

## Public Expenditure - UK - August 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The public sector has long represented a major opportunity for private companies to sell products and services. Conditions have become more challenging under the Conservative-led tight fiscal policy, with spending restrictions at the heart of government policy.”  
– Terry Leggett, Senior Analyst

### This report looks at the following areas:

- How will expenditure evolve over the next few years?
- Which sectors are being targeted for spending reductions?
- What is the likely impact of the UK’s decision to leave the EU?
- How are changes affecting the roles of services and capital expenditure?
- Where are private sector opportunities the strongest?

For the purposes of this report, UK public expenditure, which covers the government’s spending on public services, has been segmented into:

- central government own expenditure
- local government expenditure
- public corporation expenditure

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Public Expenditure - UK - August 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Executive Summary

#### The market

- Figure 1: Public expenditure as a % of GDP, 2006-15
- Figure 2: Total DEL, 2012-16 actual, 2017 expected and 2018-20 planned
- Figure 3: Total managed expenditure, 2012-16
- Figure 4: Comparison of public current and capital expenditure, 2012-16
- Figure 5: Segmentation of total managed public expenditure, by function, 2016
- Figure 6: Segmentation of total managed current public expenditure, by function, 2016
- Figure 7: Segmentation of total managed capital public expenditure, by function, 2016

#### Market factors

#### Companies

#### What we think

### Key Insights

- What is the likely impact of Brexit on public expenditure?
- What are the main drivers of public spending?
- Is capital spending in the public sector outstripping overall growth?

### Introduction

#### Definitions

#### Methodology

#### Abbreviations

#### Market positioning and issues in the market

### UK Economy

#### Overview

- Figure 8: UK GDP quarterly development, 2003-16
- Figure 9: UK GDP in economic downturns and recoveries since 1979

#### Inflation

#### Interest rates

#### House prices

- Figure 10: UK House price changes, 2006-2016

#### Consumer spending

#### Manufacturing

- Figure 11: UK manufacturing, 2014-16

#### Business investment

- Figure 12: UK GFCF 2003-16

#### Imports

#### Exports

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Public Expenditure - UK - August 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Market Factors

### Key points

### Market factors

#### Social

Figure 13: UK population projection, 2014-39

Figure 14: Composition of UK population projection, 2014-39

#### Economic

#### Political

## Market Size

### Key points

### Market size

Figure 15: Total managed expenditure, 2012-16

Figure 16: Comparison of public current and capital expenditure, 2012-16

## Market Segmentation

### Key points

### Market segmentation

Figure 17: Segmentation of total managed expenditure, by function, 2016

Figure 18: Segmentation of total managed expenditure, by function, 2012-16

### Current expenditure

Figure 19: Segmentation of current expenditure, by function, 2016

Figure 20: Segmentation of current expenditure, by function, 2012-16

### Capital expenditure

Figure 21: Segmentation of capital expenditure, by function, 2016

Figure 22: Segmentation of capital expenditure, by function, 2012-16

### General public services

Figure 23: Segmentation of total managed expenditure on general public services, by function, 2012-16

### Defence

Figure 24: Segmentation of total managed expenditure on defence, by function, 2012-16

### Public order and safety

Figure 25: Segmentation of total managed expenditure on public order and safety, by function, 2012-16

### Economic affairs

Figure 26: Segmentation of total managed expenditure on economic services, by function, 2012-16

Figure 27: Segmentation of total managed expenditure on transport, by function, 2012-16

### Environmental protection

Figure 28: Segmentation of total managed expenditure on environmental protection, by function, 2012-16

### Housing and community amenities

Figure 29: Segmentation of total managed expenditure on housing and community amenities, by function, 2012-16

### Health

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Public Expenditure - UK - August 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 30: Segmentation of total managed expenditure on health, by function, 2012-16

## Recreation, culture and religion

Figure 31: Segmentation of total managed expenditure on recreation, culture and religion, by function, 2012-16

## Education

Figure 32: Segmentation of total managed expenditure on education, by function, 2012-16

## Social protection

Figure 33: Segmentation of total managed expenditure on social protection, by function, 2012-16

## Industry Structure

### Key points

### Industry introduction

## Amey

Figure 34: Financial analysis of Amey UK, 2011-15

Figure 35: Turnover analysis of Amey UK, by sector, 2015

Figure 36: Turnover analysis of Amey UK, by region, 2015

### Company strategy

## Aspire Defence Holdings

Figure 37: Financial analysis of Aspire Defence Holdings, 2009-13

### Company strategy

## BAE Systems

Figure 38: Financial Analysis of BAE Systems, 2011-2015

Figure 39: Turnover Analysis of BAE Systems by activity, 2015

### Company strategy

## Babcock International Group

Figure 40: Financial Analysis of Babcock International Group, 2012-2016

Figure 41: Turnover Analysis of Babcock International Group, 2016

### Company strategy

## Balfour Beatty

Figure 42: Financial analysis of Balfour Beatty, 2011-15

Figure 43: Investment portfolio of Balfour Beatty by segment, 2013-14

### Company strategy

## Capita

Figure 44: Financial analysis of Capita, 2011-15

Figure 45: Turnover analysis of Capita in the public sector, 2015

### Company strategy

## G4S

Figure 46: Financial analysis of G4S, 2011-15

Figure 47: Turnover analysis of G4S, by activity, 2015

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Public Expenditure - UK - August 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 48: Turnover analysis of G4S, by region, 2015

Company strategy

### IBM United Kingdom

Figure 49: Financial analysis of IBM United Kingdom, 2011-15

Company strategy

### Interserve

Figure 50: Financial analysis of Interserve, 2011-2015

Figure 51: Turnover segmentation of Interserve, 2015

Company strategy

### Rolls Royce

Figure 52: Financial analysis of Rolls-Royce, 2011-15

Figure 53: Turnover analysis of Rolls-Royce, 2015

Company strategy

### Serco

Figure 54: Financial analysis of Serco Group, 2011-15

Figure 55: Turnover analysis of Serco Group, 2015

Company strategy

### Siemens

Figure 56: Financial analysis of Siemens plc, 2011-15

Figure 57: Turnover analysis of Siemens plc, 2015

Company strategy

### Sodexo

Figure 58: International breakdown of Sodexo turnover, by sector, 2015

Figure 59: Financial analysis of Sodexo, 2011-15

Company strategy

### Thales UK

Figure 60: Financial analysis of Thales UK, 2010-14

Company strategy

### Wates Group

Figure 61: Financial analysis of Wates Group, 2011-15

Company strategy

### Forecast

Key points

Market size

Figure 62: Total TME, 2012-16 actual, 2017 expected and 2018-20 planned

Market segmentation

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Public Expenditure - UK - August 2016

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 63: Total DEL, 2012-16 actual, 2017 expected and 2018-20 planned

Figure 64: Total DEL segmentation, 2012-13 actual, 2014 expected and 2015-16 planned

Figure 65: Analysis of AME, 2016 actual, 2017 expected and 2018-20 planned

### Further Sources and Contacts

Trade exhibitions

Trade magazines

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)