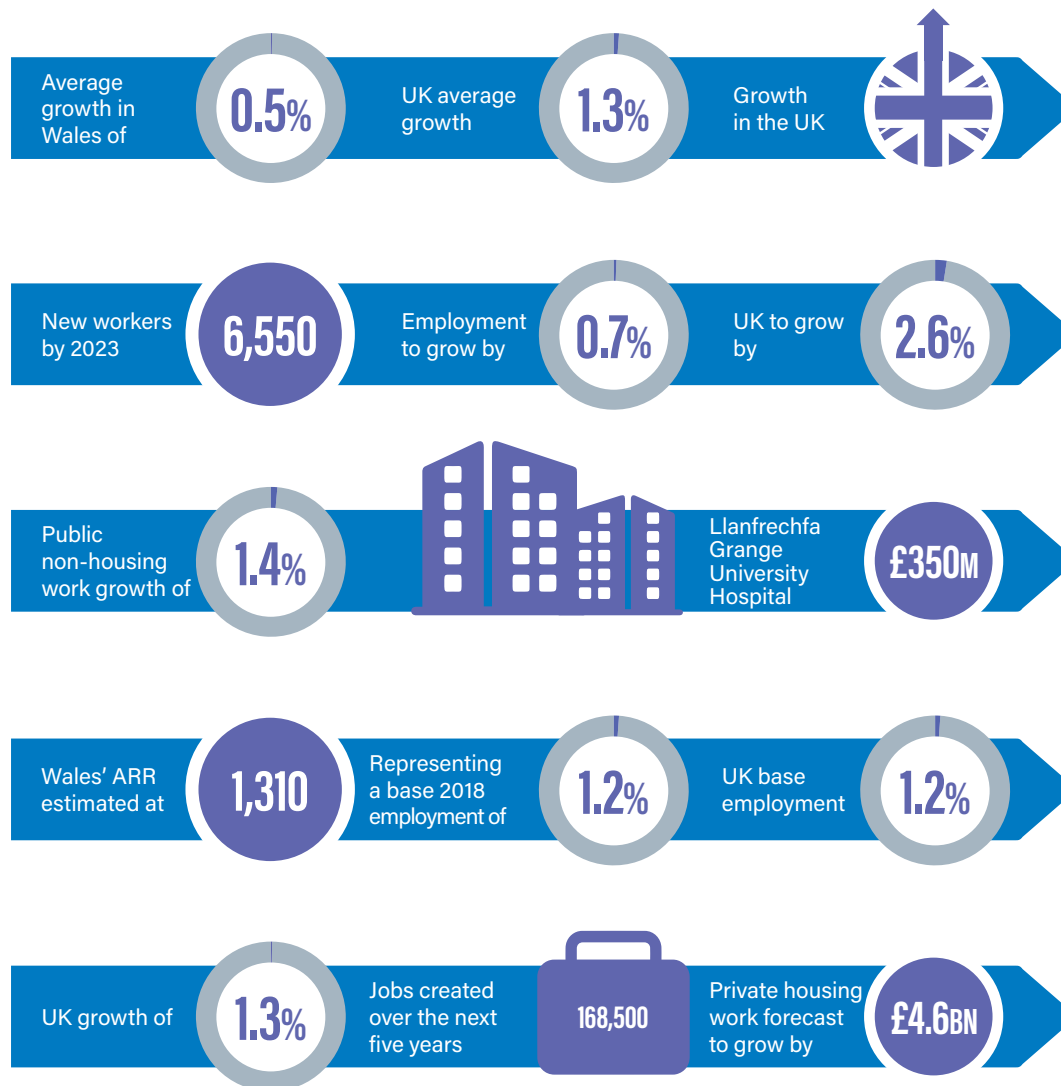
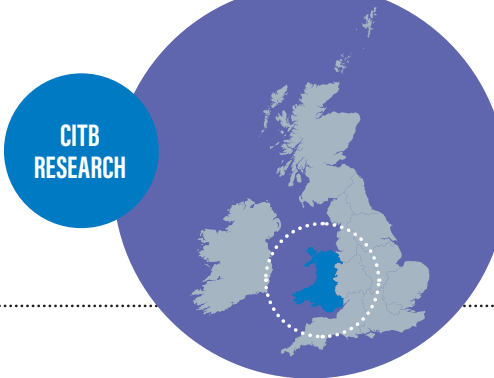


CONSTRUCTION SKILLS NETWORK WALES 2019-23



Wales is showing an average increase in work of 0.5% from 2019-23. 6,550 new workers will be needed, modest growth is expected.

GROWTH RATE

With work on Wylfa nuclear new build being suspended, the annual average growth rate for Wales has been revised down to 0.5% between 2019 and 2023. Modest growth is forecasted for private housing (1.3%), public non-housing (1.4%) and housing repair & maintenance work (1.8%), however the infrastructure sector is now expected to show no significant growth and in previous years it has been a key sector in the Welsh forecast.

JOB CREATION

The level of output growth in Wales gives an average annual increase of 0.1% in the construction workforce. This means that the workforce of nearly 111,700 at the end of 2018 is set to show a slight increase to 112,400 by the end of 2023.

ANNUAL RECRUITMENT REQUIREMENT (ARR)

Wales fares slightly better on the level of annual average recruitment requirement, which is 1.2% per year, based on 2018 employment levels, and on par with the UK figure (1.2%).

This means Wales will need to recruit an extra 1,310 new workers each year to deliver the expected work output.

MAIN GROWTH DRIVERS/CONTRACTS

The recent suspension of the Wylfa Newydd nuclear project has severely hampered construction growth in Wales in terms of its annual average expansion. Modest growth is still expected, however, owing to expansion in private housing output and a likely recovery in the public non-housing sector. In the case of the latter, work is apparently progressing well on the £350m Llanfrechfa Grange University Hospital since construction work began in July 2017, with completion due by autumn 2020. The latest indications for the Velindre Cancer Centre redevelopment is that construction on the £210m project could start in late 2019.