Retail Construction and Refurbishment Market Report - UK 2018-2022

Published: 16/08/2018 / Number of Pages: 56 / Price: £895.00

Introduction and Overview

The 5th edition of the **'Retail Construction and Refurbishment Market Report - UK 2018-2022'** analyses the key issues underpinning the UK retail sector and focuses on the long-term estate strategies and construction and development programmes of the leading retailers in both the grocery and non-food sectors. The report should be of particular interest to retailers, supply chains and construction professionals in the commercial retail sector.

Key issues covered in the report:

- Construction output in the retail sector.
- Structure, size and value of the UK retail sector - retail sales growth 2012-2017 and forecasts to 2022.
- Retail construction supply chains: Tesco; ASDA; Sainsbury'; Morrisons; Waitrose; Lidl; Aldi; Co-operative.
- Detailed analysis of issues affecting retail construction.
- Review of key construction companies and contractors in the retail sector.

Areas of particular interest:

- The structure and size of both the grocery and non-food sectors (including convenience, discount and online retailing), together with projections for growth over the next few years and key drivers of expansion in the retail sector including convenience and online.
- Current and future development pipelines and expansion plans of the 'big four' supermarkets, discounters and convenience store chains as well as non-food multiples and major department stores.
- Detailed assessment of retail new build construction output, RMI and shopfitting, together with estimated forecasts for growth over the next few years.

Some of the companies included:

Alan Nuttall Partnership, Barnwood Shopfitting, Bowmer & Kirkland, Bridgford Interiors, British Land, Caddick, Cardinal Shopfitting, Clegg Construction, Commercial Development Projects, Conamar Construction, CTS (Shopfitting), Ellmer & Chorus, Fit Out UK, Goodman Hichens, Hammerson, Havelock Europa, Harvey Shopfitters, Henry Boot, Intu, ISG, Jessops Construction, Kier, Land Securities, MACE, McLaughlin & Harvey, McLaren Construction, Morris & Spottiswood, Muir Construction, Portview Fit-Out, Powells Group, Railston, RG Group, Readie Construction, Seddon Construction, SFD -UK, Simons Group, Simpson (York), Speller Metcalfe, Styles & Wood, Tolent, Willmott Dixon, Winvic Construction and more.

RETAIL CONSTRUCTION AND REFURBISHMENT

- Construction market overview: total construction output to 2022; non-residential construction output; output by sub-sector.
- Construction output in the retail sector & shopfitting market in the UK.
- Building programmes in the retail sector: overview; current trends in store size and formats.
- Retail development pipeline, shopping centre development.
- Grocery retail development pipeline; grocery pipeline - impact on construction contractors.
- Building programmes and expansion plans leading retailers: grocery retail; non-food retail.

ISSUES AFFECTING RETAIL CONSTRUCTION

- Planning issues: overview; changes to the national planning policy framework (NPPF).
- Other issues: change of use legislation; business rates; rise of online retailing; etc.
- The Grimsey and Portas reviews - an update.
- Land and planning issues - the 'Big Four' supermarkets land and development activities.
- Sustainable construction in the retail sector: retailer progress on reducing carbon emissions; BREEAM rating for retail.

RETAIL MARKET IN THE UK

- Structure, size and value of the UK retail sector; retail sales and consumer spending.
- Store closures/administrations in the retail sector.
- The grocery market: overview and market size and structure; Sainsbury's/ASDA merger 2018.
- Leading supermarket chains and superstores - company overview; property portfolio, future plans: Tesco; ASDA; J Sainsbury; WM Morrison; other supermarket groups.
- Convenience retailing; discount/value retailing.
- Non-food retailing: clothing & footwear; electrical appliances & consumer electronics; DIY & hardware; furniture & furnishings.
- Leading non-food retailers, chains and department stores - expansion plans.
- Out of town retail parks/retail warehouse construction.

CONSTRUCTION SUPPLY IN THE RETAIL SECTOR

- Retail construction supply chains: Tesco; ASDA; Sainsbury'; Morrisons; Waitrose; Lidl; Aldi; Co-operative.
- Key construction companies and contractors in the retail sector.
- Value of construction projects by sub sector.
- Retail sector projects: contractor's market share.
- Leading contractors in the grocery/food retail sector & the general retailing sector; retail contractor profiles.

- Leading shopfitting companies & leading developers in the retail sector.

Report Summary

Over the last 10 years retail construction output has been on an underlying downward trend, firstly because of the recession and subsequently because of pressure on the housing sector and uncertainties surrounding 'Brexit'. Between 2007 and 2017, contractors output declined from £8.3bn to £6.1bn, and annual growth since 2015 has been static.

At a sub-sector level, fortunes have been mixed with expansion within the discount sector but a reduction in newbuild and output in the supermarket and High Street segments. The race to build large superstores in the grocery sector has now all but ended and larger retailers are being forced to re-evaluate their property portfolios in the face of increased competition from the value and convenience retailers and from online and 'click and collect' services. Sub-letting and re-purposing space is being deployed at both existing and new stores, particularly at out-of-town locations

Retail construction, whilst challenging for the contractor and offering slim margins, does offer repeated high volumes of work, especially in the grocery sector. In the discount grocery sector, where expansion programmes have remained relatively strong so far has been an area offering opportunities for contractors, which helped to maintain order books and work pipelines.

The continued trend for many retail projects is now for inclusion within mixed use developments and there has been a significant shift from purely retail-driven outlets to 'destination' mixed retail, leisure and family entertainment venues. The extent and speed of the recovery for retail remains heavily dependent upon levels of consumer confidence and spending, which are currently being impacted by the ongoing uncertainty surrounding the Brexit process.

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