exigere

Q3 2026
MEP market report

Last year, our MEP market engagement highlighted several challenges affecting project outcomes, including design efficiency, financial pressure, risk transfer and collaboration across the supply chain.

Building on these findings, our 2026 engagement focused on two central questions: what are the most common challenges facing the industry, and how can the MEP pre-construction process be improved from a design, cost and procurement perspective?

Through discussions with clients, design consultants and main contractors, alongside visits to trade contractors, we created a platform for participants to share open and candid views on the market.

The level of honesty and engagement exceeded expectations. Contributions from a broad range of clients, engineers, main contractors and subcontractors provided valuable insight into the pressures facing the MEP supply chain, while also helping to shape potential collaborative solutions.

Our engagement combined face-to-face client discussions, roundtables with engineers and main contractors, trade contractor visits and our annual supply chain survey. We asked two central questions alongside a broader industry risk question:

Q1 What **common problems** do you experience at pre-construction stage?

What **key improvements** should be implemented during the pre-construction stage?

Q2 What **key industry risks and challenges** should we be aware of over the next three years?

Engagement at a glance

14 engineers engaged through roundtable sessions

13 main contractors engaged through roundtable sessions

22 trade contractors visited

50+ hours of trade contractor visits

Annual supply chain survey

Key findings

Improving the MEP pre-construction process

1 . Early engagement and coordination are critical

Many design, procurement and MEP issues stem from late involvement. Engaging the right teams, specialists and contractors earlier, from Stage 3, improves integration, reduces rework and stabilises design.

2 . Clear roles, responsibilities and stage deliverables

Unclear RIBA stage outputs, fragmented teams and over-reliance on contractor-designed portions lead to inefficiency. Defining responsibilities and formal sign-offs improves accountability and delivery quality.

3 . Digital tools and design governance must be fully utilised

Underused BIM, inconsistent modelling and weak CDP thinking reduce design quality and coordination. Standardised digital practices, 3D coordination and structured design reviews are essential.

4 . Procurement and cost transparency need an overhaul

Inefficient and outdated procurement strategies, excessive risk transfer, low fee levels and lack of cost clarity create financial and project delivery risks. Transparent, collaborative procurement, realistic fees, and early cost validation are key.

5 . Focus on value, skills, and MEP integration

Skills shortages, undervaluing MEP engineers, and prioritising lowest cost over best value compromise project outcomes. Upskilling teams, promoting MEP value, and emphasising best value over price improve quality and delivery.

Key industry risks

1 Iran and Middle East conflict risk

Advance ordering within the MEP industry has so far limited immediate MEP supply chain impacts arising from the Iran and Middle East conflict and disruption risks around the Strait of Hormuz. However, once existing stock is depleted, new orders from the Middle and Far East are expected to face increased costs and extended lead times, creating potential commercial and programme risks over Q3 and Q4 of 2026. While the supply chain is not currently reporting any immediate direct impacts on MEP services, and while the worst of the conflict looks to be over, potential risks to procurement and project delivery are anticipated over the coming year. These relate to energy price volatility, material and equipment cost inflation, and supply chain disruption resulting in long-lead delays.

2 MEP skills shortage and capability gap

The sector is facing a persistent shortage of skilled operatives and experienced MEP engineers across design, coordination and commissioning roles. This is creating bottlenecks in delivery, reducing design quality and increasing reliance on less experienced staff or external consultants. Capability gaps are most acute in complex systems such as HVAC optimisation, electrical distribution, fire engineering integration and BIM coordination.

3 Fee pressure versus increasing MEP complexity

Engineering fees are continuing to stagnate or reduce while project complexity is increasing significantly (net zero targets, electrification, smart buildings, tighter performance standards). This mismatch is forcing teams to compress design programmes, reduce coordination effort and accept higher technical and delivery risk.

4 Late or incomplete MEP design development

MEP designs are frequently not developed to a sufficient level of detail at key gateways, such as RIBA Stage 3/4 equivalents. This results in design instability, late decision-making, site-driven design changes and significant rework during, particularly for spatially sensitive systems such as ductwork and plantrooms.

5 Poor early-stage MEP contractor engagement

MEP teams are often engaged too late in the design process, limiting their ability to influence building form, spatial planning and system strategy. This leads to suboptimal plant sizing, inefficient routes, coordination clashes and missed opportunities for energy and cost optimisation.

6 BIM inconsistency and coordination challenges

BIM adoption and execution vary significantly across projects and organisations. Inconsistent modelling standards, poor data structure, and limited interoperability reduce coordination effectiveness, leading to clashes, duplicated effort and inefficient design iterations between MEP and other disciplines.

7 Rising regulatory and compliance complexity

Increasing regulatory requirements around fire safety, building performance, energy efficiency and carbon reduction are adding a significant design burden. MEP engineers must navigate evolving standards while maintaining programme and cost constraints, increasing liability and coordination complexity.

8 System complexity and integration challenges

Modern MEP systems are becoming increasingly interconnected, driven by electrification, smart building technologies and low-carbon solutions. This increases interdependency between systems, including HVAC, electrical, controls and fire, making coordination more complex and raising the risk of integration failures during design, installation and commissioning.

We would like to thank all the participants who took part in our roundtable and road trip discussions:

ENGINEERING CONSULTANTS

Arup
chapmanbdsp
Cundall
GDM
Hilson Moran
Hoare Lea
Long and Partners
NDY
Scotch Partners
Sweco
TBA Contractors
Waterman Group
Watkins Payne
WSP

MAIN CONTRACTORS

8build
BAM
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Faithdean
Kier
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SRM
Structure Tone
Wates Group

TRADE/SUBCONTRACTORS

Bancroft
Briggs & Forrester
Dalkia
Designer Group
GBE Services
Gloster MEP
Grant Walker Engineering
JA Brooks
Leonari
MALA
Maze Engineering
MCS
MSL
NG Bailey
Phoenix ME
PIP Services
Price Building Services
ROC
Redworkx
SES
SRW
TClarke

Improving the MEP pre-construction process

Design challenges and recommendations

The feedback from the market engagement outlines key design challenges across clients, engineers and contractors, along with suggested improvements. Common issues include poor coordination and unclear design briefs, skills gaps, weak collaboration, overly complex processes and underuse of digital tools such as BIM. Engineers also face problems including late involvement, unclear stage expectations, design instability and insufficient recognition of MEP contributions. Contractors highlight incomplete designs, unclear deliverables, regulatory gaps and limited early technical input.

Design	1
KEY CHALLENGES	**Design definition and coordination** Unclear scope, immature designs, poor early coordination and late changes.
RECOMMENDED ACTIONS	**Strengthen design scope definition, deliverables and coordination** • Define project scope, deliverables and client expectations earlier. • Introduce structured Stage 3 design reviews and coordination checkpoints. • Improve early integration of MEP, fire and critical technical elements. • Reduce late-stage design changes through clearer decision-making and sign-offs. • Establish stronger ownership of design coordination across disciplines.

Design CONTD.	2	3	4	5
KEY CHALLENGES	**Stage 3 delivery and governance** Inconsistent stage outputs, expectation creep, CDP overuse and regulatory gaps.	**Collaboration and communication** Fragmented feedback, poor engagement and misaligned team responsibilities.	**Skills, capability and discipline integration** Capability gaps, limited understanding and underrepresentation of MEP input.	**Process, BIM and digital efficiency** Over-complex processes, weak BIM adoption and ineffective digital governance.
RECOMMENDED ACTIONS	**Improve stage governance and delivery standards** • Standardise Stage 3 output requirements and quality expectations. • Reduce unnecessary over-detailing that limits design flexibility. • Clarify the purpose and appropriate use of CDPs. • Strengthen regulatory compliance reviews earlier in the design process. • Introduce clearer governance, approval routes and accountability measures.	**Strengthen collaboration and communication** • Engage MEP contractors and the supply chain earlier. • Define clear roles and responsibilities. • Hold regular MEP coordination meetings. • Improve design and site information deliverables. • Strengthen BIM and clash resolution processes. • Introduce lessons learnt workshops.	**Develop skills and integrated working** • Provide targeted training on Stage 3 delivery, BIM, and coordination standards. • Improve understanding of client requirements and commercial drivers. • Increase technical mentoring and cross-discipline knowledge sharing. • Strengthen engineering confidence and capability to progress design appropriately. • Ensure MEP teams are engaged earlier and represented consistently in decision-making.	**Simplify processes and increase digital adoption** • Remove duplicated processes and simplify approval workflows. • Standardise digital tools, templates and coordination procedures. • Improve BIM adoption for clash detection, coordination and design visibility. • Strengthen digital governance, reporting and audit tracking • Use shared platforms to improve collaboration, transparency and information management.

Overall, the recommended improvements focus on earlier and better coordination, clearer design responsibilities and expectations, enhanced training, stronger collaboration across teams, and greater use of digital tools and structured processes to ensure more efficient and stable project delivery. It is the responsibility of all involved to drive improvements as we are all accountable.

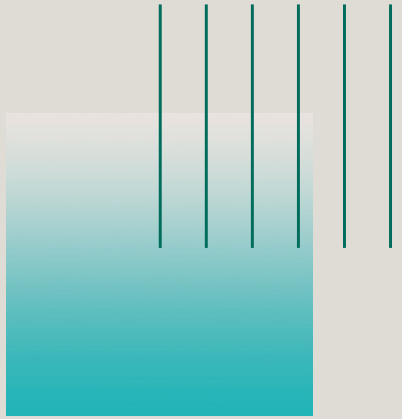
Procurement challenges and recommendations

The market engagement feedback highlights key procurement challenges across clients, engineers and main contractors. Common issues include unclear procurement approaches, inefficient use of PCSA processes, poor alignment between design and procurement, and contractor-led behaviours that can reduce transparency and collaboration. Feedback also highlighted risks around early engagement, supply chain reliability, and unclear roles and responsibilities.

Procurement	1	2	3
KEY CHALLENGES	**Procurement strategy and contract form issues**	**Early contractor engagement risks and market exposure**	**Contractor and supply chain behaviour and reliability**
RECOMMENDED ACTIONS	**Strengthen procurement strategy and contracting approach** • Select procurement routes based on project complexity and risk profile. • Improve transparency in two-stage/open-book processes with clearer cost validation. • Align contract models more explicitly with buildability, value, and risk sharing.	**Improve early contractor engagement controls** • Define clear rules of engagement and decision boundaries during early contractor involvement. • Ensure the right contractor teams are involved from the outset, not just commercial leads. • Limit over-exposure to contractor leverage through stronger client/design team governance.	**Address contractor and supply chain reliability** • Introduce stronger performance monitoring and accountability measures. • Improve supply chain visibility earlier in design and procurement stages. • Reduce dependency risks through broader supplier engagement and contingency planning.

Procurement CONTD.	4	5
KEY CHALLENGES	**PCSA inefficiencies and misuse in delivery process**	**Design procurement disconnect and and coordination gaps**
RECOMMENDED ACTIONS	**Reform PCSA use and effectiveness** • Clearly define PCSA scope, objectives and success criteria upfront. • Prevent misuse of PCSA for price-driven rather than buildability-led outcomes. • Strengthen governance to ensure fair cost development and transparency. • Clear and agreed cost tracking through the process. • Accountability from appointment to delivery of agreed target costs.	**Align design and procurement processes** • Integrate design and procurement decision-making earlier in the project lifecycle. • Reduce fragmentation caused by split procurement routes. • Improve coordination between design intent, cost planning, and contractor input.

To address the above, the key recommendations focus on improving transparency, clearly defining objectives and deliverables, strengthening early team selection, aligning procurement with design from the outset, and adopting more collaborative, strategic approaches that prioritise engineering value, accountability and supply chain stability. There also needs to be greater accountability from main contractors and trade contractors to deliver against agreed target costs and support viable schemes.



Cost
challenges and recommendations

The feedback from the market engagement outlines key cost-related challenges across clients, engineers and main contractors, along with suggested improvements. Common issues include a lack of cost certainty and transparency, rising costs driven by contractors and market pressures, and misalignment between design development, procurement, and financial expectations. Engineers face fee pressure, uncompensated work and cost uncertainty, while contractors highlight unrealistic pricing and inefficient processes that lead to rework.

Overall, the recommendations focus on improving cost transparency and validation, aligning cost planning with design progress, ensuring realistic fees and budgets, introducing stronger cost controls, and shifting the focus from lowest cost to best value through better collaboration and accountability from all parties, including main contractors and MEP subcontractors.

Cost	1	2
KEY CHALLENGES	**Cost uncertainty and financial risk** Lack of cost certainty and transparency, contractor cost inflation risk and difficulty achieving financial viability.	**Procurement, investment and client misalignment** Misalignment between procurement approaches, investor expectations and client cost priorities, often with incomplete design at key stages.
RECOMMENDED ACTIONS	**Improve cost certainty and control** Strengthen early cost planning, validate contractor pricing and manage inflation risk with clearer contingencies, regular cost reporting and early escalation to reinforce a 'no surprises' culture.	**Align procurement and client expectations** Agree expectations early and ensure financial decisions match realistic design maturity and market conditions.

Cost CONTD.	3	4
KEY CHALLENGES	**Market, contractor and supply chain pressures** Unrealistic pricing expectations, contractor risk behaviours, and broader supply chain instability.	**Process inefficiency and design rework** Inefficient workflows and rework driven by incomplete design, cost pressures and late-stage changes.
RECOMMENDED ACTIONS	**Manage market and supply chain risk** Improve contractor selection, diversify supply chains, and test pricing earlier to ensure realism', along with appropriate package procurement strategies.	**Reduce inefficiency and rework** Improve design completeness and ensure design deliverables at each stage are completed and strengthen coordination to avoid late changes and repeated work.

Across pre-construction Stages 2 to 4, the key challenges stem from poor alignment, low transparency and weak collaboration across design, procurement and cost. This leads to unclear scope, inefficient processes, cost uncertainty and increased risk.

Improvements focus on earlier integration, clearer roles and expectations, better alignment across disciplines, and a more collaborative, value-driven approach to delivering more predictable and efficient outcomes.

Industry risks and challenges

What key industry risks and challenges should we be aware of over the next three years?

Iran and Middle East conflict

The MEP industry typically places advance orders for equipment and materials, which may explain why the supply chain is not reporting any immediate effects from the conflict or disruption risks around the Strait of Hormuz. However, once pre-ordered supplies have been used, any new orders for materials and equipment from the Middle and Far East may increase costs, creating commercial, creating commercial pressure and longer lead times over the next two quarters.

1 Energy price shock and cost pressure

The conflict has pushed oil and gas prices higher due to perceived disruption risks around critical global energy routes. This increases electricity and fuel costs for construction activity, as well as manufacturing costs for MEP equipment, including steel, copper, aluminium and plastics.

2 Material and equipment cost inflation

MEP systems rely on globally traded components such as chillers, switchgear, pumps and controls. The conflict could increase pressure on commodity prices, particularly copper, aluminium, steel and polymers, due to tighter global supply, higher energy input costs and constrained production in affected regions. These raw material pressures are increasing the cost of both imported and locally manufactured equipment, as energy-intensive processing, such as metal refining and plastics production, becomes more expensive.

At the same time, suppliers may face higher input and freight costs, leading to greater price volatility and reduced cost certainty. Broader geopolitical instability may also disrupt raw material availability, logistics routes and trade flows, while tariffs, sanctions and regional conflicts could further constrain supply and amplify market volatility.

3 Supply chain disruption and long-lead delays

Geopolitical instability could increase global logistics uncertainty, particularly across key Middle East shipping routes. This may extend lead times for critical MEP equipment such as switchgear, transformers, BMS systems, chillers and heat pumps.

As a result, programme delays could become more common, with greater pressure for early procurement decisions before designs are fully developed. Supply chain fragility is also a key risk, as MEP systems depend on a small number of specialist global manufacturers. Any disruption, whether production delays, transport issues or component shortages, can significantly affect programme certainty, cost and design compliance, with limited alternative suppliers available.

2 Market metrics, indicators and forecast

The following metrics and forecasts are based on insights gathered from our engagement with MEP contractors through our quarterly MEP contractor survey.

The MEP market is showing signs of stabilisation in Q1 and Q2 2026, with MEP tender price inflation forecast at an average of 4.35% in 2026, rising to 4.50% in 2027 and 4.70% in 2028. While costs remain relatively steady, geopolitical issues are not currently having a direct impact on the industry. However, ongoing supply chain constraints remain a delivery concern. Although labour inflation across the wider construction industry has fallen to 2%, costs are increasing at a higher rate in certain MEP trades, particularly in London, as large infrastructure and data centre projects attract key labour and skilled trades. Despite these challenges, MEP contractors anticipate a 14% rise in turnover. Optimism persists, with growth hinging on improved early engagement, stronger supply chains, more effective pre-construction processes and greater accountability from all parties involved.

MEP TPI

No more hyperinflation, subject to ongoing Middle East conflict risks

The market has settled, and we do not expect the same hyperinflation pressures seen in 2024 and 2025, due to a slowdown in the tendering of viable, consented projects in early 2025 and early 2026.

However, this depends greatly on appetite from the supply chain and requires well-considered procurement and package strategies, alongside engagement with appropriate MEP trades and a committed supply chain.

The forecast for 2026 is currently stable and has manageable inflation, with the market remaining positive, driven by strong activity in decarbonisation projects, workplace, repurposing, life sciences and data centres.

MEP TENDER PRICE INFLATION: AVERAGE

2025	2026	2027	2028
3.50%	4.35%	4.50%	4.70%

On costs

Increases from a stabilised position over the last two years

PRELIMINARIES

Typical range:

15% - 20%

Previously 16% - 17%

The range of preliminaries as a percentage of MEP construction works has widened and depends greatly on the complexity of the project, moving from a range of between 16-17% in 2025, to 15-20% in 2026.

OVERHEADS AND PROFIT

Typical range:

8% - 12%

Previously 7% - 10%

Contractor overheads and profit (OHP) appear to have increased from a previous stable position, with a typical average rising from 9% in 2025 to 10% in 2026. OHP covers a contractor's business operating costs, such as office staff, insurance, equipment and profit.

RISK ALLOWANCE

Typical range:

2.9%

Previously 2.5%

Risk allowances slightly up at 2.9% across main contractors, with MEP trade contractors typically apply a risks % to cover design, procurement clarity and delivery. Persistent challenges include price fluctuations, unclear procurement routes, unforeseen site conditions and pressure to fix prices too early in design.

MEP contractor pipeline and availability

TURNOVER

Predicted for 2026:

+14%

2025: +10%

Turnover is expected to increase by an average of +14%, based on feedback from 19 of the 22 trade contractors surveyed. Three trade contractors predicted that their turnover would almost double in 2026. Interestingly, these trade contractors had turnover below £30m in 2025, which may reflect a widening supply chain.

It is worth noting that this growth is expected to come from decarbonisation and data centre projects, rather than commercial new build projects.

SECURED WORKLOAD (AVERAGE)

2026	2027	2028
65%	36%	21%

Whilst these figures represent average secured workloads, larger, multi-sector national MEP trade contractors are reporting secured workloads of circa 80% for 2026, due to their involvement on data centre and major infrastructure projects.

PIPELINE AND TENDERING

Capacity up

Work remains strong, although aggressive tendering remains a concern, particularly in the workplace sector. At the same time, new entrants and growing Tier 2 and Tier 3 contractors are increasing MEP capacity and giving clients greater choice.

Labour and supply chain trends

MEP PACKAGES

Forecast range:

+3-5%

MEP packages are generally forecast to increase by 3% to 5% in 2026. The lower end of the range reflects reduced MEP scope, stronger procurement strategies, improved design coordination and greater willingness to work.

Previous increases:

- 2025: previous range +3-4%
- 2026: forecast range +3-5%

Typical cost apportionment of overall MEP construction cost: London commercial MEP

- Direct MEP labour: 12%
- Materials: 10%
- Plant and equipment: 20%
- Specialist packages: 40%
- Preliminaries and risk: 18%

LABOUR COSTS

London mechanical labour rates:

+4.9%

2025: +10%

London electrical labour rates:

+4.6%

2025: +3%

Key drivers:

- Skilled labour shortage
- Data centre-driven demand
- Lack of younger entrants entering the trades

Direct labour can account for around 12% of the total MEP construction cost.

These rates are trending higher than general construction labour.

PLANT AND EQUIPMENT

Forecast indicator:

+5.4%

2025: +4%

Capital plant costs are forecast to increase by 1% to 5.4% in Q2 and Q3 2026.

This includes AHUs, MVHRs, switchgear and similar equipment.

Plant and equipment can account for approximately 20% of the total MEP construction cost.

MATERIAL COSTS

Forecast indicator:

+5.7%

2025: +3%

Material costs are expected to rise by 2.7% to 5.7% in Q2 and Q3 2026. These increases are linked to continued instability in global markets.

Key drivers:

- Volatility in commodity prices, including copper, steel, oil and plastics
- Supply constraints linked to data centre demand

Material costs can account for circa 10% of MEP construction cost. Products containing copper and cabling are particularly volatile.

Current market and material cost trends are reflected in exigere's balanced TPI forecast of 3.5% for 2026. With ongoing disruption risks around the Strait of Hormuz, we are yet to fully understand the potential impact on material prices for the second half of 2026.

<< click to view the Q2 2026 Market Update

SPECIALIST PACKAGES

Forecast indicator:

+5.4%

2025: +5%

Specialist subcontract packages are expected to increase by 4% - 6%, with an average increase of circa 5%, and volatility continuing into late 2026.

- Sprinkler and fire alarm package costs remain volatile.
- Fire alarm prices are now outpacing ductwork.
- Ductwork packages also remain high.

Specialist packages, including sprinklers, fire alarms, BMS, data and security, can account for approximately 40 - 45% of the overall MEP construction cost.

SUPPLY ISSUES AND KEY LONG LEAD TIMES

COMPONENT	CURRENT LEAD TIME	FORECAST LEAD TIME (2025)
Air handling units	10 to 12 weeks	9 to 12 weeks
Thermal insulation	2 to 3 weeks	3 to 6 weeks
Air source heat pumps	10 to 12 weeks	12 to 18 weeks
Generators	12 to 18 weeks	9 to 12 weeks
Switchgear	12 to 18 weeks	6 to 9 weeks
Transformers	12 to 18 weeks	9 to 12 weeks

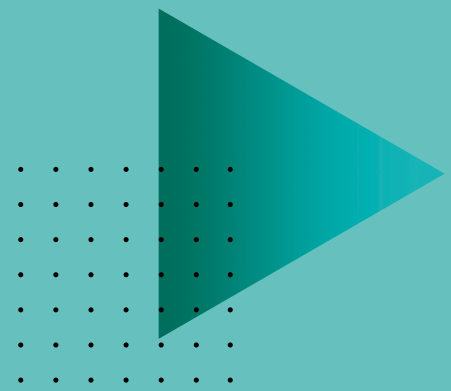
Key drivers and commentary

Lead times appear to have stabilised in Q1 and Q2 2026 but remain dependent on plant availability and manufacturing capacity.

Lead times for several MEP components remain long or are expected to increase significantly in 2026, driven by strong demand, raw material constraints and specialist labour shortages.

As mentioned previously, advance ordering within the MEP industry has so far limited immediate MEP supply chain impacts arising from the Iran and Middle East conflict and wider disruption risks.

New orders sourced from the Middle and Far East could face extended lead times, creating potential commercial and programme risks over Q3 and Q4 of 2026.



4 Industry sentiment and market outlook

MEP design consultants

POSITIVE SENTIMENT

Generally feeling upbeat and confident that they can rise to the challenge of providing sustainable, considered engineering solutions, despite being stretched. They are concerned that fee levels remain low for their enhanced services, but there is a growing sense of cautious optimism.

Main contractors

CAUTIOUS SENTIMENT

Feeling positive and currently busy, although there is some nervousness about MEP sector resources and availability as demand continues to increase across public sector and data centre pipelines.

MEP contractors

POSITIVE SENTIMENT -

Confident and competitive. Contractors are reporting steady workloads and a healthy level of activity and competition. However, there are concerns about the quality of design information they are expected to tender against and take risk on, alongside increasing worries about labour availability and fluctuations in copper and steel prices. Diversification into sectors such as decarbonisation and data centres has provided alternative workstreams beyond traditional commercial offices and residential projects.

2026 MEP market outlook

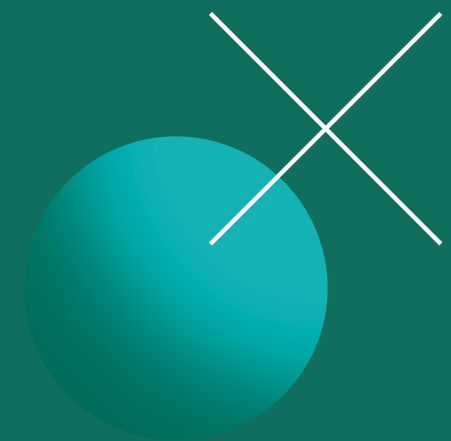
The MEP market has stabilised during the first half of 2026, with MEP tender price inflation forecast at an average of 4.35% for 2026. This is a more manageable position than the hyperinflation seen in 2024 and 2025, although geopolitical uncertainty, labour shortages and specialist package constraints continue to create risk.

Contractor sentiment remains positive, with MEP firms forecasting a 14% increase in turnover. Growth is being supported by decarbonisation, data centres, infrastructure, life sciences, repurposing and workplace projects. However, the market will continue to reward teams that engage the supply chain early, define design deliverables clearly and make cost and procurement decisions with greater certainty.

Priorities for the next 12 months

For clients and project teams, the priority is to turn market insight into more disciplined pre-construction behaviours:

- Engage MEP contractors and trade specialists earlier, particularly for complex or programme-critical packages.
- Define Stage 3 design outputs, decision points and CDP responsibilities more clearly.
- Align design, cost and procurement strategies before tendering.
- Validate costs earlier and maintain transparent cost tracking throughout pre-construction.
- Strengthen BIM coordination, design governance and structured design reviews.
- Build resilient supply chain strategies, including early planning for long-lead equipment and specialist packages.
- Focus on best value rather than lowest cost, with clearer accountability from all parties.



We look forward to our next series of market engagement roundtables and road trips, where we will discuss these topics and a wider range of issues with the MEP industry to gain their perspectives.

Are you keen to get involved?

exigere

+making projects happen

Author

Simon Willis
Partner
07917 837127
simon.willis@exigere.co.uk

Martin Broughton
Partner
07973 941264
martin.broughton@exigere.co.uk

Chris Zerdzinski
Associate
07720 164192
chris.zerdzinski@exigere.co.uk

Dan Dean
Associate
07436 0601702
dan.dean@exigere.co.uk

Jarrel Henry
Associate
07432 342963
jarrel.henry@exigere.co.uk