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ALARM

Annual Local Authority Road Maintenance Survey Report

2026

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About the ALARM survey

Each year the Asphalt Industry Alliance (AIA) commissions an independent survey of local authority highway departments in England (including London) and Wales.

The aim of the survey is to take a snapshot of the general condition of the local road network, based on information provided directly by those responsible for its maintenance. The data received from local authorities provides a means of tracking any improvement or deterioration, allowing long-term trends to be reported, and the qualitative feedback received from them provides context.

Questions in the survey relate predominantly to the maintenance of the carriageway itself – the road surface and structure – and only that part of the total highway maintenance budget which specifically addresses the condition of the carriageway, referred to as the carriageway maintenance budget. Total highway maintenance budgets also cover other significant areas of expenditure – including structural work to bridges, street lighting and cyclical maintenance (for example grass-cutting, checking traffic signals and the replacement of street furniture) – which are excluded from this report.

ALARM 2026 is the 31st annual survey and 79% of authorities responsible for local roads in England and Wales responded. This report summarises the key findings.

The survey and data collation was carried out between December 2025 and February 2026. Unless otherwise stated, the findings are based on the financial year 2025/26, ending 31 March 2026. Where these are unavailable, figures for the calendar year 2025 were requested.

There are four authorities in England, and one in London, which have Private Finance Initiative (PFI) contracts in place to fund and manage their highway maintenance programmes over a 25-year period. These are not included in the survey.

The ALARM survey 2026 includes the findings of both quantitative and qualitative research.

The data received from local authorities has been extrapolated to represent the 115 local authorities in England without a PFI, 22 in Wales and 32 in London. The results have been collated, analysed and verified by a registered member of the Royal Statistical Society. ALARM survey reports from previous years can be accessed via our website: www.asphaltuk.org. A broad range of other road-related statistics are collated on RoadFile: www.roadusers.org.uk

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Quotations used in this report are from local authority highway officials.

Arrows indicate the direction of change from the findings reported in ALARM 2025.

10 year trend: data covers ALARM report years.

Contents

It's time to build on what's been started

Overview by **David Giles**, Chair, Asphalt Industry Alliance

There's no polite way to put it: the condition of our local roads has become a national disgrace. And, with this year's ALARM survey reporting that the backlog of carriageway repairs in England and Wales has increased to another record high of **£18.62 billion**, it's clear that any noticeable improvements lie a long way off.

Tracking ALARM data over the last decade shows that the amount needed to bring the carriageway up to scratch has increased dramatically, not helped by the inconsistent funding levels that local authorities have reported over this period. Meanwhile, our ageing network has become more fragile and vital resurfacing takes place less frequently – now reportedly only once every 97 years on average.

Ensure best value

The AIA has long advocated a different approach: sustained investment in highways maintenance supported by a long-term funding horizon and greater transparency. This would provide local authority highway engineers with the certainty they need to carry out the most appropriate maintenance interventions at the right time – helping to halt decline, improve conditions and ensure best value for tax payers.

It appears the Government has listened. It's funding announcements for local highway maintenance in England, including £1.6 billion for this (2025/26) financial year – £500 million more than the previous year – plus its subsequent pledge to allocate £7.3 billion over the next four years, represent an important step forward.

This initial uplift, along with additional allocations from local authorities' own sources, has led to significant increases in the average highway maintenance budgets reported in 2025/26. However, these have only resulted in marginal improvements in conditions. So, while local authority highway engineers told us they are cautiously optimistic that the increased funding will help them stem further decline, it is not the silver bullet that will clear the backlog of repairs any time soon.

This winter was one of the wettest on record and the continuing impact of adverse weather events on a consistently underfunded, and increasingly fragile network are coming home to roost.

Certainly, it will be some time before the impact of increased funding levels, if fully delivered, will be noticed by the public. But the dial could be moved quicker if the Government's commitment to additional funding was frontloaded, rather than ramping up in the years to 2030. This would support a shift away from the seemingly endless cycle of pothole patch and repair – allowing those maintaining our local roads to focus on proactive programmes that prevent potholes forming in the first place and improve the experience of all road users.

Improve local roads

Local authorities told us that if, hypothetically, their backlog of repairs was cleared, the amount they would need to maintain their roads to a steady state each year, would be £1 billion less a year every year going forward. Plus, investing to improve local roads would also deliver significant returns to the economy and help keep communities connected.

Every journey we make relies on local roads; even carrying the utilities to support a thriving, modern society. However, it is evident from media coverage bemoaning the state of our roads that their condition remains a key issue for the public. It's time for the Government to ensure the promised funding is delivered – and fast.

David Giles

Executive summary

The Annual Local Authority Road Maintenance (ALARM) survey was introduced in 1995 and has evolved to highlight and track the connection between local road maintenance funding and conditions in England and Wales. The findings are based on information provided directly by those responsible for its upkeep.

A record number of local authorities (79%) responded to this year's survey, the 31st, providing robust data for analysis and underscoring the value that those working in the sector place on its annual findings.

Key facts 2025/26

Funding:

- Local authorities in England and Wales saw their average highway maintenance budgets increase by 17% over the last year to £30.5 million per authority.
- The average percentage of highway maintenance budget spent on the carriageway is up again by 1% to 54%.
- This means that carriageway maintenance budgets increased by 20% to an average of £17.0 million per authority.
- However, local authorities in England and Wales reported that they would have needed an extra £8.1 million each last year to maintain their network to their own targets. This is a total carriageway maintenance budget shortfall of £1.37 billion; an increase of 89% on the figure reported 10 years ago in ALARM 2017.
- **£18.62 billion** is now reported to be needed, as a one-off, to bring the network up to a 'reasonable steady state' – an increase of 54% on the £12.06 billion reported a decade ago.

The state of the roads is getting worse and the amount of money we've got to repair them isn't keeping up.

Acknowledging ALARM

The Asphalt Industry Alliance (AIA) is happy for journalists, researchers, industry organisations, government departments and others to use and/or quote the findings of ALARM 2026 contained in this report. We stipulate that it is always acknowledged as the source – referencing it as the AIA's ALARM survey report 2026 (or AIA ALARM 2026) – in all cases.

Detailed key findings can be found on page 24.

Key facts 2025/26 continued

Conditions:

- Road Condition Index (RCI) data shows some improvement in the general condition of carriageways, with a small 2% increase in the number of roads reported to be GREEN (in a good state of repair).
- There has also been a 2% drop in those classed as RED (poor overall condition), but this still means that one in every 10 miles of the network in England and Wales – around 20,400 miles – is likely to require maintenance in the next 12 months, the equivalent of a return trip from London to Adelaide, Australia.
- Just over half (51%) of the local road network is now reported to be in good structural condition, with the remaining 49% stated to have less than 15 years' structural life remaining. Structural maintenance is needed when addressing surface conditions alone won't suffice, and this data adds to a more holistic assessment of the resilience of the carriageway.
- 1.9 million potholes were filled over the last year, the same as reported in ALARM 2025, at an estimated cost of £149.3 million. This is equivalent to more than 5,200 every day of the year.
- The average frequency of resurfacing for all classes of local roads is once every 97 years, up from once every 93 years reported last year.

We've been underfunded for so long that even the increase we've seen this year is not enough for the public to see a visual improvement in the network.

Recommendations

Over the last decade the cost of fixing the backlog of local road repairs has increased by more than 50%, with the new record level of **£18.62 billion** reported this year reflecting the daily experience of road users on a network that is increasingly fragile.

Funding injections from central and local government are to be applauded, but have yet to result in tangible improvements in conditions. Plus, the widening shortfall in annual carriageway budgets needed to prevent further decline indicates the scale of the challenge. This has recently been highlighted by the impacts of one of the wettest winters on record.

Lasting improvements to our local roads will only take place if increased levels of highways maintenance funding are sustained over the long term. That's why it's vital that the Government follows through on its Budget commitments and responds to our call to frontload the additional funding, rather than ramping it up in the coming years.

This would allow local authority highway engineers to carry out the most appropriate maintenance interventions at the right time – helping to halt decline, improve conditions and ensure best value for taxpayers.

Highway maintenance budgets

Local authorities have a statutory obligation to keep their highway networks in a safe condition. However, the maintenance of local roads is just one of the key services councils have responsibility for along with, for example, education, social care and housing.

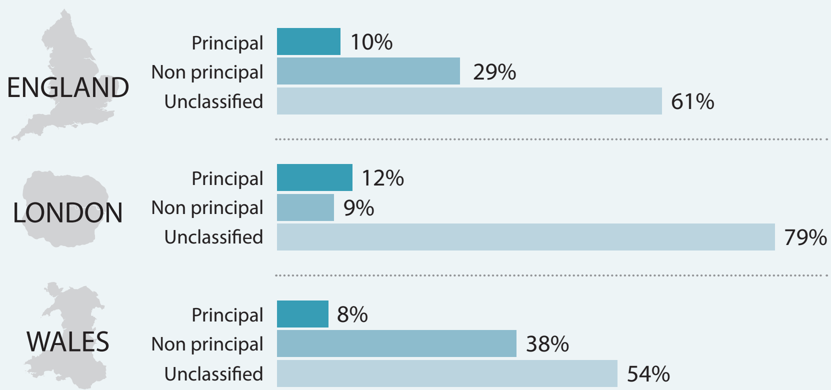
There are 204,412 miles of local roads in England and Wales, including London, representing 97.3% of the total road network (source: Department for Transport (DfT), 2026). These roads are considered to be local authorities' most valuable asset, with a combined value reported to be in excess of £550 billion. (The remainder of the network, the strategic road network (SRN) which includes motorways and key principal routes, is managed by National Highways and is excluded from this report.)

Feedback received for 2025/26 suggests that the proportion of overall local authority budgets allocated to highway maintenance has increased slightly but still only represents around 4.3% (2025: 3.1%) of their total local authority budget – less than one per cent (0.9%) of the total £550 billion asset value.

These total budgets are funded by central government and local authority sources, which may include borrowing, use of capital reserves and monies collected through council taxes, a share of business rates, parking fines and other fees.

Local roads in England and Wales 2025/26

Proportion of road by type (source: DfT road length data 2026)



Principal: A roads | Non principal: B and C roads | Unclassified: U roads

We're not going to see a radical change in our network condition with what is a fairly small amount of money compared to our backlog and funding deficits. We're still a long way from holding a steady state.

Highway maintenance funding in England

In the Autumn 2024 Budget the UK Government announced nearly £1.6 billion in capital funding for local highways maintenance in England for the 2025/26 financial year: £500 million in additional DfT Highways Maintenance Block (HMB) incentive funding when compared to 2024/25 funding levels.

This has contributed to a reported 16% increase in local authority budgets in England (excluding London) for all highway maintenance activity, to an average of £38.9 million per authority (2024/25: £33.5 million) – the highest reported in ALARM.

It continues to be the case that there is a disparity between those seeing increased funding and those which experienced a cut from the previous financial year. However, this year 71% of respondents reported an increase on last year's highway maintenance budget, up from 52% last year.

An average of 57% of total budgets allocated for highway maintenance is reported to be funded by central government, while the remaining 43% comes from local authorities' own sources. This is in line with previous years (2024/25: 55%/45%; 2023/24: 56%/44%) indicating that the money from the DfT has been supplemented by councils also providing additional funds from their own sources to support local roads maintenance, in line with HMB incentive fund criteria. In addition, 21% of local authorities in England report that they are operating an invest to save scheme, funded from their own sources.

This approach suggests a growing recognition that investment in local roads provides an effective return on investment, estimated to be up to nine times by the DfT in its 2024 *economic appraisal for investing in local highways maintenance.*

The extra funding we received has allowed us to address some of the problems we don't usually have a chance to address. It's a glimpse of what we could achieve if we receive that level of funding year-on-year over the long term.

The vast majority (93%) of funding from central government is provided by the DfT. In the 2025/26 financial year this came from three key sources: HMB needs-based funding; the separate HMB incentive element, 25% of which was held back until best practice criteria were proved to have been met; and Integrated Transport Block (ITB) funding. All respondents reported meeting the incentive criteria, so received all of their HMB allocation from this pot.

The remainder of central government funding is from other sources such as the Ministry of Housing, Communities and Local Government (MHCLG), Environment Agency grants and regional and mayoral areas growth funding.

In England, 54% of local authorities are members of a Combined Authority, which takes responsibility for allocating all DfT transport-related funding, including highway maintenance, among its partnership authorities.

These local authorities reported an average individual highway maintenance budget of £28.9 million in 2025/26 – 26% lower than the overall average for England (£38.9m).

Capital versus revenue maintenance budgets in England

As set out in the House of Commons Research Briefing *Potholes and local road maintenance funding* **capital maintenance** expenditure is funded by DfT and is primarily for the structural renewal of highway assets (including roads, footways, bridges, drainage and lighting) to extend the life of the asset. It is comprised of three streams:

- **Highways Maintenance Block (HMB) – needs element**
- **Highways Maintenance Block (HMB) – incentive element (with 25% held back until best practice criteria are met)**
- **Integrated Transport Block (ITB) – allocated to support local transport maintenance and enhancements**

Revenue maintenance expenditure mainly covers routine work required to keep the highway serviceable and reactive measures to rectify defects, such as filling in potholes. This is funded by the Ministry of Housing, Communities and Local Government through the revenue support grant.

Local authorities also allocate funding from their own sources to both capital and revenue budgets.

Highway maintenance budgets continued

Highway maintenance funding sources in London

The UK Government withdrew annual funding to Transport for London (TfL) in 2018. Since then, London boroughs have not received any funding support for the maintenance of principal routes. They also do not currently receive any funding for highway maintenance from the ULEZ scheme.

However, there are several competitive bid-for grants available from TfL, including Local Implementation Plans and the Liveable Neighbourhoods scheme, which can be allocated to road maintenance.

In 2025/26 London boroughs received some direct funding from the incentive element of DfT's Highways Maintenance Block, providing they demonstrated they meet certain best practice criteria.

Local road maintenance is now predominantly funded by London borough's own sources. These include council reserves, a share of business rates, borrowing and fines, as well as developer contributions such as Section 106 agreements and the Community Infrastructure Levy.

Highway maintenance funding sources in Wales

The Welsh Government receives a block grant from the UK Government which forms the basis of its budget along with monies raised from devolved taxes, such as business rates and council taxes as well as limited amounts of borrowing.

From this, local authorities receive the Revenue Support Grant (RSG), a non-ring fenced funding stream for allocation across all local services, including road maintenance.

Welsh authorities can also bid for competitive grants provided by Welsh Government, such as the Resilient Roads Fund and the Local Transport Fund, which provide targeted support for climate resilience and infrastructure improvements.

Plus, authorities are able to access additional funding through a Local Government Borrowing Initiative. The Welsh Government has made an extra £10 million of revenue funding available in the 2025/26 year, which is allowing local authorities to unlock an additional £120 million in capital funding over two years via borrowing.

The Senedd reports that all 22 Welsh authorities have been awarded funding under this initiative and work is already underway. It is understood that the funds borrowed will be paid back over decades in line with Welsh Government guidance.

Local authorities also generate their own revenue through sources such as parking fines and borrowing, which can help fund road maintenance.

Highway maintenance funding in London

In 2025/26, only 15% of budgets for the capital are reported to originate from central government sources and TfL. This includes £25.3 million allocated through DfT's HMB incentive fund, all of which was awarded. The remaining 85% is funded by authorities' own sources.

Overall, 60% of London respondents reported that they received an increase in their total highway maintenance budget, with the remaining 40% experiencing a reduction on last year.

However, London data indicates an average increase of 22% in overall highway maintenance budgets to £13.2 million (2024/25: £10.8m): again, the highest figure recorded in ALARM.

This increase in average budgets has been boosted by those authorities which have benefited from significant capital investment projects funded from the boroughs' own sources which, in some cases, more than doubled their previous year's budget total. In parallel, 25% of London boroughs reported that they are operating an invest to save scheme.

Highway maintenance funding in Wales

Average highway maintenance budgets have increased by 35% to £11.5 million (2024/25: £8.5m); another ALARM record high. However, as reported in other regions, some Welsh respondents (20%) still reported a cut on last year's total.

More of this funding is reported to come through the Welsh Government, predominantly via the Local Government Borrowing Initiative announced for 2025/26 and 2026/27, which was implemented to unlock additional capital funding for local roads maintenance.

As a result 45% of total funding came

through the Welsh Government and the remaining 55% of funding came directly from authorities' own sources.

Overall picture

The overall total highway maintenance budget across England and Wales for 2025/26 is calculated as £5.14 billion, up 17% on the 2024/25 figure (£4.39) and the highest recorded in the history of ALARM. Even accounting for inflation at 3.4% (source: statista.com), this is still a real terms headline increase of over 13%.

The graphic below right shows the fluctuating level of highway maintenance budgets over the last decade and the equivalent amount required to keep pace with inflation.

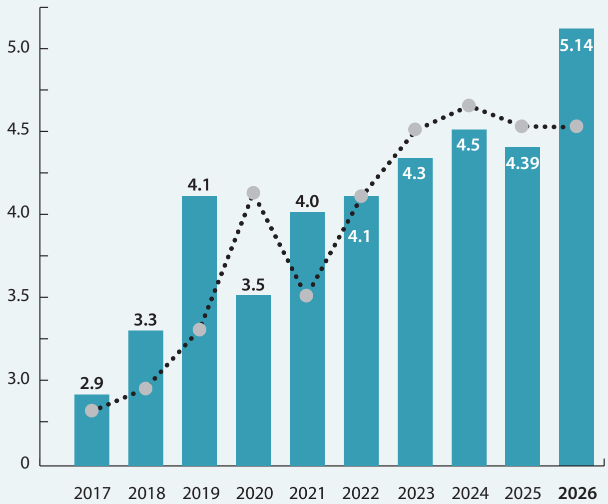
Highway maintenance budgets 2025/26

Average per authority 2025/26, with change from 2024/25

Includes bridge maintenance and structural work, cyclical maintenance (such as sweeping, grass cutting, checking traffic signals and replacing street furniture) and maintaining street lighting.

ENGLAND	LONDON	WALES
£38.9m	£13.2m	£11.5m
Up **16%**	Up **22%**	Up **35%**
2021/22 – 2025/26	2021/22 – 2025/26	2021/22 – 2025/26

10 year trend: **total highway maintenance budget** 2016/17 – 2025/26 (£bn)



Total highway maintenance budget in England and Wales

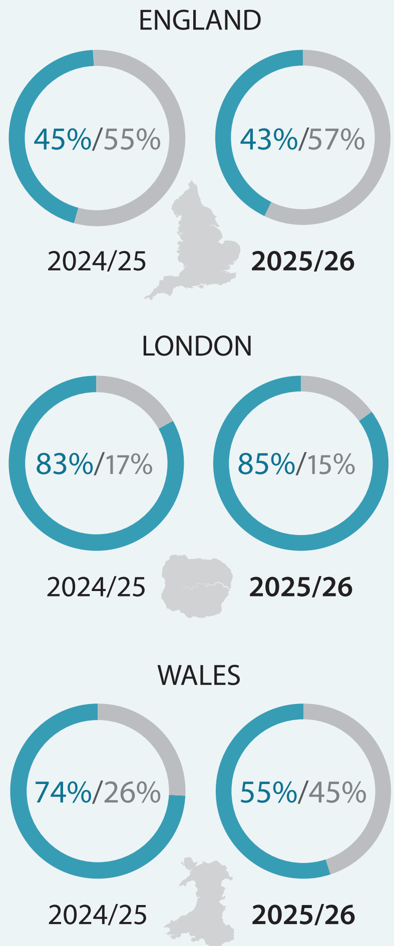
Equivalent amount if annual rate of inflation was accounted for (source: statista.com)

Highway maintenance budgets continued

Funding streams 2025/26

Local authority and central government funding

KEY Local authority
Central government



The increased money is welcome, but it's a drop in the ocean. It's certainly not the solution to all our problems

Carriageway maintenance

The carriageway spend is defined in the ALARM survey as: *the percentage of the highway maintenance budget spent on the carriageway itself*. This figure increased marginally to 54% across ALARM respondents, up from 53% reported in 2024/25 (see graphic, right, for a regional breakdown).

Overall, the reported total carriageway maintenance budget across England and Wales in 2025/26 was £2.87 billion, up 20%.

The vast majority of local authorities (88% of responses) spent all of this and one in five (20%) of these reported an **overspend** due to factors such as rising prices, future planned schemes brought forward as well as increased requirements for reactive maintenance (see below) in order to keep the network safe.

The average reported proportion of the carriageway maintenance budget spent on reactive maintenance (i.e. that not planned for at the beginning of the year) across England and Wales is 25%, the same as reported in the previous two years.

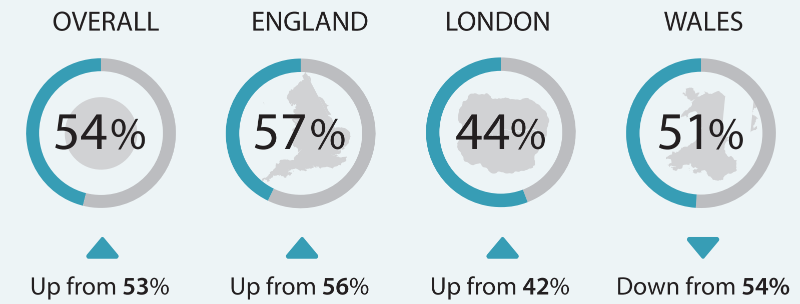
This breaks down as 22% in England; 30% in London, and 29% in Wales (see bottom right).

These figures acknowledge that circumstances can create an immediate need for maintenance to keep the roads safe and useable. It is extremely difficult for local authorities to predict and allocate the percentage of budget required for this kind of work however, respondents agree that around 18% (2024/25: 15%; 2023/24: 16%) is considered to be a more appropriate level, far less than the reported reality.

Feedback from local authority highway engineers indicates that changing weather patterns are impacting on the need for increased levels of reactive maintenance. If reactive maintenance was at 'recommended' levels, it would allow an additional £203 million, or £1.2 million per authority, to be allocated proactively.

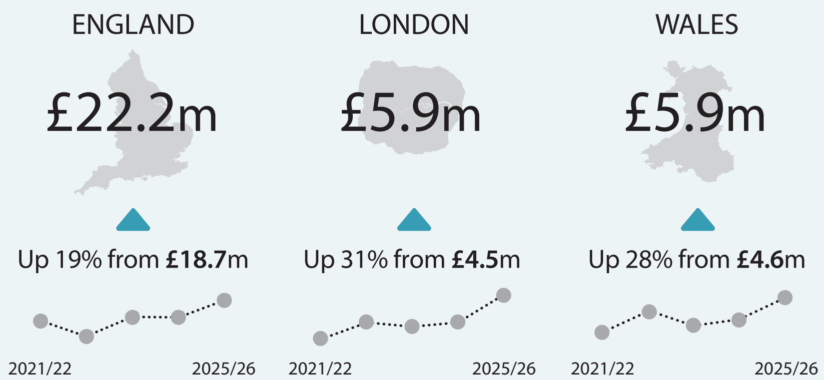
Carriageway spend 2025/26

Proportion of the total highway maintenance budget spent on the carriageway itself



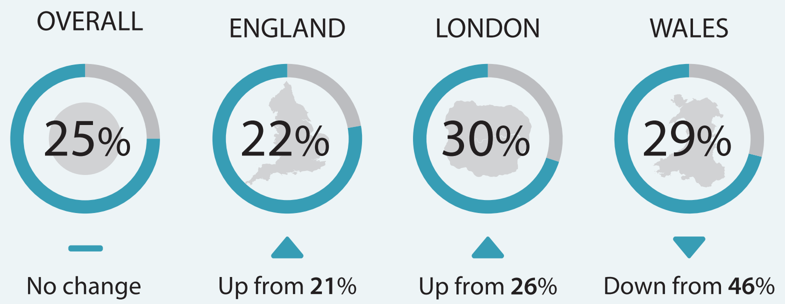
Carriageway maintenance budgets 2025/26

Average per authority, with change from 2024/25



Reactive maintenance 2025/26

Proportion of carriageway maintenance budget spent on reactive maintenance (**18%** considered more appropriate)



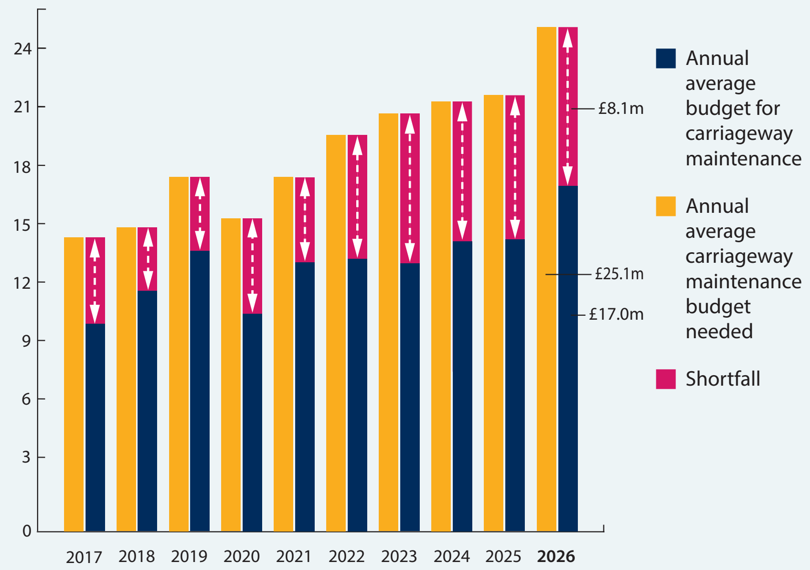
Highway maintenance budgets continued

The additional money is nice, but it doesn't account for the increased impacts of adverse weather on a deteriorating network.

We've been spending more on the carriageway to keep it safe and serviceable.

10 year trend: carriageway maintenance budget needed 2016/17 – 2025/26

Annual average per authority (£m)



Unforeseen costs

A sizeable number of respondents have reported having to cope with unforeseen highway maintenance costs over the year.

In addition to dealing with the effects of extreme weather events and increased average vehicle weights on a deteriorating network, which combine to compromise resilience, the impact of inflation is also reported to have had a noticeable effect on these costs in recent years.

In England, 38% of respondents have dealt with unforeseen costs, significantly down from 53% reported last year with the average additional cost incurred reported to have also dropped by 28% to £718,800 (2024/25: £993,400). Feedback suggests this is due to milder winters in the last two years although it is too early for the impact of the most recent storms and increased rainfall to have been taken into account.

Almost half (48%) of London boroughs reported experiencing unforeseen costs, up from 35% last year, with the additional costs incurred similar at an average of £297,300 per authority (2024/25: £289,500).

The number of respondents in Wales reporting dealing with unforeseen costs remains extremely high at 83% (2024/25: 86%) with an average additional cost of £250,000 reported (2024/25: £174,300).

Overall, £97.7 million was spent addressing unforeseen costs in England and Wales in 2024/25, down 23% on last year's figure of £127.3 million.

Adverse weather

Adverse extreme weather conditions, particularly wetter winters with more intense downpours and storms and hotter, drier summers, coupled with increased traffic volumes and the age of the network can result in accelerated deterioration and a cycle of increasing fragility.

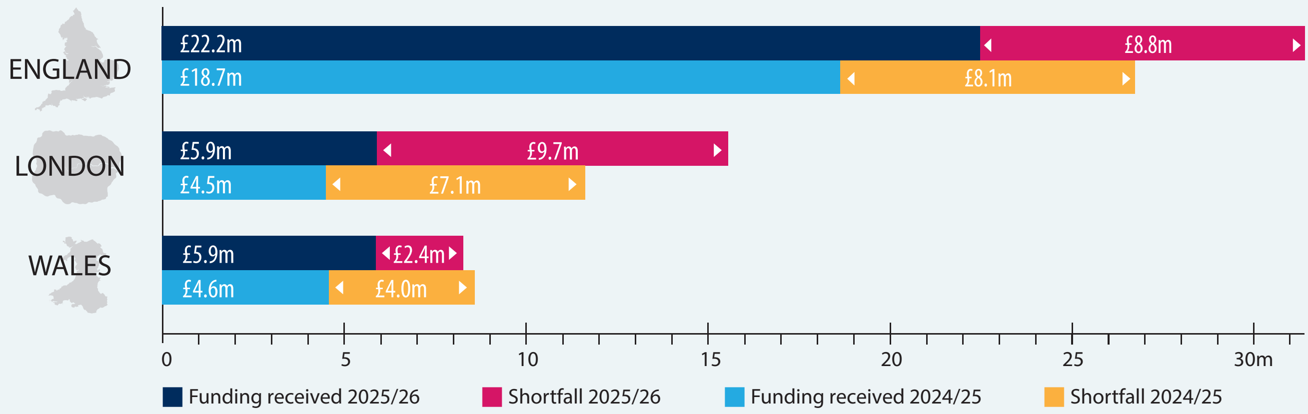
The combined impacts are more acute on evolved and often less well-maintained roads, where water can penetrate existing cracks or defects, leading to the formation of potholes which proliferate over time, compromising the serviceability of the road.

Adverse weather has caused landslips and sinkholes to appear, putting added pressure on our already stretched budget.

Highway maintenance budgets continued

Budget shortfall 2025/26

Average carriageway maintenance budget received and average shortfall per authority to meet target conditions (£m)



Budget shortfall

The total shortfall (see panel below) in 2025/26 carriageway maintenance budgets reported in England and Wales has increased 9.6% to £1.37 billion (2024/25: £1.25 billion), despite the increase in average budgets reported across all areas.

This is the equivalent of a funding gap of £8.1 million per authority or, an average of £6,717.81 per mile of network.

This breaks down as an average of £8.8 million per authority in England; £9.7m in London; and £2.4 million in Wales (see chart above).

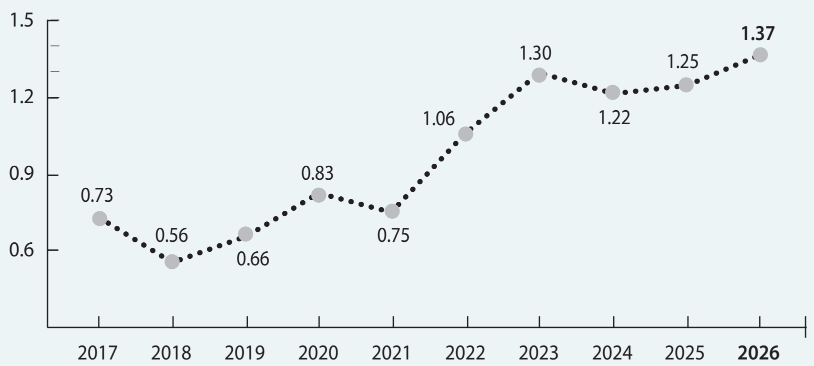
One-time catch-up cost (backlog)

Each year the ALARM survey asks highway departments to estimate how much it would cost to address the cumulative effects of the legacy of year-on-year shortfalls and bring their road networks up to a 'reasonable steady state' (assuming they had the resources in place to make it practical to do so as a one-off project).

This would be the condition from which longer-term and cost-effective, planned preventative maintenance programmes could be put into place, deferring the future cost of more extensive repairs or

10 year trend: carriageway maintenance budget shortfall 2016/17 – 2025/26

Total carriageway maintenance budget shortfall (£bn)



Shortfall versus the backlog

The **shortfall** is the difference between the sums received in any financial year and the amount a local authority would need to maintain the road network to current target conditions and prevent further decline.

Backlog describes the amount that would be needed – as a one-off – to bring the road network up to a 'reasonable steady state'; the condition that would allow it to be managed cost-effectively going forward as part of a proactive asset management approach.

replacement. The combined estimate for this one-time 'catch-up' cost – ***over and above what local authorities indicate they already receive*** – for England and Wales (including London) is now **£18.62 billion**, an increase of 11% on last year's figure. This is the highest reported in ALARM and continues the upward trajectory reported over the last decade (see chart below).

This equates to an average carriageway maintenance 'backlog' cost of £91,100 per mile of local road in England and Wales with the one-time catch-up cost now an average of £145.9 million per authority in England; £38.2 million in London and £28.3 million in Wales.

For the first time this year, ALARM respondents were asked what annual carriageway maintenance budget they would have needed to maintain their network to a steady state if, hypothetically, the backlog had been cleared.

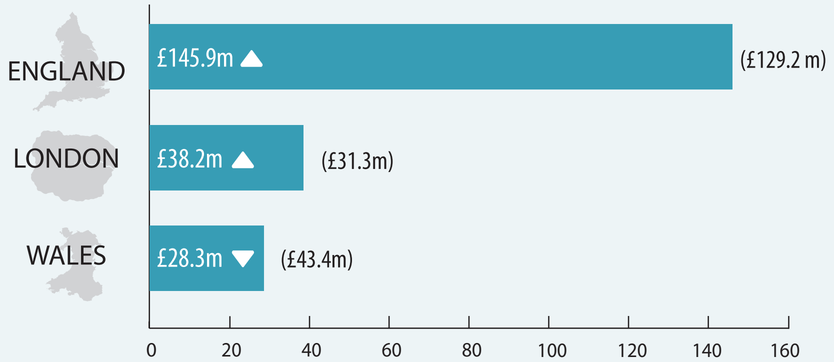
Responses indicate that £1.89 billion would have been needed in 2025/26 by local authorities in England, London and Wales – 35% lower than the 2026 carriageway maintenance budget reported (£2.90 billion). With no backlog of repairs this would deliver a £1 billion saving every year going forward in the amount needed to maintain local roads to an improved steady state condition, without considering the additional economic growth and societal benefits such a move would also support.

Addressing the maintenance backlog

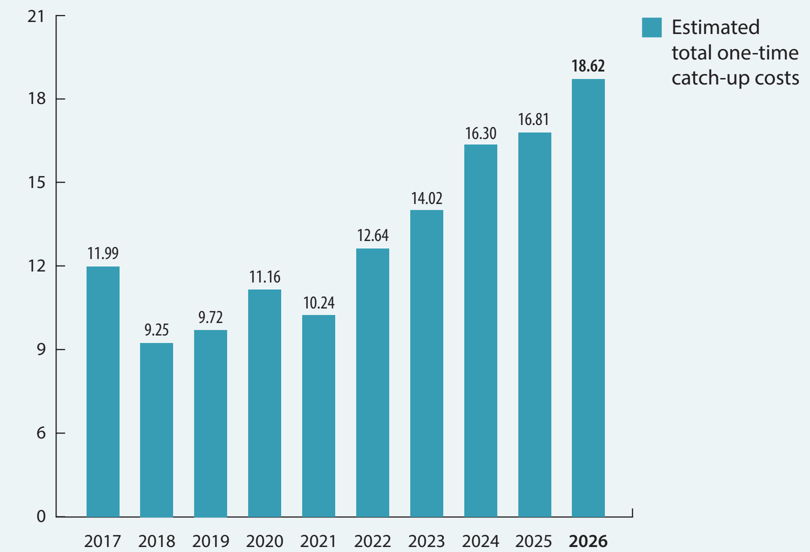
Highway departments continue to estimate that it would take 12 years to carry out the work to get local roads back to reasonable steady state conditions, if adequate annual funding and resources were in place. This breaks down as an average of 12 years in England, eight years in London and 15 years in Wales.

One-time catch-up costs (backlog) 2025/26

Average additional one-time catch-up cost required to clear carriageway maintenance backlog per authority, £m (2024/25 in brackets)



10 year trend: one-time catch-up costs (backlog) 2016/17 – 2025/26 (£bn)



Maintenance backlog

12 years: average number of years needed to clear carriageway maintenance backlog (2024/25: 12)

Highway maintenance budgets continued

Longer term funding

There is consensus among respondents that guaranteed, longer-term funding helps increase efficiency and provide a more resilient road network.

The majority (61%) indicate that a minimum of 5 years is the optimal funding term, with a further 34% stating that 10 years is the ideal.

Security of funding helps authorities and industry plan with more confidence and drive greater cost and environmental efficiencies through the promotion of proactive asset management techniques.

Longer term funding
2025/26

Reported ideal term funding in England and Wales (% of responses)

3 YEARS	5 YEARS
4%	61%

10 YEARS	OTHER
34%	1%

Knowing what budget is coming is half the battle. We're planning work programmes for years ahead but it's very difficult to do that effectively when there's such budget uncertainty.


DAF
CF

Road condition

Road Condition Index (RCI)

Responses indicated that, overall, there have been some small improvements in the condition of the local road network over the last 12 months.

The percentage of the network in England and Wales classed as RED has dropped 2%, but still means that one in every 10 miles of network in England and Wales (around 20,400 miles) is likely to require maintenance in the next 12 months.

The length of roads classed as being in a good state of repair is also reported to have increased by 2% over the year.

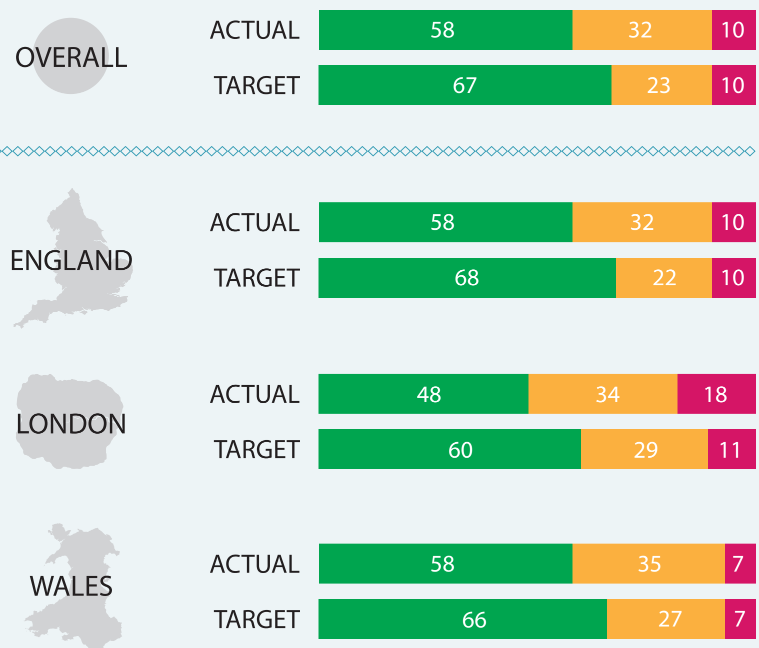
This means that 58% of local roads are now reported to be GREEN (2024/25: 56%) and 32% AMBER (the same as the previous two years). While an asset management approach to highway maintenance means that 100% of the network will not be in 100% perfect condition, 100% of the time, conditions still continue to fall short of local authorities' own current targets (see chart below).

Qualitative feedback suggests target condition levels are developed and adjusted in line with what is achievable as well as within the parameters of the Well Managed Highways Code (which allows local authorities to develop levels of service in line with local needs, priorities and affordability and is currently under review). Nevertheless, local authorities

Our network is improving slightly. Our reds are decreasing but the ambers are deepening so the extra funding needs to be there to catch those.

Road Condition Index (average all classes) 2025/26

Performance in England and Wales (% of network)



CARRIAGEWAY STATUS:
GREEN: good state of repair | **AMBER:** some deterioration is apparent
RED: poor overall condition – likely to require maintenance in next 12 months

RCI Index

The reported RCI index features three condition categories (GREEN, AMBER and RED) across three road classes – principal, classified (non-principal) and unclassified – and compares current road conditions against these targets.

Local authorities can adjust the precise definitions of the categories to reflect the individual nature of their networks. However, in general, GREEN defines lengths of carriageway in a good state of repair, AMBER is for lengths where some deterioration is apparent (which should be investigated to determine the optimum time for planned maintenance) and RED for lengths of carriageway in poor overall condition, likely to require planned maintenance within a year or so.

RCI survey data can be an early indicator of issues relating to the condition of the underlying structure of the road, for the purposes of asset management.

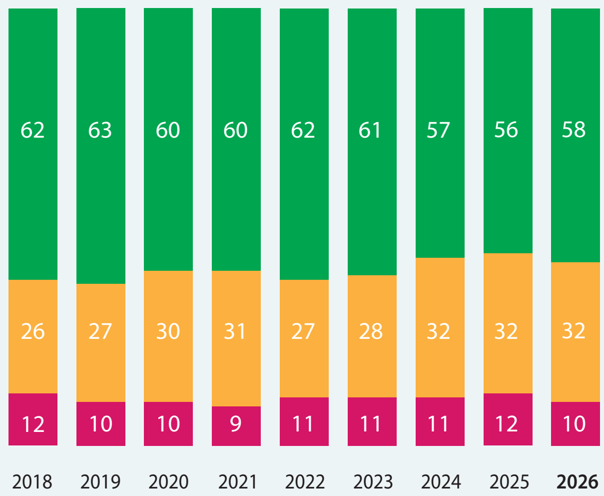
PAS 2161 defines 5 categories of road condition, in terms of **potential maintenance treatment options**, compared to the three levels (RED, AMBER, GREEN) of RCI, indicating the probable need for maintenance investigation and/or intervention.

reported that, if they had sufficient funds and resources, the ideal RCI profile of the local road network in England and Wales would be: 73% GREEN, 21% AMBER and 6% RED. If this profile could be achieved, it would result in improvements to 30% – the equivalent of over 61,300 miles – of the network.

In the nine years that ALARM has been compiling RCI data, overall road surface conditions have declined. There are 8,176 fewer miles classed as GREEN and 12,226 additional miles of carriageway marked as AMBER. The only area of marginal improvement since 2018 has been in the percentage of the network classified as RED, which was reported as being 12% of the network in 2018 and 10% in 2026 (see graph right).

9 year trend: **Road Condition Index** (average all classes) 2017/18 – 2025/26

Performance in England and Wales (% of network)



CARRIAGEWAY STATUS:

GREEN: good state of repair

AMBER: some deterioration is apparent

RED: poor overall condition – likely to require maintenance in next 12 months

Road Condition Index 2025/26

England and Wales (% of network)

		ALL CLASSES		PRINCIPAL	NON-PRINCIPAL	UNCLASSIFIED
		Target	Actual	Actual	Actual	Actual
GREEN	England	68 ↑	58 ↑	69 –	64 –	54 ↑
	London	60 ↓	48 ↑	50 ↑	51 ↑	48 –
	Wales	66 ↓	58 ↑	71 ↓	66 ↓	50 ↑
AMBER	England	22 ↓	32 ↑	27 –	30 –	33 ↑
	London	29 ↑	34 –	32 ↓	33 ↓	34 ↑
	Wales	26 ↑	35 ↓	25 –	27 ↑	43 ↓
RED	England	10 ↑	10 ↓	4 –	6 –	13 ↓
	London	11 ↓	18 ↓	18 –	16 ↓	18 ↓
	Wales	8 –	7 ↑	4 ↑	7 ↑	7 ↓

↑ Up from ALARM survey 2025 ↓ Down from ALARM survey 2025 – Same as ALARM survey 2025

Road condition continued

PAS 2161 in England

In September 2024 a new standard for how highway condition data is collected and reported was published by BSI, in conjunction with the Transport Research Laboratory (TRL) on behalf of DfT.

The Government states that PAS 2161 will "transform the use of data in highway maintenance by introducing innovative new methods for monitoring the condition of local roads in England, while ensuring the quality and comparability of road condition data across the country." (source: DfT: PAS 2161)

PAS 2161 will be mandatory for local authorities in England from 2026/27, with full compliance required by March 2028.

Our understanding is that PAS 2161 focuses on classified A, B and C roads, with reporting on these compulsory. However, reporting on the unclassified network, which accounts for an average of 65% of roads in England, including London, does not seem to be mandatory, with the requirements only providing recommendations for this part of the network.

ALARM respondents in England and London were asked if they thought PAS 2161 will support local authorities deliver improved local road conditions, with 49% (2024/25: 42%) agreeing, 9% (2024/25: 13%) disagreeing and the remaining 42% (2024/25: 45%) unsure.

Structural road condition

Structural maintenance is required when the condition of the road has deteriorated beyond the point at which only surface maintenance will suffice.

As shown in the chart on page 19, the network in England, including London, and Wales has reportedly seen some improvements. More roads are classed as good (with 15 years' or more life remaining) in England and London, while less are classed as poor (those with less than 5 years' life remaining) in the capital as well as in Wales, with England showing no change in this area.

Overall, just over half (51%) of the local road network in England and Wales is reported to be in good structural condition, up 3% from 48% reported in 2024/25, or the equivalent of an additional 6,132 miles of the network.

PAS2161 will help support local authorities identify the condition of their network as a whole, but it won't increase the level of funding that's required to reverse the decline in road condition or clear the backlog.

However, a third (33%) is now reported to be in adequate condition with 5 –15 years of life remaining. This is down from 35% in 2024/25, but higher than the 31% reported in 2022/23 and 27% in 2021/22. In addition, 16% are identified as being in poor condition (those with less than 5 years' life remaining), one per cent less than reported last year.

These figures suggest that around 104,000 miles of the local road network in England and Wales are now classed as being in good structural condition; 67,000 miles in adequate condition and 33,000 miles in poor condition.

Qualitative research supports these results, with 17% of respondents indicating that they think the structural condition of their network has improved in the last 12 months (see graphic on page 19) with fewer reporting a decline but still being the majority (52%).

Structural assessments are carried out against engineering properties and criteria and may not always identically reflect the visually evident conditions indicated by RCI and road user experience.

Schematic diagram showing deteriorating road structure

Without proper, timely maintenance the condition of roads can deteriorate. This starts with tiny cracks at the surface which, left untreated, can become larger and penetrate the sub-surface layers. Eventually the whole structure deteriorates to the point when full-depth reconstruction is necessary.

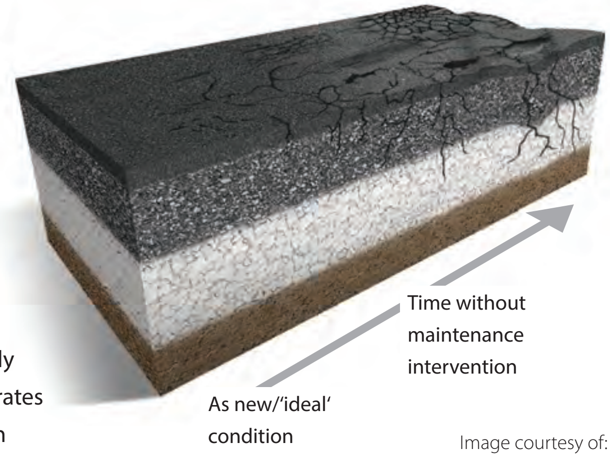
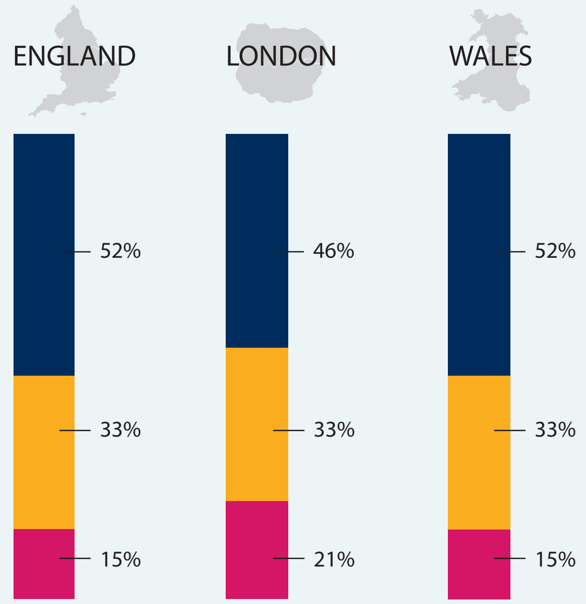


Image courtesy of: roadresource.org/PPRA

Structural road condition 2025/26

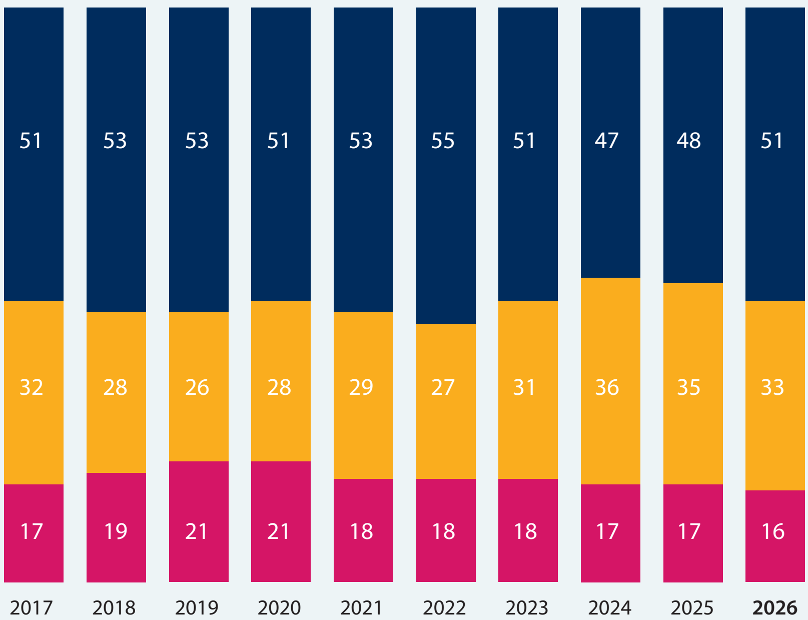
Percentage of roads in good, adequate and poor condition



KEY:
GOOD: 15 years' or more life remaining
ADEQUATE: 5-15 years' life remaining
POOR: less than 5 years' life remaining

10 year trend: **Overall structural road condition (average all classes)** 2016/17 – 2025/26

Overall structural road condition in England and Wales.
Roads reported to be in good, adequate and poor condition (%)

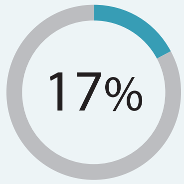


KEY: GOOD: 15 years' or more life remaining | **ADEQUATE:** 5-15 years' life remaining
POOR: less than 5 years' life remaining

Structural condition 2025/26

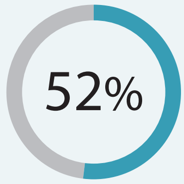
Opinion on the change in structural conditions of ALARM respondents' networks over the last 12 months (% of responses)

IMPROVED



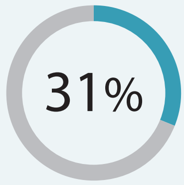
Up from **6**%

DECLINED



Down from **65**%

REMAINED STEADY



Up from **29**%

Road condition continued

Potholes

Potholes are a clearly visible symptom of roads that have been inadequately maintained and can be used as indicators of fragility, potentially pointing to underlying structural issues.

The total number of potholes filled reported in this year's survey remains in line with last year at 1.9 million. This is the equivalent of over 5,200 potholes being addressed every day of the year in England and Wales.

Qualitative feedback highlighted that more frequent weather extremes are taking their toll and that pothole repairs are just one of the challenges local authorities dealt with in the last year, which also included flooding, landslides and subsidence.

Around three quarters (73%) of responses stated that they use a guideline depth of 40mm to define a pothole – the same as reported last year. Depth definition is not the only means of prioritising repairs as the potential effect of a surface defect can vary dramatically depending on the area affected, the nature of the traffic on the road and its location.

The disparity in cost between filling potholes (excluding any relevant staff, overhead or traffic management costs) as part of a planned programme of carriageway repairs compared with that as a reactive repair is again apparent (see graphic top right).

Taking the average cost for filling a pothole to be £78.45, the total spent in England and Wales last year is estimated at £149.3 million, up from £137.4 million reported last year.

Potholes indicate that a section of road is at the end of its life and others are going to form in adjacent sections very quickly.

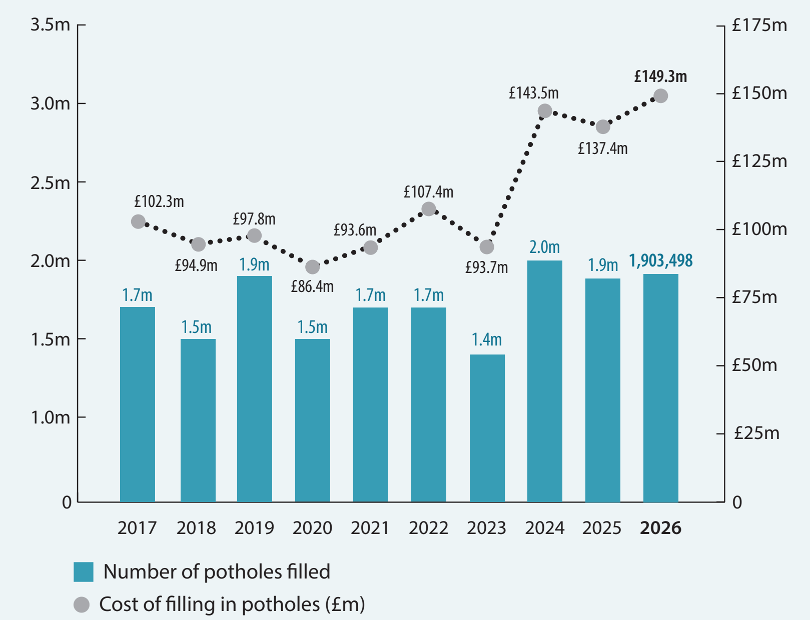
Potholes 2025/26

Average number of potholes filled per local authority, plus costs to fill as part of a planned programme and as a reactive repair, with direction of change from 2024/25 (overall average cost of filling a pothole £78.45)

			PLANNED COST	REACTIVE COST
OVERALL	11,263	▲	£63.11 ▲	£93.79 ▲
ENGLAND	14,868	▼	£61.81 ▲	£89.58 ▲
LONDON	2,573	▼	£55.39 ▼	£103.35 ▼
WALES	5,061	▲	£69.45 ▲	£88.89 ▼

10 year trend: potholes 2016/17 – 2025/26

Number of potholes filled and cost (£m)



Road resurfacing frequency

Replacing the entire surface layer of roads at regular intervals maintains an appropriate level of skid resistance – vital for road safety – guards against water ingress and freeze-thaw effects by maintaining a weatherproof seal on the road's surface and thus enhances overall resilience. It also offers the opportunity to identify and address any deeper structural issues arising which are not initially evident and is an important element of any asset management programme.

Considering the lifespan of particular materials, the type of road and the level and nature of its traffic, the recommended frequency of road resurfacing is between 10 and 20 years – an ideal only reported to be achieved on principal A roads in London. This is also intended to ensure that the whole carriageway structure has significantly longer life.

The average frequency of resurfacing across all road types and regions is calculated to be once every 97 years. This breaks down as once every 106 years in England, once every 39 years in London and once every 132 years in Wales.

The data shown in the graphic top right continues to highlight how local authorities have to prioritise key routes, to the detriment of unclassified roads, as current budgets are not sufficient to adequately maintain the whole network.

Over the last 12 months, local authorities in England and Wales reported that they resurfaced an average of 2.0% of their network, up a third from 1.5% reported last year. This equates to around 4,000 miles of the 204,412 mile total network length.

Additionally respondents reportedly treated an average of 4.4% of their network – around 9,000 miles – seeking to prolong the life of the road. This is up 47% on the figure reported last year (2024/25: 3.0%).

Road resurfacing frequency 2025/26

Average frequency (years) of resurfacing by road category with direction change from 2024/25

	All classes	Principal	Non principal	Unclassified
ENGLAND	106 ▲	48 ▲	90 ▲	123 ▼
LONDON	39 ▼	20 ▼	39 ▼	42 ▼
WALES	132 ▲	67 ▼	76 ▲	182 ▼

Length of road resurfaced 2025/26

Average % of network per authority that saw the surface layer replaced in the last year with direction change from 2024/25

OVERALL	ENGLAND	LONDON	WALES
2.0% ▲ (1.5%)	1.8% ▲ (1.5%)	4.3% ▲ (3.9%)	2.0% ▲ (1.0%)

Length of road treated 2025/26

Average % of network per authority that were treated to prolong the life of the road in the last year with direction change from 2024/25

OVERALL	ENGLAND	LONDON	WALES
4.4% ▲ (3.0%)	4.6% ▲ (3.3%)	0.8% ▼ (0.9%)	3.6% ▲ (1.2%)

Road condition continued

Utility company road openings

Opening a road to create a trench can reduce its structural life by an average of 17% (source: TRL) and the continuing high level of utility openings in England and Wales – reported again as 2.2 million (2024/25: 2.2m; 2023/24: 2.4m) – can reasonably be assumed to be having an overall detrimental effect.

An average of 41% of these utility reinstatements are reported to be assessed for compliance with the New Roads and Street Works Act specification and the majority of these (86% based on responses received) are completed in accordance with legislation.

However, local authorities in England and Wales still reported spending an average of 3.1% of their carriageway maintenance budget addressing premature maintenance arising from openings. This totals £89.3 million (2024/25: £66.8m) – just over £528,400 per authority in England and Wales.

A robust inspection regime and partnership working ensures any defects are identified prior to utility companies completing works to ensure we have no liabilities on our stretched budgets.

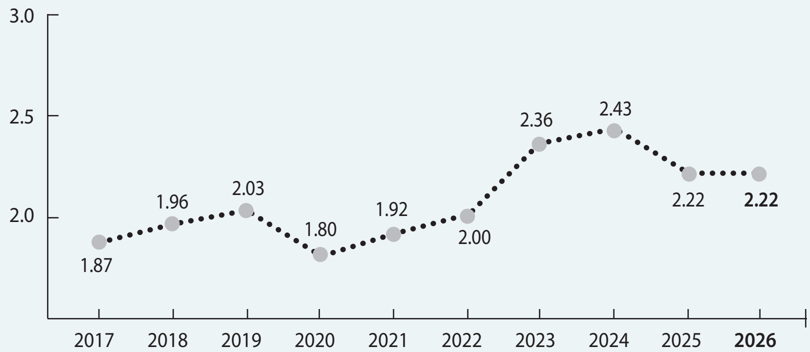
Utility company openings 2025/26

Average number of utility openings per authority in past year (previous year in brackets)

OVERALL	ENGLAND	LONDON	WALES
13,040 ▼	16,166 ▲	7,568 ▼	4,657 ▲
(13,139)	(15,811)	(9,579)	(4,347)

10 year trend: utility company openings 2016/17– 2025/26

Total number of utility company openings (millions)



Road user compensation claims

The number of claims received by local authorities in England and Wales has seen a 32% drop to an average of 279 per authority (2024/25: 410 per authority). Almost all of these (99%) are reported to relate specifically to potholes on roads, footways or cycleways.

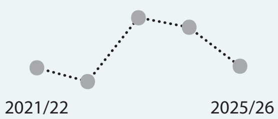
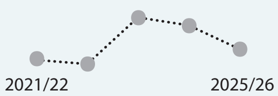
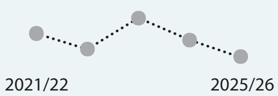
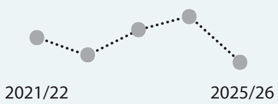
There has also been a 19% drop in the total amount paid out for compensation claims from £19.7 million reported in ALARM 2025 to £15.9 million this year, although it is recognised that successful claims will not necessarily relate to the same financial year.

A further £15.1 million was spent on staff costs to deal with claims, bringing the overall total associated with addressing claims to £31.0 million across England, London and Wales, down 17% on last year (2024/25: £37.3m). This is the equivalent of £151.45 paid out per mile of road last year.

We are on top of our highways inspections allowing us to have a really good success rate against compensation claims.

Road user compensation claims 2025/26

Number of claims in past year (average per authority) plus **total** cost (£) of dealing with claims (2024/25 figures in brackets)

	Claims	Trend 2021/22 – 2025/26	Cost of claims	Staff costs	Total cost
OVERALL	279 ▼ (410)		£15.9m ▼ (£19.7m)	£15.1m ▼ (£17.6m)	£31.0m ▼ (£37.3m)
ENGLAND	375 ▼ (551)		£11.9m ▼ (£15.8m)	£11.8m ▼ (£13.1m)	£23.7m ▼ (£28.9m)
LONDON	80 ▼ (106)		£3.0m ▲ (£2.6m)	£2.9m ▲ (£2.7m)	£5.7m ▲ (£5.3m)
WALES	65 ▼ (114)		£891.9k ▼ (£1.4m)	£357.9k ▼ (£1.7m)	£1.2m ▼ (£3.1m)

Key findings

	OVERALL*	England**	London	Wales
Percentage of authorities responding	↑ **79%**	↑ 86%	↑ 81%	↓ 36%
Highway maintenance budgets				
Average highway maintenance budget per authority	↑ **£30.5m**	↑ £38.9m	↑ £13.2m	↑ £11.5m
Percentage of highway maintenance budget spent on carriageway	↑ **54%**	↑ 57%	↑ 44%	↓ 51%
Average carriageway maintenance budget per authority	↑ **£17.0m**	↑ £22.2m	↑ £5.9m	↑ £5.9m
Shortfall				
Shortfall in road carriageway budget 2025/26	↑ **£1.37bn**	↑ £1.01bn	↑ £309.7m	↓ £52.7m
Average carriageway maintenance budget shortfall per authority 2025/26	↑ **£8.1m**	↑ £8.8m	↑ £9.7m	↓ £2.4m
Estimated time to clear carriageway maintenance backlog	– **12 yrs**	– 12 yrs	↓ 8 yrs	↑ 15 yrs
Estimated one-time catch-up costs (backlog)	↑ **£18.62bn**	↑ £16.78bn	↑ £1.22bn	↓ £623.2m
Estimated one time catch-up cost per authority (backlog)	↑ **£110.2m**	↑ £145.9m	↑ £38.2m	↓ £28.3m
Road condition				
Frequency of road resurfacing (all road classes)	↑ **97 yrs**	↑ 106 yrs	↓ 39 yrs	↑ 132 yrs
Number of potholes filled over past year	↑ **1,903,498**	↓ 1,709,820	↓ 82,336	↑ 111,342
Average number of potholes filled per authority over past year	↑ **11,263**	↓ 14,868	↓ 2,573	↑ 5,061
Average cost to fill one pothole – planned	↑ **£63.11**	↑ £61.81	↑ £63.42	↑ £69.45
Average cost to fill one pothole – reactive	↑ **£93.79**	↑ £89.58	↑ £112.29	↓ £88.89
Total spent filling potholes in past year	↑ **£149.3m**	↑ £134.1m	↑ £6.5m	↑ £8.7m
Compensation claims				
Amount paid in road user compensation claims	↓ **£15.9m**	↓ £12.0m	↑ £3.0m	↓ £891.9k
Staff costs spent on claims (per year)	↓ **£15.1m**	↓ £11.8m	↑ £2.9m	↓ £357.9k

* England, London and Wales

** excludes London

NB Numbers in the table may not add up due to rounding.

↑ Up from ALARM survey 2025
↓ Down from ALARM survey 2025
– Same as ALARM survey 2025

About the AIA

Asphalt Industry Alliance

The Asphalt Industry Alliance (www.asphaltuk.org) is a partnership of the two principal bodies which represent the UK suppliers of raw materials used to produce asphalt, as well as asphalt producers and laying contractors: the Mineral Products Association (MPA) and Eurobitume. It draws on the knowledge and resources of each association and their members.

The AIA was established in 2000 to increase awareness of the asphalt industry and its activities, and the uses and benefits of asphalt. Asphalt is the generic term used to refer to the range of bitumen coated materials available in the UK that are used in road construction and maintenance. Asphalt also has other, non-road applications such as airfield runways, sports arenas and parking areas.

Mineral Products Association

MPA Asphalt is part of the Mineral Products Association (www.mineralproducts.org), the trade association for the aggregates, asphalt, cement, concrete, dimension stone, lime, mortar and industrial sand industries and is the sectoral voice for mineral products.

MPA Asphalt represents the interests of its asphalt producer and contractor and affiliated members through representation and liaison with national and European regulators, road owner/operator clients, specifiers, standards bodies and researchers as well as with trade associations from other countries and related industry sectors. It also funds research into asphalt and its uses and operates the Asphalt Information Service which provides general guidance and information on the use of asphalts in the wide range of their applications.

Eurobitume

Eurobitume (www.eurobitume.eu) is the voice of the European bitumen industry, educating and promoting the efficient, economic, effective, safe and sustainable use of refined bitumen in road, industrial and building applications.

Eurobitume provides information and guidance on technical, health, safety and environmental matters, based on proven data, and works to create a positive image and environment for sustained bitumen demand and communicate the product benefits to key stakeholders.

In addition, it works with government and regulatory bodies to develop and maintain testing procedures and safety standards to ensure the highest possible quality standards in all bitumen-related operational activities.

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