Regional Construction Hotspots in Great Britain

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

2025 REPORT

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Best known for our construction project leads, our portfolio includes analytics, market research reports and bespoke consultancy.

Over 3,500 organisations from across the built environment supply chain, in addition to government and public sector bodies such as HM Treasury, Department for Energy Security and Net Zero and the Office for National Statistics trust us as their data partners.

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The Construction Products Association is the leading organisation that represents and champions construction product manufacturers and suppliers.

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The CPA produces a range of economic reports that provide our members, policy-makers, and wider industry with a detailed understanding of the construction market to facilitate planning and business development. Members of the Association are entitled to receive these insights at no additional cost.

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Overview

London was the UK's largest regional economy but in 2023 (the latest available from the ONS), and the largest region in terms of construction gross value added (GVA) was the South East. Its construction GVA was £24.0 billion, accounting for 15.5% of the UK construction total. With a construction GVA of £22.6 billion, London's construction GVA was the second-largest and accounted for 14.6% of the UK total. However, both these shares were lower than in 2022, with all other regions except the South West and Wales recording an increase in their share of UK construction GVA. Given the relative size of the London and South East economies, populations and construction GVA, it is easy to think that the majority of construction work is taking place in these regions.

But by using ONS regional economic data, it becomes clear that despite their overall dominance, only three of the top ten largest local authority areas for construction activity in 2023 were in London and the South East: Westminster, West Surrey and Berkshire. However, it is Hertfordshire, in the East of England, that remained as the sub-region with the largest value of construction activity in 2023. Sub-regions in the South West, the East of England, the West Midlands, Yorkshire and the Humber, and East Midlands complete the top ten list, underscoring the fact that there are large areas of activity beyond the traditional engines of growth.

Construction GV A in 2023	£ million
South East	**23,963**
London	22,573
East of England	19,324
North West	15,769
South West	12,468
West Midlands	11,744
Yorkshire and the Humber	11,387
East Midlands	11,043
Scotland	11,017
Wales	5,180
North East	4,967

Construction GVA in 2023 - Top 10	£ million	Region
Hertfordshire	**4,463**	**East of England**
Westminster	3,712	London
West Surrey	2,786	South East
Berkshire	2,602	South East
Leicestershire CC and Rutland	2,372	East Midlands
Leeds	2,307	Yorkshire and the Humber
Birmingham	2,129	West Midlands
Devon CC	2,109	South West
Heart of Essex	2,004	East of England
Staffordshire CC	1,993	West Midlands

With a construction GVA of £22.6 billion, London's construction GVA was the second-largest and accounted for 14.6% of the UK total.

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This annual regional report analyses 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 2023. By using data on contract awards in 2024, this aims to highlight construction work ahead, rather than reporting on activity is past periods that may not be relevant.

It also showcases the breadth of variation from a single Great Britain-wide figure of construction performance or contract awards activity. Overall in 2024, total GB contract awards rose 13.1%, but with growth rates ranging between +1946% and -95% when analysing at a considerably more granular regional level, stark differences in regional and sector performance become apparent.

It is important to note that the economic backdrop will be a major driver and influence on contract awards – from delays in tendering due to cost rises or project adjustments, hesitancy to proceed when financing costs have increased, to large projects initially approved in 2020, 2021 and 2022 now reaching go-ahead and contract award. The value of contract awards in 2024 is still likely to reflect high rates of construction price inflation and even some re-tendered contracts to reflect renegotiated or repricing. Given that the long-running buzzword of 'uncertainty' is still high on risk registers, the lags between contract award and start date may also be lengthened, as well as the lingering possibility of projects stalling or being cancelled after contract award.

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What is a hotspot or a coldspot?

Hotspots and coldspots seek to identify regions where contract awards in 2024 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 was in the top 10 largest regions in terms of the value of contracts awarded in 2024. However, the value of contracts awarded in Westminster was 25% lower than in the previous year, so whilst it will provide a large source of construction work, it is 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 highlighted by contract award values in the Western Isles, which increased more than ten-fold in 2024, but at £97 million, it was still one of the twenty smallest regions for contract awards in Great Britain. Similarly, contract award values in the region of Kingston-upon-Hull doubled in 2024, but this reflects a bounceback from a weak year for contract awards in 2023. Values were still lower than the long-term average. Hotspots and coldspots are also, therefore, relative to the size of each region. In a region that typically has a low volume or value of contract awards, one residential project could double annual contract award values and push the 2024 total above the long-term average – a hotspot. In contrast, one residential project in Camden and City of London is unlikely to significantly affect the growth rate or variance from the long-term average and produce a hotspot.

There are clear hotspots for upcoming construction activity over the next 6-24 months in Great Britain, with hotspots outnumbering coldspots by two-to-one overall and seven-to-one for infrastructure, which continues the trend of infrastructure driving hotspot activity seen in previous reports. There were equal numbers of residential hotspots and coldspots in 2024, which reflects weakness in the housing market and house building

The value of contract awards in 2024 - Top 10	£ million	Annual % change
North and West Norfolk	3,827	1946%
Camden and City of London	3,696	46%
Manchester	2,653	100%
Hertfordshire	1,917	158%
North Yorkshire CC	1,908	277%
Clackmannanshire and Fife	1,893	946%
Westminster	1,791	-25%
Kent Thames Gateway	1,790	408%
Birmingham	1,553	24%
Lewisham and Southwark	1,526	48%

Growth in contract awards in 2024 - Top 10	Annual % change	£ million
North and West Norfolk	1946%	3,827
Eilean Siar (Western Isles)	1341%	97
Clackmannanshire and Fife	946%	1,893
Thurrock	762%	762
Brighton and Hove	506%	491
Kent Thames Gateway	408%	1,790
Dumfries & Galloway	292%	321
Somerset	284%	1,161
North Yorkshire CC	277%	1,908
Essex Haven Gateway	277%	950

Contract award values in the Western Isles, which increased more than ten-fold in 2024, but at £97 million, it was still one of the twenty smallest regions.

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activity, which reached a nadir at the end of 2023 and early 2024, before interest rates started to be reduced by the Bank of England. Residential coldspots were most prevalent in regions with higher house prices – London, the East of England and the South East, likely indicating that demand in these regions was most affected by the affordability of higher mortgage repayments.

There were no broad hotspots in 2024 – where contract awards in each of the three main construction sectors of residential, commercial and infrastructure, were significantly above the long-term average. In this year's report, single-sector hotspots in residential, commercial or infrastructure were most common, although there were several reporting hotspots in two sectors of construction. Encouragingly, regions with single or double hotspots were spread across Great Britain. Moreover, hotspots outnumbered coldspots in all regions of Great Britain except Wales and the most hotspots were registered in Scotland, the East of England, and the South East.

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 – such as the Hornsea Project Three offshore wind farm, the Lower Thames Crossing and two projects for the Eastern Green Link 2. There was also a broader spread of construction sectors in the top ten in this year's report – the Google data centre in Waltham Cross, the former ITV studios redevelopment into offices on the South Bank in London, as well as the Agratas gigafactory in Somerset.

In smaller sub-regions, single, large offices, retail and residential projects can also generate hotspots: two residential retirement complexes totalling over £100 million in West Malling and Tunbridge Wells underpinned West Kent's hotspot status, for example.

Construction coldspots featured only lightly across Great Britain. The fewest were registered in the West Midlands (one), the North East, Yorkshire and the Humber, the East Midlands and Wales (two each).

Two residential retirement complexes totalling over £100 million in West Malling and Tunbridge Wells underpinned West Kent's hotspot status.

Top 10 Highest-Value Contracts in 2024	£m	Area
Hornsea Project Three Offshore Wind Farm	£3.6 billion	North and West Norfolk
Inch Cape 1080 MW Offshore Wind Farm	£1.5 billion	Clackmannanshire and Fife
Lower Thames Tunnel Crossing - Tunnelling	£1.3 billion	Kent Thames Gateway
Google Data Centre - Waltham Cross Cheshunt	£800 million	Hertfordshire
East Birmingham To Solihull Extension	£735 million	Birmingham
Eastern Green Link 2 - Converter Station	£700 million	North Yorkshire CC
Thurrock Flexible Generation Plant - 750MW	£645 million	Thurrock
ITV Studios Redevelopment	£500 million	Lambeth
Eastern Green Link 2 - HVDC Underground	£500 million	North Yorkshire CC
Agratas Gigafactory - Building One	£500 million	Somerset

Falls in contract awards in 2024 - Top 10	Annual % change	£ million
Isle of Wight	-95%	1
Shetland Islands	-85%	10
Orkney Islands	-80%	116
Brent	-78%	119
North Lanarkshire	-77%	192
Cheshire West and Chester	-77%	473
Suffolk	-76%	100
Buckinghamshire CC	-73%	130
East Cumbria	-72%	100
Dorset CC	-68%	231

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Executive Summary - Hotspots

A summary of key regional hotspots by sector is below:

Scotland

Angus and Dundee City	Residential Infrastructure
Perth & Kinross and Stirling	Residential
West Lothian	Residential
Scottish Borders	Residential Commercial
East Dunbartonshire, West Dunbartonshire and Helensburgh & Lomond	Commercial

Wales

Isle of Anglesey	Residential

South East

East Kent	Residential
East Surrey	Residential
Medway	Residential
Mid Kent	Residential
South Hampshire	Residential
West Kent	Residential
East Sussex CC	Commercial
Mid Kent	Commercial
Berkshire	Infrastructure
Brighton and Hove	Infrastructure
Kent Thames Gateway	Infrastructure
West Sussex (South West)	Infrastructure

London

Bexley and Greenwich	Residential Infrastructure
Merton, Kingston upon Thames and Sutton	Residential
Camden and City of London	Commercial
Haringey and Islington	Commercial
Harrow and Hillingdon	Commercial
Lambeth	Commercial
Tower Hamlets	Infrastructure
Westminster	Infrastructure

South West

Bath and North East Somerset, North Somerset and South Gloucestershire	Residential Commercial
Gloucestershire	Residential
Plymouth	Commercial
Swindon	Infrastructure

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Executive Summary - Hotspots

North East

Tyneside	Residential
Darlington	Commercial
Northumberland	Infrastructure

North West

Manchester	Residential
Mid Lancashire	Commercial
Sefton	Commercial Infrastructure
Chorley and West Lancashire	Infrastructure
Warrington	Infrastructure
West Cumbria	Infrastructure
Wirral	Infrastructure

Yorkshire & Humber

Leeds	Residential
Calderdale and Kirklees	Commercial Infrastructure
North and North East Lincolnshire	Commercial
North Yorkshire CC	Infrastructure
Wakefield	Infrastructure

East Midlands

Leicestershire CC and Rutland	Commercial
South and West Derbyshire	Commercial Infrastructure
Derby	Infrastructure
East Derbyshire	Infrastructure
Nottingham	Infrastructure

West Midlands

Sandwell	Residential
Birmingham	Commercial Infrastructure
Walsall	Commercial
Shropshire CC	Infrastructure
Stoke-on-Trent	Infrastructure
Telford and Wrekin	Infrastructure
Warwickshire	Infrastructure

East of England

Essex Thames Gateway	Residential Infrastructure
Heart of Essex	Residential Infrastructure
Luton	Residential Commercial
West Essex	Residential
Hertfordshire	Commercial Infrastructure
Southend-on-Sea	Commercial
Breckland and South Norfolk	Infrastructure
North and West Norfolk	Infrastructure
Thurrock	Infrastructure

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Executive Summary - Coldspots

A summary of key regional coldspots by sector is below:

North East

Durham CC	Residential
Hartlepool and Stockton-on-Tees	Residential

Yorkshire & Humber

Sheffield	Residential
Wakefield	Commercial

Scotland

Lochaber, Skye & Lochalsh, Arran & Cumbrae and Argyll & Bute	Residential
North Lanarkshire	Residential
East Ayrshire and North Ayrshire mainland	Commercial
Glasgow City	Commercial

East Midlands

Lincolnshire	Residential
North Northamptonshire	Infrastructure

East of England

Bedford	Residential
Cambridgeshire CC	Residential
Hertfordshire	Residential
Thurrock	Residential Commercial
Central Bedfordshire	Commercial

London

Barking & Dagenham and Havering	Residential
Enfield	Residential
Tower Hamlets	Residential
Hounslow and Richmond upon Thames	Commercial
Brent	Infrastructure
Bromley	Infrastructure

West Midlands

Worcestershire	Residential

North West

Cheshire East	Residential
Greater Manchester North West	Residential
Liverpool	Residential

Wales

Gwent Valleys	Residential
Conwy and Denbighshire	Commercial

South East

Buckinghamshire CC	Residential
Isle of Wight	Residential
Oxfordshire	Residential
West Sussex (South West)	Residential
Brighton and Hove	Commercial
Buckinghamshire CC	Infrastructure

South West

Dorset CC	Residential Infrastructure
Torbay	Commercial
Bournemouth and Poole	Infrastructure

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East of England

Contract Awards Growth (2024)

INCREASED BY 68.5%

The East of England region accounts for 8.3% of total UK GDP and key sectors of regional economic activity are industrial production and manufacturing, distribution and transport, public administration and business services. Construction GVA grew 12.5% in 2023. The value of contracts awarded in the region totalled £11.6 billion in 2024, an increase of 68.5% from the previous year. There were six overall hotspots: were Breckland and South Norfolk, Essex Thames Gateway, Heart of Essex, Hertfordshire, North and West Norfolk, and Thurrock.

> **The value of contracts awarded in the region totalled £11.6 billion in 2024, an increase of 68.5% from the previous year.**

	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
East of England	**35,442**	**3.3%**	**3.2**	**19,324**	**12.5%**	**68.5%**
Peterborough	39,935	-3.8%	3.8	443	3.5%	-63.5%
Cambridgeshire CC	40,970	9.0%	3.4	1,596	8.8%	-18.5%
Suffolk	33,074	1.4%	4.6	1,029	20.5%	-77.0%
Norwich and East Norfolk	35,182	6.7%	2.5	765	18.2%	18.7%
North and West Norfolk	24,582	-3.1%	4.7	426	7.8%	1946.0%
Breckland and South Norfolk	27,196	8.1%	1.9	687	15.7%	40.8%
Luton	33,128	14.8%	6.4	289	15.6%	105.5%
Hertfordshire	44,823	2.8%	2.4	4,463	9.8%	158.1%
Bedford	30,789	0.5%	3.7	438	9.0%	-24.8%
Central Bedfordshire	27,639	-1.0%	2.0	599	15.2%	-45.7%
Southend-on-Sea	21,938	-13.8%	2.9	250	15.2%	-4.2%
Thurrock	37,515	10.5%	2.1	654	12.4%	761.9%
Essex Haven Gateway	28,324	-1.7%	2.6	1,246	10.8%	277.1%
West Essex	36,257	1.2%	5.9	1,907	20.4%	-6.0%
Heart of Essex	39,115	1.1%	na	2,004	7.6%	78.6%
Essex Thames Gateway	32,500	7.5%	3.8	1,328	19.7%	67.2%

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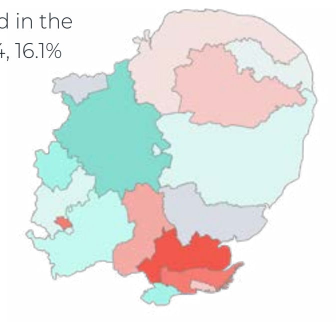
East of England

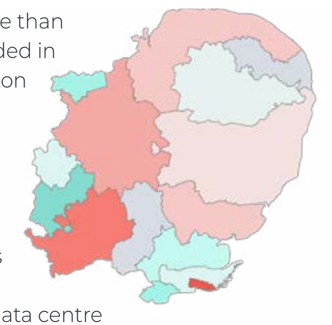
RESIDENTIAL

£1.9 billion worth of residential contracts were awarded in the East of England in 2024, 16.1% higher than the value awarded in 2023. There were four hotspots and four coldspots.



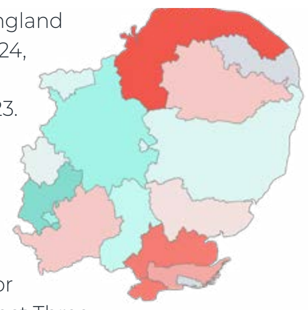
COMMERICIAL

Commercial contract awards totalled £1.5 billion in 2024, more than double the value recorded in 2023. Hertfordshire, Luton and Southend-on-Sea were hotspots, whilst Central Bedfordshire and Thurrock were coldspots. Two of the largest contract awards were outside of offices and retail: the Google data centre and Warner Bros studios.



INFRASTRUCTURE

Contract awards for infrastructure projects in the East of England totalled £6.2 billion in 2024, which was almost three times higher than in 2023. There were six hotspots, with five projects with contract values of £100 million or over, including the year's largest contract award for £3.6 billion Hornsea Project Three, attributed to North and West Norfolk.



Top 10 Residential Contracts

Project		Value	Start	Finish
The Stage, Luton	292 units	£110 million	Feb 2025	
Cherry Orchard Brickworks, Rochford	-	£80 million	Aug 2024	Nov 2029
Devonshire Gardens, Cambridgeshire	70 units	£77 million	Jun 2024	Feb 2027
Orchards Green Phase 5, Ely	300 units	£54 million	Apr 2025	Nov 2028
Castle Street, Luton	380 units	£47 million	Jun 2024	Feb 2027
Back Lane, Great Ashby	292 units	£45 million	Oct 2024	Jun 2027
Cambourne Business Park	256 units	£43 million	Oct 2024	Jun 2027
Market Square, Basildon	492 units	£42 million	Jan 2025	Sep 2027
Former Gas Holder Site, Tayfen Road	171 units	£42 million	Apr 2024	Oct 2026
Norwich Road	343 units	£41 million	Jun 2024	Feb 2027

Top 10 Commerical Contracts

Project		Value	Start	Finish
Google Data Centre - Waltham Cross	Data centre	£800 million	Jan 2024	Sep 2025
Botanic Place, Cambridge	Offices	£200 million	Apr 2024	Mar 2029
Warner Bros Studios Leavesden	Ents	£190 million	Jun 2024	Jan 2027
Prologis Park Griffin House - Phase 1 Commercial Development	Offices	£20 million	Oct 2024	Jun 2025
Tollgate Village, Stanway - Phase 1	Retail	£16 million	Sep 2024	Jun 2025
Peterhouse Tech Park, The Optic	Offices	£15 million	Jul 2023	Jan 2025
Haverhill Research Park Plot 200	Retail	£10 million	Dec 2027	Sep 2029
Floorspan Contracts, Wisbech	Offices	£8 million	Jun 2024	Jul 2025
Perrywood Garden Centre - Redevelopment	Retail	£7 million	Apr 2025	Jan 2027
Parker House, Maylands Avenue	Offices	£6 million	Mar 2024	Apr 2025

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
Hornsea Project Three Offshore Wind Farm	£3.6 billion	Jan 2025	Jan 2028
Thurrock Flexible Generation Plant - 750MW	£645 million	Jul 2023	Jul 2026
National Grid - Bramford To Twinstead Line	£363 million	Jan 2025	Dec 2028
Boreham Interchange - Chelmsford NE Bypass	£160 million	Jan 2025	Jun 2026
A120 To A133 - Link Road	£100 million	Nov 2024	Apr 2028
Medebridge Road - 70MW Solar Farm	£70 million	Apr 2024	Oct 2025
A12 - Margaretting Bypass	£65 million	Feb 2023	Jul 2024
South Fambridge Hall - 49.99MW Solar Farm	£56 million	Feb 2025	Jul 2026
Great Dunham, Palgrave Road - 49.9MW PV Farm	£50 million	Aug 2024	Feb 2029
Long Stratton Bypass	£47 million	Mar 2024	Sep 2025

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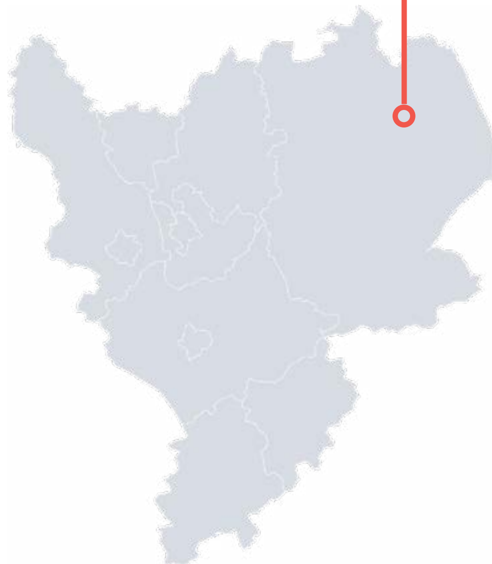
East Midlands

Contract Awards Growth (2024)

INCREASED BY 6.3%



The East Midlands region accounts for 5.7% of total UK GDP. Key sectors of regional economic activity are industrial production and manufacturing, business services, public administration and distribution and transport.

Construction gross value added grew 12.9% in 2023. The value of contracts awarded in the region totalled £4.8 billion in 2024, an increase of 6.3% from the previous year. In terms of overall contract awards, hotspots were in Derby, East Derbyshire, and South and West Derbyshire.

The value of contracts awarded in the region totalled £4.8 billion in 2024, an increase of 6.3% from the previous year.

	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
East Midlands	**31,446**	**1.3%**	**4.1**	**11,043**	**16.3%**	**6.3%**
Derby	38,113	4.1%	5.8	416	4.8%	116.5%
East Derbyshire	28,647	-0.5%	2.4	599	11.5%	26.5%
South and West Derbyshire	27,339	-1.5%	2.8	1,216	9.0%	62.2%
Nottingham	42,837	-0.6%	6.7	464	-1.5%	-58.2%
North Nottinghamshire	26,552	0.2%	4.8	1,164	10.1%	-1.8%
South Nottinghamshire	27,092	3.7%	5.5	646	10.6%	-46.6%
Leicester	30,121	-2.7%	5.8	388	2.1%	-42.8%
Leicestershire CC and Rutland	34,438	6.5%	2.7	2,372	24.5%	34.0%
West Northamptonshire	40,137	1.2%	4.2	1,554	9.2%	-14.5%
North Northamptonshire	27,000	0.5%	1.4	843	25.1%	34.9%
Lincolnshire	28,134	0.8%	4.3	1,382	11.5%	10.9%

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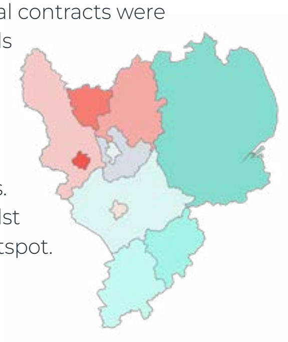
East Midlands

RESIDENTIAL

£1.1 billion worth of residential contracts were awarded in the East Midlands region in 2024, 27.9% lower than the value awarded in 2023. Nevertheless, contract award values were largely in line with long-term averages. There were no hotspots, whilst Lincolnshire was the sole hotspot.

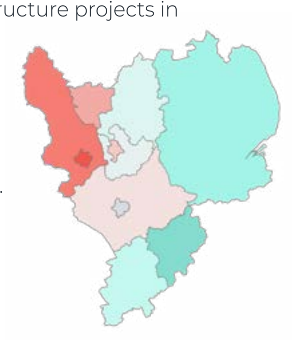


COMMERICIAL

Commercial contract awards totalled £170 million in 2024, 22.8% lower than in 2023. Leicester, Leicestershire CC and Rutland, and South and West Derbyshire were hotspots for the second year running.

INFRASTRUCTURE

Contract awards for infrastructure projects in the East Midlands region totalled £1.3 billion in 2024, which was 37.2% higher than the value awarded in 2023. There were four hotspots and one coldspot.



Top 10 Residential Contracts

Project		Value	Start	Finish
Lily Street Farm - Phase 2	443 units	£87 million	Mar 2024	Oct 2027
The Bendigo Building Student Accomm	-	£70 million	Feb 2024	Oct 2026
Brookvale Phase 1C, Shirebrook	397 units	£44 million	Jun 2024	Feb 2027
Field Farm, Ilkeston Road	200 units	£41 million	Jun 2024	Feb 2027
Boots Enterprise Zone residential	406 units	£41 million	Dec 2024	Aug 2027
The Landmark, Derby	202 units	£30 million	Jun 2024	Feb 2026
Higham Ferrers	300 units	£30 million	May 2024	Jan 2027
Lynncroft, Eastwood	104 units	£29 million	Mar 2025	Nov 2027
Mary Gee Halls - Retirement Apts	-	£27 million	Sep 2025	Dec 2030
Uppingham Road Care Home	73 units	£21 million	Jan 2025	Sep 2026

Top 10 Commerical Contracts

Project		Value	Start	Finish
Broadleys, Clay Cross	Offices	£25 million	Jul 2024	Feb 2027
Top Wighay - Office	Offices	£16 million	Jan 2024	Oct 2025
Mira Drive, Plot 6 - Workshop	Offices	£11 million	Nov 2024	Aug 2026
Church Street, Heage	Offices	£10 million	Feb 2026	Nov 2027
Norfolk House Farm - Glasshouse	Retail	£10 million	May 2025	Feb 2027
Trinity Place - Cladding Works	Offices	£7 million	Jan 2024	Jul 2024
Aldi Food Store - Rockingham Road	Retail	£5 million	Jan 2025	Dec 2025
Enterprise West Lindsey Site A	Offices	£5 million	Nov 2024	Nov 2025
Aldi Food Store - Gallamore Lane	Retail	£4 million	Feb 2025	Feb 2026
Lidl - Kettering Road North	Retail	£3 million	Apr 2024	Jan 2025

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
Stenson Lane - 400MW Battery Storage	£120 million	Jan 2026	Jan 2028
A38/A5111 Kingsway Roundabout	£73 million	Nov 2022	Nov 2025
A38/A52 Markeaton Roundabout	£73 million	Nov 2022	Nov 2025
A38/A61 Abbey Hill Roundabout	£73 million	Nov 2022	Nov 2025
Plot G2 Infinity Park	£60 million	Mar 2024	Jun 2025
Newtonwood Lane Farm - 49.9MW Energy Storage	£49 million	Oct 2024	Feb 2025
Anglian Water Services - Ground Infrastructure	£31 million	Oct 2023	Jan 2027
Humber - Stallingborough 3 Sea Defence	£30 million	Jan 2025	Jan 2026
Saltfleet To Gibraltar Point - Beach Nourishment 2025-27	£29 million	Jan 2025	Mar 2028
Drakelow 90MW Battery Energy Storage	£27 million	Jan 2026	Jul 2030

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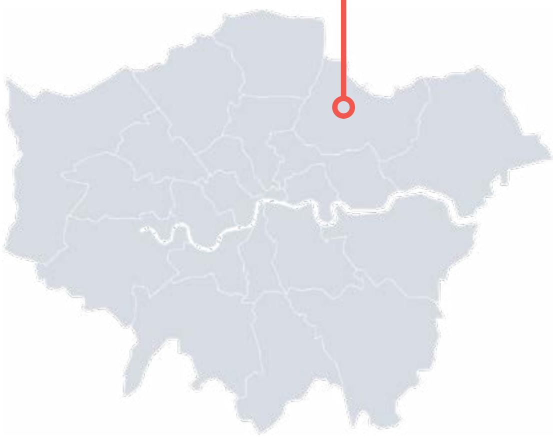
London

Contract Awards Growth (2024)

INCREASED BY 5.4%



London is the largest regional economy, accounting for 22.4% of total UK GDP and the highest GDP per head. Construction GVA increased 1.4% in 2023, marking the slowest rate of regional growth. 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 £15.0 billion in 2024, 5.4% higher than the previous year. There were four overall hotspots and two overall coldspots.

The value of contracts awarded in the region totalled £15.0 billion in 2024, 5.4% higher than the previous year.

	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
London	**69,077**	**2.2%**	**5.1**	**22,573**	**1.4%**	**5.4%**
Camden and City of London	4,208,169	9.4%	5.5	1,241	11.4%	46.2%
Westminster	459,185	9.2%	4.9	3,712	16.9%	-25.4%
Kensington & Chelsea and Hammersmith & Fulham	80,863	-2.8%	4.4	412	14.8%	5.2%
Wandsworth	31,224	-6.2%	3.6	406	27.7%	82.5%
Hackney and Newham	38,363	23.4%	5.1	1,127	4.3%	-26.9%
Tower Hamlets	140,524	-5.3%	6.6	781	13.4%	54.6%
Haringey and Islington	67,874	9.1%	6.1	878	13.1%	-31.7%
Lewisham and Southwark	52,577	3.9%	5.5	1,025	13.8%	48.0%
Lambeth	52,039	-5.4%	10.3	558	-6.5%	82.8%
Bexley and Greenwich	27,640	-5.9%	8.6	1,398	2.8%	141.2%
Barking & Dagenham and Havering	27,058	2.1%	4.7	1,345	-6.9%	-49.7%
Redbridge and Waltham Forest	22,327	-1.2%	4.1	859	-2.2%	-59.8%
Enfield	29,984	-8.0%	3.7	846	-11.5%	-23.6%
Bromley	30,010	-12.5%	3.8	688	-0.6%	143.8%
Croydon	34,353	3.3%	7.3	671	-6.7%	-27.7%
Merton, Kingston upon Thames and Sutton	33,606	-3.9%	3.6	1,265	-1.1%	74.1%
Barnet	31,118	2.2%	5.8	871	-13.2%	-34.2%
Brent	33,670	-1.2%	3.1	1,065	-9.4%	-80.5%
Ealing	30,308	-10.1%	4.0	826	-4.0%	-10.9%
Harrow and Hillingdon	38,839	-10.7%	3.7	1,594	-5.7%	22.5%
Hounslow and Richmond upon Thames	53,989	-8.6%	2.8	1,006	-15.5%	11.5%

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London

RESIDENTIAL

£5.0 billion worth of residential contracts were awarded in London in 2024, 15.8% lower than the value awarded in 2023. There were hotspots in Bexley and Greenwich, and Merton, Kingston upon Thames and Sutton. There were 11 projects with a contract value of £100 million or above.

COMMERICIAL

At £6.1 billion in 2024, the total value of commercial contracts awarded in London was a third higher compared with 2023. There were four hotspots, one coldspot and 25 projects with a contract value of £100 million or above, significantly more than in 2022 and 2023.

INFRASTRUCTURE

Contract awards for infrastructure projects in London totalled £846 million in 2024, 27.2% lower than in 2023 and significantly lower than the contract values recorded in the residential and commercial sectors. There were three hotspots and two coldspots.

Top 10 Residential Contracts

Project		Value	Start	Finish
216-220 Blackfriars Road	62 units	£400 million	Apr 2024	Nov 2027
Vulcan Wharf - Mixed Development	-	£300 million	Jul 2024	Jul 2026
Former Surrey County Hall	-	£250 million	Apr 2025	Dec 2027
Hawthorne House - Student Accomm	719 units	£185 million	Aug 2022	Sep 2026
Colindale Gardens, Blocks V Y & Z	775 units	£150 million	Jun 2025	Jun 2028
Merrick Place, Ealing	575 units	£150 million	Jul 2023	Apr 2026
The Green Quarter, Ealing	564 units	£140 million	Apr 2023	-
Bacton Rise Estate, Camden	243 units	£133 million	Jul 2024	Jul 2026
Southall Sidings	460 units	£130 million	Nov 2023	Nov 2025
651 Old Kent Road	262 units	£130 million	Jan 2024	Sep 2026

Top 10 Commerical Contracts

Project		Value	Start	Finish
ITV Studios Redevelopment	Offices	£500 million	Jan 2025	Jan 2029
60 Gracechurch St	Offices	£500 million	-	-
50 Fenchurch St Redevelopment	Offices	£400 million	Jan 2025	Jan 2028
Citibank, 25 Canada Square	Offices	£329 million	Jun 2023	Apr 2028
The Dovetail Building, Houndsditch	Offices	£300 million	Oct 2025	Sep 2028
Hill House, Little New Street	Offices	£250 million	Oct 2025	Jun 2028
Royal Mint Court - Chinese Embassy	Offices	£203 million	Jun 2027	Nov 2029
Lansdowne House	Offices	£200 million	Jul 2024	Oct 2027
334-348 Oxford St	Offices	£200 million	Feb 2024	May 2027
1 Exchange Square	Offices	£200 million	Jan 2024	Jun 2026

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
Northern Outfall Sewer - Major Upgrade Works	£36 million	Aug 2021	Jun 2027
Brent Cross West Waste Transfer Station	£35 million	Jan 2025	Sep 2025
Thames Water - Victoria Station Mains	£25 million	-	Dec 2024
Thames Water - Water Pipe Upgrade Phase 1	£20 million	Apr 2024	-
Thames Water - Eversholt Street Mains	£12 million	-	Mar 2024
South Harrow Sidings DTUP	£10 million	Mar 2022	-
Northfields Depot DTUP	£10 million	Jul 2023	-
Thames Water - East London Sewer Upgrade	£8 million	-	-
Elephant & Castle Underground Station	£8 million	Jan 2025	Jan 2027
Greenwich Peninsula Infrastructure Works	£7 million	Mar 2025	Apr 2026

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North East

Contract Awards Growth (2024)

DECREASED BY 30.5%

The North East region accounts for 2.8% of UK GDP and is the region with the lowest GDP per head. Key sectors of regional economic activity are industrial production and manufacturing, distribution and transport, and public sector administration. Construction GVA rose 23.0% in 2023. The value of contracts awarded totalled £2.4 billion in 2024, a decrease of 30.5% from the previous year. In terms of overall contract awards, Northumberland was a hotspot and Hartlepool and Stockton-on-Tees, and Sunderland were coldspots.

The value of contracts awarded totalled £2.4 billion in 2024, a decrease of 30.5% from the previous year.

	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
North East	**28,583**	**3.3%**	**4.4**	**4,967**	**23.0%**	**-30.5%**
Hartlepool and Stockton-on-Tees	29,100	-2.4%	3.4	716	14.9%	-34.3%
South Teesside	23,559	-0.2%	6.1	357	26.1%	-68.4%
Darlington	30,420	5.3%	3.7	100	22.0%	-18.3%
Durham CC	25,821	11.2%	3.9	1,098	19.9%	-56.4%
Northumberland	23,339	0.9%	3.3	453	26.5%	59.7%
Tyneside	32,449	6.9%	5.3	1,676	25.7%	14.7%
Sunderland	31,839	-6.4%	3.2	566	28.1%	-57.4%

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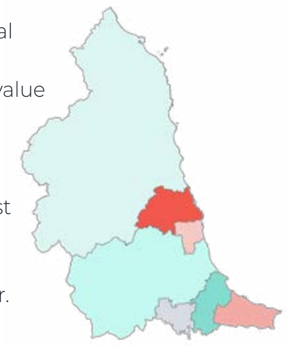
North East

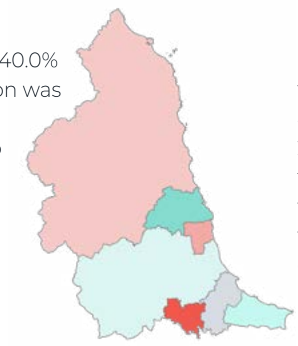
RESIDENTIAL

£520 million worth of residential contracts were awarded in the North East in 2024, half of the value awarded in 2023. Tyneside was a hotspot; Durham CC, and Hartlepool and Stockton-on-Tees were coldspots. The largest contract was the £121 million Pottery Lane/Forth Banks development in Tyne and Wear.



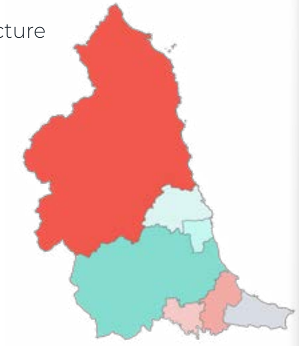
COMMERICIAL

Commercial contract awards totalled £204 million in 2024, 40.0% higher than in 2023. Darlington was a hotspot and there were no coldspots. Only two of the top ten largest contract awards were for offices projects.



INFRASTRUCTURE

Contract awards for infrastructure projects in the North East totalled £670 million in 2024, 41.9% lower than the value in 2023. Northumberland was the sole hotspot, reflecting the A1 dualling projects and there were no infrastructure coldspots.



Top 10 Residential Contracts

Project		Value	Start	Finish
Pottery Lane, Forth Banks	519 units	£121 million	Oct 2024	Jun 2027
Bretts Wharf, Pipewellgate	262 units	£50 million	Jul 2024	Jul 2026
Strawberry Buildings Student Accomm	260 units	£34 million	Oct 2024	Aug 2026
Benwell Dene	139 units	£30 million	Aug 2024	Aug 2028
Kenton Bankfoot - Final Phase	237 units	£28 million	Jan 2025	Sep 2027
Vallum Heights, Newcastle Upon Tyne	171 units	£17 million	Apr 2024	Apr 2027
Cragdale Gardens	84 units	£16 million	Sep 2022	Sep 2024
Neasham Road - Phase C	144 units	£14 million	Mar 2024	Sep 2026
Front Street Student Accomm	125 units	£14 million	Jun 2024	Sep 2025
Murton Lane	135 units	£14 million	Jul 2024	Jan 2027

Top 10 Commerical Contracts

Project		Value	Start	Finish
Darlington Economic Campus HQ	Offices	£118 million	Oct 2024	Jan 2027
Leechmere Road - Home Bargains	Retail	£10 million	Feb 2024	Feb 2025
Northern Echo Building - Office Space	Offices	£9 million	Jan 2024	-
Willowburn Retail Park Phase 2	Retail	£6 million	Jan 2024	Nov 2024
Aldi Food Store - Great Lime Road	Retail	£4 million	Mar 2024	Jan 2025
Bedlington Town Centre Redevelopment	Retail	£4 million	May 2024	May 2025
Teesside Leisure Park Units A2 & A3	Retail	£3 million	Mar 2024	Mar 2025
Lidl Food Store - West Dyke Road	Retail	£3 million	Aug 2024	May 2025
Galleries Retail Park Units 4, 5 & 6	Retail	£3 million	-	Jan 2024
Aldi Stores Colliery Lane	Retail	£3 million	Apr 2024	Dec 2024

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
A1 - North Of Ellingham	£97 million	Jan 2024	Jan 2026
A1 - Morpeth To Ellingham Dualling	£97 million	Jan 2024	Jan 2026
Middlesbrough Gresham Redevelopment	£50 million	Jul 2025	Jan 2029
Whinfield 33MW Solar Farm	£31 million	Jan 2024	Jan 2025
Newburn Bridge Rd - 100MW Battery Storage	£30 million	Dec 2024	Aug 2025
Quantafuel - Port Of Sunderland - Recycling Plant	£20 million	Jun 2024	Mar 2025
Kirklevington Sewage Treatment Works	£16 million	Aug 2026	May 2027
Redcar Bulk Terminal - Remediation & Strengthening Works	£15 million	Jan 2025	Jan 2026
Northbound Tyne Tunnel - Maintenance Works	£11 million	Apr 2024	Mar 2025
Merchant Park EfW Facility	£10 million	Jun 2024	Jun 2025

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North West

Contract Awards Growth (2024)

DECREASED BY -5.5%

	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
North West	**35,635**	**7.5%**	**4.1**	**15,769**	**17.1%**	**-5.5%**
West Cumbria	na	na	2.3	na	na	202.5%
East Cumbria	na	na	2.1	na	na	-72.9%
Manchester	65,591	23.6%	8.8	1,485	21.0%	99.9%
Greater Manchester South West	47,604	11.9%	3.4	1,761	-2.9%	-3.8%
Greater Manchester South East	28,190	3.9%	3.4	643	19.5%	-1.8%
Greater Manchester North West	25,308	1.3%	4.3	1,272	23.7%	19.6%
Greater Manchester North East	23,816	1.7%	3.9	1,243	39.0%	1.9%
Blackburn with Darwen	29,985	8.9%	4.4	268	42.6%	-34.2%
Blackpool	26,598	-3.3%	5.4	100	1.0%	107.1%
Lancaster and Wyre	26,468	5.7%	3.0	385	11.0%	-9.7%
Mid Lancashire	41,808	6.4%	1.7	1,226	4.7%	70.0%
East Lancashire	24,800	-0.4%	4.6	474	24.4%	-39.1%
Chorley and West Lancashire	30,522	11.9%	2.6	545	20.8%	-34.7%
Warrington	54,025	12.0%	na	1,399	17.2%	50.0%
Cheshire East	45,078	1.3%	4.2	802	18.6%	-60.6%
Cheshire West and Chester	43,099	1.9%	2.3	517	28.6%	-77.4%
East Merseyside	30,949	0.4%	4.9	1,139	17.7%	-47.5%
Liverpool	40,392	13.6%	6.2	822	23.4%	-53.9%
Sefton	22,550	0.1%	3.6	349	18.7%	51.6%
Wirral	23,944	4.6%	3.4	399	26.7%	-65.2%

The North West region accounts for 9.8% of UK GDP and includes two major cities: Manchester and Liverpool. Key sectors of regional economic activity are industrial production and manufacturing, wholesale and retail trade, and public sector administration. Construction GVA grew 17.1% in 2023. The value of contracts awarded totalled £7.2 billion in 2024, a decrease of 5.5% from the previous year. In terms of overall contract awards, there were hotspots in Manchester, Sefton and West Cumbria.

The value of contracts awarded totalled £7.2 billion in 2024, a decrease of 5.5% from the previous year.

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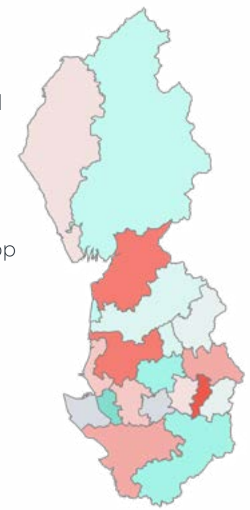
North West

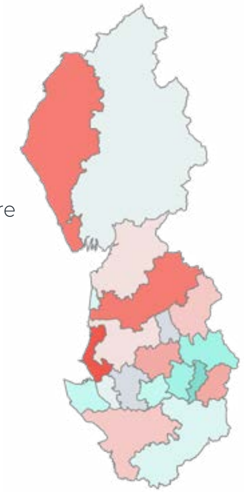
RESIDENTIAL

Residential contracts totalled £3.1 billion in the North West in 2024, an increase of 10.2% from 2023. Manchester was the sole hotspot and accounted for seven of the top ten largest contract awards.



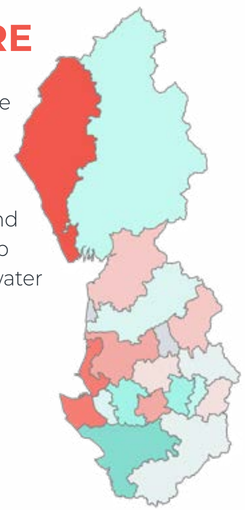
COMMERICIAL

Commercial contract awards totalled £558 million in 2024, 10.7% lower than in 2023. There were two hotspots: Mid Lancashire and Sefton. There were no commercial coldspots.



INFRASTRUCTURE

Contract awards for infrastructure projects in the North West totalled £966 million in 2024 which was 30.2% lower than in 2023. There were five hotspots and no coldspots. Contracts in the top ten were spread across energy, water & sewerage, and roads.



Top 10 Residential Contracts

Project		Value	Start	Finish
New Town, Victoria North, Manchester	1,551 units	£330 million	Apr 2025	Nov 2028
Viadux Phase 2 , Manchester	780 units	£250 million	Jun 2024	-
Dantzic Street , Manchester	1,550 units	£210 million	Oct 2024	-
One Medlock Street - Student Accomm	-	£200 million	Jun 2024	Jun 2027
The Old Brewery Waterhouse Gardens	556 units	£195 million	Aug 2023	Apr 2026
Jersey Wharf, Jersey Street	190 units	£88 million	Jun 2024	Feb 2027
Lumina Village, Former Kelloggs Site	199 units	£80 million	Jan 2024	Aug 2027
Great Jackson Street, Manchester	988 units	£74 million	Mar 2024	Oct 2027
Stopford Park Development	-	£65 million	Jan 2025	Dec 2026
1 Oxford Place - Student Accomm	319 units	£65 million	Nov 2023	Oct 2025

Top 10 Commerical Contracts

Project		Value	Start	Finish
The Greenheys Building, Manchester	Offices	£75 million	Mar 2024	Mar 2026
The Galleries Shopping Centre, Wigan	Retail	£67 million	Apr 2024	Apr 2027
No1 Grape Street, Manchester	Offices	£30 million	Jul 2024	Jul 2026
Cheadle Eco Business Park	Offices	£23 million	Apr 2025	Jan 2027
Simon House - Data Centre	Data ctr	£20 million	Jun 2024	Jun 2025
Burtons Chambers - Refurbishment	Offices	£20 million	Mar 2024	Jan 2026
Accrington Town Square Market Stalls	Retail	£20 million	May 2024	Oct 2024
Kendal Market Hall And Forum	Retail	£18 million	Feb 2024	Nov 2025
58 Mosley Street - Office Refurbishment	Offices	£15 million	Jan 2024	Oct 2024
Edge Lane Shopping Park, Liverpool	Retail	£12 million	Jun 2024	Jun 2025

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
LLW Repository - Nuclear Waste Disposal Area	£67 million	Jul 2024	Feb 2028
Fiddlers Ferry 150 MW Energy Battery Storage	£45 million	Mar 2024	Mar 2025
Astley Bridge - Water Storage Tunnel	£38 million	Jun 2024	Mar 2025
River Calder Lune Street - Flood Defence Works	£37 million	Nov 2025	Aug 2031
Moorside Farm - 28MW Solar Farm	£28 million	May 2024	Nov 2028
M62 Motorway Bridge In Castleton - Reconstruction	£22 million	Sep 2024	Feb 2025
Vause Farm - 20MW Battery Storage	£20 million	Jun 2024	Sep 2027
Sellafield Limited - Remediation Minor Tasks	£18 million	May 2024	Mar 2025
Greek Street - Roundabout	£16 million	Aug 2025	-
Severn Trent - Chester Pipeline Project	£16 million	Jan 2024	Dec 2024

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Scotland

Contract Awards Growth (2024)

INCREASED BY 10.1%

	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
Scotland	**37,192**	**1.5%**	**3.3**	**11,017**	**14.6%**	**10.1%**
Angus and Dundee City	29,716	2.1%	6.5	265	1.1%	35.0%
Clackmannanshire and Fife	27,398	1.8%	4.0	472	-1.7%	945.8%
East Lothian and Midlothian	24,456	5.9%	3.3	287	13.9%	-43.5%
Scottish Borders	27,485	-5.3%	5.8	172	1.8%	-37.2%
City of Edinburgh	69,809	8.1%	3.4	994	26.6%	-3.8%
Falkirk	32,277	-8.4%	3.2	338	4.6%	-48.5%
Perth & Kinross and Stirling	36,364	-5.0%	1.8	511	7.1%	-41.2%
West Lothian	38,101	14.5%	4.4	974	11.2%	1.7%
E Dunbartonshire, W Dunbartonshire and Helensburgh & Lomond	28,085	0.0%	3.0	158	19.7%	30.8%
Dumfries & Galloway	32,027	-4.4%	2.2	192	3.2%	292.3%
E Ayrshire and N Ayrshire mainland	24,564	2.1%	2.8	354	14.9%	-35.8%
Glasgow City	50,250	9.6%	4.9	1,447	24.1%	20.9%
Inverclyde, E Renfrewshire and Renfrewshire	25,447	-2.3%	3.1	472	14.6%	-25.6%
North Lanarkshire	34,184	3.9%	1.4	1,175	12.1%	-78.2%
South Ayrshire	30,057	-4.7%	4.0	155	6.9%	-24.5%
South Lanarkshire	28,895	-3.8%	1.3	962	23.5%	-32.3%
Aberdeen City and Aberdeenshire	41,051	-10.7%	3.2	1,047	20.3%	-40.0%
Caithness & Sutherland and Ross & Cromarty	na	na	na	na	na	-17.2%
Inverness & Nairn and Moray, Badenoch & Strathspey	na	na	1.0	na	na	-8.9%
Lochaber, Skye & Lochalsh, Arran & Cumbrae and Argyll & Bute	na	na	5.1	na	na	13.0%
Eilean Siar (Western Isles)	28,192	3.2%	na	na	na	1341.4%
Orkney Islands	34,973	11.0%	na	na	na	-85.4%
Shetland Islands	40,844	-1.4%	na	na	na	-95.4%

Scotland accounts for 7.4% of total UK GDP. Key sectors of economic activity in the region are industrial production and manufacturing, distribution and transport and public administration. Construction GVA increased 14.6% in 2023, and the value of contracts awarded in the region totalled £7.5 billion in 2024, an increase of 10.1% from the previous year. In terms of overall contract awards, there were three hotspots, in Clackmannanshire and Fife, Dumfries and Galloway, and Glasgow City.

The value of contracts awarded in the region totalled £7.5 billion in 2024, an increase of 10.1% from the previous year.

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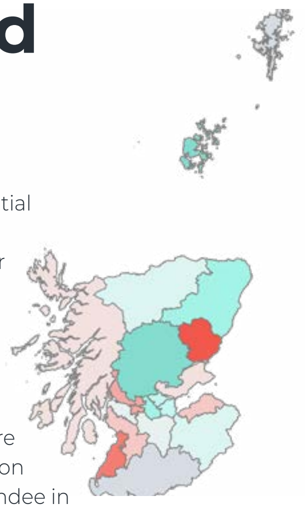
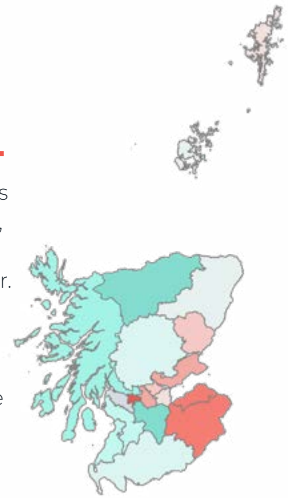
Scotland

RESIDENTIAL



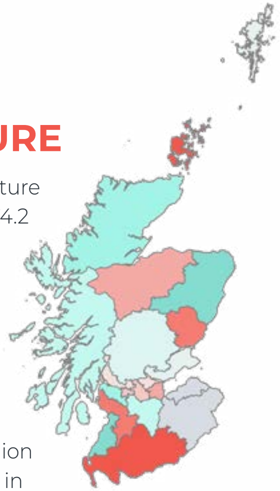
£1.3 billion worth of residential contracts were awarded in Scotland in 2024, 1.5% lower than the value awarded a year earlier. Hotspots were in Angus and Dundee City, Perth & Kinross and Sterling, West Lothian and Scottish Borders. There were two student accommodation schemes in Angus and Dundee in the top ten.

COMMERCIAL



Commercial contract awards totalled £186 million in 2024, 18.3% lower than the value awarded in the previous year. There were three hotspots: East Dunbartonshire, West Dunbartonshire and Helensburgh & Lomond, the Western Isles and Scottish Borders.

INFRASTRUCTURE



Contract awards for infrastructure projects in Scotland totalled £4.2 billion in 2024, which was 46.5% higher than the value awarded in the previous year. There were five hotspots and no coldspots. There were seven contract values over £140 million, including on of the year's largest – the £1.5 billion Inch Cape offshore wind farm in Clackmannanshire and Fife.

Top 10 Residential Contracts

Project		Value	Start	Finish
Standhill Farm, Armadale	375 units	£72 million	Oct 2024	Jun 2027
The Stores, City Wharf, Glasgow	-	£65 million	Aug 2024	Aug 2029
The Ard, Glasgow - Student Accomm	-	£39 million	Apr 2025	Dec 2027
South Tranent, Windygoul	92 units	£31 million	Jan 2025	Sep 2027
Marketgait - Student Accomm	178 units	£30 million	Jun 2024	Dec 2026
Oldfold Farm, Phase 4	128 units	£30 million	Jul 2024	Jan 2027
Stewarts Quarter, Fife	170 units	£25 million	Sep 2024	May 2027
Brown Street - Student Accomm	-	£20 million	Feb 2024	Oct 2026
Ayrshire Central Hospital Redevelopment	184 units	£18 million	Sep 2024	Mar 2027
Devonshaw Leisure Park - holidays homes	-	£18 million	Jan 2025	Jul 2025

Top 10 Commerical Contracts

Project		Value	Start	Finish
Dundas House, 20 Brandon St - Fit Out	Offices	£35 million	Mar 2024	Feb 2025
Strathkelvin Retail Park - 7 Retail Units	Retail	£10 million	Aug 2024	Aug 2025
George Street Mini Masterplan	Retail	£10 million	May 2024	Feb 2026
Home Bargains - Angus Retail Park	Retail	£9 million	May 2024	Nov 2024
Easter Queenslie Recycling Centre	Offices	£7 million	Jun 2024	Jul 2025
Angus Retail Park	Retail	£5 million	Jul 2024	Jan 2025
Aldi Food Store - Kirkintilloch	Retail	£5 million	Jul 2024	Mar 2025
Oregon Timber Frame Headquarters	Offices	£4 million	Mar 2024	Dec 2024
BHC Limited, Medwyn Park, Carnwath	Offices	£4 million	Jun 2025	Apr 2026
Aldi Food Store - Macduff	Retail	£3 million	Apr 2024	Feb 2025

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
Inch Cape 1080 MW Offshore Wind Farm	£1.5 billion	Sep 2024	Sep 2027
Clash Gour 225MW Wind Farm	£240 million	Sep 2024	Feb 2026
A9 Dualling - Tomatin to Moy	£185 million	Oct 2024	Feb 2033
Stranoch 2 84MW Wind Farm	£150 million	May 2024	Nov 2025
Coalburn Energy - 500MW Battery Storage	£150 million	Nov 2023	Oct 2025
Kilmarnock Sth Substation - 300MW Battery Storage	£147 million	Feb 2023	Jul 2024
East Kilbride To Barrhead Line - Electrification Works	£140 million	Dec 2023	Dec 2025
Blackhillock 300MW Battery Energy Storage System	£90 million	Feb 2023	Jul 2026
Cruachan Upgrade Project	£80 million	Apr 2026	Jun 2027
Enoch Hill Windfarm - 70MW Wind Farm	£70 million	Jul 2023	-

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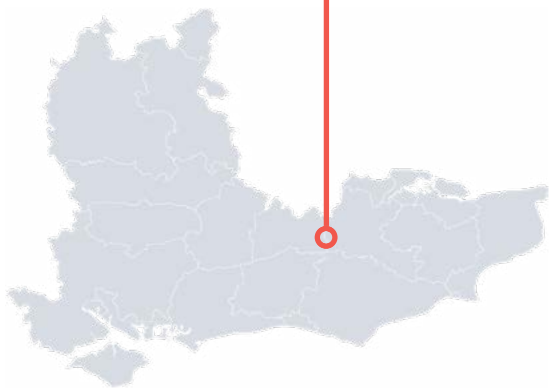
South East

Contract Awards Growth (2024)

INCREASED BY 29.2%



	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
South East	**41,319**	**3.3%**	**3.5**	**23,963**	**11.8%**	**29.2%**
Berkshire	60,564	10.3%	3.7	2,602	18.0%	17.4%
Milton Keynes	59,940	-2.2%	2.4	682	7.6%	25.7%
Buckinghamshire CC	37,698	2.5%	4.7	1,770	7.9%	-76.5%
Oxfordshire	42,756	6.7%	2.8	1,426	16.7%	-26.2%
Brighton and Hove	47,461	11.1%	4.1	354	11.7%	506.3%
East Sussex CC	24,593	1.8%	6.0	981	18.5%	39.4%
West Surrey	50,390	-1.0%	2.9	2,786	5.3%	0.5%
East Surrey	46,120	1.4%	2.1	1,560	28.0%	57.5%
West Sussex (South West)	32,204	3.1%	4.7	713	16.3%	55.2%
West Sussex (North East)	38,591	7.7%	1.9	1,198	23.1%	-29.1%
Portsmouth	41,317	6.9%	6.1	336	12.8%	-17.4%
Southampton	42,580	-12.7%	4.4	287	14.3%	46.7%
Isle of Wight	26,787	2.5%	3.9	155	9.2%	-100.0%
South Hampshire	32,341	-1.0%	2.0	1,079	0.7%	11.7%
Central Hampshire	37,975	-0.4%	1.3	1,338	4.4%	47.4%
North Hampshire	53,275	5.5%	2.5	1,043	-0.9%	-16.7%
Medway	30,128	7.5%	2.0	724	16.6%	54.9%
Kent Thames Gateway	30,249	-0.6%	5.3	1,540	20.3%	408.0%
East Kent	27,680	1.5%	4.8	792	4.5%	53.9%
Mid Kent	33,046	5.0%	3.3	952	7.9%	17.1%
West Kent	43,259	-0.9%	3.4	1,648	10.1%	109.7%

The South East region accounts for 14.2% of total UK GDP 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 11.8% in 2023 and the value of contracts awarded in the region totalled £9.9 billion in 2024, an increase of 29.2% from the previous year. In terms of overall contract awards, Brighton and Hove, Central Hampshire, East Kent, East Sussex CC, Kent Thames Gateway, and West Kent were hotspots.

The value of contracts awarded in the region totalled £9.9 billion in 2024, an increase of 29.2% from the previous year.

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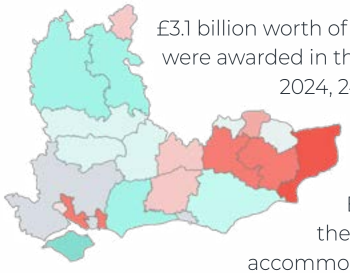
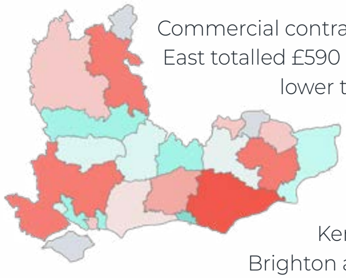
South East

RESIDENTIAL



£3.1 billion worth of residential contracts were awarded in the South East region in 2024, 24.6% higher than the value awarded in 2023. There were six hotspots, including East Kent, which hosts the £418 million student accommodation project at Giles Lane, Canterbury.

COMMERICIAL



Commercial contract awards in the South East totalled £590 million in 2024, 3.9% lower than in 2023. There were two hotspots for commercial activity in 2024 – East Sussex CC and Mid Kent – and one coldspot: Brighton and Hove. Three projects in the top ten will see activity continuing through to 2027.

INFRASTRUCTURE

Contract awards for infrastructure projects in the South East totalled £3.1 billion in 2024, almost double the value awarded in 2023. Kent Thames Gateway and West Sussex (South West) were the two hotspots. Buckinghamshire CC was a coldspot. Four of the largest contract awards were valued at £150 million or above.

Top 10 Residential Contracts

Project		Value	Start	Finish
Giles Lane - Student Accomm	-	£418 million	Sep 2024	Mar 2027
West Slope Student Accomm	-	£200 million	Jul 2024	Jan 2029
Bargate Quarter Development	-	£132 million	Jul 2024	Dec 2025
Lakes Estate, Drayton Road	308 units	£85 million	Jan 2024	Sep 2026
Mount Pleasant Road Retirement Apts	166 units	£72 million	Apr 2024	Oct 2025
One Horton Heath - Phase - 1	393 units	£70 million	Dec 2024	Feb 2030
Sackville Road Urban Village	260 units	£60 million	Sep 2024	Jul 2030
West Malling Retirement Village	132 units	£60 million	Sep 2024	Sep 2026
3 -12 High Street, Woking	-	£50 million	Jan 2025	Mar 2026
Winterfield Lane, East Malling	250 units	£50 million	Jul 2023	Feb 2027

Top 10 Commerical Contracts

Project		Value	Start	Finish
Whitehill & Bordon Town Centre	Retail	£80 million	Sep 2024	Dec 2027
Trinity House Project - Life Sciences	Offices	£60 million	Oct 2023	Oct 2025
Aerox London Oxford Airport	Offices	£35 million	Nov 2024	Jun 2027
Slough Trading Estate - LD14	Data centre	£30 million	Aug 2024	Aug 2025
Buildings 2 & 3 And 4 Park Square	Offices	£30 million	Sep 2024	Sep 2025
Rutherford Road, Oxfordshire	Retail	£23 million	Mar 2024	Nov 2024
Swallow Business Park Phase 5	Offices	£23 million	-	Sep 2024
Speedwell House, Oxford	Offices	£20 million	Jun 2025	Jun 2027
Plot C, Pitstone Business Park	Offices	£19 million	Oct 2024	Jul 2026
Signal Yard - Refurbishment	Offices	£14 million	Jan 2025	Jun 2025

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
Lower Thames Tunnel Crossing - Tunnelling Works	£1.3 billion	Jan 2026	Jan 2032
Worthing Heat Network Project	£250 million	Aug 2024	Jan 2026
Slough Multi-Fuel CHP Plant 50MW	£200 million	May 2021	Nov 2024
Marchwood Port Development	£150 million	Mar 2024	Jan 2025
A423 Kennington Improvements Scheme	£90 million	Dec 2024	Dec 2027
Bunkers Hill Farm - Solar Farm & Battery Storage	£50 million	May 2023	May 2024
Netley Mill Water Treatment Works -Mains Pipeline	£46 million	Feb 2024	Dec 2025
Dover Harbour Board	£45 million	Oct 2024	Apr 2026
A28 Sturry Link Road	£34 million	Jan 2025	Oct 2026
Testwood Water Supply Upgrade Works	£33 million	Jul 2024	Dec 2025

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South West

Contract Awards Growth (2024)

INCREASED BY 17.9%

The South West region accounts for 7.5% of total UK GDP and key sectors of economic activity in the region are distribution and transport, public administration and business services. Construction GVA registered an increase of 8.8% in 2023 and the value of contracts awarded in the region totalled £5.9 billion in 2024, an increase of 17.9% from the previous year. In terms of overall contract awards, Somerset was the sole hotspot and Dorset CC and Swindon were coldspots.

The value of contracts awarded in the region totalled £5.9 billion in 2024, an increase of 17.9% from the previous year.

	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
South West	**35,731**	**4.8%**	**2.6**	**12,468**	**8.8%**	**17.9%**
Bristol, City of	47,148	9.9%	3.2	1,177	-5.2%	-3.0%
Bath and NE Somerset, N Somerset and S Gloucestershire	39,250	13.4%	2.3	1,835	8.8%	17.9%
Gloucestershire	37,590	-0.3%	2.7	1,449	14.1%	-24.1%
Swindon	57,253	0.3%	3.9	366	1.4%	-25.8%
Wiltshire	33,332	4.3%	2.2	919	11.1%	26.0%
Bournemouth, Christchurch and Poole	37,048	2.7%	2.5	911	6.9%	-16.5%
Dorset CC	29,573	1.1%	3.6	800	13.6%	-72.3%
Somerset	30,486	3.0%	2.5	1,094	16.1%	284.1%
Cornwall and Isles of Scilly	28,620	3.2%	2.3	1,224	3.6%	24.1%
Plymouth	30,446	1.5%	2.8	459	13.1%	108.0%
Torbay	21,478	2.2%	1.1	126	14.5%	-4.0%
Devon CC	31,674	6.3%	2.3	2,109	12.1%	44.0%

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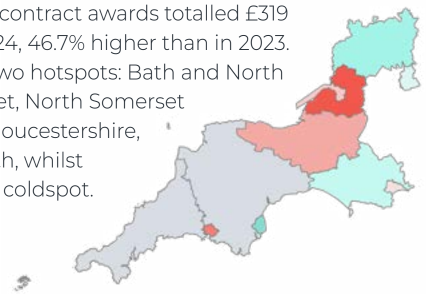
South West

RESIDENTIAL

£2.1 billion worth of residential contracts were awarded in the South West region in 2024, a third higher than in 2023. There were two hotspots: Bath and North East Somerset, North Somerset and South Gloucestershire, and Gloucestershire. Dorset CC was a coldspot. Four of the top ten largest contracts were for student accommodation.

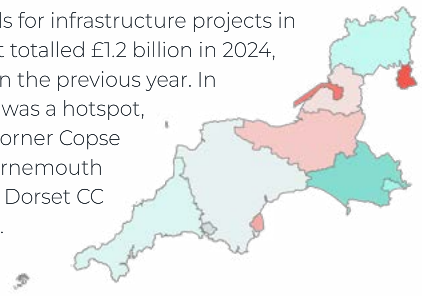
COMMERICIAL

Commercial contract awards totalled £319 million in 2024, 46.7% higher than in 2023. There were two hotspots: Bath and North East Somerset, North Somerset and South Gloucestershire, and Plymouth, whilst Torbay was a coldspot.



INFRASTRUCTURE

Contract awards for infrastructure projects in the South West totalled £1.2 billion in 2024, 13.5% lower than the previous year. In 2024, Swindon was a hotspot, driven by the Corner Copse solar farm. Bournemouth and Poole, and Dorset CC were coldspots.



Top 10 Residential Contracts

Project		Value	Start	Finish
Western Riverside Quarter, Bath	611 units	£200 million	Dec 2024	Jul 2028
Clydesdale & Birks - Student Accomm	-	£185 million	May 2024	Oct 2026
Trengrouse Care Home	-	£86 million	Apr 2025	Apr 2040
Brabazon - Student Accomm	-	£80 million	Apr 2024	Dec 2026
Bath Press Site, Lower Bristol Road	277 units	£55 million	Sep 2024	Jul 2026
Brimscombe Port Redevelopment	-	£40 million	Mar 2023	Jun 2027
Hinton Road - Student Accomm	170 units	£36 million	Jan 2025	Sep 2027
SAP4 The Den - Student Accomm	329 units	£36 million	Aug 2024	Feb 2026
Clarence Road, Bristol	432 units	£35 million	Apr 2025	Aug 2028
Priest Street, Williton	350 units	£35 million	Feb 2025	Oct 2027

Top 10 Commerical Contracts

Project		Value	Start	Finish
1 Georges Square, Bristol	Offices	£100 million	Dec 2023	Mar 2025
Longwell Green - Regeneration	Retail	£31 million	Aug 2024	Jun 2027
Numatic International Limited	Offices	£17 million	Jan 2024	Jan 2026
Bailys Buildings Development	Offices	£12 million	May 2024	Jan 2026
UK Hydrographic Office	Offices	£10 million	Oct 2024	Apr 2026
Devonport Royal Dockyard	Offices	£10 million	Jul 2024	Apr 2025
Fairpark Road, Liskeard	Offices	£9 million	Jul 2024	May 2025
Sainsburys - Yatton, Arnolds Way	Retail	£8 million	Oct 2024	-
8 Cotswold Business Village - Refurb	Retail	£8 million	Nov 2024	Jan 2025
Valley Road, Gloucestershire	Offices	£7 million	May 2025	Feb 2026

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
Somerset Tidal Barrier	£249 million	Nov 2024	Nov 2028
Bristol Sewage Treatment Plant - Recycling Centre	£100 million	Jan 2024	Jan 2029
Banwell Bypass & Highway Improvements	£89 million	Sep 2024	May 2026
Corner Copse - 49.9MW Solar Farm	£50 million	Sep 2024	Mar 2026
Manhay Geothermal Power Plant	£50 million	Feb 2025	Jul 2026
Rag Lane - 49.99MW Solar Farm	£50 million	Apr 2024	-
Whaddon Lane - 25 MW Solar Photovoltaic Arrays	£30 million	Sep 2024	Sep 2026
Berkeley Nuclear Power Station Remediation Works	£30 million	Jan 2021	Jan 2031
Horsey Level - 24MW Solar Farm	£24 million	Jul 2023	Jan 2024
Ham Farm - 22MW Solar Farm & Battery Storage	£22 million	Jan 2025	May 2025

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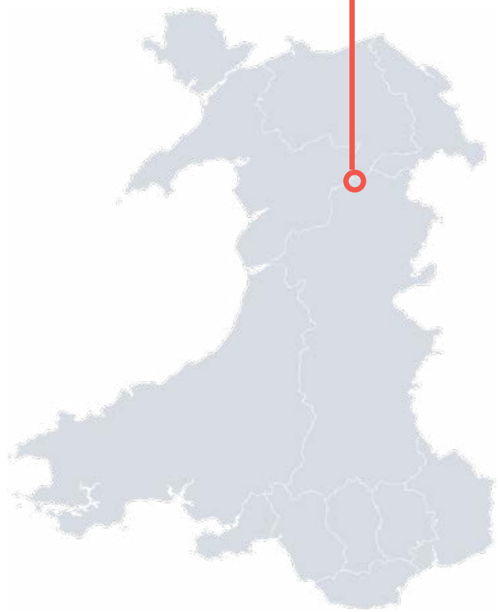
Wales

Contract Awards Growth (2024)

DECREASED BY 16.9%



Wales accounts for 3.4% of total UK GDP 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 10.7% in 2023, whilst the value of contracts awarded in the region totalled £1.8 billion in 2024, a decrease of 16.9% from the previous year. In terms of overall contract awards, there were no hotspots, with contract values largely in line with the long-term average. However, there was one coldspot: Sout West Wales.

> **The value of contracts awarded in the region totalled £1.8 billion in 2024, a decrease of 16.9% from the previous year.**

	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
Wales	**29,316**	**-0.9%**	**2.9**	**5,180**	**10.7%**	**-16.9%**
Isle of Anglesey	24,279	4.5%	4.8	100	22.0%	20.5%
Gwynedd	27,791	-5.1%	4.1	202	7.4%	20.2%
Conwy and Denbighshire	25,335	-1.4%	2.4	416	9.5%	-39.4%
South West Wales	26,745	-1.1%	2.1	426	8.7%	-32.9%
Central Valleys	24,553	-2.6%	4.2	na	na	-25.5%
Gwent Valleys	22,552	-2.5%	3.1	528	22.5%	-48.4%
Bridgend and Neath Port Talbot	26,186	-4.9%	2.5	na	na	2.9%
Swansea	29,592	-5.8%	2.7	298	13.3%	14.7%
Monmouthshire and Newport	31,929	-3.5%	2.8	514	16.3%	-2.1%
Cardiff and Vale of Glamorgan	37,759	3.6%	2.2	846	8.9%	20.6%
Flintshire and Wrexham	38,096	7.6%	3.4	518	17.7%	-41.9%
Powys	23,918	-2.3%	2.8	na	na	-58.2%

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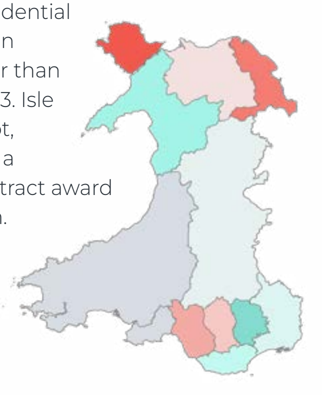
Wales

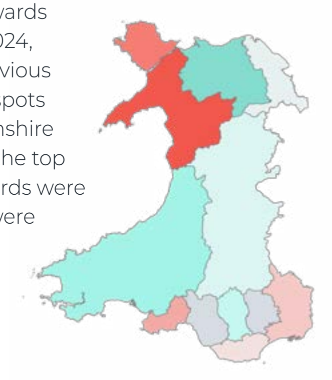
RESIDENTIAL

£425 million worth of residential contracts were awarded in Wales in 2024, 13.6% lower than the value awarded in 2023. Isle of Anglesey was a hotspot, whilst Gwent Valleys was a coldspot. The largest contract award was valued at £40 million.



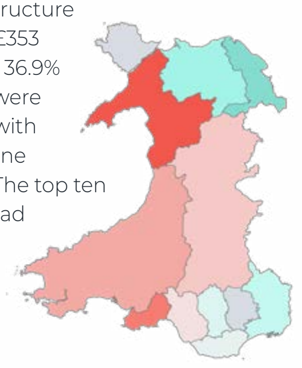
COMMERICIAL

Commercial contract awards totalled £85 million in 2024, 2.1% higher than the previous year. There were no hotspots but Conwy and Denbighshire was a coldspot. Nine of the top ten largest contract awards were in retail; three of those were supermarkets.



INFRASTRUCTURE

Contract awards for infrastructure projects in Wales totalled £353 million in 2024, which was 36.9% lower than in 2023. There were no hotspots or coldspots, with contract values largely in line with long-term averages. The top ten contract awards were spread across ports, solar farms, and flood and coastal defences.



Top 10 Residential Contracts

Project		Value	Start	Finish
Cardiff Sixth Form College - Accomm	-	£40 million	Jan 2024	Jul 2026
Holywell Road, Ewloe Green	315 units	£31 million	Jan 2025	Sep 2027
Menai Bridge - Extra Care Facility	-	£28 million	Jan 2025	Jan 2027
Beili Glas Farm	98 units	£27 million	Apr 2024	Apr 2026
Knox Court, South Glamorgan	215 units	£20 million	Oct 2024	Apr 2026
Sunnyside Wellness Village, Glan Y Parc	59 units	£15 million	Mar 2024	Jan 2026
Highmere Drive, Connahs Quay	141 units	£14 million	Feb 2024	Aug 2026
Pont Rhyd Y Cyff, Llangynwyd	133 units	£13 million	Feb 2025	Aug 2027
St Asaph Business Park - Care Home	-	£10 million	Sep 2024	-
Vinegar Hill, Undy	70 units	£8 million	Nov 2024	Jun 2026

Top 10 Commerical Contracts

Project		Value	Start	Finish
Next Generation Data Project Delta	Data centre	£22 million	Jan 2024	Aug 2026
Swansea East Trade Park - Clase Road	Retail	£8 million	Nov 2024	Nov 2025
Castle Square Regeneration	Retail	£8 million	Nov 2024	Nov 2025
Cardiff Market Renovation & Restoration	Retail	£4 million	Oct 2024	Apr 2025
Home Bargains, Newport W Retail Park	Retail	£4 million	Jun 2024	Mar 2025
Travis Perkins - Swansea Enterprise Park	Retail	£4 million	Oct 2024	Jul 2025
Greenmeadow Community Farm - Cafe	Retail	£3 million	Nov 2024	May 2025
Aldi - Aberaman Park Industrial Estate	Retail	£3 million	Mar 2024	Aug 2024
Aldi - Co Op Nelson	Retail	£3 million	Apr 2025	-
Aldi - Caernarfon Road	Retail	£3 million	Sep 2024	May 2025

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
Holyhead Port - Border Control Facility	£41 million	Jul 2024	Jan 2025
Brynrhyd Farm - 30MW Solar Farm	£30 million	Mar 2025	Sep 2029
Swansea Greener Grid Park Facility	£20 million	Oct 2024	Apr 2026
Haverfordwest Public Transport Interchange Scheme	£15 million	Aug 2024	May 2025
North Promenade - Flood Alleviation Scheme	£13 million	Dec 2024	Dec 2025
Kinmel Bay Coastal Defence Improvement Works	£10 million	Aug 2024	Jun 2025
Uskmouth Power Station - 230MW Battery Storage	£10 million	Nov 2023	Nov 2025
Canton Depot - Bogie Drop Building	£9 million	Aug 2024	Jul 2026
Bryngolwg Farm, Hirwaun - 8.94MW Solar Farm	£5 million	Apr 2023	Oct 2023
Lon Pin, Llanbedrog - 4.99MW Solar Farm	£5 million	Sep 2024	Jun 2025

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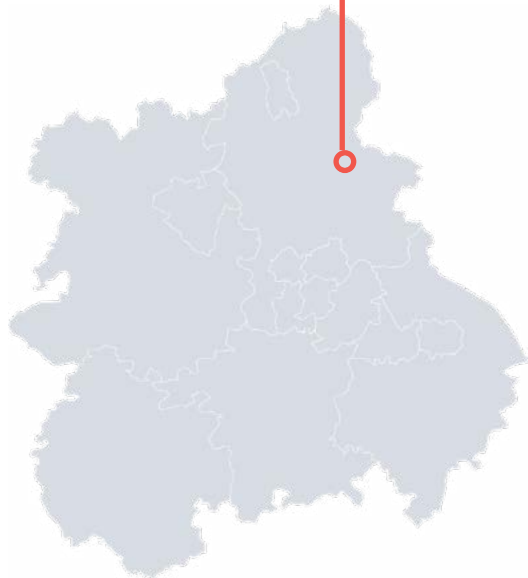
West Midlands

Contract Awards Growth (2024)

INCREASED BY 7.4%



The West Midlands region accounts for 7.1% of UK GDP. Key sectors of regional economic activity are industrial production and manufacturing, public administration and distribution and transport. Construction GVA growth was 10.7% in 2023. The value of contracts awarded in the region totalled £4.8 billion in 2024, which was 7.4% higher than the value in the previous year. In terms of overall contract awards, Shropshire CC was the only hotspot.

> **The value of contracts awarded in the region totalled £4.8 billion in 2024, which was 7.4% higher than the value in the previous year.**

	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
West Midlands	**32,077**	**0.3%**	**4.1**	**11,744**	**10.7%**	**7.4%**
Herefordshire	29,729	2.9%	2.1	297	12.1%	-55.1%
Worcestershire	32,644	2.0%	2.2	1,201	9.8%	5.2%
Warwickshire	45,518	5.4%	2.2	1,548	16.5%	-18.1%
Telford and Wrekin	33,349	3.5%	3.0	262	11.0%	33.4%
Shropshire CC	27,310	-0.1%	1.9	451	0.9%	163.4%
Stoke-on-Trent	29,631	1.1%	4.4	347	-5.2%	110.4%
Staffordshire CC	28,667	-1.7%	2.0	1,993	9.5%	-24.3%
Birmingham	33,362	2.3%	7.1	2,129	15.6%	23.9%
Solihull	53,082	-4.2%	1.1	937	5.2%	-59.6%
Coventry	35,719	-3.9%	7.1	398	28.4%	2.4%
Dudley	21,766	-4.9%	3.4	718	13.2%	-4.1%
Sandwell	24,012	-7.7%	6.4	584	19.4%	-57.4%
Walsall	21,986	-5.7%	2.9	458	-1.5%	-7.4%
Wolverhampton	26,574	-0.8%	8.5	419	0.0%	89.1%

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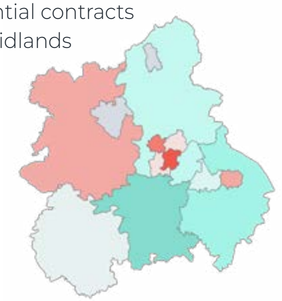
West Midlands

RESIDENTIAL

£899 million worth of residential contracts were awarded in the West Midlands region in 2024, 37.7% lower than the value awarded in 2023. Sandwell was a hotspot and Worcestershire was a coldspot. Projects in Birmingham and Coventry accounted for seven of the top ten largest contract awards.

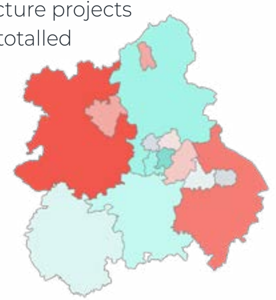


COMMERICIAL

Commercial contract awards totalled £424 million in 2024, 72.4% higher than in 2023. Birmingham and Walsall were hotspots. Outside of the redevelopment of the Tea Factory, the next largest contract award was £24 million.

INFRASTRUCTURE

Contract awards for infrastructure projects in the West Midlands region totalled £1.6 billion in 2024, which was 68.2% higher than the value awarded in 2023. There were five hotspots, including Birmingham, contributed by two of the region's largest contract awards: the Metro extension and the Hams Hall battery storage facility.



Top 10 Residential Contracts

Project		Value	Start	Finish
The Oaks Student Accomm, Coventry	1,209 units	£54 million	Oct 2023	May 2027
Brindley Drive, Birmingham	581 units	£41 million	Jul 2024	Mar 2027
Progress House Student Accomm	544 units	£40 million	Jun 2024	Feb 2027
250 & 251 Bradford Street, Birmingham	130 units	£40 million	Oct 2023	Oct 2025
Tasley, Shropshire - Plots 1 and 7	-	£39 million	Oct 2024	Jun 2027
Thompsons Farm, Coventry	171 units	£31 million	Aug 2024	Apr 2027
Upper Trinity Street, Digbeth	-	£30 million	Mar 2024	Mar 2026
Wolverhampton Eye Infirmary Redev	-	£30 million	Aug 2024	Feb 2026
Former Gas Works, Swan Ln, Sandwell	147 units	£30 million	Mar 2024	Mar 2026
Neighbourhood Heights, Morville Street	80 units	£25 million	Nov 2024	Nov 2025

Top 10 Commerical Contracts

Project		Value	Start	Finish
The Tea Factory - BBC Production Centre	Media	£200 million	Jan 2024	Jan 2026
Project Catalyst, Washwood Heath	Offices	£24 million	Oct 2024	Oct 2025
125 Colmore Row - Offices Refurb	Offices	£20 million	May 2024	Jul 2025
Bet 365 Trent House HQ, Media Way	Offices	£20 million	Jan 2024	Feb 2025
Walsall Bradford Mall - Saddlers Centre Redevelopment	Retail	£11 million	Apr 2025	Jul 2027
Burnt Meadow Road, Worcestershire	Offices	£11 million	Nov 2024	Aug 2026
National Highways HQ, Three Snowhill	Offices	£10 million	Dec 2024	Jun 2025
Sainsburys & Costa - Joynes Road	Retail	£9 million	Sep 2024	Oct 2025
Middlemore Lane, Walsall	Offices	£8 million	May 2024	May 2025
35 Newhall Street - Renovation	Offices	£8 million	Aug 2024	Aug 2025

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
East Birmingham To Solihull Extension	£735 million	Jun 2024	Jun 2027
Hams Hall - 349.9MW Battery Storage Facility	£105 million	Jan 2025	Jun 2026
Doverdale - 49.9MW Solar Farm & 49.9MW Battery Storage	£65 million	Apr 2024	Sep 2025
Birmingham Airport - Security Screening Hall	£50 million	Jan 2024	-
Ashorne Hill - 49.9MW Solar Farm & Battery	£50 million	Jan 2024	Oct 2024
Faringdon To Blunsdon - Pipe Upgrade	£45 million	Dec 2023	Dec 2026
Aldridge - Household Waste Recycling Centre	£32 million	May 2021	Aug 2024
East And West Midlands Emergency Area Retrofit	£26 million	Feb 2024	Feb 2025
Church Farm, Withington - 25MW Solar Farm	£25 million	Apr 2024	Jun 2025
Eastfields Farm, Harbury - Solar Arrays & Battery	£25 million	Apr 2025	Oct 2029

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Yorkshire & The Humber

Contract Awards Growth (2024)

INCREASED BY 16.6%

The Yorkshire and Humber region accounts for 6.6% of total UK GDP. Key sectors of regional economic activity are industrial production and manufacturing, distribution and transport and public administration. Construction grew 15.5% in 2023. The value of contracts awarded totalled £6.0 billion in 2024, an increase of 16.6% from the previous year. In terms of overall contract awards, North Yorkshire CC was a hotspot, whilst Sheffield and York were coldspots.

The value of contracts awarded totalled £6.0 billion in 2024, an increase of 16.6% from the previous year.

	GDP per head (£)	GDP growth 2018-2023	Unemployment rate (%)	Construction GVA (2023, £ millions)	Construction Growth (2024)	Contracts Awards Growth (2024)
UK Average	**39,845**	**4.1%**	**3.7**	**154,140**	**11.5%**	**13.1%**
Yorkshire and the Humber	**32,625**	**4.8%**	**2.8**	**11,387**	**15.5%**	**16.6%**
Kingston upon Hull, City of	30,522	-0.2%	4.5	557	5.9%	115.3%
East Riding of Yorkshire	30,172	7.1%	1.5	533	11.7%	-18.7%
North and North East Lincolnshire	33,474	2.7%	4.8	697	13.0%	2.9%
York	44,872	6.0%	3.0	444	20.7%	-53.5%
North Yorkshire CC	35,742	7.4%	1.4	1,415	24.8%	277.4%
Barnsley, Doncaster and Rotherham	24,598	-0.5%	3.8	1,853	8.6%	-38.4%
Sheffield	33,234	13.1%	2.2	946	8.0%	-55.7%
Bradford	23,945	-0.3%	5.3	607	14.1%	-24.7%
Leeds	47,411	12.4%	1.5	2,307	19.5%	-6.0%
Calderdale and Kirklees	26,304	-5.3%	2.7	1,078	24.8%	80.5%
Wakefield	31,580	4.0%	1.5	951	15.3%	49.4%

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Yorkshire & The Humber

RESIDENTIAL

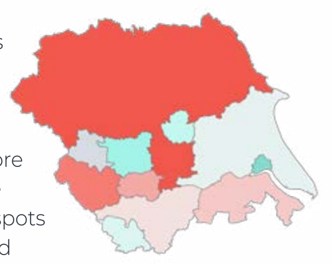
£1.6 billion worth of residential contracts were awarded in the Yorkshire and Humber in 2024, a decrease of 15.6% compared to the value awarded in 2023. Leeds was a hotspot and accounted for nine out of the ten largest contract awards. Sheffield was a coldspot.

COMMERCIAL

Commercial contract awards totalled £267 million in 2024, 7.0% lower than in 2023. Calderdale and Kirklees, and North and North East Lincolnshire were hotspots. Wakefield was a coldspot.

INFRASTRUCTURE

Contract awards for infrastructure projects in the Yorkshire and Humber region totalled £2.4 billion in 2024 which was more than double the value awarded in 2023. Hotspots were in Calderdale and Kirklees, North Yorkshire CC, and Wakefield. There were no coldspots.



Top 10 Residential Contracts

Project		Value	Start	Finish
Wellington Square, Leeds	464 units	£220 million	Feb 2025	Sep 2028
Sweet Street West, Leeds	451 units	£165 million	Feb 2024	Sep 2027
Sky Gardens - Midland Mills, Leeds	306 units	£90 million	Jan 2024	Jul 2026
Beck Yard, Leeds	375 units	£69 million	Aug 2024	May 2027
Merrion Street, Leeds	660 units	£60 million	Jan 2022	Aug 2024
Leeds Arena Student Accomm	-	£46 million	Jul 2024	Mar 2027
Kirkstall Road Student Accomm	205 units	£44 million	Oct 2024	Dec 2025
The Store House, Briggate	205 units	£43 million	Apr 2024	Apr 2026
Flax Place, Leeds	369 units	£40 million	Sep 2024	Sep 2026
Raithwaite Bay Development	-	£40 million	Jul 2024	Jul 2026

Top 10 Commerical Contracts

Project		Value	Start	Finish
Halifax PLC Trinity Road - HQ Refurb	Offices	£60 million	Oct 2024	Mar 2027
DFDS One Humber - Phase 1A	Offices	£20 million	Dec 2025	Jul 2028
Long Lane, Woodmansey	Offices	£19 million	Apr 2025	Jan 2027
Dalton Lane - Data Centre	Data Ctr	£12 million	Apr 2023	Apr 2025
Scarborough West Pier	Offices	£11 million	Oct 2024	Jul 2026
Aldi Food Store, Gresley Road	Retail	£10 million	Jan 2024	Feb 2025
Grainger Market Redevelopment	Retail	£9 million	Jul 2024	Jul 2025
Tesco Store, Skipton Road	Retail	£7 million	Nov 2024	Nov 2025
Marks & Spencer, Wheatley Retail Park	Retail	£7 million	Nov 2024	May 2025
Europa House - Office Refurbishment	Offices	£7 million	Oct 2023	Nov 2025

Top 10 Infrastructure Contracts

Project	Value	Start	Finish
Eastern Green Link 2 - Converter Station	£700 million	Jul 2027	Dec 2028
Eastern Green Link 2 - HVDC Underground	£500 million	Jul 2025	Dec 2026
Humber Zero Project - VPI Power Station	£131 million	Mar 2026	Aug 2027
Immingham Eastern Ro-Ro Terminal	£125 million	May 2024	Nov 2025
Monk Fryston 320MW Battery Storage	£96 million	Jul 2024	Apr 2025
Skerne - 45MW Solar Farm & 30MW Battery	£60 million	Dec 2024	Sep 2025
Ferrybridge Power Station - 150MW Battery	£45 million	Sep 2024	Aug 2025
Marr Hall Farm, Barnsley Rd - 40MW Solar Farm	£40 million	Aug 2024	Dec 2024
A629 Western Corridor Improvements	£34 million	Apr 2024	Apr 2028
A629 Halifax To Huddersfield	£34 million	Jun 2024	Nov 2025

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Revisiting the Northern Powerhouse

The Northern Powerhouse was a key policy area for the Conservative-Liberal Democrat coalition government between 2010 and 2015, and was continued under the Conservative government after the 2015 General Election. Its aim was to rebalance and boost economic growth in the North of England, primarily through investment in infrastructure, science and innovation and an element of devolution through City Deals and elected regional mayors. The term has now largely disappeared from government vernacular, replaced over time with general 'Levelling Up' and regional investment deals and devolution.

The Northern Powerhouse featured as the case study in the 2019 edition of this report as initial projects started to be awarded contracts, but over ten years after it became an area of focus for government policy and regional investment, this edition looks at how construction activity and construction contract awards have evolved over that decade across the regions of the North East, the North West, Yorkshire and the Humber and North Wales. The data has also been broken down to cover what were labelled the "core cities" of Kingston-upon-Hull, Manchester, Liverpool, Leeds, Sheffield and Newcastle.

In terms of economic growth, average annual real GDP growth has outpaced UK-level GDP growth for the majority of Northern Powerhouse regions and cities; the North East, North Wales and Kingston-upon-Hull are the exceptions. Construction GVA growth over the period displayed a stronger average annual growth rate than the UK average in all regions and cities. Of course, context is everything and this report cannot determine if stronger growth rates in the Northern Powerhouse regions can be solely attributed to an increased government policy focus.

Northern Powerhouse	Annual average growth 2015-2024		
	GDP	Construction GVA	Contract awards
UK	1.5%	5.7%	3.7%
North East	1.3%	7.5%	1.6%
North West	1.9%	7.1%	2.8%
Yorkshire and the Humber	1.6%	7.3%	6.2%
North Wales	1.4%	7.4%	13.9%
Kingston-upon-Hull	1.3%	6.8%	204.2%
Manchester	4.8%	12.0%	19.3%
Liverpool	2.1%	7.3%	1.9%
Leeds	2.6%	8.1%	32.9%
Sheffield	1.8%	6.8%	-5.7%
Newcastle	2.2%	8.4%	0.7%

In terms of economic growth, average annual real GDP growth has outpaced UK-level GDP growth for the majority of Northern Powerhouse regions and cities.

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Average annual growth in contract awards was more varied, with a broad split between regions and cities where growth was above the UK outturn – Yorkshire and the Humber, North Wales, Kingston-upon-Hull, Leeds and Manchester and those where it was below – the North East, the North West, Liverpool, Newcastle and Sheffield.

Over the last ten years, some of the country's largest contract awards have been for projects in the Northern Powerhouse regions: the £2.3 billion Transpennine Route Upgrade in 2017, the £1.5 billion Sellafield Product and Residue Store Retreatment Plant (SRP) and the £1.5 billion Dogger Bank Creyke Beck offshore wind farm in 2020. All three are currently underway. Others have already completed such as the Tees Renewable Energy Plant and Everton FC's new stadium, which will have contributed significantly to regional construction activity.

Nevertheless, as is typical with large construction projects, final decision-making, contract award and project start are often subject to long lags for both publicly and privately funded schemes. Changes in the macroeconomic environment, construction costs and changes in investor and government priorities can all influence the speed at which projects proceed. Two privately-financed projects in the top 30 largest contract awards over the last decade remain either at the planning stage – the Able Marine Energy Park in the Humber Estuary – or subject to a final investment decision – the Wilton International lithium hydroxide manufacturing plant in Teesside, whilst the Wylfa nuclear power station, which would have been the second new nuclear power station after Hinkley Point C, was cancelled by its main investor in 2020, four years after contract award.

A similar fate has also hit two of the major roads projects that were among the region's largest contract awards. The M62 upgrade between junctions 20 and 25 was cancelled as part of the government's scrapping of smart motorways in 2023, whilst the A5036 Port of Liverpool access improvements scheme was paused in 2023 and pushed back into National Highways' RIS3 road investment period, before being officially cancelled in the Budget in October 2024 as the Treasury labelled it unfunded and affordable.

Two privately-financed projects in the top 30 largest contract awards over the last decade remain either at the planning stage or subject to a final investment decision.

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Top 30 Largest Contract Awards in the Northern Powerhouse	Region	Sector	Year awarded	Value	Status
Transpennine Route Upgrade - West Of Leeds	Yorkshire & the Humber	Infrastructure	2017	£2.3 billion	Underway
Dogger Bank Creyke Beck 1.4GW Offshore Wind Farm	Yorkshire & the Humber	Infrastructure	2020	£2.0 billion	Underway
Sellafield Retreatment Construction Programme	North West	Infrastructure	2019	£1.5 billion	Underway
Eastern Green Link 2 - Converter Station	Yorkshire & the Humber	Infrastructure	2024	£700 million	Early works
Tees Renewable 295MW Energy Plant	North East	Infrastructure	2016	£650 million	Complete
Sellafield - Clean-Up Decommissioning Programme	North West	Infrastructure	2016	£500 million	Underway
WI Lithium Hydroxide Manufacturing Plant	North East	Industrial	2022	£500 million	Final investment decision pending
Everton FC Stadium	North West	Commercial	2022	£500 million	Complete
Eastern Green Link 2 - HVDC Underground Cables	Yorkshire & the Humber	Infrastructure	2024	£500 million	Underway
Lostock Energy From Waste Facility (69.9MW)	North West	Infrastructure	2021	£480 million	Nearing completion
Wylfa Nuclear Power Station - Anglesey	North Wales	Infrastructure	2016	£450 million	Cancelled
Manchester Airport T2 Transformation Project	North West	Infrastructure	2016	£450 million	Nearing completion
HMP Millsike	Yorkshire & the Humber	Public Non-housing	2022	£400 million	Complete
M62 Junctions 20-25 Smart Motorway	Yorkshire & the Humber	Infrastructure	2020	£392 million	Cancelled
A1 Birtley To Coal House - Widening	North East	Infrastructure	2021	£370 million	Underway
A63 Castle Street Improvements	Yorkshire & the Humber	Infrastructure	2020	£355 million	Underway
Metrolink Scheme - Trafford Park	North west	Infrastructure	2017	£350 million	Complete
Keadby 2 - 840MW CCGT Power Station	Yorkshire & the Humber	Infrastructure	2018	£350 million	Complete
Co-Op Live Manchester Arena	North West	Commercial	2021	£350 million	Complete
Etihad Stadium - North Stand Extension	North West	Commercial	2024	£340 million	Underway
A5036 Port Of Liverpool Access Improvements	North West	Infrastructure	2022	£335 million	Cancelled
Manchester Town Hall Redevelopment	North West	Commercial	2019	£330 million	Underway
New Town Victoria North - 1551 Apartments	North West	Residential	2024	£330 million	Underway
Thirlmere-West Cumbria Link Water Mains Project	North West	Infrastructure	2017	£300 million	Complete
Blyth Offshore Wind Farm Demo Project - 41.5MW	North East	Infrastructure	2017	£300 million	Complete
Viadux Phase 1	North West	Residential	2020	£300 million	Complete
Monopile Manufacturing Facility & UK HQ	North East	Industrial	2022	£300 million	Complete
Able Marine Energy Park - Main Quay Works	North East	Infrastructure	2021	£285 million	Planning
Ferrybridge Multifuel 2 (MF2) Power Station	Yorkshire & the Humber	Infrastructure	2016	£258 million	Complete
Burbo Bank Offshore Windfarm Extension	North West	Infrastructure	2015	£250 million	Complete

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Methodology

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 2024 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 2024 with the average (median) value of contract awards over the last four years across the residential, commercial and infrastructure sectors. If 2024 contract values are significantly above the long-term average, then this is considered a hotspot. Conversely, a region is considered a coldspot if 2024 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 2018 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 International Territorial Level (ITL) level 3 groupings. This is one level above local authority-level data and is the UK standard for the subdivision of countries for statistical purposes. It mirrors the Nomenclature of Territorial Units for Statistics (NUTS) that is used by the EU.

There are 174 ITL3 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, data centres
- **Infrastructure:** railways and stations, roads, bridges, ports, harbours and waterways, energy and utilities

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