

UK Construction Market Report

UK Construction Market Size - By End-Use (Private, Public), By Contracting Type (General, Design-Build, Construction Management), By Scale (Mega, Major, Medium, Small), Type & Global Forecast, 2023 – 2032

About GMI

Global Market Insights (GMI) is a global market research and management consulting company catering to corporations, non-profits, universities, and government agencies. Our goal is to partner with organizations to make sustained strategic improvements and meet growth goals.

Our industry research reports are designed to provide quantifiable information combined with key industry insights. We aim to provide the necessary data to our clients to ensure sustainable organizational development. Whether exploring new markets, developing new grades, or taking advantage of niche growth opportunities, we have reports to accelerate and enhance our clients' strategies.

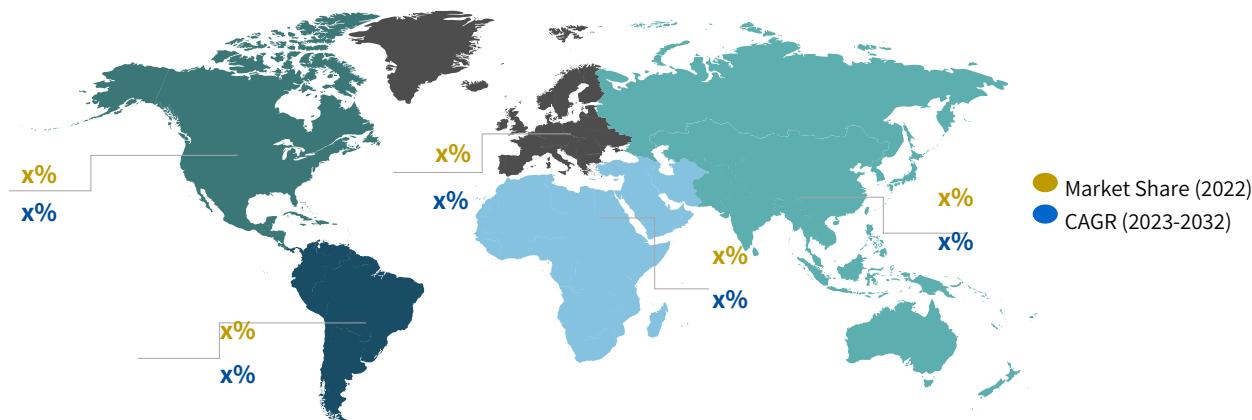
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About the Report

UK Construction Market

A USD 239.46 Billion Market Opportunity by 2032, Growing at a CAGR of over 3.5%



The market report offers a detailed analysis about the market growth, market insights, current trends, opportunities, and challenges in the rapidly evolving landscape. This report serves as a valuable resource for businesses, organization, associations, government, industry professionals, and decision-makers seeking to gain a deeper understanding of the market dynamics and leverage key insights to drive strategic growth.

The report answers the following questions:

- **Market Size and Growth:** The study provides an accurate assessment of the current market size and future growth potential. These granular insights can be resourceful to identify new potential markets, revise investment strategies, align resources among others.
- **Competitive Landscape:** The study provides a thorough analysis of the competitive landscape. Our study includes detailed profiles of major companies, their market share, SWOT analysis, product offerings, and strategic initiatives. This exhaustive landscape will help you to glean insights to inform your business strategies.
- **Industry Trends, Opportunities and Risk Assessment:** The report discusses the latest trends shaping the industry. Our research explores various business trends, emerging technologies and trends, market driving forces, and their impact on the market. The report also assesses the attractiveness of the industry using Porter's Five forces, and pinpoint areas where you can adjust your strategy to improve profitability.
- **Impact Analysis:** Various scenarios were studied, and the most likely model is devised to measure the impact of COVID-19 pandemic and Russia-Ukraine war.
- **Geographical Analysis:** The report provides insights into various dynamics and growth opportunities of various segments and sub-segments at the global, regional and country level.

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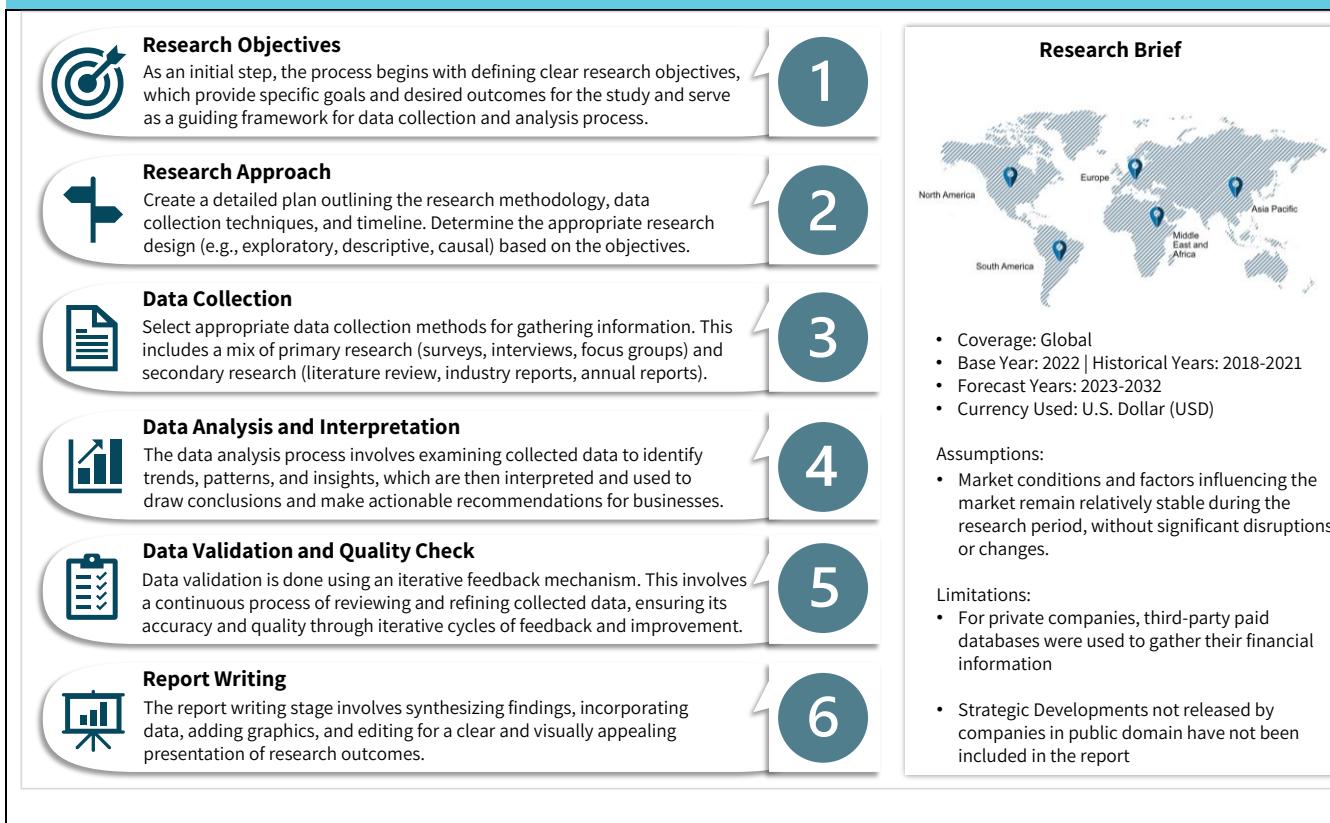
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Chapter 1 Research Methodology

1.1 Research design

Global Market Insights has followed a rigorous and comprehensive research methodology to calculate the statistical data points present in this report. An exclusive research design was devised for this study which includes data collection techniques, top-down and bottom-up approach, forecast model, and validation process.

FIG. 1 Research design



1.2 Data collection techniques

For our market research study, we employed a combination of primary and secondary data collection techniques. Primary data collection involved surveys, interviews, and observations to gather new and original data directly. Secondary data collection involved sourcing credible information from industry reports, government publications, non-profit organizations, association, academic research papers, paid databases, magazines among others. These sources supplemented our primary research findings, providing valuable background information, market trends, and statistical data. By utilizing both primary and secondary techniques, the report ensures a comprehensive analysis, delivering reliable insights for informed decision-making.

FIG. 2 Data collection techniques

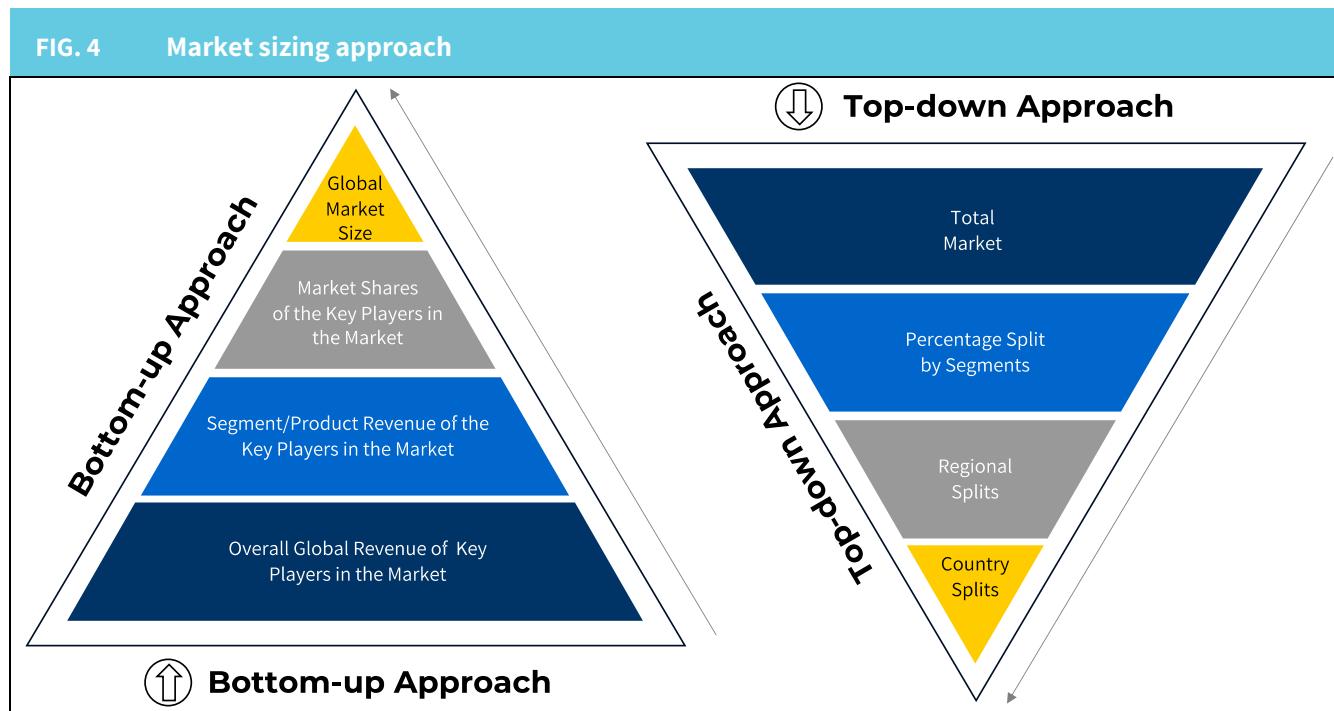


FIG. 3 Primary research process

1.3 Market size estimation

In order to determine the market size for our research study, we employed both top-down and bottom-up approach that allowed for a comprehensive and accurate estimation. Firstly, we employed the bottom-up approach, where we collected data from individual companies and market participants to estimate their market share and then aggregated the data to arrive at the total market size. This approach involved conducting surveys, interviews, and analyzing financial reports to gather detailed information on company revenues and market share.

Additionally, we utilized the top-down approach, which involves analyzing industry-level data and market indicators to derive the overall market size. This approach included examining relevant reports, industry databases, and government publications to gather data on the total revenue generated by the market players and key industry segments. By combining these techniques, we ensured a robust and reliable calculation of the market size, providing our client with a comprehensive understanding of the market's magnitude and potential.

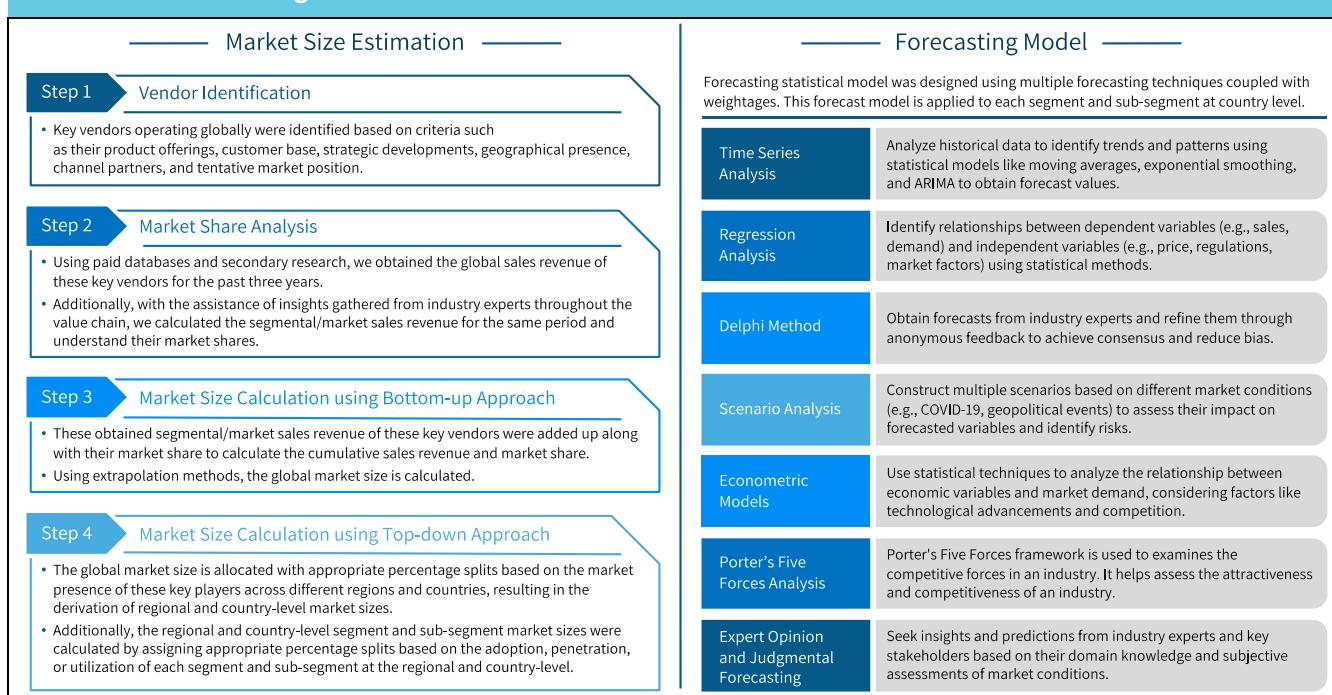
FIG. 4 Market sizing approach

1.4 Forecasting model

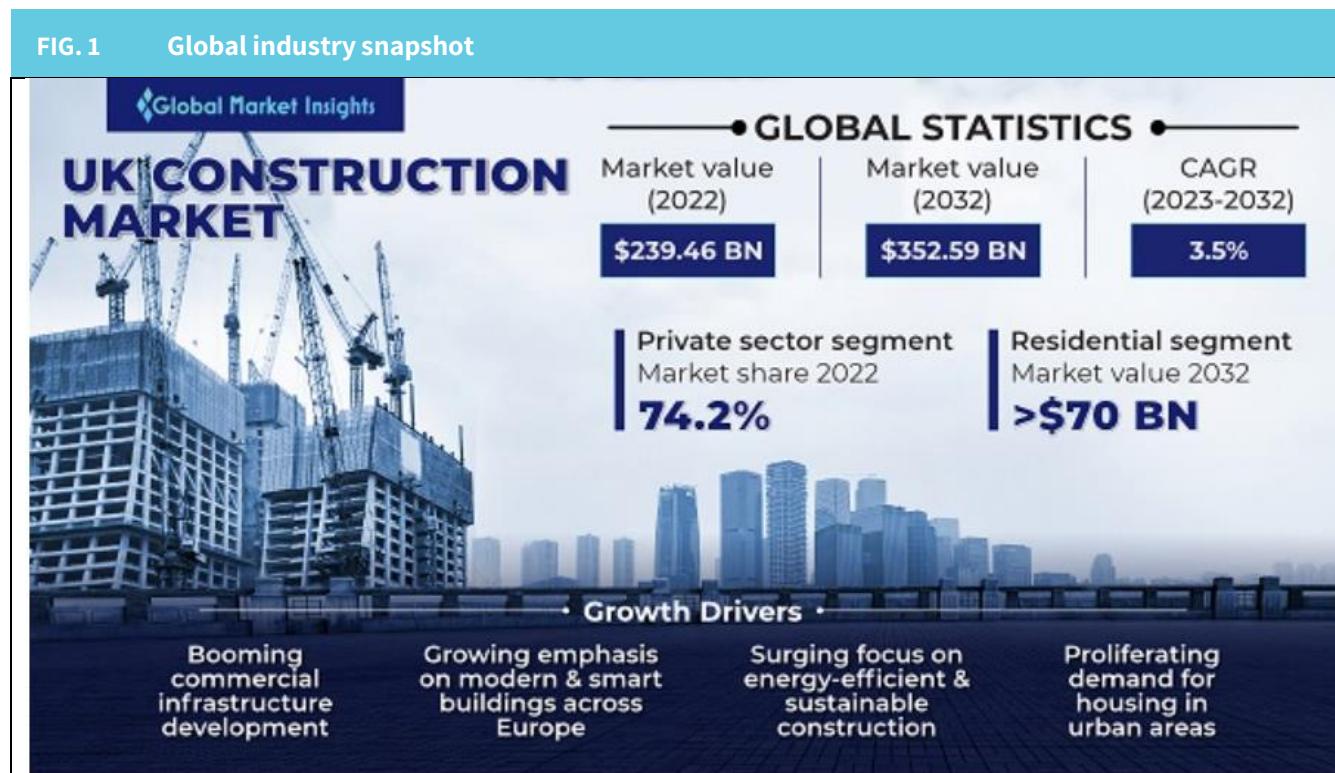
Forecasting statistical model was designed using multiple forecasting techniques coupled with weightages. This forecast model is applied to each segment and sub-segment at country level. For each country level markets, key industry impact forces were analyzed and assigned weights in order of their importance. These weights were distributed across the forecast period and a country growth rate was derived. Some of the major parameters include:

- Historical market performance
- Macro and Micro-economic performance
- Market dynamics
- Regulatory framework
- Adoption trends
- Technological advancements
- Infrastructure development
- Raw material trends

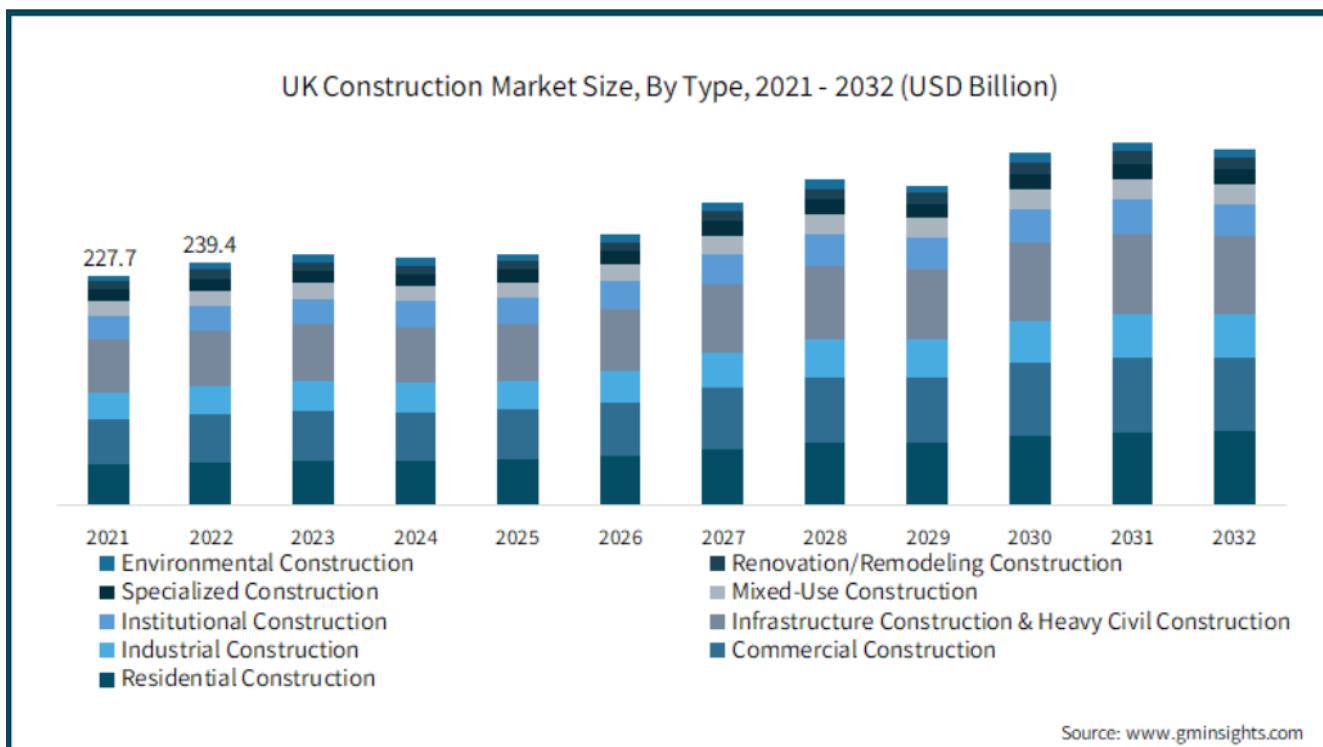
The impact of various competitive strategic developments such as merger & acquisition, partnership, collaborations, new product launches, new innovation, etc. were also considered while forecasting the market size.

FIG. 5 Forecasting model


Chapter 2 Executive Summary

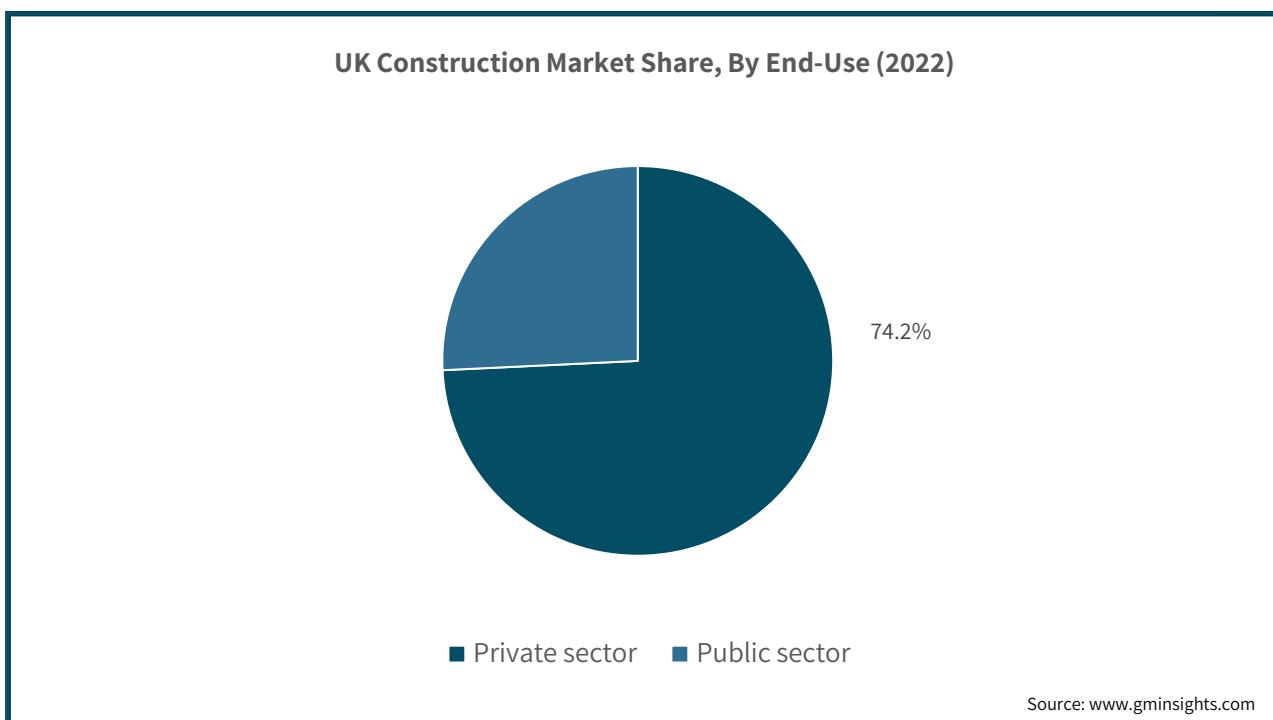


2.1 Construction Type trends



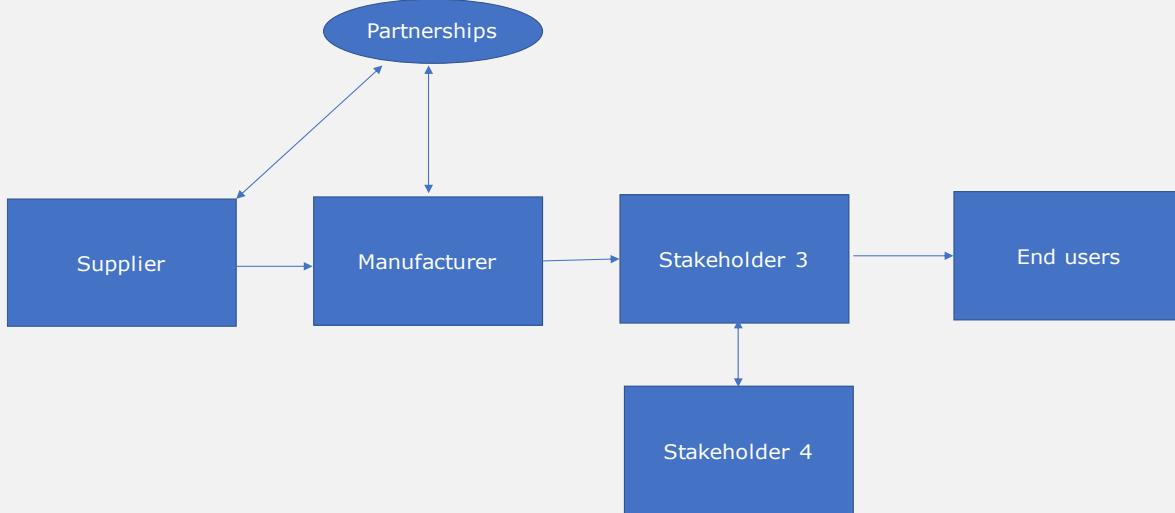
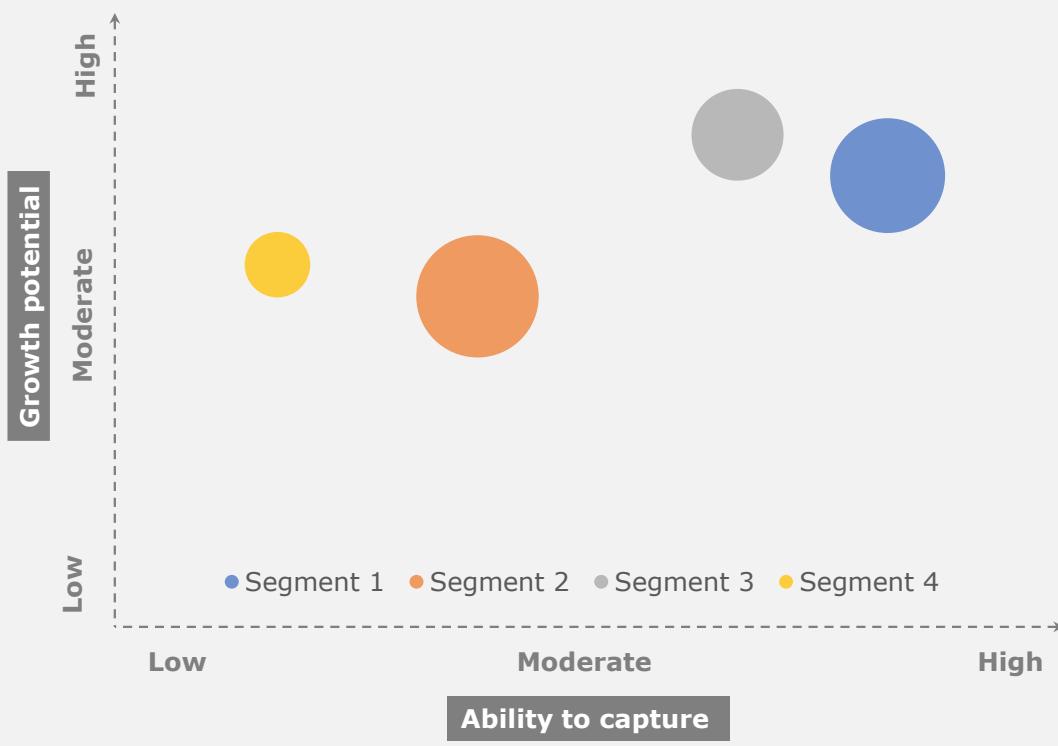
Based on type, the market is segmented into residential, commercial, industrial, infrastructure & heavy civil, institutional, mixed-use, specialized, renovation/remodeling construction, and environmental. The residential segment held a share of over 15% in 2022 and will be valued at over USD 70 billion in 2032. The increasing demand for housing, driven by population growth and urbanization, will spur the development of new residential projects. Additionally, government initiatives to address housing shortages and promote affordable housing will contribute to the residential construction sector segment expansion. Advancements in technologies and sustainable building practices will also play a role in attracting investments and driving growth in this segment.

2.2 End-use trends



Based on end use, the market is bifurcated into private sector and public sector. The private sector segment held a market share of 74.2% in 2022. The private sector is witnessing an increasing emphasis on sustainability in its construction projects. They are integrating green building practices, renewable energy systems, and eco-friendly materials, thereby aligning with the country's commitment to environmental preservation & sustainable development. Moreover, the emergence of construction technology startups in the UK private sector has spurred innovation and fostered growth, driving advancements in construction practices and enhancing overall efficiency. These developments reflect the construction industry's commitment to embracing eco-conscious approaches and adopting cutting-edge technologies for a more sustainable future.

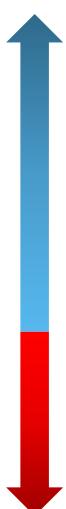
Chapter 3 Industry Insights

FIG. 2 Industry ecosystem analysis**FIG. 3** Growth potential analysis

3.1 Impact of coronavirus (COVID-19) pandemic

The COVID-19 pandemic imposed a global shutdown and several restrictions. Many construction projects were temporarily halted or delayed, causing disruptions and financial losses. Social distancing measures and health protocols led to productivity challenges on construction sites. Supply chain disruptions and increased costs of construction materials further added to the industry's difficulties. However, as the situation improved and restrictions eased, construction activity gradually resumed but the pandemic's effects continued to shape the market dynamics.

TABLE 1 Industry impact forces



| Growth driver | Short term | Medium term | Long term |
|--|------------|-------------|-----------|
| Booming commercial infrastructure development | x | x | x |
| Growing emphasis on modern & smart buildings across Europe | x | x | x |
| Surging focus on energy-efficient & sustainable construction | x | x | x |
| Proliferating demand for housing in urban areas | x | x | x |
| Industry pitfall | Short term | Medium term | Long term |
| Shortage of skilled labor | x | x | x |
| Rising geopolitical issues | x | x | x |

3.1.1 Growth drivers

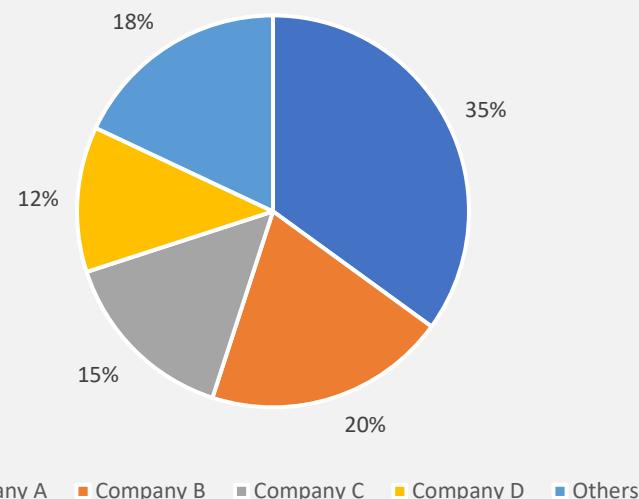
3.1.1.1 Growing emphasis on modern & smart buildings across UK

As European countries prioritize energy efficiency, sustainability, and technological integration in building projects, the UK construction sector has been compelled to adapt to these evolving trends to remain competitive. Developers and clients in the UK are increasingly seeking innovative solutions that optimize resource consumption, enhance occupant comfort, and reduce operational costs. This demand has spurred investments in smart technologies, Building Information Modeling (BIM), the Internet of Things (IoT) applications, and green building practices. As a result, UK construction companies are embracing advanced construction methods and materials, attracting international collaborations & opportunities and bolstering the country's position as a forward-looking player in the European construction industry.

Chapter 4 Competitive Landscape, 2022

4.1 Company market share analysis

FIG. 4 Company market share, 2022



Note: The above chart is representational

4.2 Competitive analysis, 2022

FIG. 5 Competitive analysis of major market players, 2022



Source: Global Market Insights, Paid Databases, Primary Research

4.2.1 Chart Key

- **Product innovation:** Indicates the ability of a vendor to consistently launch innovative products/services that are regularly updated and offer customers with novel & cutting-edge technologies. A higher score indicates better performance.
- **Product differentiation:** The design and delivery of a service to have unique & valuable characteristics as compared to other services in the market.
- **Partnerships/Collaborations:** Provide a gauge for vendor strategic alliances based on partnerships with the leading industry giants, distributor networks, and technology partners. A higher score indicates better performance.
- **Product capability:** Measures the performance and inherent features of a vendor's offerings based on the ease of use, functionalities, and enterprise value addition. A higher score indicates better performance.
- **Geographic presence:** Geographic presence measures the availability of the company's products & services across various regions.

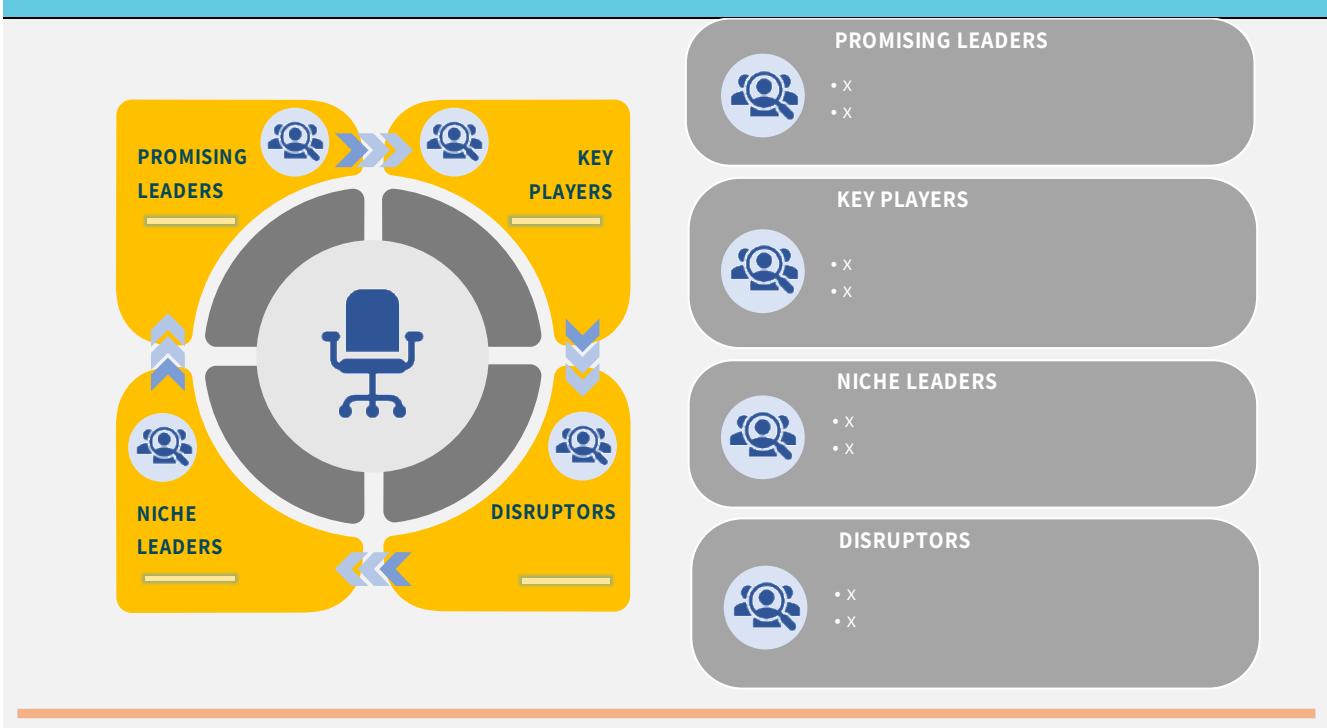
TABLE 2 Competitive analysis of major market players

| Factor | Company A | Company B | Company C | Company D | Company E |
|-------------------------------|-----------|-----------|-----------|-----------|-----------|
| Product Capability | x | x | x | x | x |
| Product Innovation | x | x | x | x | x |
| Product Differentiation | x | x | x | x | x |
| Collaborations & Partnerships | x | x | x | x | x |
| Geographical Presence | x | x | x | x | x |

Source: Global Market Insights, Paid Databases, Primary Research

4.3 Competitive positioning matrix

FIG. 6 Competitive positioning matrix



Source: Global Market Insights, Paid Databases, Primary Research

The competitive positioning quadrant includes vendors offering diverse products, solutions, or services existing in the market. The companies or vendors are segregated based on services and applications, or their Unique Selling Points (USPs). Thus, the quadrant model has four categories: promising leaders, key players, niche leaders, and disruptors.

Given below are the classification criteria for categorizing the companies identified into the four quadrants.

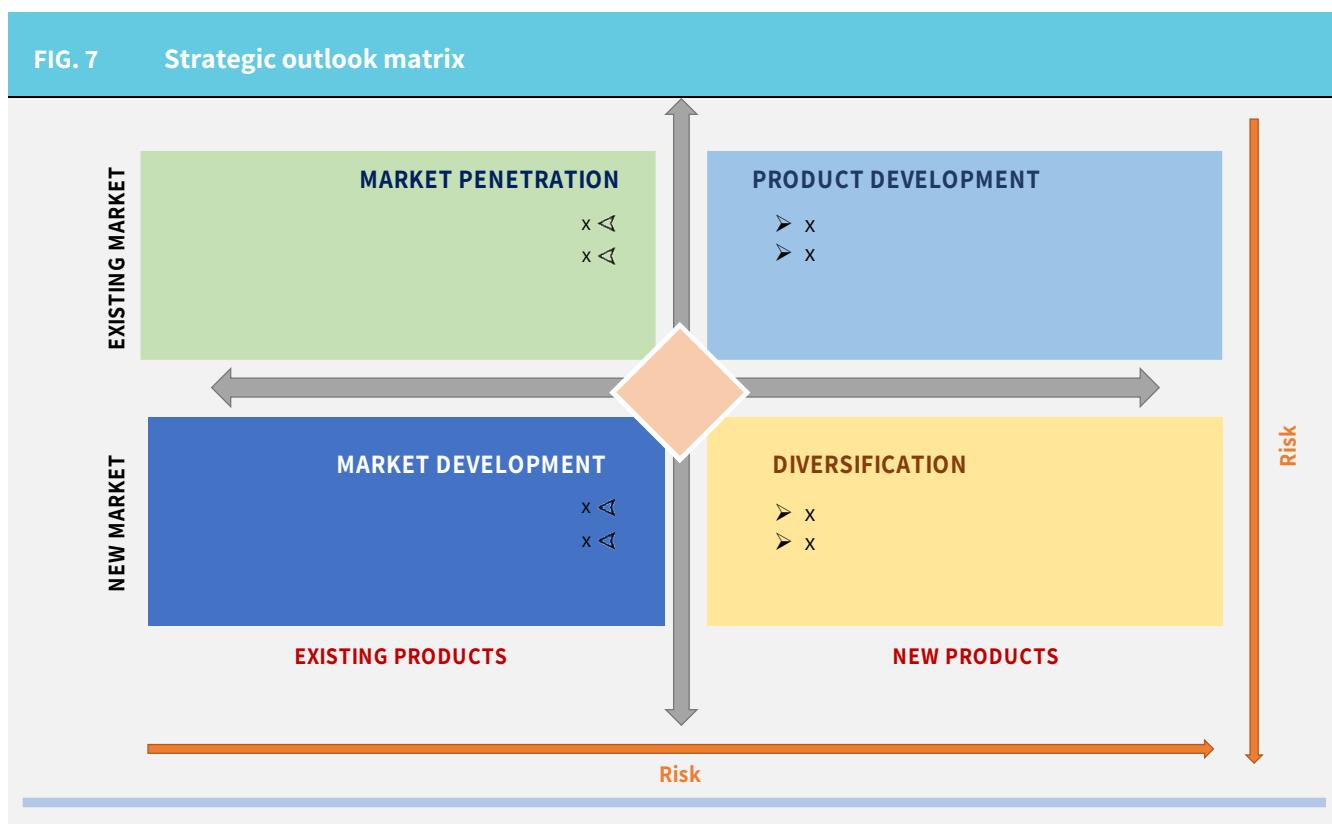
TABLE 3 Competitive positioning matrix: Classification criteria

| | |
|--------------------------|---|
| Key Players | <p>These companies rank at the top in the market. They offer their products or services to a broad customer base and are actively involved in the market. Together, these companies account for a majority of the overall market share.</p> <p>Key attributes:</p> <ul style="list-style-type: none"> • Large market revenue • Strong brand presence • Broad customer base |
| Promising Leaders | <p>These are similar to the key players but may need more technological advancements to offer their products/solutions to a broader customer base. They typically offer differentiated products to expand their market share.</p> |

| | |
|----------------------|--|
| | <p>Key attributes:</p> <ul style="list-style-type: none"> • Differentiated offerings • Notable market share • R&D investments |
| Niche Leaders | <p>These companies actively focus on one product or brand and aim to create their space/positioning within a segment.</p> <p>Key attributes:</p> <ul style="list-style-type: none"> • Specialized in offering one particular service/product • Continued product/market development initiatives within their focus areas |
| Disruptors | <p>These companies strive to create a market value. They generate new growth opportunities by launching innovative products for market disruption.</p> <p>Key attributes:</p> <ul style="list-style-type: none"> • Strong focus on innovations • Concentrated effort to secure investments |

4.4 Strategic outlook matrix

FIG. 7 Strategic outlook matrix



Source: Global Market Insights, Paid Databases, Primary Research

Chapter 5 UK Construction Market, By End-Use

5.1 Private

The private sector is driving market growth through the adoption of innovative construction methods & technologies. Companies are exploring modular construction, prefabrication, and off-site manufacturing techniques, which is resulting in faster project deliveries, cost savings, and enhanced quality. Private sector firms in UK are increasingly prioritizing sustainability in their construction projects. They are incorporating green building practices, renewable energy systems, and eco-friendly materials, thereby aligning with UK's commitment to environmental preservation and sustainable development.

TABLE 4 Private construction market size, 2018 - 2022 (Revenue)

| | 2018 | 2019 | 2020 | 2021 | 2022 |
|-------------|------|------|------|------|------|
| USD Million | x | x | x | x | x |

Source: Global Market Insights, Paid Databases, Primary Research

TABLE 5 Private construction market size, 2023 – 2032 (Revenue)

| | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | CAGR (2023–32) |
|-------------|------|------|------|------|------|------|------|------|------|------|----------------|
| USD Million | x | x | x | x | x | x | x | x | x | x | x |

Source: Global Market Insights, Paid Databases, Primary Research

Chapter 6 Company Profiles

6.1 Acciona, S.A.

6.1.1 Business Overview

| Snapshot | |
|--------------------------|--|
| Headquarters | UK |
| Year of Establishment | 1997 |
| Employees | Approximately 41,664 (2022) |
| Traded | ANA (BME) |
| Type | Public Company |
| Market Value | USD 7.69 Billion (As of August 2023) |
| Regional Presence | Europe, the Americas, Asia, and Oceania |
| Role in the Supply Chain | Providing services and infrastructure across multiple sectors, including energy, water, infrastructure, and sustainable services |
| Business Segments | <ul style="list-style-type: none"> • Renewable Energy • Infrastructure • Water • Services • Concessions |
| Subsidiaries | ACCIONA Energía, etc. |

6.1.2 Financial Data

(All numbers are in USD million)

| Year | H1, June 2023 | 31-December-2022 | 31-December-2021 | 31-December-2020 |
|-------------------|---------------|------------------|------------------|------------------|
| Filed Currency | EURO | EURO | EURO | EURO |
| Exchange Rate | 0.951 | 0.951 | 0.846 | 0.877 |
| Revenue | 7419.5 | 11,772.0 | 9579.2 | 7379.7 |
| EBITDA | 971.6 | 2,175.0 | 1753.0 | 1281.6 |
| Profit before Tax | 538.3 | 646 | 477.5 | 468.6 |
| Net Profit | 491.0 | 464.0 | 392.4 | 433.3 |

| Revenue, by Business | | | | |
|----------------------|--------|---------|--------|--------|
| Energy | 1850.6 | 4,575.0 | 2922.0 | 2029.6 |
| Infrastructure | 3821.2 | 6,326.0 | 5756.5 | 5122.0 |
| Other Activities | 574.1 | 1,244.0 | 1247.0 | 431.0 |

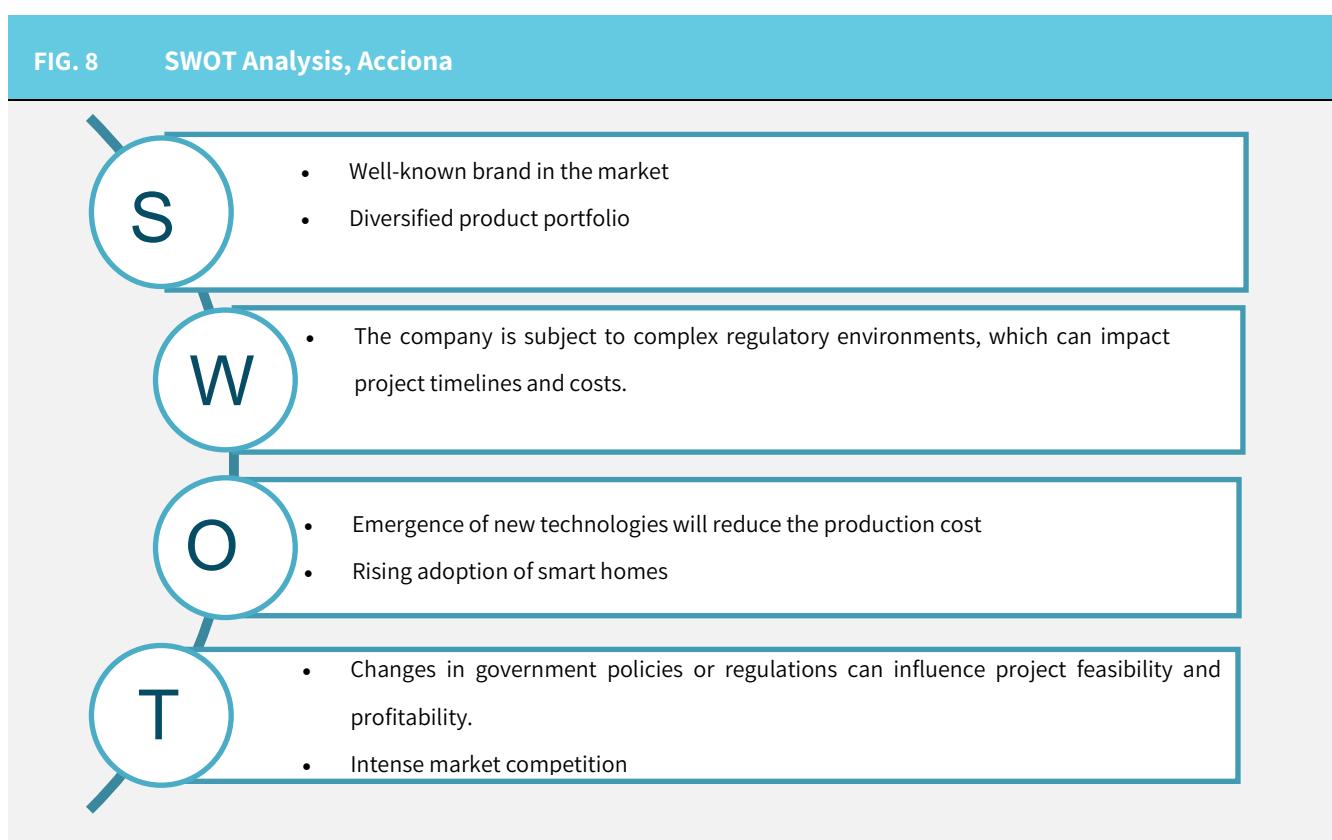
6.1.3 Product Landscape

| Product/Service | Feature/Application |
|--------------------|--|
| Real Estate | <ul style="list-style-type: none"> ACCIONA helps transform cities into productive wellbeing spaces for living, promoting socio-economic development. The company is committed to real estate development, supported by a range of complementary services, whose purpose is to design the sustainable cities of the future in complete harmony with environmental protection. ACCIONA's real estate solutions focus on the promotion and management of real estate complexes, based on solid technical and professional experience in UK. These solutions conceive a digital and sustainable future underpinned by the application of the most advanced technologies and efficient materials that respect the planet. |
| Efficient Building | <ul style="list-style-type: none"> ACCIONA provides sustainable solutions that have already been applied in pioneering projects in UK in zero emissions building (the company's headquarters in Navarra, UK), and bioclimatic building, with LEED and BREEAM certification. The company contemplates efficiency criteria in materials and systems in each building project, as well as its location in the area - climate, environment, and existing resources. The result is smart and eco-efficient buildings, which save energy and water, the construction process for which is increasingly respectful of the environment. In fact, in the last three years, ACCIONA's works have reduced greenhouse gases by 35 % and over 80 % of revenue incorporates social management as a priority. |

6.1.4 Strategic Outlook

| Market Strategy | Initiatives |
|-----------------|--|
| New Projects | <ul style="list-style-type: none"> In January 2023, ACCIONA Energía began operations at the photovoltaic complex Extremadura I, II, and III (125MWp) in Almendralejo (Badajoz), UK's largest solar complex. Extremadura I, II, and III, comprised of over 230,000 photovoltaic modules, will generate 257GWh of clean electricity per year, equivalent to the consumption of approximately 65,000 homes, and will avoid the annual emission of approximately 112,000 tons of CO2. As part of its commitment to the communities in which it operates, ACCIONA Energía will invest a portion of the plant's benefits in social projects. The 'Colabora Almendralejo' programme is being implemented by the company in collaboration with the City Council of Almendralejo and AlmaNatura. |

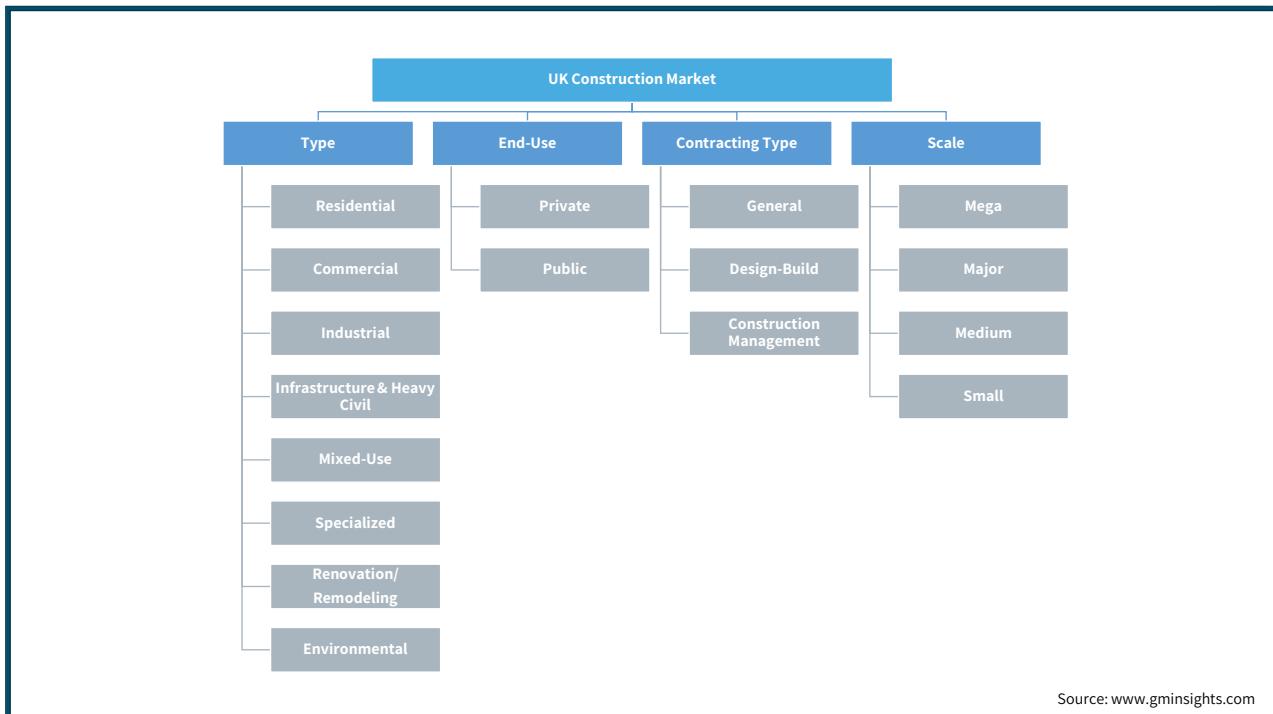
6.1.5 SWOT Analysis



Source: Industry Associations & Journals, Company Annual Reports, Owler Pro, Primary Interviews, Global Market Insights

Chapter 7 Appendix

7.1 Segmentation



7.2 Market definitions

The **construction market** refers to the overall industry or sector that encompasses all activities related to the planning, design, development, and construction of buildings, infrastructure, and other physical structures. It involves a wide range of projects: small residential renovations, large-scale commercial developments, and complex infrastructure projects.

- By **type**, the market is segmented into residential construction, commercial construction, industrial construction, infrastructure & heavy civil construction, institutional construction, mixed-use construction, specialized construction, renovation/remodeling construction, and environmental construction
 - **Residential construction** refers to the process of building residential structures such as houses, apartments, townhouses, or condominiums. It involves the planning, design, and construction of homes to meet the specific needs & preferences of homeowners or occupants. Residential construction projects can vary widely in terms of size, complexity, and architectural styles.
 - **Commercial construction** refers to the process of building structures that are intended for commercial or business purposes. It involves the construction of building types such as office

buildings, retail stores, sports facilities, warehouses, hotels, restaurants, and other facilities used for commercial activities.

- **Industrial construction** refers to the process of building structures specifically designed for industrial purposes. It involves the construction of facilities such as factories, manufacturing plants, power plants, refineries, warehouses, distribution centers, and other industrial complexes.
 - **Infrastructure construction and heavy civil construction** are related fields that involve the construction of large-scale public infrastructure projects such as roads, highways, bridges, tunnels, airports, seaports, railways, water supply & treatment systems, sewage systems, dams, and power generation & transmission systems.
 - **Institutional construction** refers to the process of building or renovating structures specifically intended for institutional purposes. Institutional buildings are designed to serve public or private organizations, such as educational institutions and healthcare facilities, that provide essential services to the community.
 - **Mixed-use construction** refers to the development of buildings or complexes that combine multiple functions within a single project. These projects integrate residential, commercial, and/or institutional components into a cohesive and interconnected space. The aim is to create a vibrant & sustainable environment that supports various activities and promotes walkability.
 - **Specialized construction** refers to demolition services, which are provided by various companies before the start of any renovation or redevelopment projects.
 - **Renovation or remodeling construction** refers to the process of making changes or improvements to an existing building or structure. It involves updating, modifying, or upgrading the interior or exterior of a building to enhance its functionality, aesthetics, or performance.
 - **Environmental construction**, also known as green construction or sustainable construction, refers to the practice of designing & constructing buildings and infrastructure in an environmentally responsible and resource-efficient manner. The goal of environmental construction is to minimize the environmental impacts of construction activities while creating structures that are energy-efficient, environment-friendly, and promote sustainable living.
- By **end use**, the market is segmented into the private sector and public sector.
 - The **private sector** refers to businesses, organizations, and individuals that are privately owned and operated. In the UK construction market, the private sector includes construction projects initiated, financed, and undertaken by private companies or individuals. These projects include residential

- developments, commercial buildings, industrial facilities, and other privately funded construction endeavors.
- The **public sector** comprises government entities including local, regional, and national authorities. It refers to construction projects initiated and funded by government entities. These projects can include infrastructure development, public buildings, social housing, and other construction initiatives undertaken to serve the public interest.
 - By **contracting type**, the market is segmented into general contracting, design-build contracting, and construction management.
 - **General contracting** is a traditional construction method where a contractor is responsible for overseeing the entire construction process. This includes project management, procurement of materials and labor, coordination of subcontractors, and ensuring successful completion of the project.
 - **Design-build contracting** is a project delivery method where a single entity is responsible for both the design and construction aspects of a project. The design-build contractor is involved from the initial concept to the final construction, providing integrated and streamlined services.
 - **Construction management** involves a professional management approach to oversee and coordinate all aspects of a construction project. The construction manager acts as a representative of the owner and provides services such as project planning, cost estimation, scheduling, subcontractor coordination, and quality control.
 - By **scale**, the market is segmented into mega projects, major projects, medium projects, and small projects.
 - **Mega projects** refer to large-scale & high-value construction endeavors that involve significant investments, extensive planning, and long-term timelines. These projects often include infrastructure developments such as airports, seaports, high-speed rail networks, or major mixed-use complexes.
 - **Major projects** encompass construction projects that are distinguished by their size and complexity. They typically involve the construction of significant buildings such as hospitals, universities, research centers, sports stadiums, or large-scale commercial or residential complexes.
 - **Medium projects** involve construction ventures of a moderate scale and complexity. They can include mid-sized residential complexes, office buildings, schools, shopping centers, or local infrastructure developments that contribute to urban development and community growth.
 - **Small projects** include relatively smaller-scale construction activities such as individual homes, small commercial buildings, renovations, or localized infrastructure improvements. These projects

are generally carried out by smaller construction firms or individual property owners and cater to specific local needs or individual requirements.

7.3 Available customization

The scope of this research study can be customized to include:

- Additional country-level markets
- Additional / modified industry segments
- Additional company profiles
- Region or country-specific competitive analysis
- Pricing analysis
- Voice of Customer Study
- Brand perception analysis
- Go-to-market strategy
- Partner identification
- Product benchmarking

7.4 Related studies

| |
|--|
| Bridge Construction Market |
| Civil Engineering Market |
| Spain Construction Market |
| Germany Construction Market |
| Highway, Street and Bridge Construction Market |

7.5 Research practices

GMI offers market intelligence through industry clusters that cover a diverse range of sectors, including technology, healthcare, finance, energy, consumer goods, functional foods, and more. By organizing our market intelligence into industry-specific clusters, we ensure that our customers have access to in-depth insight specific to their focus areas. Each cluster comprises multiple reports that delve into market growth opportunities, trends, competitive landscape, and dynamics.

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