LOCARLA

UK Social Housing R&M Procurement Report

SEVEN-YEAR MARKET ANALYSIS (2019–2025)

TRADES | AUTHORITIES | CONTRACTORS | PROCUREMENT DYNAMICS

2026

A data-driven review of UK social housing awards, analysing market structure, concentration, procurement trends, and pipeline exposure across core maintenance and compliance trades.

Table of Contents

This report provides a structured analysis of social housing repairs and maintenance procurement, drawing on published contract awards to assess spend trends, award volumes and market concentration across the sector.

Coverage at a glance

Core trades (7 years: 2019–2025)
Responsive Repairs | Planned Works | Gas | Voids
5,134 contracts | **£36bn** total value

Supplementary trades (5 years: 2021–2025)
Fire Safety | Roofing
2,004 contracts | **£2.6bn** total value

Geograhy
UK social housing sector (Housing Associations and Local Authorities)

In total, **7,138 contracts valued at £39bn** are analysed to benchmark market activity, supplier performance and upcoming renewal pipelines.

Methodology & Coverage Notes

- Contract data is compiled from published award notices, supplemented where available by announcements in news, minutes, and verified public or social media sources.
- Values reflect the full contract term, including all stated extensions.
- Where award values are not disclosed, estimates are derived using standard trade rates applied to the reported number of homes. This methodology is applied consistently across all core leagues.
- Integrated or multi-trade contracts are classified under Responsive Repairs only to avoid double counting across trades.
- Gas Servicing excludes Commercial Gas and Heat Network works.
- Planned Works includes programmes such as kitchens, bathrooms, doors and windows, and may incorporate heating, roofing or retrofit elements; these are recorded only within Planned Works and not duplicated in Gas or Roofing leagues.
- Call-off contracts are identified where explicitly stated in award documentation.

The findings are presented for analytical and market intelligence purposes only. While care has been taken to ensure accuracy, this report should not be relied upon as a substitute for formal procurement, financial, or investment advice.

Insights are AI-generated based on analysed contract data.

UK Social Housing R&M Market

Key Metrics Overview

7 years of awards distilled into key metrics, highlighting the scale, structure & competitiveness of the R&M market.

£36bn

Total Market Value (7 Years)

Awarded contract value across 7yrs of UK social housing maintenance and capital investment.

5,134

Total Contracts Awarded

Contract awards spanning Responsive Repairs, Planned Works, Gas Servicing & Heating and Voids.

49%

Top 10 Market Concentration

Share of total contract value secured by the ten highest-value contractors, indicating sector consolidation.

11%

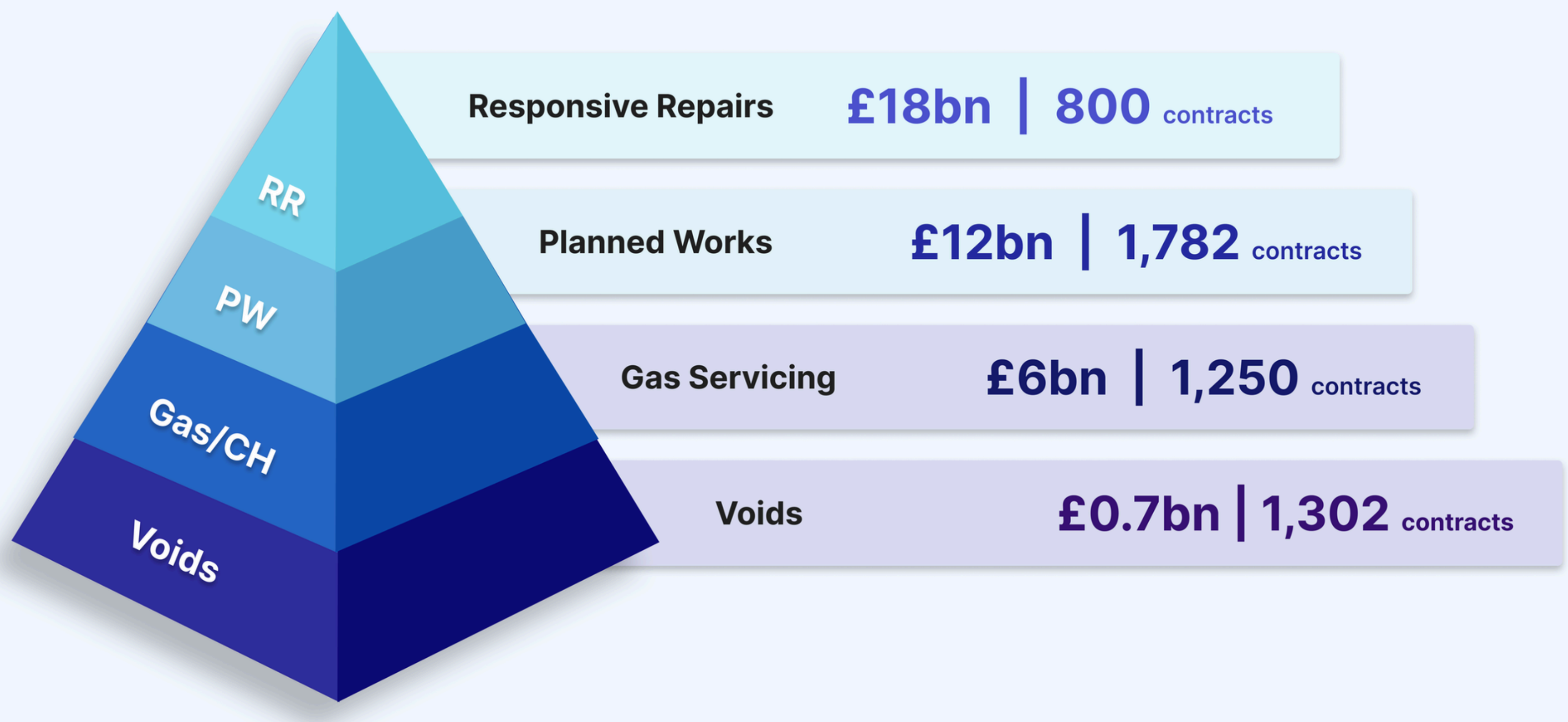
7-Year Net Market Change

Overall percentage change in awarded contract value between 2019 and 2025.

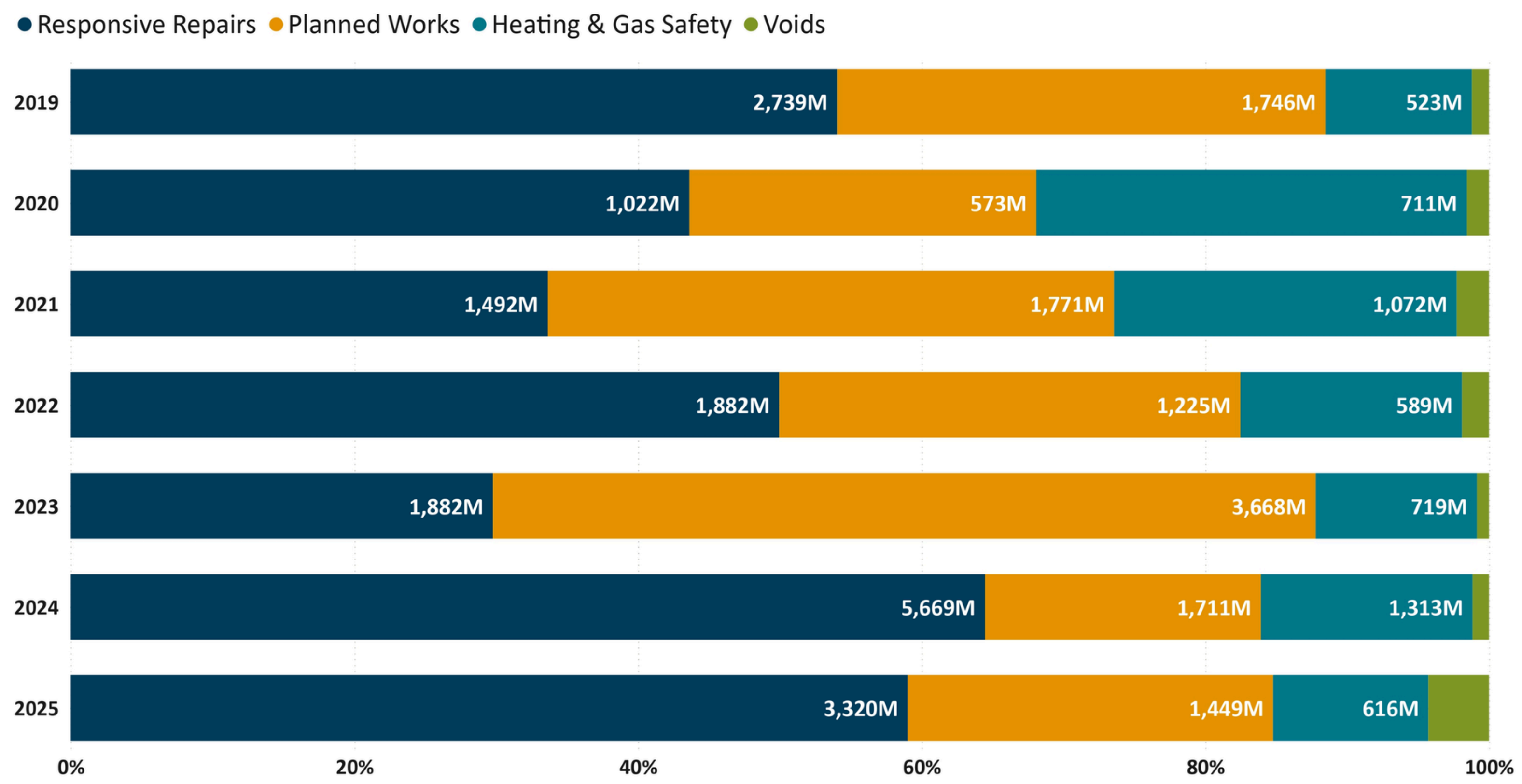
Trade Share Snapshot

Over seven years of historic spend, Responsive Repairs absorbs the most spend, reflecting urgent risk and compliance pressures.

Planned Works leads in volume, signalling a fragmented, programme-led pipeline rather than big-ticket projects.



2019-2025
Spend Breakdown by Trade



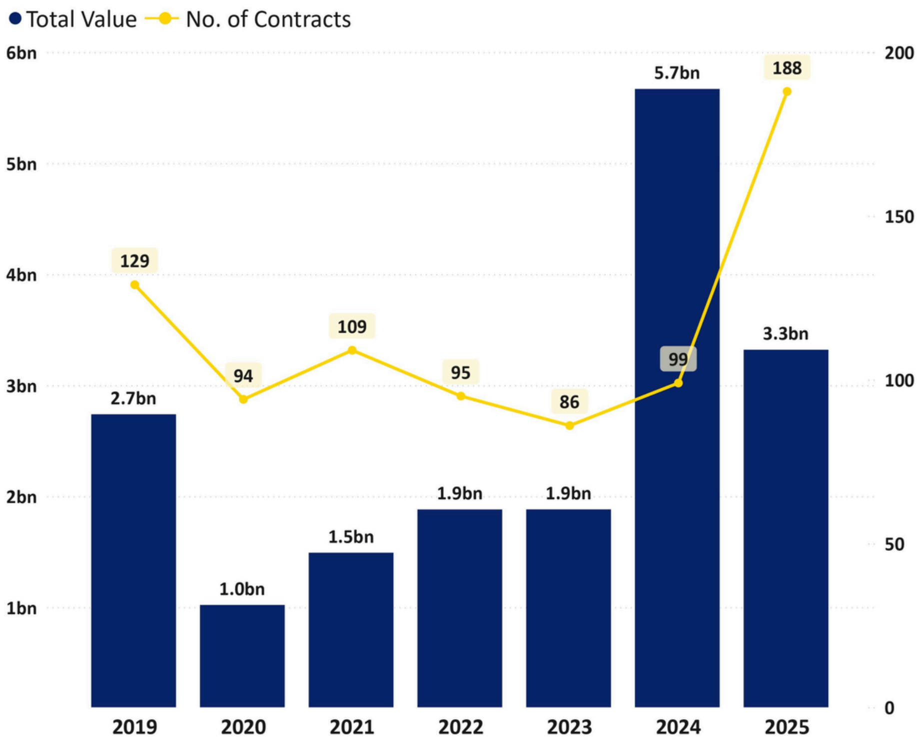
Planned Works dips sharply in 2020 (£573m) before rebounding to £3.7bn in 2023, indicating a pause followed by catch-up investment.

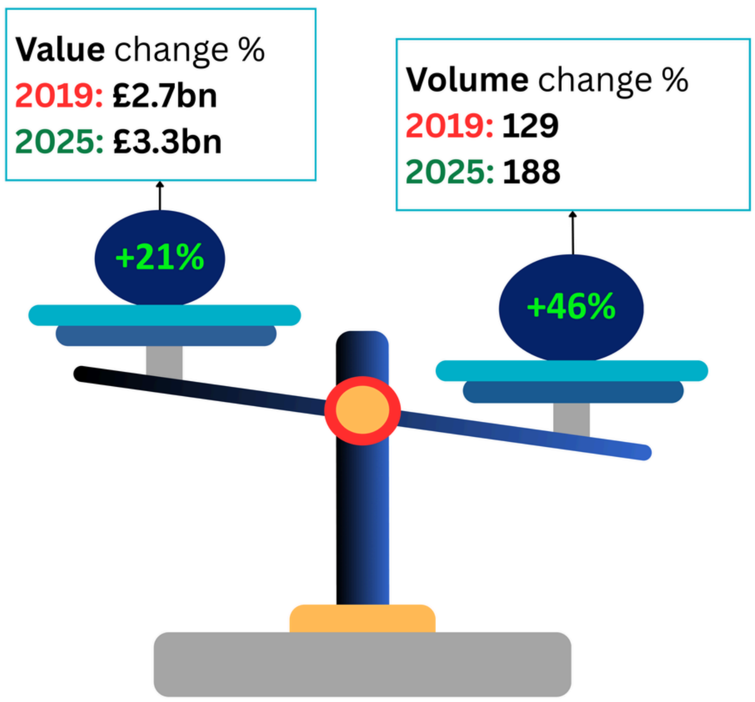
Over the same period, Responsive Repairs rises steadily from £1.2bn in 2020 to a peak £5.7bn in 2024, reinforcing the sector's reliance on day-to-day maintenance.

Responsive Repairs

Awards Trend (2019 - 2025)

£3.32bn awarded in 2025





Key Takeaways

- Spend grew **+21%**, while award volumes increased **+46%**
- **Average contract size fell 18% (£21.4m → £17.7m)**, indicating smaller or more segmented awards
- **2024** recorded the **highest annual spend (£5.7bn)**
- Procurement activity recovered steadily after the **2020 dip**
- Higher award counts suggest **wider contractor participation** and **reduced consolidation**

2024

Peak spend year - **£5.7bn**

+£3.8bn

Largest annual uplift **2023–24**

£1.0bn

Lowest spend in **2020** dip

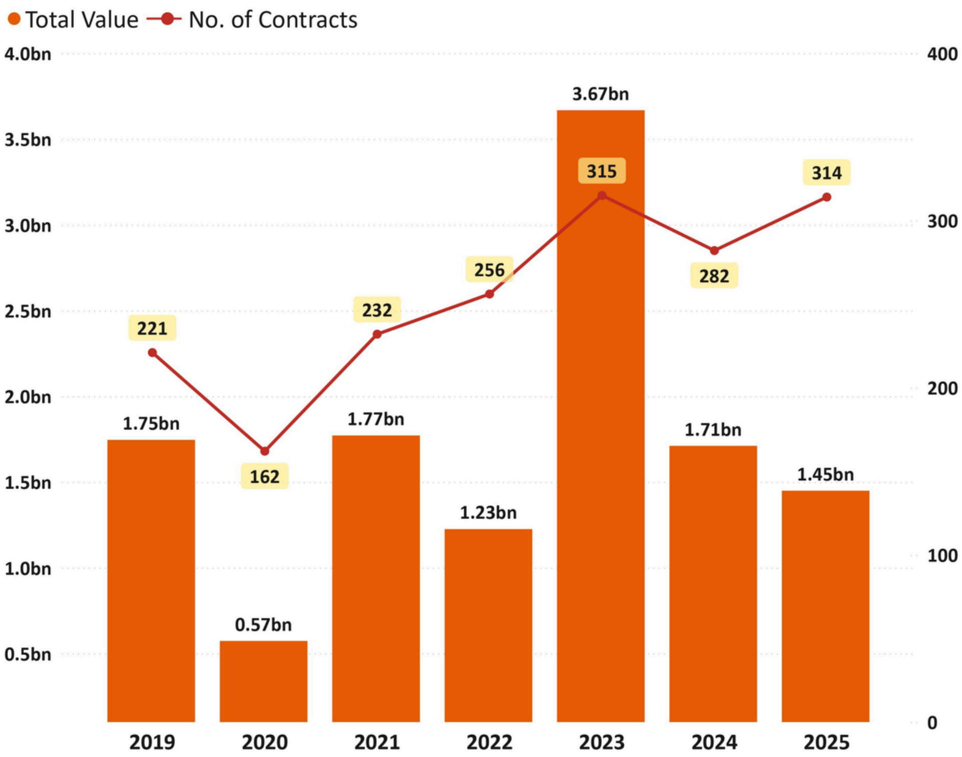
+59 contracts

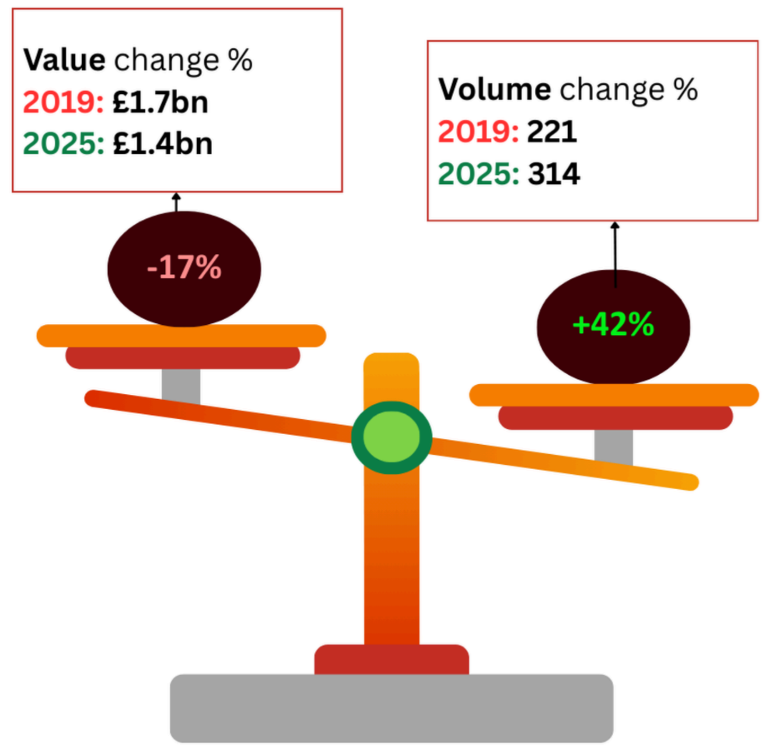
Up from 129 since **2019**

Planned Works

Awards Trend (2019 - 2025)

£1.45bn awarded in 2025





Key Takeaways

- **Value declined 17% (£1.7bn → £1.4bn)** while **volumes rose 42% (221 → 314).**
- Value peaked in **2023 (£3.67bn)** before normalising, indicating a temporary surge.
- **2020 trough (£0.57bn)** was followed by **recovery through 2023**, reflecting backlog release.
- **Elevated volumes in 2024–2025** despite lower value point to smaller contract sizes.
- **Value–volume divergence** signals **tighter budgets** and **wider supplier distribution**.

2023
Peak spend year - **£3.6bn**

+£2.4bn
Largest annual uplift **2022–23**

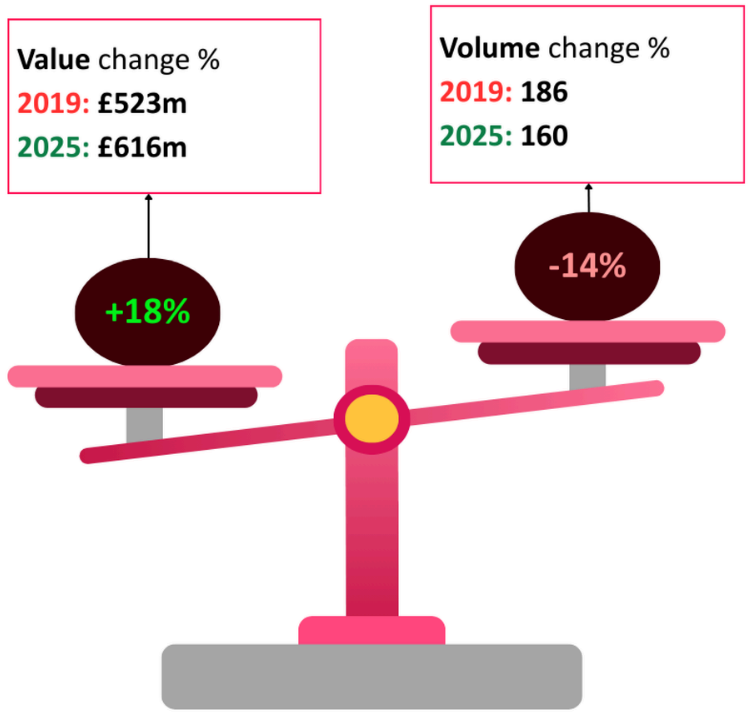
£0.5bn
Lowest spend in **2020** dip

+93 contracts
Up from 221 since **2019**

Gas Servicing & Central Heating

Awards Trend (2019 - 2025)

£0.62bn awarded in 2025



Key Takeaways

- **Value rose 18% (£523m → £616m)** while **volumes fell 14% (186 → 160)**, indicating consolidation.
- Value peaked in **2024 (£1.31bn)** - more than double 2022 (£0.59bn) before moderating in 2025.
- Contract volumes peaked in **2021 (222 awards)** & **declined thereafter**, reflecting reduced activity.
- Post-2021 growth has been driven by larger awards, **reflecting long-term compliance** models.
- Rising value alongside falling volume points to **increased concentration & higher entry barriers**.

2024

Peak spend year - **£1.3bn**

+£0.6bn

Largest annual uplift **2023–24**

£0.5bn

Lowest spend in **2019** dip

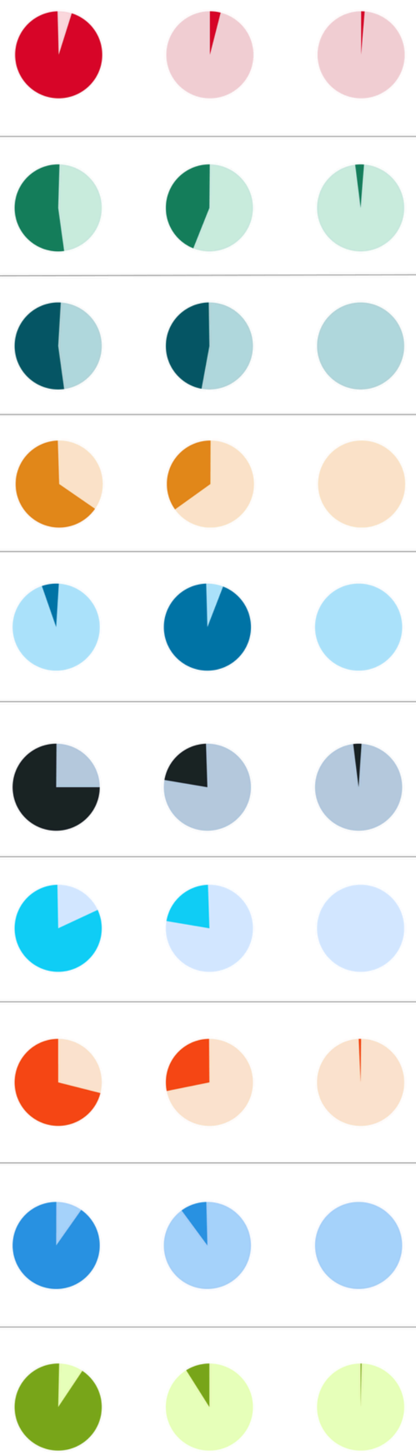
-26 contracts

Down from 186 since **2019**

Market Leaders and Portfolio Concentration (across Core Trades)

A breakdown of the top contractors by value, showing how spend is distributed across trades and where delivery is most concentrated.

Contractor	RR	PW	Gas	Total Value	Insights
MEARS				£4,471m	Responsive Repairs–led portfolio, with 95% of value concentrated in RR.
EQUANS				£2,660m	Balanced multi-trade operator, split between RR (53%) & Planned Works (44%).
Wates				£2,539m	Evenly split between RR and Planned Works, indicating a diversified delivery mix.
axis				£2,076m	RR-focused contractor, with nearly two-thirds of value from responsive works.
united infrastructure				£1,553m	93.7% concentrated in PW, indicating clear capital-works specialisation.
MORGAN SINDALL PROPERTY SERVICES				£1,532m	Strong RR bias (71%), supported by meaningful Planned Works presence.
FORTEM Every Home Matters				£931m	80% RR exposure, reflecting high repairs concentration and limited diversification.
NOVUS Property Solutions				£781m	71% RR / 28% PW split, showing repairs dominance with moderate diversification.
ian williams				£713m	Significant RR reliance (90%) indicates narrow trade exposure
CARDO				£672m	91% concentrated in RR, evidencing strong single-trade focus.



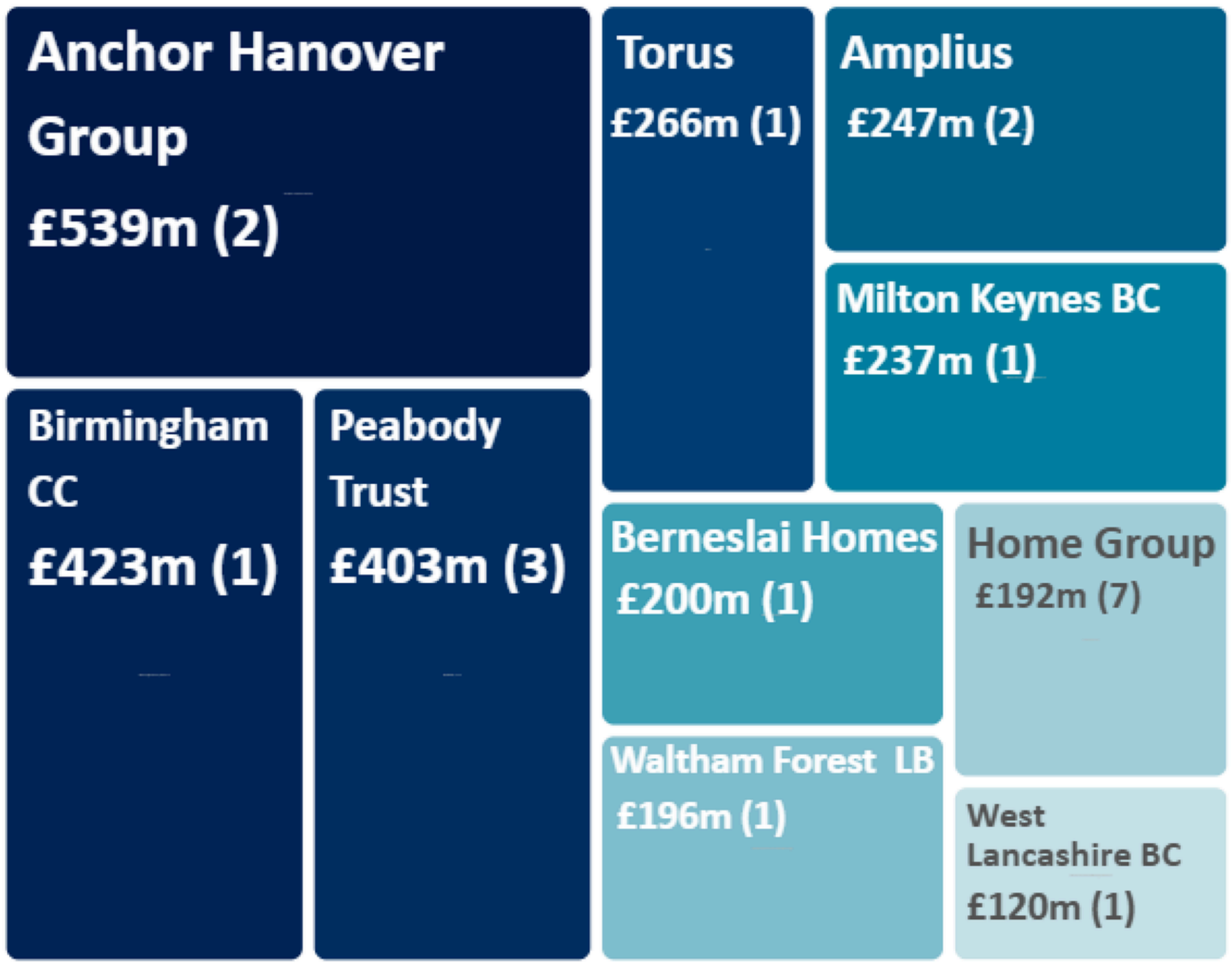
All top 10 performers across RR, PW and Gas are LOCARLA clients.

Leadership is scale-skewed: Rank 1 (£4.48bn) vs Rank 10 (£0.67bn) shows an ~85% value gap, signalling wide tier dispersion.

Exposure is repairs-led: 6 of the Top 10 generate ≥70% of value from Responsive Repairs, indicating trade concentration risk.

Diversification is limited: only 3 of 10 show balanced RR–PW splits, reinforcing reliance on core maintenance scale.

Top Authorities by Upcoming Responsive Repairs Renewals



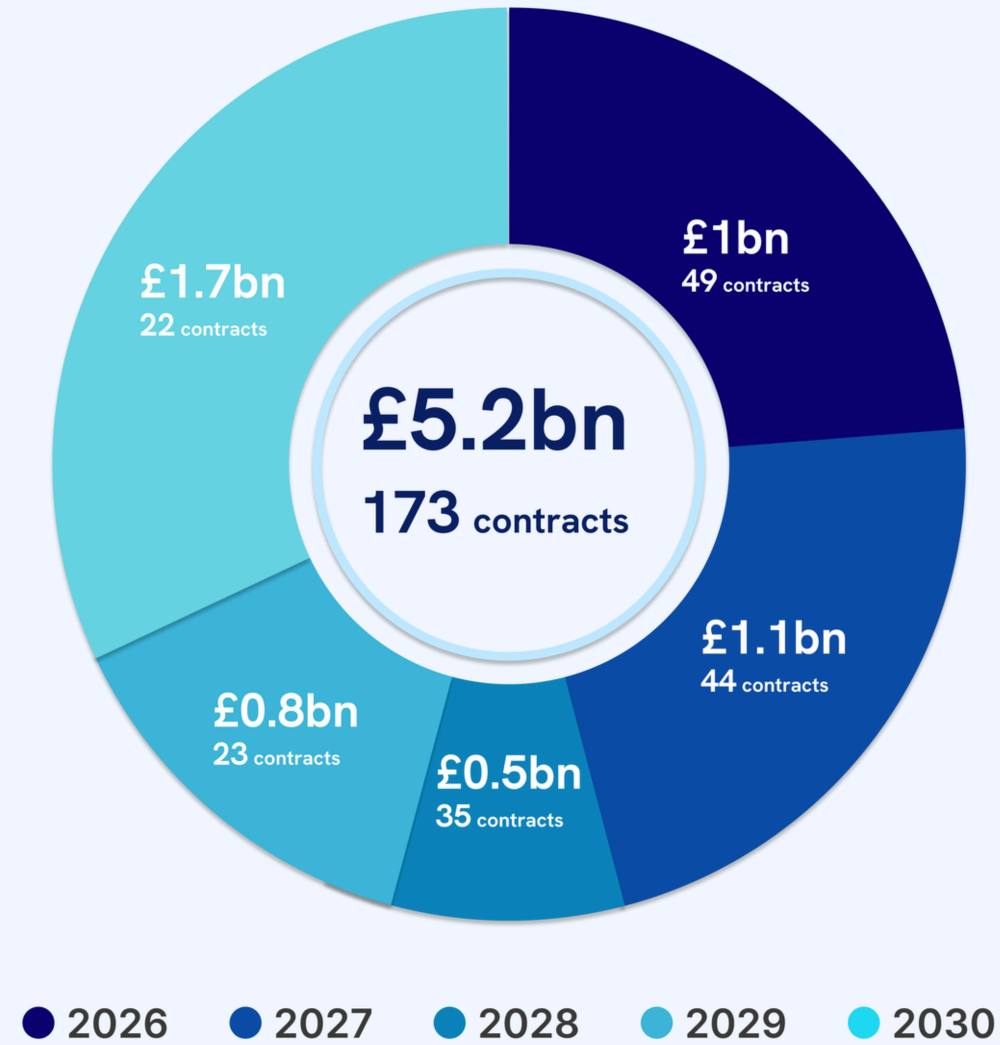
Note : All figures are based on initial contract values at award and do not include extensions. Contracts without end dates are also being excluded.

Key Takeaways

- **£5.2bn across 173 contracts** are expiring over the next five years, creating a substantial re-procurement pipeline.
- The top 10 authorities represent **£2.8bn+ (~55%) of expiring value**, led by Anchor Hanover (£539m), Birmingham CC (£423m) and Peabody (£403m) — evidencing landlord-level concentration.
- **Home Group holds the highest volume exposure (7 contracts) but lower value (£192m)**, indicating smaller or shorter-term awards.
- **High-value expiries concentrated among a few large landlords** point to intensified rebid competition and strategic opportunity for scale contractors.

5-Year Expiry Pipeline

Responsive Repairs Value & Volume



2030

Peak year with largest contracts expiring - **£1.7bn**

0.4bn

lowest value year in **2028**, reflecting a lighter pipeline

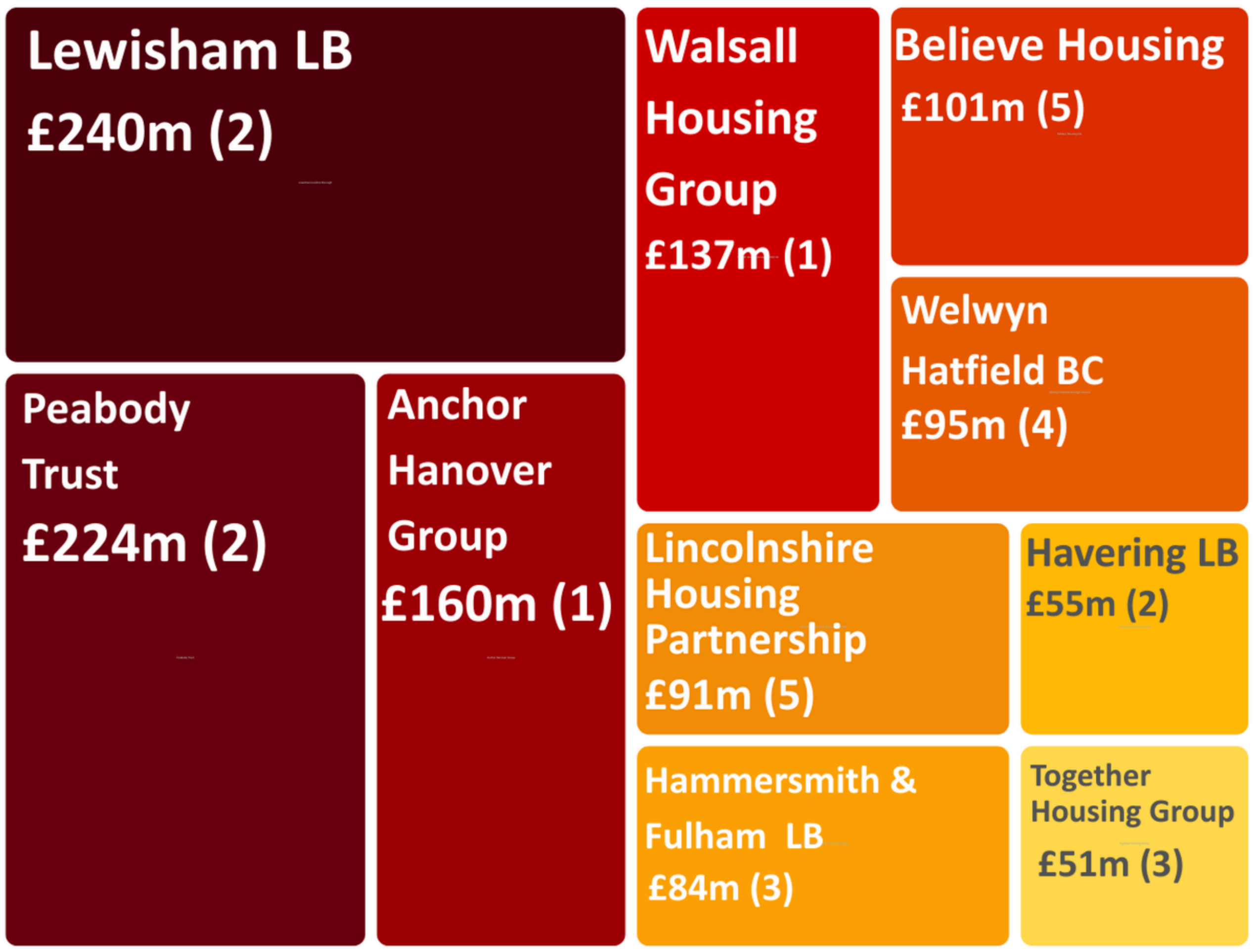
42%

share of all expiries concentrated in **2026–27**, creating near-term pressure

50 contracts

highest award volume in **2027**, showing smaller lots and heavier competition

Top Authorities by Upcoming Planned Works Renewals



Note : All figures are based on initial contract values at award and do not include extensions. Contracts without end dates are also being excluded.

Key Takeaways

- **£2.9bn across 380 contracts** are expiring over the next five years, indicating a materially larger volume pipeline than Responsive Repairs but lower aggregate value.
- **2027–2029 show relatively even value** distribution (£612m–£684m), suggesting a staggered mid-cycle renewal profile.
- **2030 is materially lower (£126m, 10 contracts)**, reflecting limited long-term large frameworks in this trade.
- The top authorities (e.g., Lewisham £240m; Peabody £225m; Anchor £160m) account for a significant share of expiries, indicating landlord-level concentration.
- The **high contract count relative to value suggests continued fragmentation**, favouring broader supplier participation over large-scale consolidation.

5-Year Expiry Pipeline

Planned Works Value & Volume

2026

Peak year with largest contracts expiring - **£918m**

126m

lowest value year in **2030**, reflecting a lighter pipeline

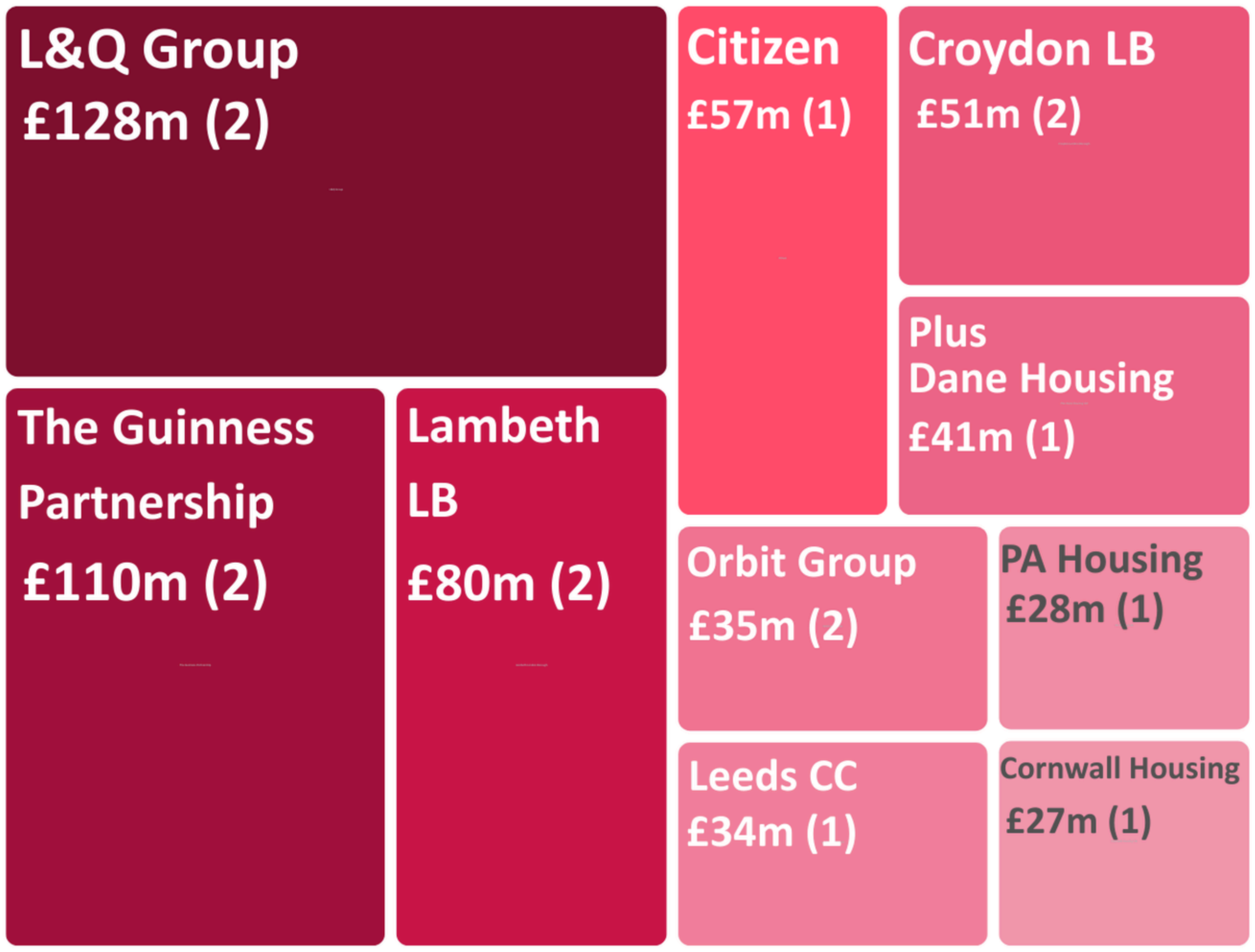
53%

share of all expiries concentrated in **2026–27**, creating near-term pressure

192 contracts

highest award volume in **2026**, showing smaller lots and heavier competition

Top Authorities by Upcoming Gas Servicing Renewals



Note : All figures are based on initial contract values at award and do not include extensions. Contracts without end dates are also being excluded.

5-Year Expiry Pipeline

Gas Servicing Value & Volume

2027

Peak year with largest contracts expiring - **£602m**

149m

lowest value year in **2029**, reflecting a lighter pipeline

55%

share of all expiries concentrated in **2026–27**, creating near-term pressure

93 contracts

highest award volume in **2026**, showing smaller lots and heavier competition

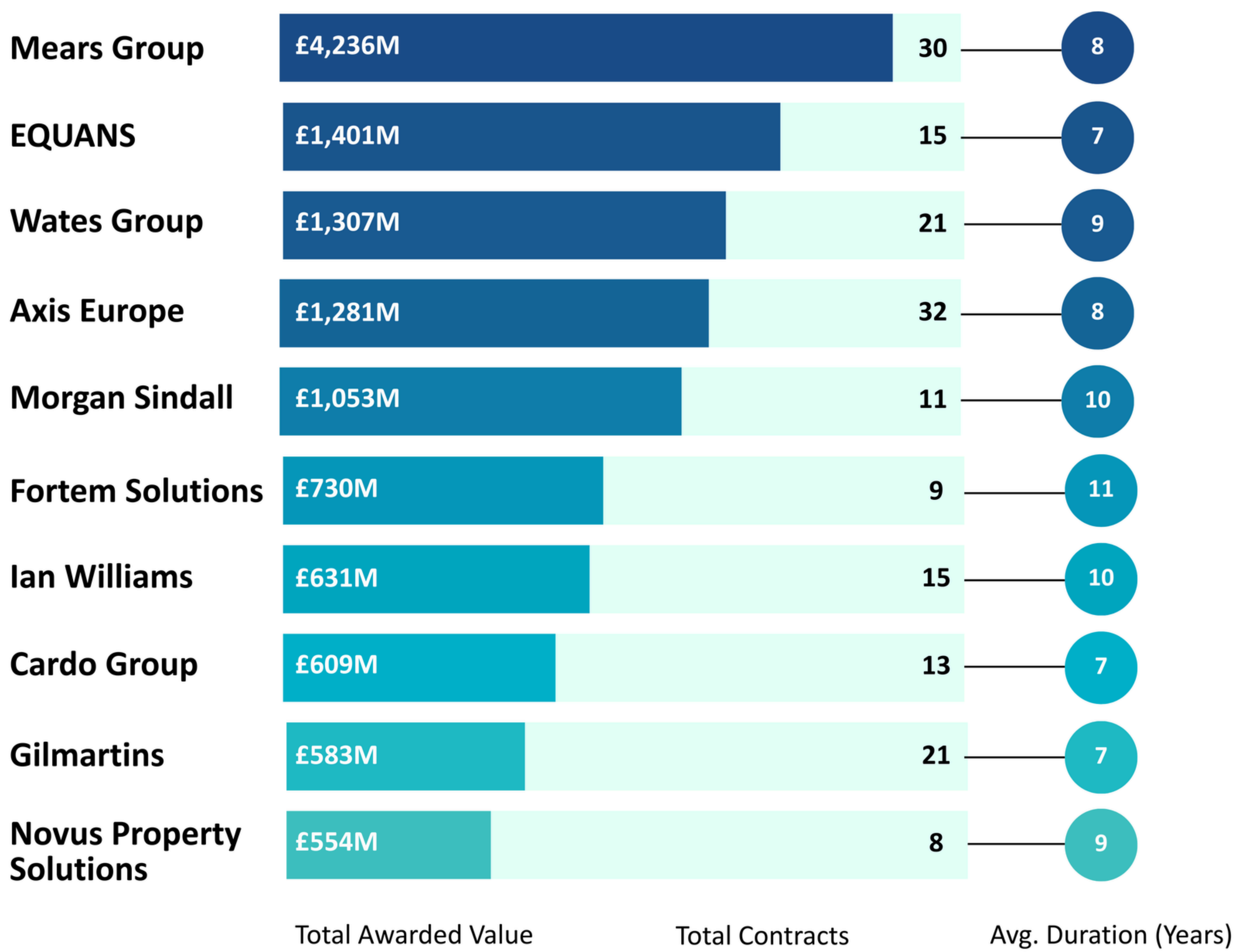
Key Takeaways

- **£1.6bn across 287 contracts** are expiring over the next five years, reflecting a moderate-value but high-activity compliance pipeline.
- **2026 and 2028** remain elevated **(£280m and £302m respectively)**, suggesting sustained short- to mid-term procurement momentum.
- **2030 shows lower volume (17 contracts)** but meaningful **value (£321m).**
- The top authorities (e.g., L&Q £128m; Guinness £110m; Lambeth £80m) indicate landlord-level value clustering, increasing competitive intensity among scale providers.
- The relatively **even value spread across 2026–2029** suggests structured renewal cycles rather than one-off surges, supporting continued market consolidation.

Top Contractors by Value, Volume & Term

This view combines value, volume, and contract duration across Responsive Repairs to show not only who wins most awards, but who secures larger and longer-term programmes.

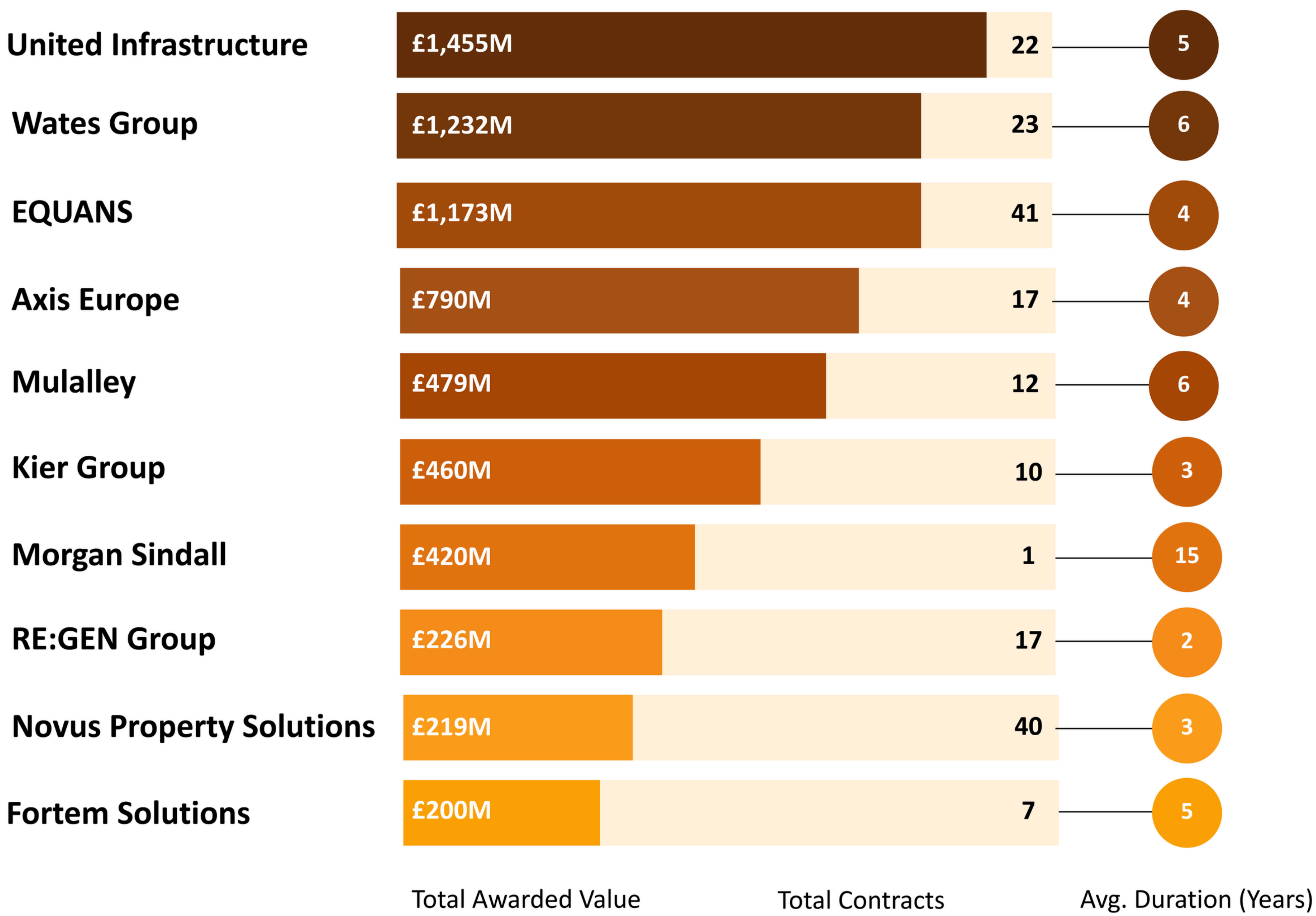
Responsive Repairs (2019 - 2025)



Top Contractors by Value, Volume & Term

This view combines value, volume, and contract duration across Planned Works to show not only who wins most awards, but who secures larger and longer-term programmes.

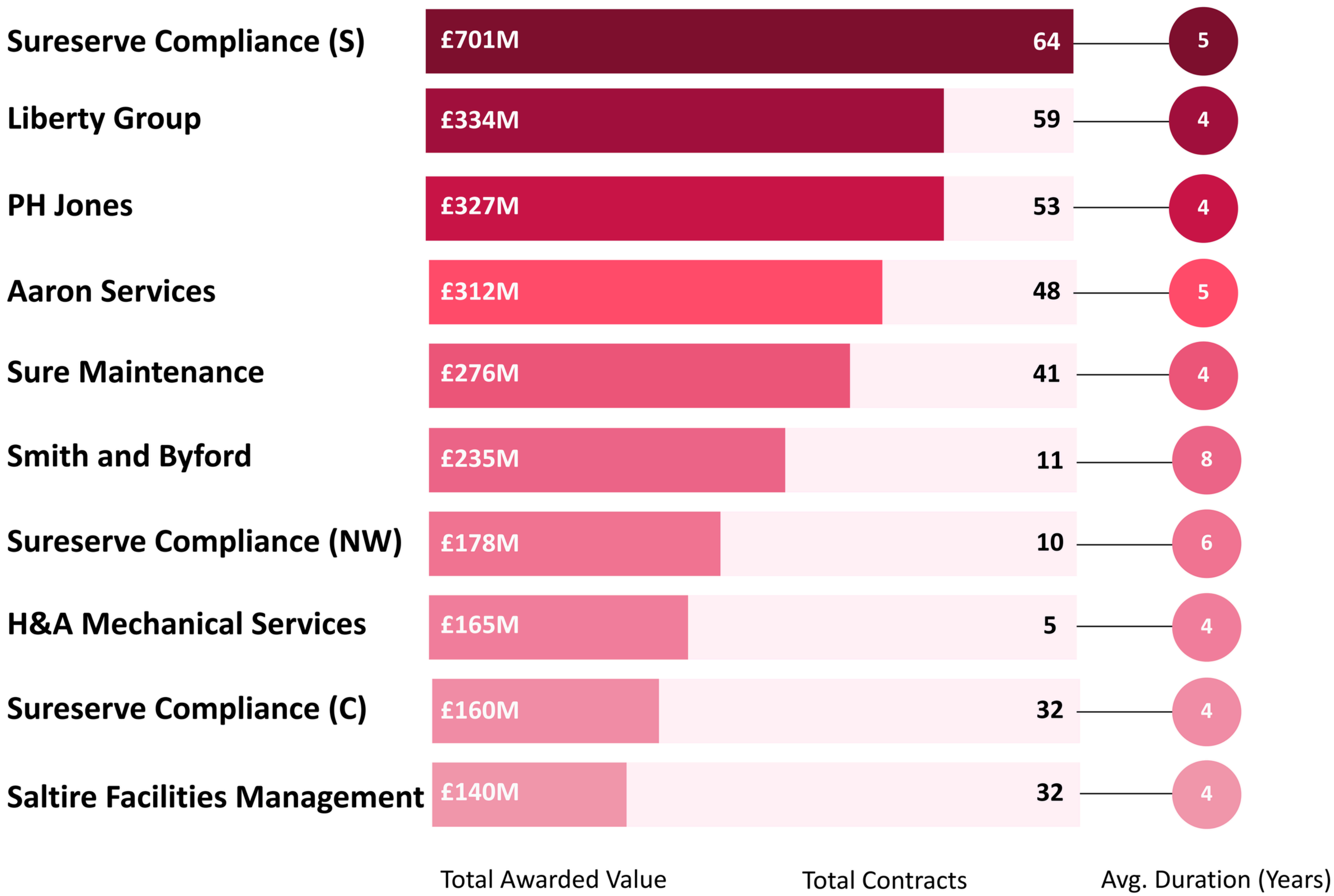
Planned Works (2019 - 2025)



Top Contractors by Value, Volume & Term

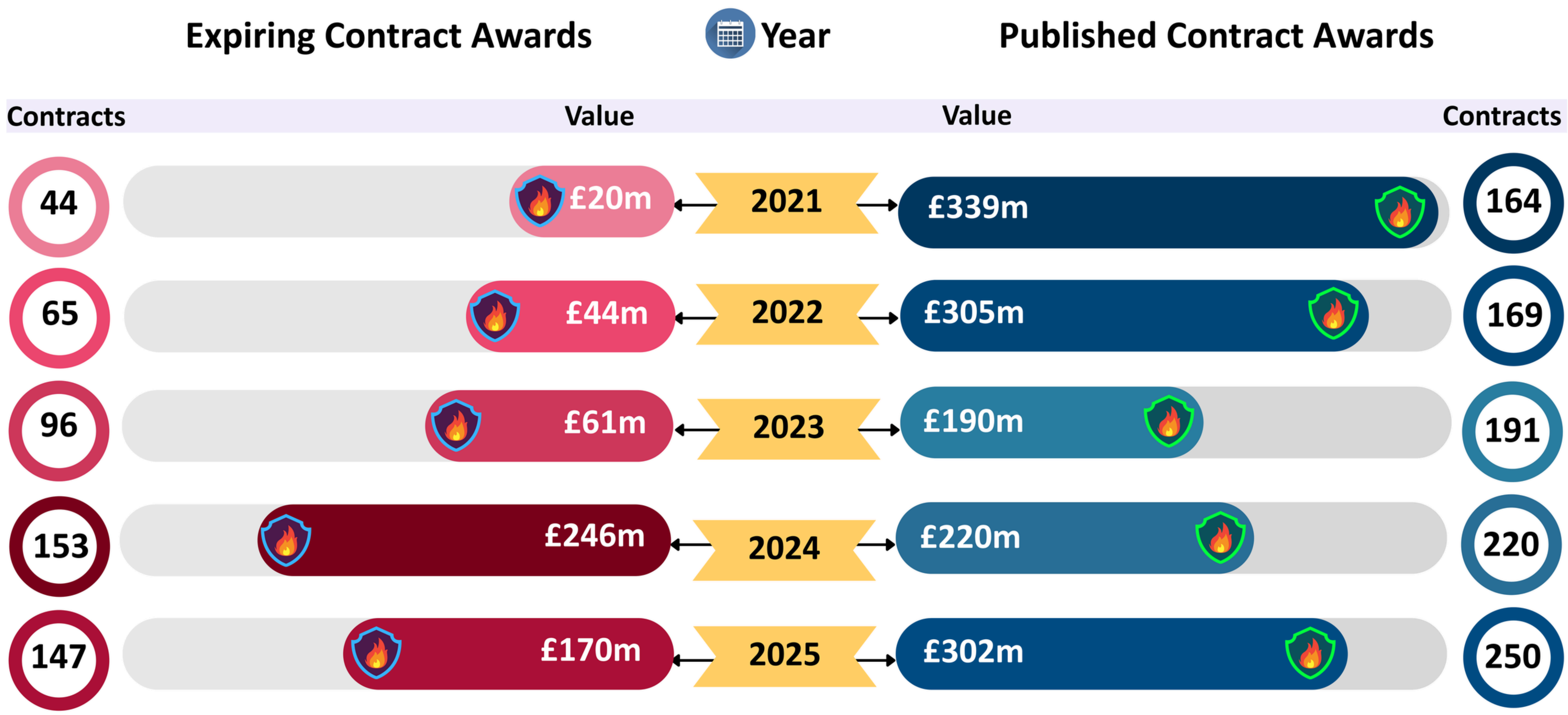
This view combines value, volume, and contract duration across Gas Servicing & Central Heating to show not only who wins most awards, but who secures larger and longer-term programmes.

Gas Servicing & Central Heating (2019 - 2025)



Fire Safety Procurement Flow: New Awards vs Contract Expiry

A year-wise snapshot of contract expiries against fresh awards in Fire Safety. It reveals where demand accelerates and where replacement or retendering pressure builds.



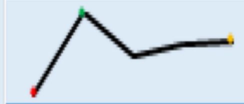
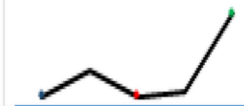
Note : All figures are based on initial contract values at award and do not include extensions.

Key Takeaways

- **1,002 contracts (£1.6bn)** awarded over five years; volumes rose **53% (165 → 252)**, signalling sustained compliance-led expansion.
- Values declined **44% (£339m → £190m) 2021–2023**, before recovering to **£302m in 2025**, reflecting correction then stabilisation.
- Expiring values surged to **£246m in 2024 (+303% YoY)**, indicating a major rebid cycle.
- **308 awards (~28%)** were framework/DPS call-offs, evidencing structured procurement dominance.
- Authority demand is concentrated, with **Barking & Dagenham (£228m; 142 contracts)** materially ahead of peers.
- Market leadership is concentrated among **Kier Places, EQUANS, Harmony Fire, Bell Group and Ventro**, reinforcing Tier 1 scale advantage.
- Volume growth without proportional value uplift indicates **declining average contract sizes and increased fragmentation** rather than large-scale programme expansion.

Roofing Contractors League – 5-Year Awards Performance

A five-year snapshot of roofing awards by value, volume, and contract term.

Rank	Contractor	Number of Contracts	Annualised Contract Value (£)	Total Contract Value (£)	5-Year Award Trend
1	Milestone Contracting	17	13,713,763	70,442,256	
2	RE:GEN Group	7	11,851,298	62,175,042	
3	Ailsa Building Contractors	11	9,400,700	41,734,161	
4	Cardo Group	23	7,272,550	38,671,590	
5	Procast Building Contractors	8	7,394,433	38,114,766	
6	DLP Services (Northern)	8	6,831,312	33,953,271	
7	Highview Group	17	13,568,099	31,868,696	
8	Hugh LS McConnell	8	8,286,328	30,095,903	
9	WRPS Group	16	5,208,845	28,160,343	
10	Amber Construction Services	4	10,505,251	22,770,957	

Key Takeaways

• **907 contracts worth £1.0bn** were awarded over five years, reflecting steady mid-scale capital deployment.

• **191 contracts (~21%)** were let via call-off mechanisms, evidencing structured procurement reliance.

• The top 3 contractors account for **~17% of total value**, confirming moderate concentration without Tier 1 dominance.

• The value spread between rank 1 (£70m) and rank 10 (£22m) (~67% delta) highlights a competitively fragmented market structure.

• Procurement activity shows clear seasonality, with **September (£131.0m)** and **October (£121.5m) representing the highest-value months**, indicating Q3–Q4 award clustering aligned to budget cycles.

R&M Market Highlights

2024

Peak Procurement Cycle Year - £8.8bn across 620 contracts, representing the highest annual award value within the 7-year dataset.

Gas Servicing & Heating

Strongest Net Growth Trade (2019–2025) - Value increased 18% (£523m → £616m) over the period, representing the highest net growth among core trades.

Mears Group

Market-Leading Contractor by Value - £4.4bn secured across **40 contracts**, demonstrating sustained Tier 1 scale and delivery dominance.

L&Q Group

Leading Commissioning Authority - £2.6bn awarded across 18 contracts, reflecting concentrated large-scale programme deployment.

Call-off Contract Value

Framework-Linked Spend Concentration - £3.7bn awarded through call-offs, highlighting material value channelled through structured procurement mechanisms.

Call-off Contracts

Structured procurement activity: 847 awards delivered via call-off, evidencing strong framework and DPS reliance**, up 18% since 2019.**

Company Overview

About us

Locarla is an online platform of business intelligence information and data, built for RMI & Construction companies working in the Social Housing sector.

We provide a data service to companies, with products and services to sell to Housing Associations & Local Authorities, and to the organisations we collect data on.

These are some of our clients.

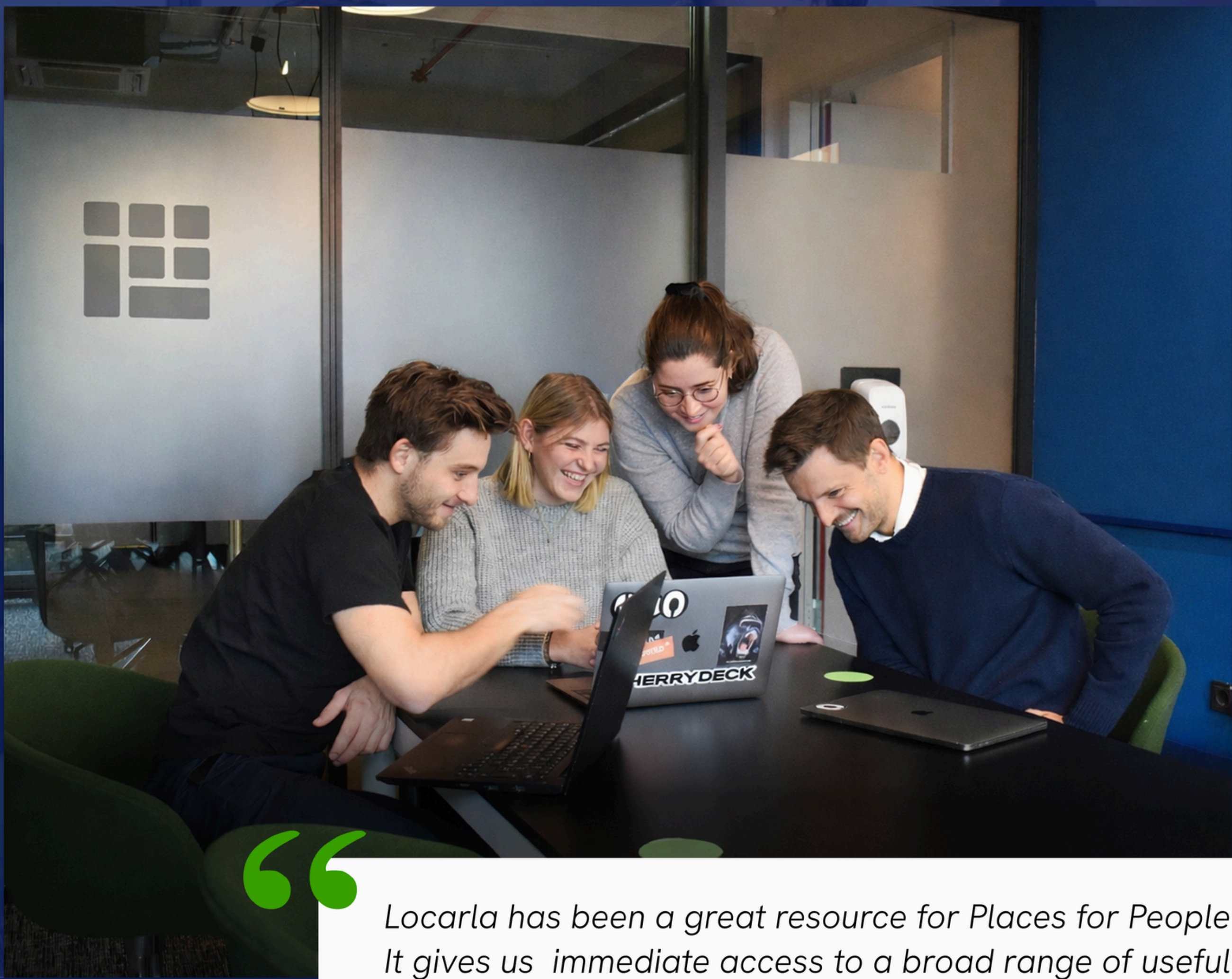
Our Social Housing and RMI Insight licenses offer tailored solutions to unlock new opportunities and outpace the competition.

Did you know that a www.Locarla.com licence includes all of the following?

- Dedicated Built Environment Tender Alert Service
- Competitor & Pipeline Analysis
- Detailed information on 3000+ Social Housing organisations
- 17,000 people working in UK Social Housing
- Mapping of 4.6 million social homes
- Housing News and Local Authority Minutes

We recently integrated AI Bid Assistant software, included in the licence price.
If you would like to see how it works, we built this PDF.

LOCARLA



Locarla has been a great resource for Places for People because: It gives us immediate access to a broad range of useful housing information in one easy to use, intuitive platform. It allows us to identify, harness and nurture strategic relationships in the sector which can underpin our development and regeneration program.

Alan Heron - Places for People

www.locarla.com

helpdesk@locarla.com

53 Woodfield Avenue, London SW16 1LE