth, Hounslow and Richmond upon Thames, and Kensington & Chelsea and Hammersmith & Fulham. Contract awards included two of the three largest offices projects in Great Britain: the £400 million 40 Leadenhall and the £250 million 20 Ropemaker Street.



Infrastructure

Contract awards for infrastructure projects in London totalled £1.6 billion in 2020, 87.9% higher than in 2019 and the highest value since 2017. This was due to the £1.0 billion Silvertown road tunnel project, the country's second-largest contract award of 2020. Consequently, this made Bexley and Greenwich a hotspot, alongside Barnet and Bromley.



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
West Thamesmead - Plots 2-4, 7 & 8	-	£500m	Sep 20	Sep 25
Consort Place, Alpha Square	-	£470m	Sep 19	Jan 21
Audley Square Development	-	£250m	Jul 20	-
Goodmayes Railway Station	1280	£128m	-	-
Marylebone Sq Moxon Development	79	£106m	Nov 20	Jul 23
Wembley Park - NW09 & NW10	-	£80m	Jan 20	Jul 22
Oval Gas Works, Kennington	738	£72m	Jan 20	Jan 24
The Yards, Leven Road - Phase 1	-	£70m	Mar 20	Nov 24
Fulham Gasworks - Phase 1	-	£70m	Dec 19	Dec 23
Grand Union - Northfields - Phase 2A	-	£70m	Oct 20	Oct 21

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
40 Leadenhall - Gotham City	Offices	£400m	Mar 20	Nov 23
20 Ropemaker Street	Offices	£250m	Feb 20	Oct 22
Whiteleys Centre Redevelopment	Retail	£200m	Jan 20	Jan 24
Timber Square - Office & Commercial Buildings	Offices	£195m	Aug 22	Nov 25
33 Charterhouse Place	Offices	£120m	Jan 21	Sep 22
Eco Park House South	Offices	£107m	Jan 21	Jul 22
White City Place Plots 6-8	Offices	£103m	Aug 20	-
Embassy Gardens Nine Elms Plot A01	Offices	£100m	Jan 20	Jan 22
Bankside Yards Western Site	Offices	£100m	Aug 20	Dec 21
2-3 Finsbury Avenue Broadgate Tower - Office Development	Offices	£100m	Nov 20	Feb 24

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
Silvertown Tunnel	£1bn	May 20	Jan 25
Bedford Passage - Enabling Works	£30m	Jan 20	Jun 21
Colindale Station Redevelopment	£22m	Apr 21	Apr 22
Copley Close - Energy Centre	£20m	May 20	Oct 20
West Coast Main Line - Bushey And Euston	£15m	May 20	
West Ham - Pedestrian Bridges/Station Entrance	£15m	Dec 19	Dec 24
Brent Cross South Phase 1 - Infrastructure	£15m	Sep 20	Sep 23
Beam Parkway A1306 Dual Carriageway Reconfig	£13m	Oct 20	Apr 23
Tottenham Hale Infrastructure Contract	£10m	Feb 19	Dec 20
Silvertown Tunnel Readmission Work	£10m	Nov 19	Dec 25

Source: Barbour ABI, CPA

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FOCUS ON…

North East

The North East region accounts for 2.8% of UK GVA and had the highest regional unemployment rate in 2019 (6.4%) and the lowest GVA per head. Key sectors of regional economic activity are industrial production and manufacturing, distribution and transport, and public sector administration. Construction GVA rose 5.1% in 2019.

The value of contracts awarded totalled £2.1 billion in 2020, an increase of 8.2% from the previous year. In terms of overall contract awards, Tyneside and Sunderland were hotspots, whilst Durham CC was a coldspot.

Tyneside had the largest growth in contracts awarded in 2020, increasing by 77.7%

	GVA per head	GVA growth 2014-2019	Unemployment rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
North East	20,727	12.7%	6.4	3,363	5.1%	8.2%
Hartlepool and Stockton-on-Tees	22,332	13.4%	6.4	536	3.3%	65.3%
South Teesside	17,415	12.9%	5.6	260	-1.9%	-25.8%
Darlington	24,416	0.0%	5.8	195	12.1%	-80.3%
Durham CC	16,925	12.8%	7.2	633	9.0%	-59.7%
Northumberland	16,005	11.4%	6.3	311	3.7%	76.0%
Tyneside	23,379	15.7%	6.2	1,246	5.0%	77.7%
Sunderland	25,431	9.7%	6.4	353	4.7%	10.3%

Source: Barbour ABI, CPA , ONS

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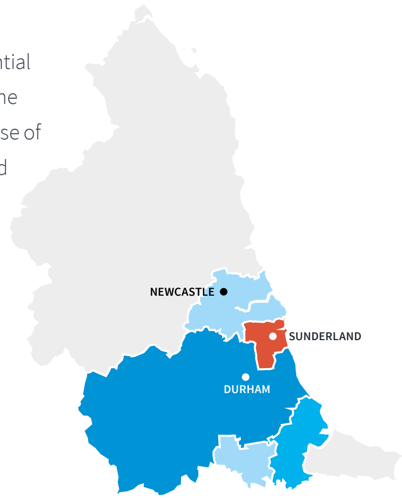
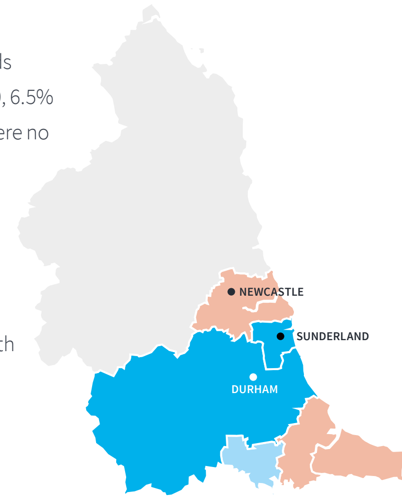
Residential

£751 million worth of residential contracts were awarded in the North East in 2020, an increase of 20.8% from 2019. Sunderland was a hotspot, whilst Durham CC was a coldspot, despite hosting one of the top ten largest contracts in the region.



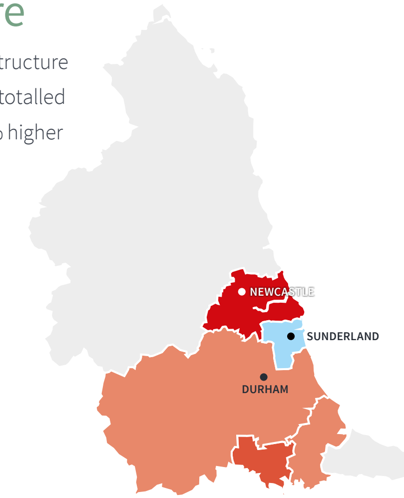
Commercial

Commercial contract awards totalled £210 million in 2020, 6.5% lower than in 2019. There were no hotpots, although the value of commercial contract awards was above the long-term average in three sub-regions: Hartlepool and Stockton-on-Tees, South Teesside, and Tyneside.



Infrastructure

Contract awards for infrastructure projects in the North East totalled £426 million in 2020, 15.0% higher than the value in 2019. There were hotspots in Darlington, Durham CC, Hartlepool and Stockton-on-Tees, and Tyneside.



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
South Ryhope	450	£95m	Jan 21	Jan 26
Strawberry Place - Flats, Hotel and Office	328	£94m	Apr 21	Apr 23
Yarm Back Lane	426	£42.6m	Jan 21	Jan 29
Clasper Village	191	£40m	May 20	Oct 23
Pottery Lane, Forth Banks	525	£39.4m	Jan 21	Sep 23
Langley Park, Durham	353	£35.3m	Nov 20	Nov 30
Gateshead Freight Depot	300	£28.8m	Sep 20	-
Percy Drive, Amble	272	£27.2m	Sep 20	Jun 27
Arcot, Cramlington - Phase B	96	£21.8m	Apr 21	Apr 23
Former North Hylton College	105	£20m	Apr 20	Dec 22

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
Pilgrim Place - Offices, Restaurants & Bars	Mixed	£45m	Oct 20	Apr 23
Pilgrim Street - Office Phase 1	Offices	£36m	Oct 20	Oct 23
Boho Digital City - Boho X	Offices	£30m	Mar 21	Oct 23
Home Group - One Strawberry Lane	Offices	£24m	Aug 20	Jun 22
Costain Jacobs Partnership - Regional Hub	Offices	£11.9m	Jul 20	Apr 22
Travelodge Hotel & Lidl Food Store	Retail	£10m	Jul 20	Apr 22
Fujifilm Diosynth Project Meridian Phase 1	Offices	£7.8m	Mar 20	Mar 21
A V Dawson Office Building	Offices	£4.5m	Oct 20	Aug 21
Aldi Food Store - Trunk Road, Eston	Retail	£4m	Oct 20	-
Aldi Food Store - Brenda Road	Retail	£4m	Mar 20	Oct 20

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
A1 Scotswood To North Brunton	£183m	Mar 20	Oct 22
A19 Norton To Wynyard Widening	£63m	Aug 20	Aug 22
Thorpe Bank Solar Farm - 32Mw	£32m	Jan 21	Jan 22
Cowpen Bewley Road - 49.99Mw Energy Generation Facility	£15m	Aug 19	Sep 20
Saltholme Power - 49.99Mw Gas Fired Facility	£15m	Aug 19	Sep 20
Ponteland Flood Alleviation Scheme	£10m	Aug 20	Mar 21
Durham University - Infrastructure Works	£8m	Sep 20	Apr 21
Northumbrian Water - Pittington Treatment Works	£8m	Dec 20	Apr 22
New Elvet Bridge	£7.5m	Jul 20	Sep 21
Union Chain Bridge Refurbishment	£6.8m	Feb 20	May 21

Source: Barbour ABI, CPA

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FOCUS ON…

North West

The North West region accounts for 9.5% of UK GVA and includes two major cities: Manchester and Liverpool. Key sectors of regional economic activity are industrial production and manufacturing, distribution and transport, and public sector administration. Construction GVA grew 6.3% in 2019. The value of contracts awarded totalled £7.1 billion in 2020, a decrease of 8.7% from the previous year. In terms of overall contract awards, there were hotspots in Greater Manchester North West, Lancaster and Wyre, and Wirral.

Lancaster and Wyre recorded the largest growth in contracts awarded in 2020, increasing by 150.2%

	GVA per head	GVA growth 2014-2019	Unemployment rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
North West	25,629	19.6%	4.2	11,404	6.3%	-8.7%
West Cumbria	22,226	8.3%	3.2	316	0.0%	-91.5%
East Cumbria	26,307	12.5%	4.0	510	0.8%	119.3%
Manchester	44,356	33.6%	8.5	916	10.2%	69.0%
Greater Manchester South West	35,042	21.5%	4.5	1,582	5.7%	59.9%
Greater Manchester South East	20,163	18.8%	4.9	549	2.8%	-9.2%
Greater Manchester North West	18,058	18.6%	4.5	867	2.0%	8.0%
Greater Manchester North East	17,603	21.2%	4.5	811	5.1%	-42.6%
Blackburn with Darwen	20,846	15.8%	5.5	113	-0.9%	-48.4%
Blackpool	20,149	29.8%	4.7	93	0.0%	54.6%
Lancaster and Wyre	17,845	18.3%	2.8	284	10.9%	150.2%
Mid Lancashire	32,365	16.8%	2.2	1,217	4.5%	-0.1%
East Lancashire	19,007	16.5%	2.3	316	-1.6%	46.2%
Chorley and West Lancashire	20,269	23.3%	5.5	353	1.1%	23.3%
Warrington	36,937	21.6%	3.0	908	1.2%	-42.8%
Cheshire East	38,361	24.4%	3.7	633	5.1%	-44.5%
Cheshire West and Chester	30,567	12.9%	3.4	348	1.5%	-2.1%
East Merseyside	23,272	14.2%	3.2	920	5.3%	-63.4%
Liverpool	27,182	14.4%	4.0	621	3.3%	-3.5%
Sefton	15,217	13.8%	2.5	236	5.8%	-65.8%
Wirral	15,831	12.4%	3.6	259	0.0%	54.6%

Source: Barbour ABI, CPA, ONS

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FOCUS ON…NORTH WEST

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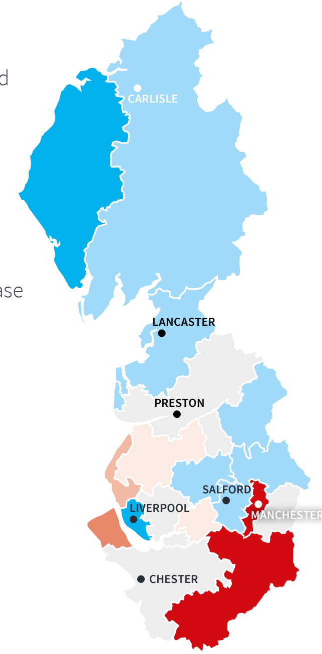
Residential

£3.0 billion worth of residential contracts were awarded in the North West in 2020, an increase of 30.1% from 2019. East Lancashire, Greater Manchester South West, and Wirral were hotspots, with coldspots in Cheshire East and Sefton.

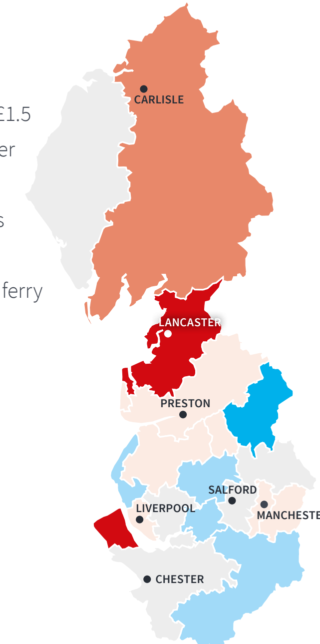
Commercial

Commercial contract awards totalled £938 million in 2020, 83.8% lower than in 2019. There were three hotspots: Wirral, Cheshire East, and Manchester. Contract awards in the latter were significantly above long-term average values due to an increase in large city centre projects.



Infrastructure

Contract awards for infrastructure projects in the North West totalled £1.5 billion in 2020 which was 39.4% lower than in 2019. Lancaster and Wyre, and Wirral were significant hotspots due to the £150 million A585 road scheme and work at the Seacombe ferry terminal.



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
City View Development - Regent Plaza	-	£150m	Mar 20	Jul 23
New Victoria Development	-	£100m	Aug 20	Aug 30
Affinity Living Riverview - Manchester	91	£100m	Aug 19	Jul 21
Echo Street Manchester	884	£90m	Apr 20	Apr 23
Plot 11 First Street Co-Living	224	£90m	Sep 20	Sep 24
Crown Street Phase 2 A, B & D	855	£88m	Sep 20	Sep 22
Anchorage Gateway Redevelopment	-	£75m	Mar 21	Nov 23
Swan House, Swan Street	370	£65m	Jul 20	-
Stockport Interchange Project	196	£52m	Jan 21	Jan 24
Ordsall Lane Dock 5 Development	394	£48m	Mar 20	Jan 23

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
Manchester Central - Bauer Millet Site	Offices	£300m	Feb 24	-
One City Road Redevelopment	Offices	£121m	Jan 22	Jan 26
Noma Plot P 4 Angel Square	Offices	£50m	Oct 20	Aug 22
Manchester Airport City Plots E1, E2 & E3	Offices	£47m	-	-
Mayfield Phase 1 - Baring Street Office 1	Offices	£28m	Jan 21	Aug 23
Base Manchester Science Park	Offices	£28m	Dec 20	Jul 23
Atlantic House - Office Refurbishment	Offices	£25m	-	-
Noma Old Bank Building	Offices	£20m	Jan 20	-
Bentley Limited 27 & 29 Pyms Lane	Offices	£20m	-	-
Royal Arcade - Crewe Town Centre Redev	Retail	£20m	Jul 21	Jul 23

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
Thirlmere-West Cumbria Link Water Mains Project	£300m	-	Sep 22
Preston Western Distributor Road	£161m	Apr 20	Apr 24
A585 Windy Harbour To Skippool	£150m	Apr 20	Jul 23
Ince Park 49.5Mw Energy From Waste Facility	£150m	Dec 20	Dec 22
M56 J6-8 - Smart Motorway Trunk Road Improvement	£90m	Oct 20	-
Seismically Reinforced Structure - Sellafield	£59m	Oct 21	Oct 23
A500 Dualling - South Cheshire	£57m	Jul 21	Jul 23
Liverpool Waters District Heating Network - Phase 1 Central Docks Neighbourhood	£50m	Aug 20	-
Stockport Interchange Project	£45m	Apr 21	Apr 23
Great North Rail - Manchesters Railway Signalling Improvements	£36m	Aug 20	Nov 21

Source: Barbour ABI, CPA

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FOCUS ON…

Scotland

Scotland accounts for 7.2% of total UK GVA. Key sectors of economic activity in the region are industrial production and manufacturing, distribution and transport and public administration. Construction GVA increased 3.5% in 2019. The value of contracts awarded in the region totalled £4.3 billion in 2020, a decrease of 4.4% from the previous year. In terms of overall contract awards, hotspots were in East Dunbartonshire, West Dunbartonshire and Helensburgh & Lomond, Eilean Siar (Western Isles), Inverclyde, East Renfrewshire and Renfrewshire, Shetland Islands, West Lothian, and Scottish Borders. Aberdeen City and Aberdeenshire, Edinburgh, East Lothian and Midlothian, and Lochaber, Skye & Lochalsh, Arran & Cumbrae and Argyll & Bute were coldspots.

Shetland Islands left everyone standing, recording the largest growth in contracts awarded in 2020, increasing by 8,120%

	GVA per head	GVA growth 2014-2019	Unemployment rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
Scotland	26,968	13.6%	4.3	8,928	3.7%	-4.4%
Angus and Dundee City	21,338	13.8%	5.0	294	4.6%	-44.6%
Clackmannanshire and Fife	19,979	15.2%	6.1	542	3.8%	46.6%
East Lothian and Midlothian	17,625	26.1%	3.0	296	7.2%	-52.8%
Scottish Borders	20,844	13.3%	1.0	151	16.2%	136.7%
Edinburgh, City of	46,027	25.9%	4.0	695	3.0%	-47.9%
Falkirk	24,947	15.9%	4.9	408	8.5%	-78.3%
Perth & Kinross and Stirling	28,302	12.8%	4.0	532	-0.4%	29.7%
West Lothian	26,917	24.3%	3.1	483	5.0%	40.1%
"E Dunbartonshire, W Dunbartonshire and Helensburgh & Lomond"	16,860	20.5%	3.3	128	0.8%	69.5%
Dumfries & Galloway	24,252	11.7%	5.8	205	13.9%	20.9%
E Ayrshire and N Ayrshire mainland	16,122	9.1%	4.6	287	9.1%	19.9%
Glasgow City	35,032	15.3%	4.6	1,115	3.3%	-33.3%
Inverclyde, E Renfrewshire and Renfrewshire	19,449	13.3%	4.6	439	9.5%	35.9%
North Lanarkshire	23,699	19.4%	5.9	871	4.7%	117.7%
South Ayrshire	22,043	14.0%	4.9	194	-2.5%	-68.5%
South Lanarkshire	21,358	12.2%	3.4	742	3.8%	6.7%
Aberdeen City and Aberdeenshire	35,203	-7.8%	4.7	1,002	0.1%	-20.6%
Caithness & Sutherland and Ross & Cromarty	22,325	10.9%	4.1	152	-4.4%	24.4%
Inverness & Nairn and Moray, Badenoch & Strathspey	27,447	19.7%	2.0	510	0.4%	-29.9%
"Lochaber, Skye & Lochalsh, Arran & Cumbrae and Argyll & Bute"	24,994	17.6%	2.6	94	3.3%	-57.7%
Eilean Siar (Western Isles)	21,158	10.8%	3.7	29	0.0%	47.1%
Orkney Islands	25,139	0.4%	na	38	-7.3%	-45.6%
Shetland Islands	32,618	-6.0%	na	49	-3.9%	8,120%

Source: Barbour ABI, CPA , ONS

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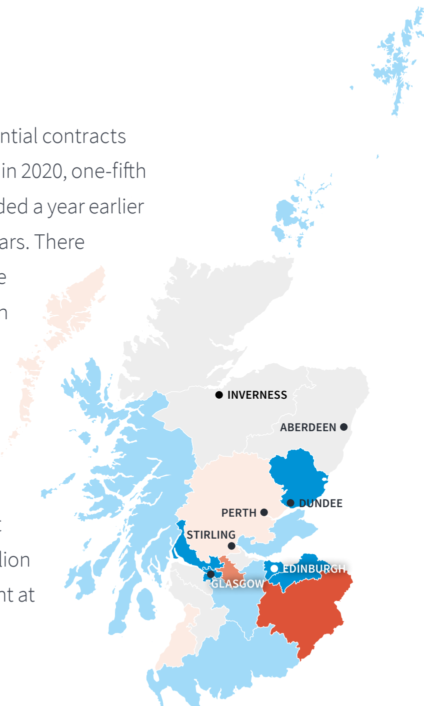
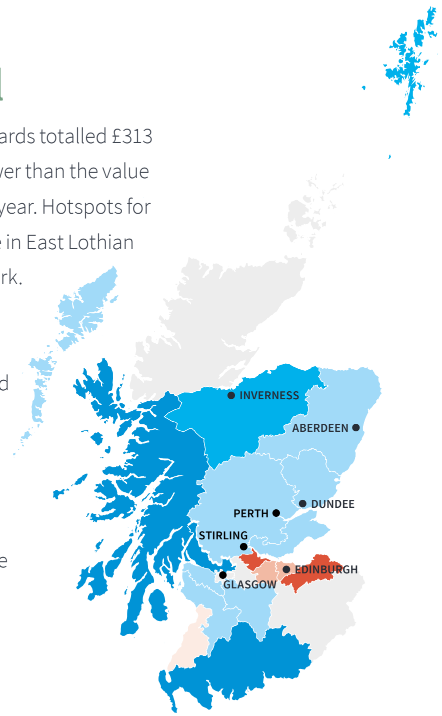
Residential

£1.2 billion worth of residential contracts were awarded in Scotland in 2020, one-fifth lower than the value awarded a year earlier and the lowest in seven years. There were two hotspots and five coldspots. The £100 million Phase 1 of Elgin Long South was Scotland's largest residential contract award. This was followed by the £70.0 million development in Scone and the £63.8 million second phase development at Torrance Park.



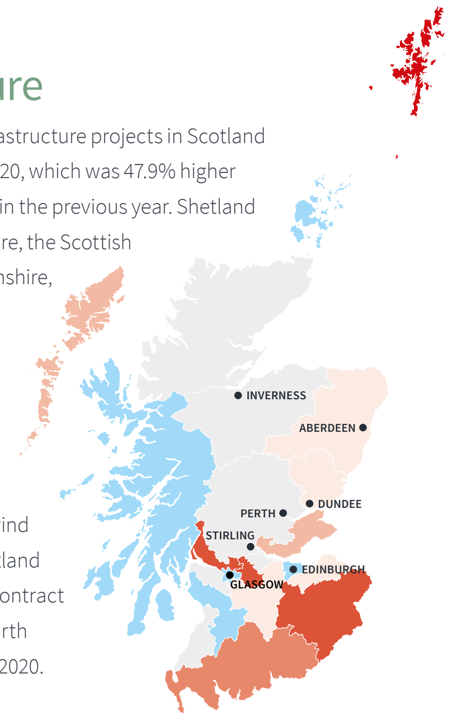
Commercial

Commercial contract awards totalled £313 million in 2020, 37.6% lower than the value awarded in the previous year. Hotspots for commercial activity were in East Lothian and Midlothian, and Falkirk. The £85.0 million mixed-use development that includes offices, retail and a restaurant on Argyle Street in Glasgow City was the largest commercial contract for the year. There were three coldspots in 2020.



Infrastructure

Contract awards for infrastructure projects in Scotland totalled £1.4 billion in 2020, which was 47.9% higher than the value awarded in the previous year. Shetland Islands, North Lanarkshire, the Scottish Borders, East Dunbartonshire, West Dunbartonshire and Helensburgh & Lomond, and Dumfries and Galloway were hotspots. There were no coldspots. The £500 million Viking offshore wind farm project on the Shetland Islands was the largest contract in the region and the fourth largest in the country in 2020.



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
Elgin Long South - Phase 1	-	£100m	Jul 19	Jan 30
North Scone, Tayside	700	£70m	Sep 19	Sep 40
Torrance Park Phase 2	638	£64m	Jul 20	Jul 24
Former Ruchill Hospital	403	£56m	Jan 21	-
Glenboig, Coatbridge	535	£54m	Jan 22	Aug 25
Granton Harbour, West Harbour Rd	302	£45m	Sep 20	-
Schloss Roxburghe Hotel Redev	-	£30m	Dec 19	Apr 21
Edinburgh St James	152	£30m	Aug 20	Feb 22
Lyndsayfield Road Phase 1A	254	£25m	Mar 20	Jun 25
Buchanan Wharf - Phase 2 Building 5	-	£25m	Nov 19	Feb 22

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
Argyle Street, Strathclyde	Offices	£85m	Oct 20	Jan 23
The Haymarket - Phase 1	Offices	£80m	Mar 20	Jul 22
Ineos HQ2 - Office Development	Offices	£20m	Apr 20	Oct 21
Broadway 2 North - Renfrew & Renfield	Offices	£19m	-	-
Oceaneering D2 Business Park	Offices	£7m	Jan 20	Apr 21
James Craig Walk - Office Block	Offices	£6m	May 19	Sep 20
Kingshill Business Park - 4 Buildings	Offices	£6m	Apr 20	May 21
Purifier Studios, Poplin Street	Offices	£6m	Sep 20	Oct 21
South Road, Cupar - B&M and Retail	Retail	£6m	Feb 21	Nov 21
Clyde Gateway URC Phase 2	Offices	£5.5m	Sep 20	May 21

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
Viking Wind Farm 457Mw - Shetland Islands	£500m	Aug 20	Aug 24
Aikengall Iia Wind Farm - 75.5Mw	£70m	Jul 22	Dec 23
Northern Ammunitioning Jetty - DIO	£64m	Jun 19	Aug 21
Windy Rig 48Mw Wind Farm	£55m	Oct 21	Mar 23
Daldowie Waste Water Treatment Works	£55m	Jan 20	Jul 21
Invercannie Waterworks	£52m	Dec 20	Dec 22
Shetland HVDC Link	£50m	Sep 20	Feb 22
Peterhead 400 Kv Substation	£47.5m	Dec 20	Dec 23
Cairnmore Hill Wind Farm - 33.6Mw Wind Farm	£37m	Jan 25	-
Inverclyde 30Mw Wind Farm	£36m	Sep 20	Sep 21

Source: Barbour ABI, CPA

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FOCUS ON…

South East

The South East region accounts for 14.2% of total UK GVA and key sectors of economic activity in the region are distribution and transport, information and communications, real estate activities, business services and public administration. Construction GVA rose 4.0% in 2019. The value of contracts awarded in the region totalled £5.5 billion in 2020, a decrease of 26.8% from the previous year. In terms of overall contract awards, Kent Thames Gateway and Medway were hotspots, whilst coldspots were in Berkshire, Mid Kent, North Hampshire, and South Hampshire.

The value of contracts awarded in the region totalled £5.5 billion in 2020, a decrease of 26.8% from the previous year

	GVA per head	GVA growth 2014-2019	Unemployment rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
South East	31,783	18.3%	3.9	19,358	5.5%	-26.8%
Berkshire	50,654	19.3%	3.9	2,029	2.0%	-24.4%
Milton Keynes	54,031	29.2%	3.3	483	10.8%	55.2%
Buckinghamshire CC	29,825	16.4%	3.4	1,466	10.1%	-9.4%
Oxfordshire	32,961	16.2%	3.0	1,309	5.3%	-4.3%
Brighton and Hove	30,017	24.4%	7.6	241	-17.2%	-59.0%
East Sussex CC	17,077	21.9%	6.1	740	1.2%	-64.8%
West Surrey	39,856	18.5%	3.9	2,420	3.5%	-47.7%
East Surrey	33,822	-4.1%	3.2	1,363	13.4%	53.0%
West Sussex (South West)	24,447	26.7%	2.1	516	5.3%	0.2%
West Sussex (North East)	32,014	23.5%	3.4	901	8.9%	7.6%
Portsmouth	27,832	11.4%	5.7	278	0.0%	-62.7%
Southampton	30,865	15.3%	3.2	260	-4.8%	8.7%
Isle of Wight	18,849	11.5%	5.6	133	10.8%	-27.2%
South Hampshire	24,232	9.0%	4.6	1,022	4.8%	-49.8%
Central Hampshire	29,158	17.6%	2.4	1,426	4.0%	-81.1%
North Hampshire	41,276	19.9%	3.8	1,096	6.9%	-47.8%
Medway	21,060	23.9%	5.1	649	11.1%	173.9%
Kent Thames Gateway	23,637	21.2%	3.0	1,209	4.9%	144.8%
East Kent	19,546	19.7%	4.0	690	1.3%	-30.1%
Mid Kent	25,686	24.1%	3.4	770	10.6%	-62.9%
West Kent	33,179	26.9%	3.6	1,412	6.8%	14.3%

Source: Barbour ABI, CPA, ONS

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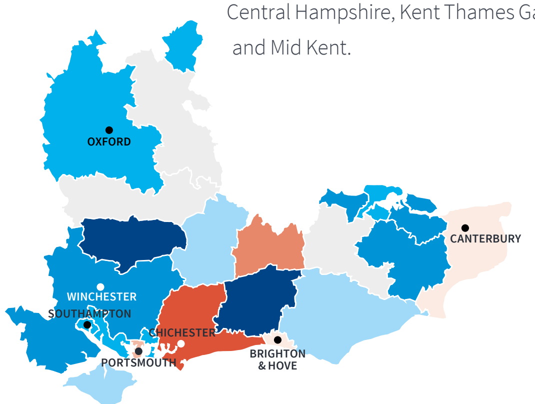
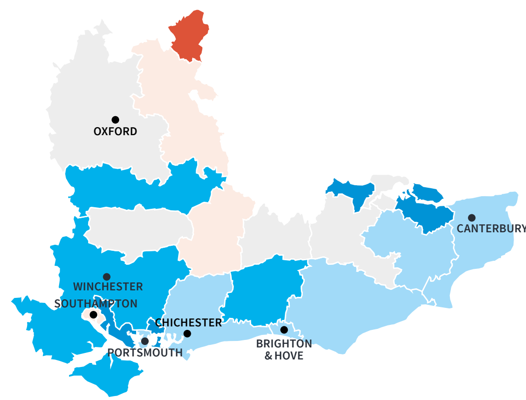
Residential

£2.2 billion worth of residential contracts were awarded in the South East region in 2020, 28.1% lower than the value awarded in 2019 and the lowest in seven years. West Sussex (South West) and East Surrey were hotspots, whilst five sub-regions were registered as coldspots in 2020: West Sussex (North East), North Hampshire, Central Hampshire, Kent Thames Gateway and Mid Kent.



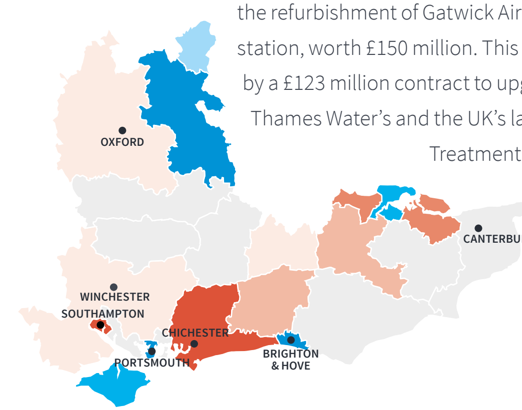
Commercial

Commercial contract awards in the South East totalled £525 million in 2020, 28.5% lower than in 2019. Milton Keynes was the sole hotspot for commercial activity in 2020, reflecting the £150 million contract for Santander's new technology hub. Kent Thames Gateway and South Hampshire were coldspots.



Infrastructure

Contract awards for infrastructure projects in the South East totalled £934 million in 2020, 17.6% higher than the value awarded in 2019. Hotspots of activity were in Southampton, West Sussex (South West) and Kent Thames Gateway; coldspots were in Brighton and Hove, Portsmouth and Buckinghamshire CC. The largest contract award for the region was for the refurbishment of Gatwick Airport's railway station, worth £150 million. This was followed by a £123 million contract to upgrade Beckton, Thames Water's and the UK's largest Sewage Treatment Works (STW).



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
The Landing Maidenhead	-	£100m	Mar 20	Dec 23
Free Wharf, Shoreham By Sea Phase 2	261	£68m	Oct 20	Oct 23
Littlemore Park, Oxford	270	£60m	Apr 20	Oct 22
Aubrey Place	294	£47m	Jan 20	Apr 22
Shinfield West Phase 2	473	£47m	Jul 18	Jul 21
The Wycliffe Centre Redevelopment	167	£40m	Oct 20	Jul 22
The Foundry Quarter, Weldale Street	429	£32m	Jan 20	Jan 22
Ockford Park, Godalming	252	£30m	Feb 20	Feb 25
Block 3 Queensmead	99	£30m	Jul 20	Jul 22
Church Road , Tonbridge	300	£29m	Aug 20	Aug 24

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
Santander Tech Hub Campus	Offices	£150m	Sep 21	Dec 24
West Witney Employment Area Ph1	Offices	£33m	Feb 20	Feb 21
One Causeway Park, Staines	Offices	£30m	Jul 20	Jul 21
Farnborough Town Centre Block 3	Retail	£27m	Apr 20	Apr 22
Thameswey Energy Centre, Poole Road	Offices	£20m	Jan 20	Mar 21
Rhodes House - South Parks Road	Offices	£20m	Jul 20	Jul 22
NFTP Fusion Buildings	Offices	£18m	Nov 20	Nov 21
Lidl Supermarket & 30 Apartments	Retail	£15m	Feb 20	Aug 21
Windsor Dials - Office Development	Offices	£14m	Jun 20	Sep 21
Sainsbury's Gatehouse Road, Aylesbury	Retail	£12m	-	-

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
Gatwick Airport Railway Station Refurbishment	£150m	Apr 20	Apr 23
Thames Water Beckton STW AMP 7 Upgrade	£123m	Jan 21	Jan 24
M2 Junction 5 Improvements	£100m	Jul 20	Jul 22
A27 Worthing & Lancing Improvements	£64m	Apr 20	Apr 22
Port Of Southampton - Cruiser Terminal 5	£55m	Oct 20	Oct 21
Redhill Railway Station - Redevelopment	£40m	Aug 20	Oct 22
Botley Bypass	£26m	Sep 20	-
Hilton South Terminal LGW Multi Storey Car Park	£26m	Sep 20	Aug 22
A2300 Corridor - Dual Carriageway	£22m	Apr 20	Jul 21
A21 Safety Package And Route Corridors Scheme	£20m	Dec 20	Dec 24

Source: Barbour ABI, CPA

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South West

The South West region accounts for 7.1% of total UK GVA and key sectors of economic activity in the region are distribution and transport, public administration and business services. Construction GVA registered an increase of 3.1% in 2019. The value of contracts awarded in the region totalled £4.2 billion in 2020, a decrease of 6.5% from the previous year. In terms of overall contract awards, hotspots were in the City of Bristol, Cornwall and Isles of Scilly, Dorset CC, Swindon and Torbay. Bournemouth and Poole, and Somerset; coldspots were in Bath and North East Somerset, North Somerset and South Gloucestershire, and Devon CC.

A decrease of 6.5% from the previous year, hotspots were in the City of Bristol, Cornwall and Isles of Scilly, Dorset CC, Swindon and Torbay

	GVA per head	GVA growth 2014-2019	Unemployment rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
South West	25,629	17.0%	3.8	9,992	5.3%	-6.5%
Bristol, City of	33,093	20.3%	5.0	1,001	12.0%	50.4%
"Bath and NE Somerset, N Somerset and S Gloucestershire"	30,523	16.9%	3.7	508	6.9%	-49.5%
Gloucestershire	28,642	15.8%	3.7	2,162	3.0%	3.8%
Swindon	43,094	12.8%	3.6	383	-6.4%	76.9%
Wiltshire	23,141	11.5%	2.4	840	10.8%	-32.7%
Bournemouth and Poole	21,608	17.5%	4.7	820	0.1%	-55.4%
Dorset CC	26,932	18.2%	3.3	682	10.2%	53.6%
Somerset	20,996	15.8%	3.0	922	2.7%	-47.7%
Cornwall and Isles of Scilly	20,055	24.9%	4.1	1,109	7.9%	136.3%
Plymouth	21,995	18.1%	4.5	347	4.5%	-9.0%
Torbay	14,500	2.7%	4.8	83	-3.5%	66.5%
Devon CC	22,821	17.7%	3.9	1,668	6.0%	-26.2%

Source: Barbour ABI, CPA, ONS

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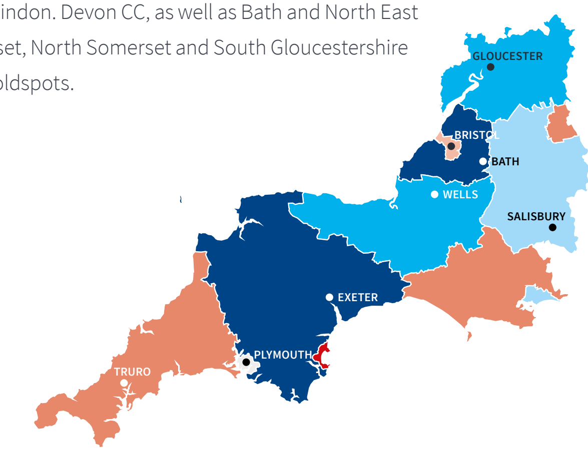
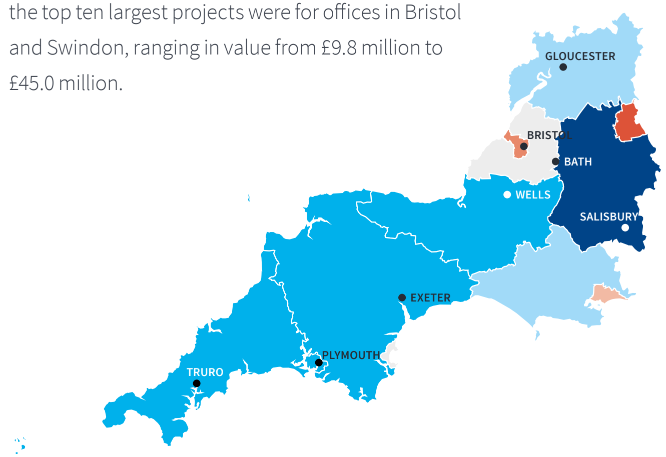
Residential

£1.8 billion worth of residential contracts were awarded in the South West region in 2020, 4.9% lower than the value awarded in 2019 and the lowest in five years. There were hotspots in Torbay, Cornwall and Isles of Scilly, Dorset CC and Swindon. Devon CC, as well as Bath and North East Somerset, North Somerset and South Gloucestershire were coldspots.



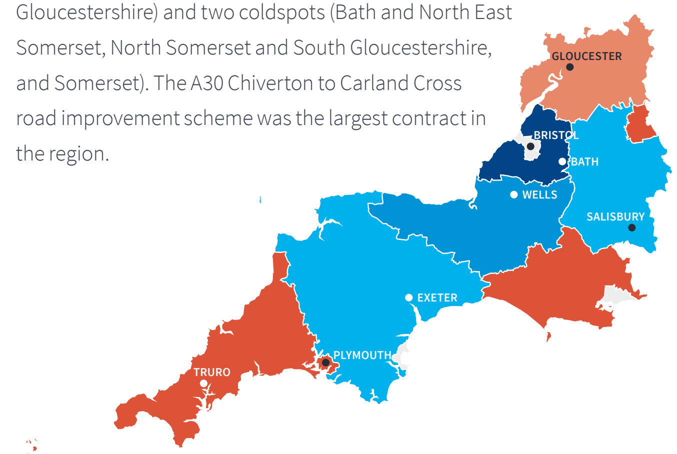
Commercial

Commercial contract awards totalled £354 million in 2020, 26.5% higher than in 2019. The City of Bristol and Swindon were hotspots of commercial activity in 2020, whilst Wiltshire was a coldspot. Seven of the top ten largest projects were for offices in Bristol and Swindon, ranging in value from £9.8 million to £45.0 million.



Infrastructure

Contract awards for infrastructure projects in the South West totalled £857 million in 2020, 12.0% above the previous year. There were five hotspots (Plymouth, Cornwall and Isles of Scilly, Swindon, Dorset CC and Gloucestershire) and two coldspots (Bath and North East Somerset, North Somerset and South Gloucestershire, and Somerset). The A30 Chiverton to Carland Cross road improvement scheme was the largest contract in the region.



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
Finzels Rch Millwrights Pl & Coopers Ct	318	£100m	Jan 21	Aug 23
Bristol Uni Student Accommodation	-	£94m	Apr 21	Dec 23
Siddington Park Farm Retirement	-	£50m	Apr 20	Apr 23
Shurdington Road, Leckhampton	350	£46m	Apr 21	Dec 23
Spa Road, Melksham	447	£45m	Apr 20	Dec 22
Warmwell Road, Dorchester	401	£40m	-	-
Studytel Penryn	528	£40m	Mar 20	Sep 21
Oakfield Village, Marlowe Avenue	239	£36m	Jul 20	Jul 22
North Prospect Phase 4	196	£35m	Jul 20	Jul 23
St Mary's Hill, Blandford	350	£35m	Feb 20	Feb 23

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
EQ Bristol - Offices	Offices	£45m	Dec 20	Dec 22
Assembly Bristo, Building B & C	Offices	£37m	Aug 20	Mar 23
Finzels Reach - Project Halo - Offices	Offices	£33m	Jun 20	Jun 22
Zurich - Project Norwood	Offices	£30m	Aug 20	Mar 23
Boundary Rd - Project Gazelle Data Ctr	Offices	£15m	Jan 20	Jan 22
Imperial Park Phase 6 - Retail and Gym	Retail	£12m	-	Aug 20
Finzels Reach Generator Building	Offices	£12m	Nov 20	Jun 22
North Road West & Grovefield Way	Retail	£12m	Oct 20	Jun 21
1 Portwall Square, Redcliff	Offices	£10m	Nov 20	-
Corinthian Park, Grovefield Way Phase 1	Retail	£10m	Oct 20	Oct 22

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
A30 Chiverton To Carland Cross	£210m	Jul 20	Jul 23
Bridgwater 7.75 Mw Resource Recovery Facility	£72m	Oct-19	Apr 21
Hinkley Point C Pipework Contract	£58m	-	-
North Devon Link Road	£55m	Jan 21	Jan 29
Hinkley Point C - Shurton Substation	£50m	Aug 19	Apr 22
Bristol Temple Meads Station - Temple Quarter	£40m	Jul 20	Jul 23
Clifton Farm - 35Mw Solar Park	£35m	Jan 22	-
Plymouth Railway Station Redevelopment	£26m	Jul 21	Jul 26
Wichelstowe Development Area - Southern Access	£26m	Oct 20	Apr 21
Hinkley Point C Conventional Island	£25m	Jul 20	-

Source: Barbour ABI, CPA

UK Construction Hotspots
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FOCUS ON…

Wales

Wales accounts for 3.3% of total UK GVA and key sectors of economic activity in the region are industrial production and manufacturing, distribution and transport, public administration and real estate activities. Construction GVA increased 2.6% in 2019. The value of contracts awarded in the region totalled £1.9 billion in 2020, an increase of 4.6% from the previous year. In terms of overall contract awards, Central Valleys, Gwynedd, and Monmouthshire and Newport were hotspots, whilst there were no coldspots.

Construction GVA increased 2.6% in 2019. The value of contracts awarded in the region totalled £1.9 billion in 2020, an increase of 4.6% from the previous year

	GVA per head	GVA growth 2014-2019	Unemployment rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
Wales	21,295	17.9%	3.7	4,279	4.6%	4.6%
Isle of Anglesey	16,131	30.6%	5.1	71	14.5%	-73.1%
Gwynedd	19,720	9.8%	2.7	209	3.0%	49.0%
Conwy and Denbighshire	17,658	16.9%	4.4	365	11.6%	25.9%
South West Wales	18,574	21.5%	2.8	430	5.4%	-39.9%
Central Valleys	17,439	9.9%	5.8	488	3.0%	375.8%
Gwent Valleys	16,180	19.1%	4.8	338	8.3%	40.4%
Bridgend and Neath Port Talbot	19,836	16.2%	2.0	482	1.0%	41.9%
Swansea	22,939	15.7%	5.1	304	-1.0%	-70.8%
Monmouthshire and Newport	24,815	25.1%	3.6	402	9.2%	57.1%
Cardiff and Vale of Glamorgan	27,629	17.5%	2.9	926	3.7%	-46.9%
Flintshire and Wrexham	27,593	21.6%	2.8	352	2.9%	-18.3%
Powys	17,098	10.7%	4.6	109	3.8%	126.5%

Source: Barbour ABI, CPA , ONS

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FOCUS ON…WALES

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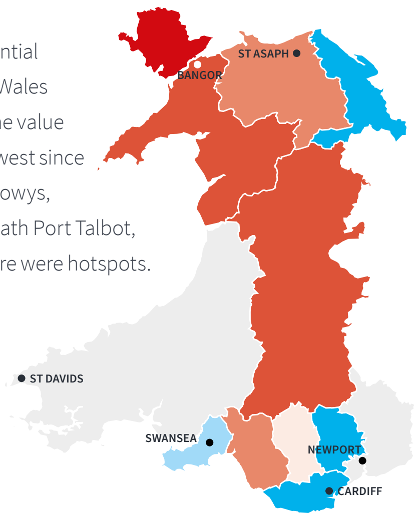
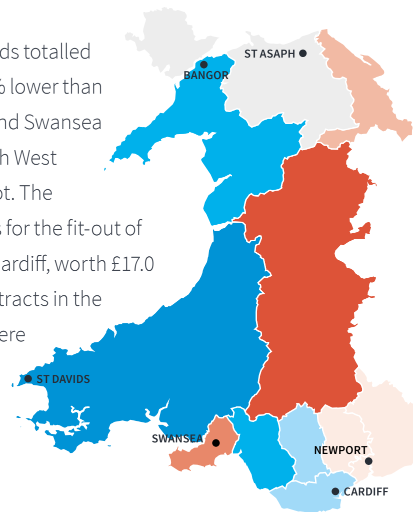
Residential

£441 million worth of residential contracts were awarded in Wales in 2020, 31.0% lower than the value awarded in 2019 and the lowest since 2013. The Isle of Anglesey, Powys, Gwynedd, Bridgend and Neath Port Talbot, and Conwy and Denbighshire were hotspots. There were no coldspots.



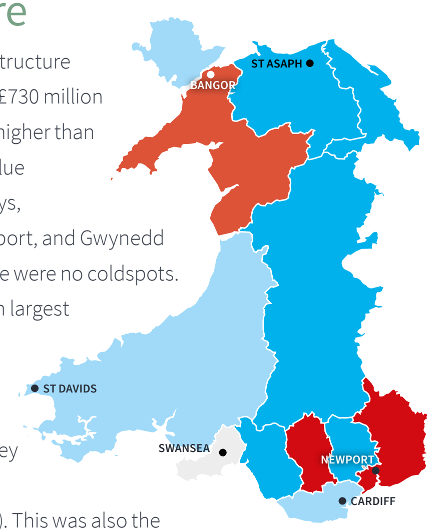
Commercial

Commercial contract awards totalled £79.5 million in 2020, 38.8% lower than the previous year. Powys and Swansea were hotspots, whilst South West Wales was the sole coldspot. The largest contract award was for the fit-out of HMRC's new office hub in Cardiff, worth £17.0 million. The remaining contracts in the top ten list for the region were for lower-value projects, ranging from £2.0 million to £6.0 million.



Infrastructure

Contract awards for infrastructure projects in Wales totalled £730 million in 2020, which was 57.3% higher than in 2019 and the highest value in four years. Central Valleys, Monmouthshire and Newport, and Gwynedd were hotspots, whilst there were no coldspots. Four of the region's top ten largest contracts were for road projects, including the £514 million dualling of the A465 Heads of the Valley between Dowlais Top and Hirwaun (sections 5 and 6). This was also the third-largest contract award in the country.



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
Crick Road, Portskewett	271	£27m	Apr 20	Dec 22
South Sebastopol, Upland Parcels	228	£23m	Apr 20	Dec 22
Sunnyside Wellness Village, Glan Y Parc	-	£19m	Sep 20	Mar 22
Coed Darcy Phase 2B	163	£16m	-	-
Biophilic Living At Picton Yard	44	£15m	Apr 20	Feb 22
North Parade, Gwynedd	49	£12m	Jan 21	-
Neuadd Maldwyn, Severn Road	66	£12m	Jan 21	Jan 23
Crabtree Walk, Mid Glamorgan	45	£12m	Jan 21	Jul 22
Llanwrst Road, Glan Conwy	111	£11m	-	-
Parc Derwen Parcel R20	102	£10m	Dec 20	Jun 23

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
HMRC Cardiff - Fit Out	Offices	£17m	Jan 20	Nov 20
Brynmawr Retail Park	Retail	£6m	Mar 20	Mar 21
Lidl Store - Llangefni	Retail	£3m	Apr 20	Oct 20
Lidl Supermarket, Bodhyfryd, Wrexham	Retail	£3m	Sep 20	Jun 21
Aldi Food Store - Pool Road	Retail	£3m	Nov 20	Sep 21
Aldi Food Store - Chester Street, Mold	Retail	£2.7m	Dec 20	Oct 21
Aldi Food Store - Ruthin	Retail	£2.5m	Jan 20	Oct 20
Three Cocks - 9 Commercial	Retail	£2.3m	Jan 21	Jan 22
Hafod Morfa Copperworks	Offices	£2m	Jul 20	Aug 22
North Wales Newspapers	Offices	£2m	-	Feb 20

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
A465 Heads Of The Valley Dualling Sections 5 & 6	£514m	Apr 21	Dec 25
Renewable Energy Hub - 125Mw Solar & Wind	£80m	Aug 20	-
Blaenhiraeth Farm - Penderi Solar Farm	£30m	Jun 21	Sep 21
A533 Expressway Bridge Replacement Scheme	£23m	Apr 21	Jul 22
A55 Abergwyngregyn To Tair Meibion	£18m	Sep 20	Mar 22
ABP Cardiff Bay - Swansea West Pier Refurbishment	£15m	Jul 20	Jan 22
Barmouth Viaduct (Main Works Timber)	£11m	Jun 20	Jun 22
RAF Sealand South Camp - H3 & H5 Enabling Works	£5m	Mar 21	Sep 21
Garden Village - Landscaping	£5m	Feb 21	Feb 22
Harbourside Strategic Employment - Infrastructure	£4m	Jan 21	Jun 22

Source: Barbour ABI, CPA

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West Midlands

The West Midlands region accounts for 7.1% of UK GVA. Key sectors of regional economic activity are industrial production and manufacturing, public administration and distribution and transport. Construction GVA growth was 4.0% in 2019. The value of contracts awarded in the region totalled £4.0 billion in 2020, which was 8.7% higher than the value in the previous year. In terms of overall contract awards, Dudley, Solihull and Walsall were all hotspots, with Staffordshire CC a coldspot.

The value of contracts awarded in the region totalled £4.0 billion in 2020, which was 8.7% higher than the value in the previous year

	GVA per head	GVA growth 2014-2019	Unemployment rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
West Midlands	24,343	20.7%	5.3	8,991	4.0%	8.7%
Herefordshire, County of	20,758	16.2%	3.0	216	2.4%	-6.7%
Worcestershire	24,311	17.7%	3.5	883	10.9%	5.5%
Warwickshire	34,302	24.9%	3.1	1,389	-3.1%	-32.0%
Telford and Wrekin	25,785	25.3%	6.0	205	20.6%	45.5%
Shropshire CC	19,223	12.5%	3.9	523	1.0%	-9.6%
Stoke-on-Trent	23,683	26.2%	3.0	359	4.7%	-35.0%
Staffordshire CC	21,483	19.7%	5.4	1,705	4.7%	-16.9%
Birmingham	24,345	17.6%	8.5	1,538	-1.0%	17.1%
Solihull	47,786	53.5%	4.3	586	5.6%	99.1%
Coventry	26,671	17.3%	5.8	289	8.6%	-14.7%
Dudley	17,120	15.0%	6.2	538	14.7%	820.2%
Sandwell	20,515	22.0%	5.6	421	12.0%	-49.2%
Walsall	16,900	9.2%	5.1	373	-3.1%	253.9%
Wolverhampton	19,797	11.2%	5.0	322	13.8%	-5.3%

Source: Barbour ABI, CPA , ONS

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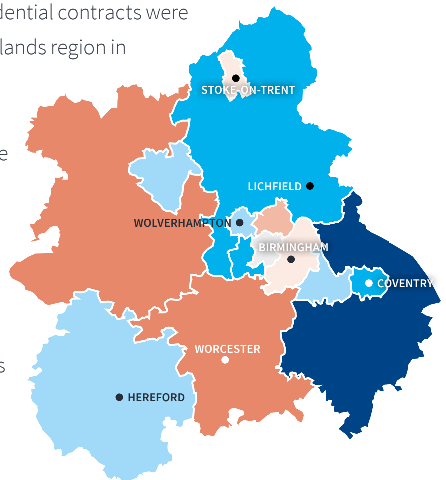
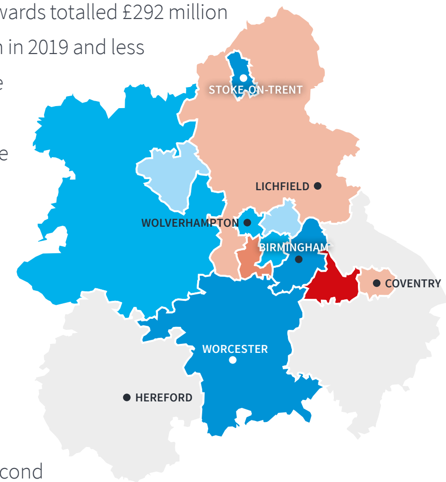
Residential

£1.5 billion worth of residential contracts were awarded in the West Midlands region in 2020, 1.9% lower than the value awarded in 2019 and the lowest since 2014. Shropshire CC and Worcestershire were hotspots, whilst Warwickshire was a coldspot. Two of the region's largest contracts were residential-led mixed-use development schemes in Birmingham, valued at £150 million and £110 million each.



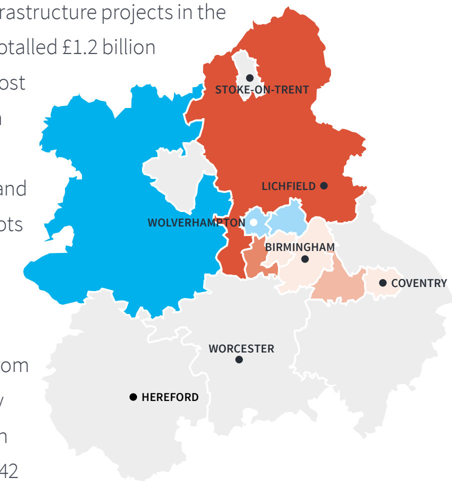
Commercial

Commercial contract awards totalled £292 million in 2020, 6.8% lower than in 2019 and less than one-third the value recorded five years ago. Solihull and Dudley were commercial hotspots, whilst Stoke-on-Trent, Birmingham and Worcestershire were coldspots. Major contracts reflected the £41.9 million plot A3 at Blythe Valley Business Park in Solihull and a second £40.0 million office building at Friargate in Coventry. Four of the top ten contracts were also for fit-out and refurbishment projects.



Infrastructure

Contract awards for infrastructure projects in the West Midlands region totalled £1.2 billion in 2020, which was almost three times higher than the value awarded in 2019. Staffordshire CC and Dudley were the hotspots of activity, reflecting the £344 million contract to extend the West Midlands metro from Wednesbury to Brierley Hill and the £312 million contract for the M40/M42 interchange smart motorway scheme. There were no coldspots in the region in 2020.



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
Connaught Square, Birmingham	940	£150m	Oct 20	Oct 24
Exchange Square - Phase 2	-	£110m	Jul 20	Feb 24
Former Lea Castle Hospital Redev	-	£60m	Jun 20	Jan 24
C'wealth Games Athlete Village - Plot 8	-	£40m	Jan 20	Jul 21
C'wealth Games Athlete Village - Plot 9	-	£40m	Jan 20	Jul 21
Alcester Road - Phase 2A And 2C	391	£39m	Jan 21	Sep 23
Former Caparo Works, Old Birchills Rd	252	£31m	Feb 20	Feb 24
Churncote, Shrewsbury	296	£30m	Jan 21	Sep 23
Gilders Yard, 11-21 Great Hampton St	147	£28m	Sep 20	Mar 21
Goscote Lane, Walsall	263	£26m	Jan 21	-

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
Blythe Valley Business Park Plot A3	Offices	£42m	Dec 19	Jun 21
Two Friargate Phase 2, Greyfriars Green	Offices	£40m	Jun 20	Dec 21
Homer Road Gateway	Offices	£32m	Jan 21	Aug 23
Selfridges Birmingham Facade Replacement	Retail	£20m	Dec 20	Oct 22
Cadent - Plot 1A	Offices	£15m	Sep 20	Jun 22
Whittington Barracks - Office Building	Offices	£11m	Apr 20	-
Platform 21 New Street Fit Out	Retail	£10m	Feb 20	Dec 20
10 Brindley Place - Office Fit-Out	Offices	£9m	Jul 20	Jul 21
St James Place - Office Refurbishment	Offices	£8.5m	Apr 21	Oct 22
M&S - Sears Retail Park	Retail	£6m	Jan 20	-

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
Wednesbury To Brierley Hill Extension	£344m	Feb 20	Jan 23
M40 And M42 Interchange - Smart Motorway	£312m	Aug 20	Sep 24
Whitley South Gateway Infrastructure - Phase 2	£96m	Feb 20	Aug 21
Hs2 Phase 1 Enabling Works North	£50m	Jul 21	Jan 23
Curzon Station Metro Stop - Birmingham	£28m	-	Jan 23
Swift Ford Solar Farm - 27Mw	£27m	Mar 22	Sep 26
A34 Perry Barr Highway Improvement Scheme	£27m	Jun 20	Feb 22
HMP Rye Hill - New Houseblock	£25m	Jan 20	Jan 22
M6 Junction 13-15 - Upgrade	£20m	Jun 20	Oct 21
Dudley Very Light Rail - Rail Test Track	£16m	Oct 20	Dec 21

Source: Barbour ABI, CPA

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FOCUS ON…

Yorkshire & Humber

The Yorkshire and Humber region accounts for 6.5% of total UK GVA. Key sectors of regional economic activity are industrial production and manufacturing, distribution and transport and public administration. Construction grew 5.6% in 2019, whilst the value of contracts awarded totalled £6.1 billion in 2020, an increase of 45.0% from the previous year. In terms of overall contract awards, Calderdale and Kirklees, Kingston upon Hull, and York were hotspots.

The Yorkshire and Humber region accounts for 6.5% of total UK GVA, contracts awarded totalled £6.1 billion in 2020

	GVA per head	GVA growth 2014-2019	Unemployment rate	Construction GVA (2019)	Construction Growth (2019)	Contracts Awards Growth (2020)
UK Average	29,599	19.0%	4.5	123,199	6.6%	-6.1%
Yorkshire and the Humber	23,269	18.8%	4.4	8,118	5.6%	45.0%
Kingston upon Hull, City of	23,786	20.4%	5.1	390	14.0%	2220.3%
East Riding of Yorkshire	21,032	20.5%	3.9	385	2.4%	12.1%
North and North East Lincolnshire	23,042	18.1%	5.6	599	1.5%	-57.2%
York	29,913	13.9%	2.0	335	-0.9%	103.0%
North Yorkshire CC	24,361	19.0%	2.4	910	6.6%	-60.3%
Barnsley, Doncaster and Rotherham	17,909	19.4%	5.7	1,540	2.5%	-28.6%
Sheffield	22,263	11.0%	5.0	684	8.9%	-5.0%
Bradford	18,464	16.2%	6.0	407	0.7%	101.6%
Leeds	34,510	20.9%	4.1	1,773	11.0%	-41.7%
Calderdale and Kirklees	19,181	20.0%	3.2	827	3.5%	186.6%
Wakefield	23,198	27.9%	5.5	724	5.5%	-46.0%

Source: Barbour ABI, CPA , ONS

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FOCUS ON…YORKSHIRE & HUMBER

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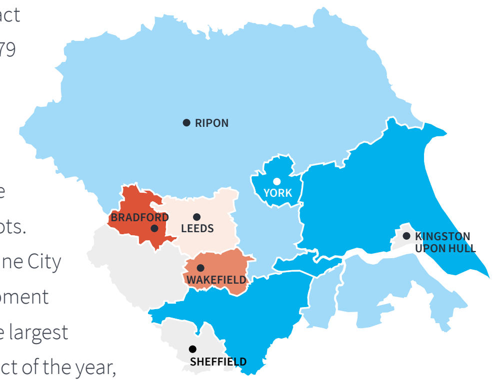
Residential

£1.6 billion worth of residential contracts were awarded in the Yorkshire and Humber in 2020, a decrease of 0.5% compared to the value awarded in 2019. York was the only hotspot, with three of the top ten contract awards located in the city.

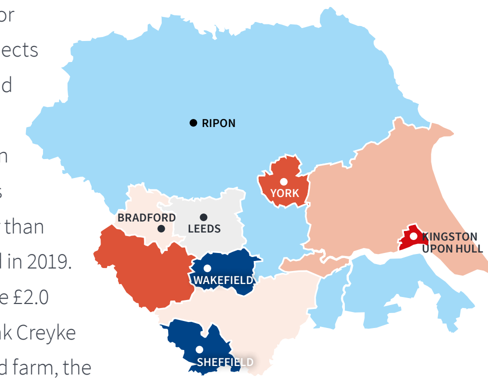
Commercial

Commercial contract awards totalled £279 million in 2020, 3.4% higher than in 2019. Bradford and Wakefield were commercial hotspots. The £35.0 million One City Park office development in Bradford was the largest commercial contract of the year, followed by Scotch Corner Designer Outlet and a new office building on plot B3 at Thorpe Park Business Park, worth £30.0 million each.



Infrastructure

Contract awards for infrastructure projects in the Yorkshire and Humber region totalled £3.3 billion in 2020, which was three times higher than the value awarded in 2019. This was due to the £2.0 billion Dogger Bank Creyke Beck offshore wind farm, the country's largest contract in 2020. The M62 Junctions 20 to 25 smart motorway and the A63 Castle Street improvement schemes also featured in the country's top ten largest contracts in 2020. As a result, the City of Kingston upon Hull and Calderdale and Kirklees were hotspots of activity, along with York.



TOP 10 Residential Contracts

The top 10 residential contracts by value of project.

Project	Units	Value	Start	Finish
Heworth Green, York	-	£200m	Aug 20	Jun 21
Germany Beck	677	£100m	Jun 17	Jun 27
Former Bombardier Works, Hexthorpe	671	£67m	May 20	Nov 25
Kangaroo Works	364	£60m	Feb 21	Sep 24
Radial Park, Manston Lane	240	£50m	Oct 20	Oct 25
The Cocoa Works	263	£45m	Sep 20	Sep 22
Doncaster Monk Bridge	357	£45m	Oct 20	-
Brownell Street Sheffield	284	£42m	Oct 20	Jun 23
Carlton Hill Student Residences	-	£40m	Jan 21	Oct 23
Hatfield Lane, Armthorpe	382	£38m	Oct 20	Oct 26

Source: Barbour ABI, CPA

TOP 10 Commercial Contracts

The top 10 commercial contracts by value of project.

Project	Type	Value	Start	Finish
One City Park, Bradford	Offices	£35m	Jan 21	Jan 24
Scotch Corner Designer Outlet	Retail	£30m	Mar 20	Sep 21
Thorpe Park Business Park Plot B3	Offices	£30m	Jan 21	Oct 22
Latitude Phase Purple Building 03	Offices	£23m	Apr 20	Oct 21
Bradford Market - 8-24 Darley Street	Retail	£15m	May 20	May 22
Wellington Place - Office Building	Offices	£10m	Mar 20	Mar 22
12 King Street - Offices & Restaurant	Offices	£10m	Nov 20	Aug 21
Hilderthorpe Road, Bridlington	Retail	£8m	Nov 20	Aug 21
B&M & 2 Retail - Cemetery Road	Retail	£6m	Aug 20	Sep 21
Calder Park - Zone 4	Offices	£5m	Jul 20	Jul 21

Source: Barbour ABI, CPA

TOP 10 Infrastructure Contracts

The top 10 infrastructure contracts by value of project.

Project	Value	Start	Finish
Dogger Bank Creyke Beck 1.4Gw Offshore Wind	£2bn	Jan 20	Jan 22
M62 Junctions -25 Smart Motorway	£392m	Sep 21	Sep 24
A63 Castle Street Improvements	£355m	Mar 20	Mar 25
Keighley Clean Energy 10Mw EfW Facility - 10Mw	£120m	Oct 20	Apr 23
Easington Terminal Onshore Pipeline	£100m	Oct 18	Dec 20
York Central Station Redevelopment - Phase 1	£77m	Jan 21	May 23
Regent Street Flyover Works	£30m	May 20	Apr 23
Leeds City Centre Transport Improvements	£20m	-	Mar 21
Withernsea WWTW Relocation	£20m	Apr 20	Jul 21
Great Coates Renewable Energy Centre - 18Mw	£18m	-	-

Source: Barbour ABI, CPA

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CASE STUDY…

The Impact of Covid-19

In response to the Covid-19 pandemic, the UK economy entered an unprecedented lockdown from 23 March until a loosening in restrictions from mid-May. With swathes of activity on hold across sectors of the economy, GDP contracted by 19.5% in the second quarter of 2020, rapidly outpacing the 5.9% fall that occurred between the first quarter of 2008 and the second quarter of 2009 amidst the global financial crisis and recession.

In 2020, the government confirmed that construction was permitted to continue throughout this period. However, activity was paused on sites across sectors and regions of the country as social distancing measures were implemented on site and for workers and deliveries travelling to sites. According to the ONS, in the second quarter of 2020, construction output declined 33.7% compared to three months earlier, including a 41.6% monthly fall in April, as the only full month in which lockdown restrictions were in place. In Scotland, only health-related new build construction and essential maintenance was permitted to take place, with these restrictions in place for longer, until mid-June.

In the second quarter of 2020, construction output declined 33.7% compared to three months earlier, including a 41.6% monthly fall in April

For Great Britain and across all sectors, the value of projects put on hold peaked in the week ending 17 April, at a total value of £70.7 billion. London accounted for 29% of delayed projects at peak and given the wider restrictions on construction work put in place by the Scottish Government, Scotland accounted for the next highest proportion at 23%.

After these initial pauses, activity resumed quickly, however, reflecting catch-up on site, as well as pent-up demand.

Nationally, the value of restarted projects overtook the value of delayed projects at the end of May, following on from the easing of restrictions in mid-May encouraging a wider return to site. Restarts in Scotland did not reach this point until early July, however, given the wider scope of restrictions.

The unprecedented nature of lockdowns, as well as the uncertainty created by unknown and nascent shifts in behaviour regarding homeworking, commuting and demand for home and office space was initially expected to affect contract awards. However, as in previous years, the number of hotspots outweighed the number of coldspots in all regions apart from the South East in 2020. Furthermore, hotspots were balanced across the three main sectors of residential, commercial and infrastructure despite heightened uncertainty and the sharp decline in GDP and construction output. In the commercial sector that is typically most sensitive to economic conditions, contract awards for offices projects valued at greater than £100 million returned in London, even as homeworking becomes more popular and raises questions over future demand and use of office space. Indeed, the top ten contract awards in 2020 were all £100 million or above. Nevertheless, end dates are largely beyond 2022, when demand is likely to be more defined.

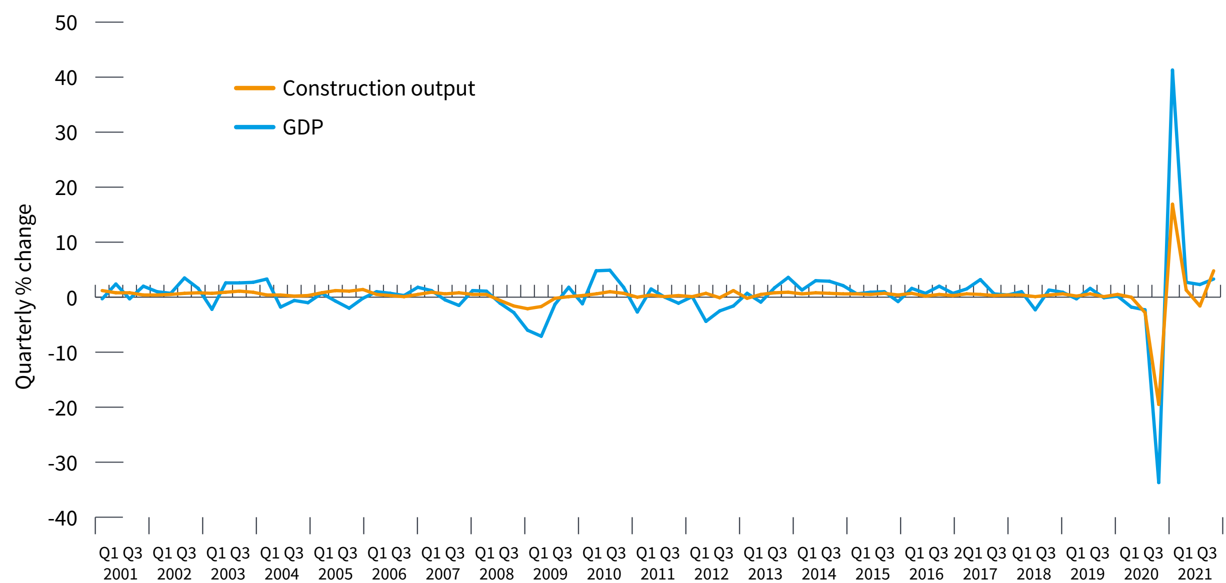

FIG 2.1 – Quarterly GDP and construction output growth

Source: Barbour ABI

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METHODOLOGY...

Calculating a hotspot or coldspot

The ONS releases construction output data for Great Britain on a monthly and quarterly basis, and a regional breakdown of construction activity is reported three months following the end of the reference quarter. This regional data is only available on a non-seasonally adjusted basis and in current prices, making analysis more difficult than for national output data, which is available in constant price terms to indicate volumes of work.

Given the lags in reporting actual volumes of construction work completed, and the difficulties in measuring activity on a regional basis, this research seeks to identify regional 'hotspots' – where the value of construction contracts awarded in 2020 is above its historical average. This forward-looking approach aims to signpost areas of strength for construction over the next 12 months.

The analysis in this publication compares the value of construction contracts awarded in 2020 with the average (median) value of contract awards over the last four years across the residential, commercial and infrastructure sectors. If 2020 contract values are significantly above the long-term average, then this is considered a hotspot. Conversely, a region is considered a coldspot if 2020 contract values are significantly below the long-term average.

The hotspots are calculated using Barbour ABI data on contract awards, based on actual contract values, which have not been adjusted for inflation or deflation. The measure of heat indicates how the value of contracts awarded in 2020 compares with the long-term annual average, on a scale of –5 to +5: -5 being 'very cold', or significantly below the long-term average; +5 being 'very hot', or significantly above the long-term average.

Regional breakdown:

Regions in Great Britain have been broken down based on the Nomenclature of Territorial Units for Statistics (NUTS) level 3 groupings. This is one level above local authority-level data and is the EU and Eurostat standard for the subdivision of countries for statistical purposes.

There are 174 NUTS3 regions in the UK, although the regions in this report cover the 168 regions in Great Britain only, to match the geographical coverage of construction output data from the ONS.

Sector breakdown:

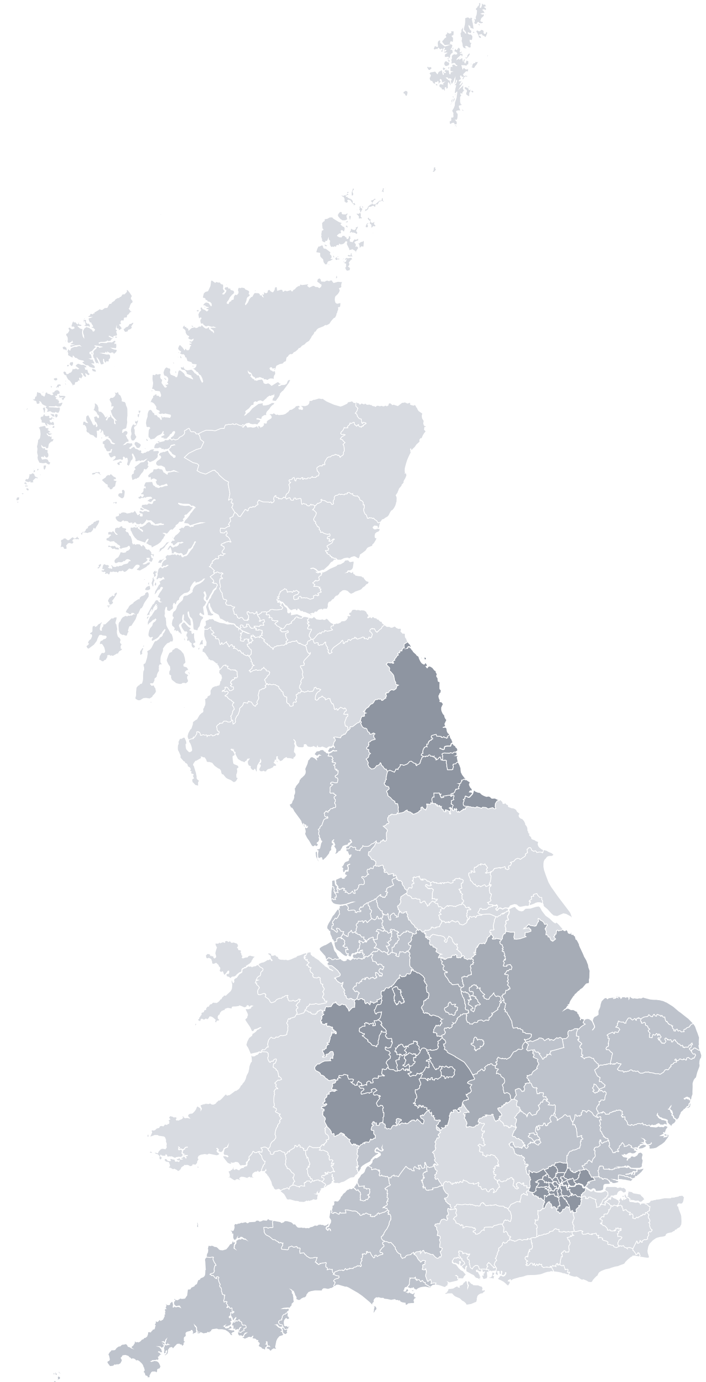
The analysis is broken down to show contract awards in the three largest construction sectors: residential, commercial and infrastructure.

Residential: housing (private developments), student accommodation, new build, conversions and change of use

Commercial: offices, retail, supermarkets

Infrastructure: railways and stations, roads, bridges, ports, harbours and waterways, energy and utilities

Regions in Great Britain have been broken down based on the Nomenclature of Territorial Units for Statistics (NUTS) level 3 groupings, covering 168 regions in Great Britain



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