Article

Blue Book 2026: industry impact analysis

Analysis on the industry impacts of the 2026 UK National Accounts methodological improvements and new survey and administrative information.

Contact:
Blue Book Coordination team
blue.book.coordination@ons.gov.uk
+44 1633 456103

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1 . Main changes

- Gross value added (GVA) by industry now reflects the use of the Annual Survey of Goods and Services (ASGS) for almost all service industries; in nominal price terms, this has led to an increase in the GVA of service sectors, such as information and communication and a reduction in the GVA of the manufacturing and wholesale and retail sections.

- Improvements to the methods used to measure actual and imputed rental also led to a reassessment of the real estate industry: increasing consistency between the National Accounts and Public Sector Finances (PSF) also had industry impacts, including in social care and public administration.

- Annual data for 2024 have been estimated for the first time using the supply and use tables (SUTs) framework, and our annual estimates of GDP for 2022 and 2023 have been improved with updated data and sources.

- We held a detailed review of the energy industries and their associated products over a longer period, 2017 to 2024, in consultation with colleagues from Department for Energy Security and Net Zero (DESNZ); this resulted in a reduced fall of 24% between 2019 and 2024 in the value added by the energy industries, compared with 42% previously.

- The next Quarterly National Accounts release on 30 September 2026 will incorporate these revisions into our official estimates in line with ourNational Accounts revisions policy; read more in Section 10: Data sources and quality.

- These revisions will then be incorporated into the Monthly GDP release on 15 October 2026.

2 . Overview

The 2026 Annual National Accounts, also known as Blue Book 2026, will incorporate more recent survey and administrative information, together with methodological improvements. Further information on these changes is available in our pre-announced changes article.

Data for 2024 will be estimated for the first time using the annual supply and use tables (SUTs) framework, and our estimates for 2022 and 2023 have been improved with updated data. The SUT framework looks at the supply of goods and services, how they are used in the economy, and their associated prices in detail. More information is available in our Blue Book 2026: impact on GDP and main components. Our Monthly GDP data will also be revised to be consistent with the updated annual and quarterly measures of gross value added (GVA).

3 . The relationship between gross value added and gross domestic product

Throughout this article, annual data labelled "Blue Book 2025" is consistent with our latest GDP First Quarterly Estimate, UK: April to June 2026 bulletin. Growth rates quoted throughout have been calculated based on the rounded chained volume measure levels.

This article will focus on the annual impacts resulting from these improvements, and particularly on the impact on industry Gross Value Added (GVA). For detail on the annual and quarterly impacts on total Gross Domestic Product (GDP) and the expenditure and income approaches, please see our article Blue Book 2026: Impact on GDP and main components.

To set the industry detail presented in this article in context:

- volume growth in 2022 is now estimated to be 5.0% (down 0.1 percentage point), 0.4% in 2023 (up 0.1 percentage point) and 1.1% in 2024 (up 0.1 percentage point)

- revisions to annual volume GDP growth between 1997 and 2024 range between negative 0.1 and positive 0.3 percentage points, with the single positive 0.3 percentage point revision in 2017.

- the main cause of these revisions is the incorporation of data from the Annual Survey of Goods and Services (ASGS), although improvements to actual and imputed rental were the main cause of the 2017 growth rate revision.

- ASGS makes a positive contribution to the level of GDP from 2007 onwards, with the largest contributions in 2023 and 2024 bringing the overall increase to the current price level of GDP in 2024 to 0.5%.

The sum of GVA across industries plus net taxes on products is equal to GDP.

In this article, we use the terms output, intermediate consumption and GVA. Output measures the total value of goods and services produced, whereas GVA measures the value generated after accounting for the goods and services used up in production (intermediate consumption).

Double deflation

In Blue Book 2026, we are publishing detailed 2024 annual GVA volume data which have been double deflated for the first time. Double deflation refers to having separate deflators for both the output and the intermediate consumption of a product, and is included during Blue Book as it needs structural data which are not available for the early estimates.

These estimates also benefit from the availability of structural annual data sources, which measure the components of GVA (output and intermediate consumption) separately, which is not possible in the short-term. These data are confronted with other sources (such as data on international trade, wages and household expenditure) in the supply and use framework, which further strengthens the resulting estimates. More detail on the impact of double deflation on GVA estimates can be found in our Double deflation and the supply and use framework in the UK National Accounts article.

4 . Updated data for the structure of the UK economy

Industry weights represent the relative size of each industry's contribution to the economy. Figure 1 shows changes in the Gross Value Added (GVA) weight (in parts per thousand) for each of the 20 Standard Industrial Classification (SIC) Section-level industries in 2023 compared with those previously published. A major source of these changes is the rebalancing of industries and products that resulted from incorporating data from the Annual Survey of Goods and Services (ASGS). However, a detailed review of the energy industries has also resulted in changes of the relative contribution of the mining and quarrying and electricity and gas sections. Further detail on the impact of ASGS follows later in this section, while the energy industries review is discussed in Section 6: The agriculture and production sector.

Figure 1 shows that we now estimate the electricity and gas industry to be a larger proportion of the UK economy than previously, while the manufacturing and wholesale and retail sections are now smaller proportions of the UK economy.

While the proportions fluctuate from year to year, in 2023 the relative size of the service sector (SIC Sections G to T) remains unchanged at 79.8%. ASGS does increase the share of GVA provided by services in most years, but in 2023 the other Blue Book 2026 changes (such as the impact of the energy review) offset the impact.

Figure 1: The largest positive changes in weights in 2023 are from Electricity and Gas (Section D) and Information and Communication (Section J)

Change in gross value added (GVA) weights, Blue Book 2025 compared to Blue Book 2026, UK, 2023

Notes

1. Weights on the right side are the Blue Book 2026 weights.

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Impact of using data from the Annual Survey of Goods and Services

To gain greater insight into the range of products produced by the service sector, the ONS launched the Annual Survey of Goods and Services (ASGS) in 2017. With the results of ASGS now fully incorporated into our supply and use data confrontation, we now have a higher degree of confidence in the data on the products that these industries produce. This covers their primary and secondary products, as services industries tend to produce a range of products beyond those typically associated with their main activity.

Prior to the incorporation of ASGS, many of the industries within information and communication, professional, scientific and technical activities and business support services were identified to have generated supply of products that exceeded the reported uses of these products. Data from ASGS has given us a greater degree of confidence in the breakdown of products that these industries produce. This has led us to redress the balance of these estimates in favour of the ASGS-improved output data. This insight can only be achieved by the annual supply and use data confrontation, which looks in detail at economic activity split into 112 distinct products and industries.

Consequently, the manufacturing industry sees the biggest fall in its contribution to the economy. The ASGS dataset has shown that a substantial proportion of manufactured goods are produced by businesses classified to the service sector. Reflecting this new information has led to a downward reassessment of the amount of manufactured goods produced by manufacturing businesses themselves. As a result, despite there being an upwards revision to the total production of manufactured goods, less total output is now attributed to the manufacturing industry. As the manufacturing industry relies heavily on intermediate consumption, it tends to make up a larger proportion of total output than of total GVA. In 2024, manufacturing accounted for 13.1% of total output but only contributed 8.6% of total GVA.

From Blue Book 2025 to Blue Book 2026, the estimate of secondary production of all industries in current price terms for 2023 at SIC Section level has been revised up by 35.1%, with secondary production increasing from 6.3% to 8.4% of total output. Secondary production here refers to cases where businesses report producing products that are not the product typically associated with their main industry.

The five largest contributors to the overall 35.1% increase in secondary production in 2023 in current prices, from Blue Book 2025 to Blue Book 2026, are listed in Table 1. These are only the five largest contributors, and multiple sections made slightly negative contributions

Table 1: Top five contributing SIC Sections to revisions to secondary production in 2023 current prices

Industry	Contribution to total change (percentage points)
N: Business Support Services	+12.1
M: Professional, Scientific & Technical Activities	+7.2
G: Wholesale & Retail	+5.8
H: Transport & Storage	+3.4
S: Other Services	+3.3

Source: UK National Accounts from the Office for National Statistics

The revisions to secondary output were concentrated in a small number of service SIC Section-level industries, with the largest five contributing SIC Sections shown in Table 1 accounting for almost all of the total change.

The largest contribution to the revision of secondary output came from Business Support Services (SIC Section N). Revisions to this industry's output were the result of higher estimated production of professional, scientific and technical services, information and communication services, and manufacturing products, such as printing and recording services.

The next two largest contributors, Professional, Scientific and Technical Activities (SIC Section M) and Wholesale and Retail (SIC Section G), saw substantial upward revisions to their production of manufacturing products, which drove increases in their secondary production. Examples include computer, electronic and optical products produced by the professional, scientific and technical activities industry, and food and beverages produced by the wholesale and retail industry. This was somewhat offset by ASGS estimating lower production of food and beverage services by the retail industry than previously thought.

The estimate of primary output across all industries in 2023 current prices was revised down by 1.2%, accompanying the increase to secondary production. The five largest contributors to this total change in primary production for 2023 current prices from Blue Book 2025 to Blue Book 2026 are shown in Table 2.

Table 2: Top five contributing SIC Sections to revisions to primary production in 2023 current prices

Industry	Contribution to total change (percentage points)
J: Information & Communication	+0.8
G: Wholesale & Retail	-0.6
N: Business Support Services	-0.6
M: Professional, Scientific & Technical Activities	-0.2
B: Mining & Quarrying	-0.2

Source: UK National Accounts from the Office for National Statistics

Given that primary and secondary production together make up total output, it is unsurprising that many of the sections with the largest contributions to the positive revision to secondary production also made the largest contributions to the negative revision to primary production. The exception is Mining and Quarrying (SIC Section B), where revisions were not caused by ASGS but by the detailed review of the energy industries, which will be discussed in Section 6: The agriculture and production sector. In contrast, information and communication (SIC Section J) makes a positive contribution to the revision to primary production; reflecting increased confidence in primary and secondary production data. Information and Communication is discussed in more detail in Section 5: The services sector.

5 . The services sector

The services sector has consistently contributed over 70% of the UK's gross value added (GVA) since 1998 and around 80% in recent years, reaching 81.2% in 2024. In Blue Book 2026, annual volume growth in services for 2024 is estimated at 1.3%, a downwards revision from 1.4% in our Quarter 2 2026 First Quarterly Estimate (FQE) release. Figure 2 shows the GVA volumes and revisions between Quarter 2 (Apr to June) 2026 FQE release and the updated Blue Book 2026 estimates.

The Quarter 2 2026 FQE release is consistent with Blue Book 2025 data from 1997 to 2023, and 2024 and 2025 have been revised in line with our National Accounts revisions policy since the Blue Book 2025 release.

Figure 2: Services growth revisions are mainly positive between 1998 and 2020, with negative revisions in the period 2021 to 2024; the largest positive revision is positive 0.5 percentage points (pp) in 2017, and the largest negative revision is negative 0.3pp in 2022

Gross value added (GVA) volume growth and revisions of the services sector, UK, 1998 to 2024

Notes:

1. Revisions are rounded to one decimal place and calculated based on the rounded chained volume measure (CVM) levels.

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Average annual volume growth of the services sector over the period from 1998 to 2024 has been revised upwards by 0.1 percentage points, with positive revisions in all but one of the years from 1998 to 2020. The largest upward revision of 0.5 percentage points in 2017 was primarily caused by real estate activities (SIC Section L), following improvements to private actual and imputed rentals in household expenditure.

Revisions were concentrated in the period 2007 to 2024, with this period affected by the use of the Annual Survey of Goods and Services (ASGS). 2024 was balanced for the first time using the detailed annual supply and use framework, and data for 2022 and 2023 were improved by a range of separate updated data sources, including the Annual Business Survey, the Annual International Trade in Services Survey and HM Revenue and Customs tax data.

Volume GVA growth revisions by service industry

Revisions to the services sector were spread across a range of services, with the largest average annual positive revision to growth across the period 1997 to 2024 in business support activities (SIC Section N).

Figure 3: The largest positive average annual revisions from 1997 to 2024 were in business support activities

Gross value added (GVA) volume growth series by service section, UK, 1998 to 2024

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When comparing new estimates for 2024 against those previously published, the largest positive revision to contributions came from financial and insurance activities, and the largest negative revision to contributions came from wholesale and retail activities.

Figure 4: The largest change in contributions between Blue Book 2025 and Blue Book 2026 in the services sector came from wholesale and retail activities

Contributions to gross value added (GVA) services sector growth, UK, 2024

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Professional, scientific and technical activities

2024 volume GVA growth of professional, scientific and technical activities has been revised downwards from 2.4% to 0.5%. This reflects lower output growth in current prices than previously estimated following the incorporation of 2024 annual data sources, such as the Annual Business Survey (ABS), for the first time.

Business support services

The average annual volume GVA growth from 1997 to 2024 in the business support services section was revised upwards by 0.4 percentage points. This revision was largely caused by the office administrative, office support and other business support activities industry (SIC Division 82), and in particular over the period from 2007 to 2019, when the average annual volume GVA growth of SIC Section N was revised upwards by 0.9 percentage points.

These revisions reflect the introduction of ASGS data, which improved the capture of secondary production within the industry. The impact was particularly large for the office administrative, office support and other business support activities industry, as its definition is broad, meaning businesses within the industry undertake a wide range of secondary activities.

Information and communication services

As discussed in Section 3: The relationship between gross value added and gross domestic product, the extra detail provided by ASGS led us to reassess the supply and use of products produced by the service industries. This led to an overall increase in the size of this section of the economy, but also a modest downward revision to the amount of growth over the time series.

Figure 5: The size of the information and communication section has increased, and there was a small downwards revision to the amount of growth

Information and Communication gross value added (GVA) volume growth series, UK, 1998 to 2024

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The annual average volume GVA growth of publishing services between 1998 and 2024 has seen a downward revision, by 0.9 percentage points. ASGS has highlighted that businesses classified as computer services (SIC Division 62) also produce substantial publishing output (specifically licensed computer software). This led to slightly weaker volume GVA growth in publishing activities (SIC Division 58) in the 2010s in particular.

In the other direction, we have substantial increases in volume GVA growth in both computer services and information services (SIC Divisions 62 and 63, respectively). These are industries where it has been and remains difficult to reconcile the revenue reported by producers of these products and the spending reported by their consumers. The extra detail provided by ASGS has increased our confidence in the production side of this balance, and we have rebalanced our statistics for these industries accordingly.

Wholesale and retail

Volume GVA growth in the wholesale and retail section (SIC Section G) in 2024 was revised downwards from negative 0.3% to negative 3.6%, resulting in the largest negative contribution to the 2024 services sector volume GVA growth rate revision. The revision reflects stronger growth in intermediate consumption relative to output across the wholesale and retail industries, identified through the incorporation of ASGS and 2024 ABS for the first time in Blue Book 2026.

Average annual GVA volume growth from 1998 to 2024 is stronger than previously estimated, having been revised up by 0.3 percentage points. This growth revision mainly occurred over the period from 2007 to 2017, where average annual growth was revised upwards by 0.8 percentage points, reflecting a higher estimate of secondary output, particularly of manufacturing products. The introduction of ASGS for the first time (covering data from 2007 onwards) led to the collection of more information regarding secondary production.

Financial services

Financial and insurance services made the largest positive contribution to the 2024 growth rate revision, as the 2024 growth of the industry was revised upwards from negative 2.2% to positive 1.4% in Blue Book 2026. This upward revision was primarily in non-monetary financial institutions in financial intermediation (SIC Division 64) and services auxiliary to financial services (SIC Division 66). This is based on the increased use of external data sources and reports to supplement Office for National Statistics (ONS) data when producing the annual estimates.

6 . The agriculture and production sector

In Blue Book 2026, annual volume growth in the agriculture and production sector for 2024 is estimated at 0.4%, revised upwards from negative 1.5% from our Quarter 2 (Apr to June) 2026 First Quarterly Estimate (FQE) release.

Average annual growth of the agriculture and production sector over the period 1998 to 2024 has been revised downwards by 0.1 percentage points, with negative revisions in almost every year from 1998 to 2017. There were positive revisions to growth in the years 2021 to 2024 when compared with Quarter 2 FQE, with the energy industries a major contributor.

The largest downward revision of 1.8 percentage points occurred in 2020, where volume gross value added (GVA) growth is now estimated to be negative 1.1%, revised down from 0.7% in Blue Book 2025. This was mainly caused by the manufacturing industry, where GVA volume growth is now estimated to have fallen by 2.9%, compared with a previously estimated decline of 0.8%. The introduction of Annual Survey of Goods and Services (ASGS) data from 2007 onwards provided us with improved information on manufacturing activity undertaken by service industry businesses, allowing us to reassess the contribution of the manufacturing industry. In 2020, this led to improved reconciliation between current price output and price measures, resulting in a slightly steeper decline in volume GVA growth.

In addition, volume GVA growth in the electricity, gas, steam and air conditioning supply section in 2020 is now estimated at 4.1%, lower than the previous 10.5% estimate in Blue Book 2025. This was caused by stronger growth in intermediate consumption of energy products in current prices following the review into energy industries as part of the 2026 Annual National Accounts.

Figure 6: The agriculture and production sector has been revised downwards for almost every year from 1998 to 2017, with upwards revisions to each year from 2021 to 2024; the largest positive revision is positive 1.9 percentage points in 2024, and the largest negative revision is negative 1.8 percentage points in 2020

Gross value added (GVA) volume growth and revisions to the agriculture and production sector, UK, 1998 to 2024

Notes:

1. Revisions are rounded to one decimal place and calculated based on the rounded chained volume measures (CVM) levels.

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Volume GVA growth revisions by agriculture and production sector

The agriculture, manufacturing and electricity and gas industries all saw positive revisions to volume GVA growth for 2024. The upward revision to growth between 2019 and 2024 was largely caused by the electricity and gas section, where volume GVA growth is now estimated to have fallen by less over the period than previously thought. Average annual volume GVA growth from 1998 to 2024 was slightly lower in both the agriculture and manufacturing sections following the incorporation of ASGS for the first time.

Figure 7: Average annual volume GVA growth from 1998 to 2024 was slightly lower in both the agriculture and manufacturing sections following the incorporation of ASGS for the first time

Gross value added (GVA) volume growth series by agriculture and production sector, UK, 1998 to 2024

Notes

1. Index of Production does not include agriculture.

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Figure 8: The largest change in contribution to agriculture and production growth in 2024 came from electricity and gas

Contributions to gross value added (GVA) agriculture and production sector growth, UK, 2024

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Understanding volume GVA growth in the energy industries

The Office for National Statistics (ONS) benefits from having a good range of information available on the energy products and industries. As well as the usual structural annual surveys and administrative data sources that the ONS uses (including trade data from HM Revenue and Customs), the Department for Energy Security and Net Zero (DESNZ) publishes a range of statistics, for example energy balances showing where different types of energy come from and how they are used. The North Sea Transition Authority (NSTA) also publishes statistics particularly relating to crude petroleum and natural gas extraction.

However, these sources use different compilation approaches, and this can make comparisons difficult. One example is that we assign businesses to industries based on their main activity; in this way, a company in the electricity industry (for example) may also supply a substantial amount of mains gas. Another example is that the product classification used by the ONS requires us to consider natural gas extracted from the ground as a different product to mains gas, even though these products are not very different from one another.

Recent events have made the analysis of this industry more complex. Prices of crude oil and natural gas rose quickly after 2020, peaking in 2022 following the outbreak of war in Ukraine. The operation of the Energy Price Guarantee initially prevented these price rises being passed on in full to electricity and gas customers. During the period October 2022 to June 2023, the Energy Price Guarantee meant that electricity and gas producers received the full value of the supplied product, while consumer bills were subsidised.

The ONS has reviewed in detail the energy industries as part of the 2026 Annual National Accounts, focusing on the period 2019 to 2024. This work has included revisiting and re-confronting the important data sources over this period in both value and volume terms and with advice from colleagues at the Department for Energy Security and Net Zero (DESNZ).

The changes from this review have come mostly from making better use of existing data. Price information published by OFGEM was used to provide additional information and assurance. However, as with all other industries and products, 2024 also reflects the more complete annual dataset being confronted through the annual supply and use framework for the first time. Having 2024 data available provided additional useful context for assessing data movements in the years 2021 to 2023.

Figure 9: The energy industries saw a smaller fall in GVA from 2022 onwards in Blue Book 2026 compared with previously published estimates

Gross value added (GVA) volume growth for the energy industries, UK, 2019 to 2024

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Collectively, the energy industries are now estimated to show a 24% fall in volume GVA between 2019 and 2024, compared with a 42% fall previously. As Figure 9 shows, the majority of the upward revision comes from less negative growth rates in the years 2022 to 2024. The production of electricity and mains gas now aligns more closely with related concepts in DESNZ publications (electricity production and mains gas supply for consumption). Since this rebalancing exercise was carried out, DESNZ have published their [Digest of UK Energy Statistics (DUKES) 2026](#).

Over this period, our annual surveys of businesses in the electricity and mains gas section show a substantial increase in spending on energy inputs, such as natural gas. This is to be expected over a period where energy prices were high, and as such the impact on volume GVA is modest. However, the period also saw substantial increases on spending on non-energy products such as machinery and equipment, repair services, and head office and management consultancy. These products have not seen large price rises and so represent considerable increases in the volume of intermediate consumption, reducing volume gross value added of the industry. Petroleum refining is an industry with very narrow margins (value added is small compared with output and intermediate consumption) and its volume GVA tends to be volatile from year to year.

Figure 10: Revisions across energy sub-industries contribute to a less negative growth profile for the energy sector between 2022 and 2024

Gross value added (GVA) volume growth for each of the energy industries, UK, 2019 to 2024

Notes

1. The Blue Book 2026 weights for the industries within the energy industries in 2024 are: 22.6% for B05 and B06, 4.2% for C19, 56.1% for D35.1, 17% for D35.2-3. Weights do not sum to 100% due to rounding.

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Revisions to contributions to GVA volume growth in the energy industries

Figure 11 shows the contribution to this revision from each of the four industries that make up the energy industries. The contribution of the electricity industry is revised up in all years, while coal mining, crude petroleum and natural gas extraction is not much changed in 2022, and revised up in 2023 and 2024.

Figure 11: Electricity power generation, transmission and distribution (SIC Division D35.1) and Extraction of crude petroleum and natural gas, and mining of coal and lignite (SIC Division B05 and B06) made the largest positive contributions to revisions in energy industry growth from 2022 onwards

Contribution to revision from energy industries, UK, 2022 to 2024

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Further work on the energy industries

While this year's detailed review of the energy industries and products has led to improved estimates of their contribution to the UK economy, there remain further areas for investigation. We will look in more detail at how the intermediate consumption of products other than energy, by the electricity and mains gas industries, can help to understand the causes of this increase in spending. This is particularly important at a time when the generation of electricity is diversifying. We will investigate the relationship between the volume of electricity and gas supplied and associated services (such as distribution and trade of electricity and gas). Better measuring economic globalisation is likely to lead to better measures of the petroleum industry, as refining is an activity that can be performed under contract. We will continue to work with partners in DESNZ and HM Revenue and Customs to better understand the coherence of the data used to produce these estimates.

Agriculture

Volume GVA in the agriculture section grew by 6.5% in 2024, revised upwards from the previous estimate of 0.3%. This was mainly because of an upward revision to volume GVA growth of crop and animal production, hunting and related service activities (SIC Division A01), reflecting the incorporation of more detailed annual data than were previously available. While there was little change to current price GVA growth, the falling prices of products of agriculture, hunting and related services, which account for the vast majority of the industry's output, resulted in stronger output growth in volume terms and therefore stronger volume GVA growth.

In addition, output in the forestry and logging industry (SIC Division A02) was higher than previously estimated because of the incorporation of 2024 Annual Business Survey (ABS) data for the first time in Blue Book 2026.

Manufacturing

Volume GVA growth in the manufacturing industry is now estimated to be 1.5% in 2024, revised upwards from 0.3%.

These revisions were spread out over the manufacturing subsections, with the pharmaceutical manufacturing industry (SIC Division 21) making the largest contribution to this revision. Volume GVA growth in this industry in 2024 was revised upwards from 0.7% to 7.3% in Blue Book 2026. This was because the net trade data indicated the output and value added of firms had grown by slightly more than indicated by our short-term surveys.

Figure 12: Upward revisions to Manufacturing (Standard Industrial Classification (SIC) Section C) growth were mainly driven by larger contributions from pharmaceuticals, transport equipment and chemical products, partly offset by a negative contribution from food manufacturing

Contributions to gross value added (GVA) volume growth in the manufacturing section, UK, 2024

Notes

1. The industry weights for contributions were calculated using 2023 current prices.

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Food products, beverages and tobacco

The contribution to growth of the manufacturing industry by the food products, beverages and tobacco industry decreased from positive 0.82 to negative 0.48 percentage points. The main contributions to this revision came from revisions to the processing and preserving of meat and production of meat products and the manufacture of dairy products industries.

For these industries, GVA growth in nominal prices was lower than previously estimated because of the incorporation of ABS data for 2024 for the first time, which showed lower output growth.

Additionally, the volume GVA growth rates of these industries were pushed downwards by a fall in 2024 prices for products of agriculture, hunting and related services, as these products make up a large proportion of the intermediate consumption of both industries. This increased the volume intermediate consumption growth of both industries.

7 . The construction industry

In Blue Book 2026, annual volume growth in the construction section (Standard Industrial Classification (SIC) Section F) for 2024 is estimated at negative 0.1%, which is revised down 0.1 percentage points from the previous 0.0% estimate.

Average annual growth of the construction section over the period 1998 to 2024 has been revised downwards by 0.1 percentage points, with annual revisions ranging from a downward revision of 0.6 percentage points in 2023 to upward revisions of 0.5 percentage points in 2016 and 2022. The upward revision in 2016 reflected revised price movements for construction and construction works, while the upward revision in 2022 and the downward revision in 2023 were the result of reassessing the section in the light of new and revised income data. Slight downward revisions to growth were seen in each year up to 2013 because of a higher estimate of intermediate consumption in volume terms.

Figure 13: Average annual growth in the construction section has been revised downwards by 0.1 percentage points

Gross value added (GVA) volume growth and revisions to the construction section, UK, 1998 to 2024

Notes

1. Revisions are rounded to one decimal place and calculated based on the rounded chained volume measures (CVM) levels.

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8 . Future developments

Information on upcoming releases is covered in detail in Sections 10 and 11 of the [Blue Book 2026: impact on GDP and main components] published on 20 August 2026.

Changes to aggregation within the production industries and products

Going forward, we will be aggregating together some smaller industries in both the supply and use tables and the GDP low level aggregates table.

The following industries and products will be combined in our supply and use tables and input-output tables, due to be published 30 October 2026:

- Coal mining (SIC and CPA Division 05) with crude petroleum and natural gas extraction (Division 06)
- Metal mining (SIC and CPA Division 07) with other mining and quarrying (Division 08)

These changes will also appear in the annual volume dataset, which we maintain as part of the article [Double deflation and the supply and use framework in the UK National Accounts]. Additionally, we will no longer include a chained volume measure series for the manufacture of fats and oils (SIC and CPA Subdivision 10.4). However, we will continue to publish current price and previous year's price series for the product and industry, so users can construct their own aggregates including this product and industry.

In our quarterly low level aggregates table, the following changes will be made, from the publication on 30 September 2026:

- Coal mining (SIC Division 05) will be combined with crude petroleum and natural gas extraction (SIC Division 06)
- the chained volume measures for manufacture of fats and oils (SIC Subdivision 10.4) will no longer be published; this will still form part of the aggregate series for the manufacture of food products
- current prices will continue to be published in the low level aggregates dataset

9 . Glossary

10 . Data sources and quality

Revisions

The next Quarterly National Accounts release on 30 September 2026 will incorporate these revisions into our official estimates in line with ourNational Accounts revisions policy. These will also be incorporated into our Monthly GDP release on 15 October 2026. The fullGDP revisions article to accompany this Blue Bookwill be released on 30 October 2026.

Standard Industrial Classifications

We have used shortened names of the UK Standard Industrial Classification (SIC) names for Sections.

The following list contains the full names of Sections included in this article:

- Section A: Agriculture, forestry and fishing
- Section B: Mining and quarrying including oil and gas extraction
- Section C: Manufacturing
- Section D: Electricity, gas, steam and air
- Section E: Water supply, sewerage, etc
- Section F: Construction
- Section G: Wholesale and retail trade and repair of motor vehicles and motorcycles
- Section H: Transportation and storage
- Section I: Accommodation and food services
- Section J: Information and communication
- Section K: Financial and insurance activities
- Section L: Real estate
- Section M: Professional, scientific and technical activities
- Section N: Administrative and support service activities
- Section O: Public administration, national defence, social security
- Section P: Education
- Section Q: Health and social work
- Section R: Arts, entertainment and recreation
- Section S: Other service activities
- Section T: Activities of households as employers

11 . Related links

Proposed Changes to be Implemented in Blue Book and Pink Book: 2026
Article | Released 24 March 2026
Planned scope and content of the UK National Accounts, the Blue Book and UK Balance of Payments, the Pink Book, 2026, editions.

Incorporating the Annual Survey of Goods and Services into the UK National Accounts, Blue Book: 2026
Methodology | Released 22 June 2026
How the 2026 UK National Accounts will integrate Annual Survey of Goods and Services (ASGS) data to enhance the understanding of production by industries in the service sector.

Improvements to the local government measure of intermediate consumption in the National Accounts: Blue Book 2026
Methodology | Released 22 June 2026
Improvements to our methods for measuring local government intermediate consumption (P.2), to be incorporated in the 2026 annual National Accounts.

Improvements to private actual and imputed rentals in household expenditure in UK National Accounts, Blue Book 2026
Methodology | Released 22 June 2026
Improvements made to private actual and imputed rentals methods and sources to be implemented in the Blue Book 2026 dataset.

Blue Book 2026: impact on GDP and main components
Article | Released 20 August 2026
Annual and quarterly impacts on the 2025 UK National Accounts from recent methodological improvements, and new survey and administrative information.

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