

Sustainable Growth

Leading UK construction group, carrying out major building and infrastructure projects.



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FY25 revenue
£1.9bn

FY25 divisional adjusted operating margin
3.0%

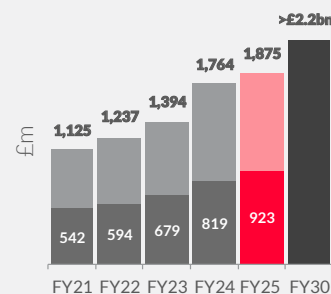
FY25 adjusted profit before tax
£45.0m

TSR
(1 Jul 2020 to 30 Jun 2025)
352%

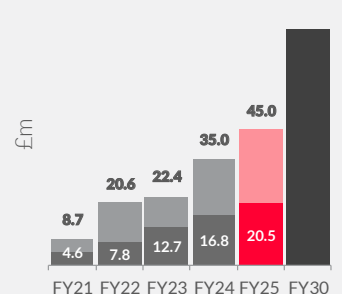
Key strengths

- Five years of sequential and profitable growth.
- Margin up to 3.0%, delivering our previously communicated margin target one year early.
- Well positioned in core and adjacent markets, reinforced by strong Government support and major investment in June 2025's Spending Review.
- Disciplined approach to contract selection and rigorous risk management; underpinned by multi-stage contract negotiation.
- High-quality, record £4.1bn order book across public and private sector giving excellent pipeline visibility.
- Well-established, long-term client and supply chain relationships.
- Margin target to be driven by volume growth and leverage; better contracting environment; operational improvement (quality, efficiency, digital and work in higher margin adjacement markets).
- Strong balance sheet, well capitalised and debt free.
- Committed to growing, sustainable shareholder returns.

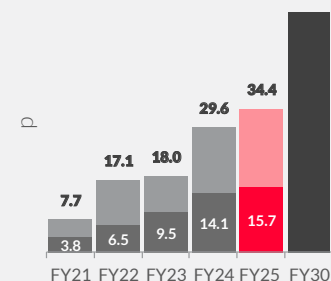
FY25 revenue up 6%



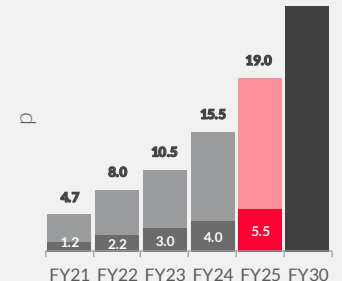
FY25 adjusted PBT up 29%



FY25 adjusted EPS up 16%



FY25 DPS up 23%



■ 2030 strategic growth targets (indicative).

Strategy to 2030

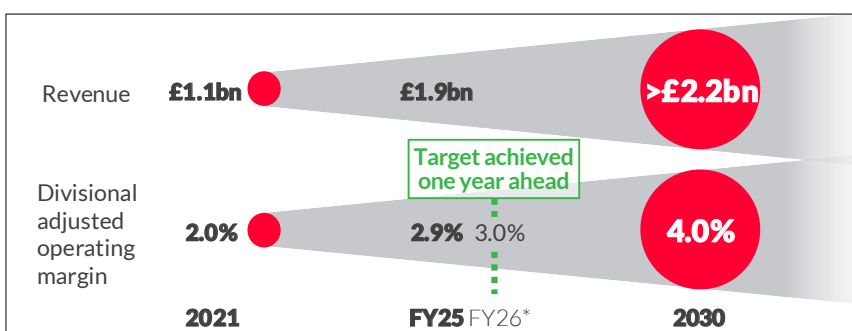
Grow revenue and margin in our three core businesses

Grow our specialist businesses in higher margin, adjacent markets

Re-enter the Affordable Homes market

Leverage our geographical and client footprint across the UK

Continue to generate growing shareholder returns



Growth via core markets

Building | Highways | Environment

Growth via adjacent markets

Private Rented Sector | Capital maintenance and asset optimisation | Affordable homes | Specialist Services

Risk management

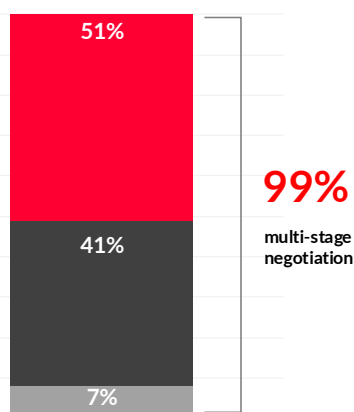
Assessing and managing risks and uncertainties is the central element of our process and business strategy. Commercial control and rigorous risk management are an integral part of our strategy. We achieve this through our:

- Focus on margin improvement as we grow.
- Disciplined approach to project selection including:
 - Ensuring appropriate terms and conditions for each project.
 - Employing margin thresholds.
- Peer reviews of bids and contract reporting.
- Board approval for all bids with specific risk factors or with a value of over £25m.
- Aligned and informed supply chain.
- Clear management reporting lines.

High-quality order book

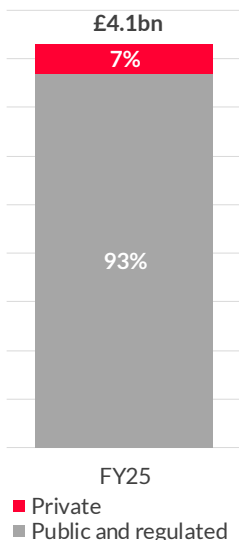
As at 30 June 2025

Order book procurement



- Target/cost plus
- Negotiated
- Two-stage
- Single-stage (1%)

Order book by client type



- Private
- Public and regulated

Order book by sector

Building	Total £2.4bn
Defence	£701m
Custodial	£490m
Education	£446m
Commercial & other	£403m
FM	£382m
Health	£32m

Infrastructure	Total £1.7bn
Environment	£1,071m
Highways	£617m

93%

Repeat clients for FY25
(FY24: 93%)

92%

Work secured for FY26
(FY24: 92%)

75%

Work secured for FY27
(FY24: 70%)

ESG



Scan for our full sustainability metrics

More information:

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