RICS Public Affairs

Third quarter 2006

RICS construction market survey United Kingdom

Construction activity buoyed by booming property markets

- Booming housing and commercial property markets keep construction activity rising
- Influx of Eastern European workers eases skills shortages
- Confidence high despite August interest rate rise

Change in workloads, UK

Growth in construction workloads slowed fractionally after increasing for three consecutive quarters. However, growth in workloads is still high, being well above year ago rates. The strongest sectors of activity were in private commercial and private housing, which have both now grown above their long-run survey averages for four consecutive quarters. Elsewhere, public housing workloads rose at the same pace as in the previous quarter, while expansion slowed for other public works and infrastructure. In the private industrial sector workloads showed signs of stabilising. Surveyors report new enquiries are healthy across most sectors but especially strong in housing, industrial and commercial property.

For the third consecutive quarter Scotland and Wales saw the fastest expansion in workloads. Workloads in London and the South East continued to grow solidly but at a slightly slower pace. Workloads in the South West, North and the Midlands rose strongly although growth in the Midlands has slightly moderated compared to the previous quarter. Workloads declined fractionally in Northern Ireland for the first time since Q3 2004.

In Q3, the percentage of respondents who reported skill shortages of trades persons fell to 29%, offsetting most of last quarter's increase. Excluding the first quarter of this year, this is the lowest level in almost seven years. The decline in skill shortages reflects the high inflow of migrant workers from Eastern and Central Europe. All regions in Q3 have felt the impact of migrant workers with the exception of Scotland, where skill shortages are the highest since Q1 2000.

Surveyors confidence in the future outlook remained unchanged despite the August interest rate rise. Industry confidence is being driven by the strength of the economy, which has recovered since the weakness in mid-2005. Booming housing and commercial property markets are boosting optimism and construction activity as higher capital values are an incentive to raise development. Also, a more healthy economy is prompting firms to raise investment spending according to government statistics, particularly outside manufacturing.

Confidence in the profit outlook over the next twelve months fell for the second consecutive quarter. One explanation for this decline is that high energy and raw materials prices are becoming embedded in respondents expectations. Indeed, surveyors report a pick up in the growth in costs of their main inputs including wages and materials, while also reporting that output price inflation held steady.

	Proportion of surveyors reporting a rise, fall or no change in construction workloads for quarter				Expected change over the next quarter - % balance*		% of surveyors reporting recruitment difficulties
	Rise %	Same %	Fall %	Balance*	Workloads	Employment	
	Not Seasonally Adjusted						
2004 Q3	27	61	12	15	56	48	44
Q4	34	54	12	22	62	55	42
2005 Q1	33	55	12	21	53	54	38
Q2	28	59	12	16	42	42	32
Q3	28	58	13	15	44	42	32
Q4	30	60	10	20	56	44	34
2006 Q1	34	55	11	23	54	46	28
Q2	34	57	10	24	48	39	36
Q3	31	60	10	21	48	42	29

* Balance = Proportion of surveyors reporting a rise in workloads minus those reporting a fall

Please note that data for workload, employment, profit margin expectations and skill shortages are now weighted by region and have been revised.

Total contribution to the survey was 170 forms.

Note that weightings applied to the survey have changed by region and sector and that all historical data have been revised for the survey.

RICS

National workloads

Total workloads

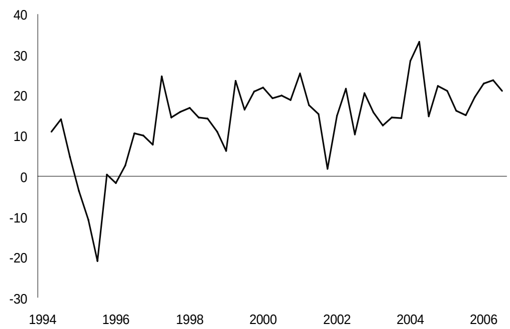
Growth in construction workloads slowed fractionally after increasing for three consecutive quarters. However, growth in workloads is still high, well above year ago rates and the long run average of the survey.

In 2006 Q3, 21% more surveyors reported a rise in workloads than a fall, down from 24% in the previous quarter. The strongest sectors of activity were in private commercial and private housing (despite a slight easing in the pace of expansion in the former), which have both now grown above their long-run survey averages for four consecutive quarters.

Elsewhere, public housing workloads rose at the same pace as in the previous quarter, while the pace of expansion slowed in the other public works and infrastructure sectors. In the private industrial sector workloads showed signs of stabilising.

Change in total workloads

% Balance



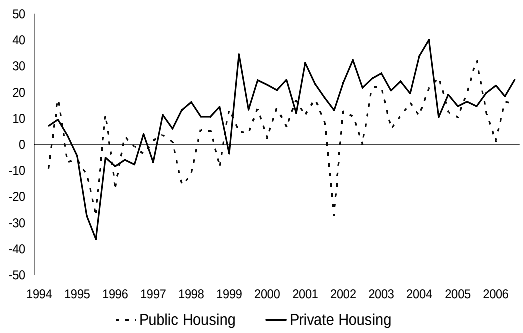
Private/public housing

The growth in private housing workloads increased at the fastest pace since Q2 2004. In Q3, 25% more surveyors reported an increase in workloads than reported a decline, up from 18% in Q2.

Growth in public housing continued at the same solid pace as in the previous quarter, well above the survey's long run average. In Q3, 16% more surveyors reported an increase in workloads than reported a decline, the same as in Q2.

Change in private/public housing workloads

% Balance



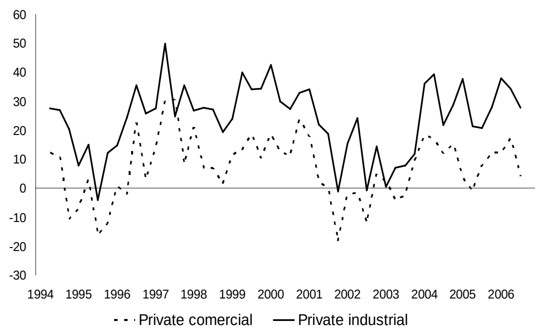
Private commercial/industrial

Private commercial workloads continued to grow strongly in Q3. 28% more surveyors reported workloads were rising than falling, which is above the survey's long run average, although it marks a continuation of the mild slowdown in growth that began last quarter.

Industrial construction activity slowed in Q3 with 4% more surveyors reporting a rise in workloads than a fall. This is the lowest figure since Q2 2005 and below the survey's long run average.

Change in private commercial workloads

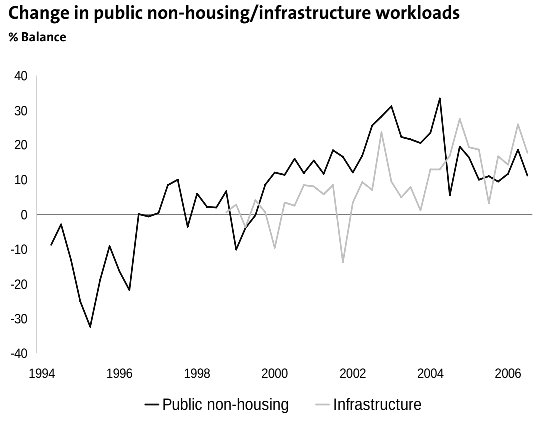
% Balance



Public non-housing and infrastructure

Growth in non-housing public works activity continued in Q3, although the pace slowed. 11% more surveyors reported a rise a workloads than a fall, down from 19% in the previous quarter.

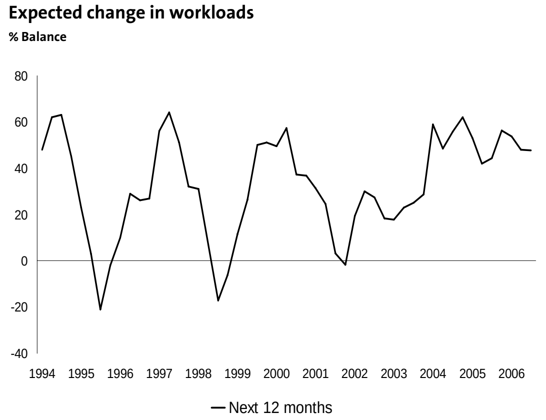
Growth in infrastructure workloads held above the survey's long run average rate, although the pace slowed compared to last quarter. In Q2,18% more surveyors reported a rise in workloads than a fall, down from 26% in the previous quarter.



Expected workloads

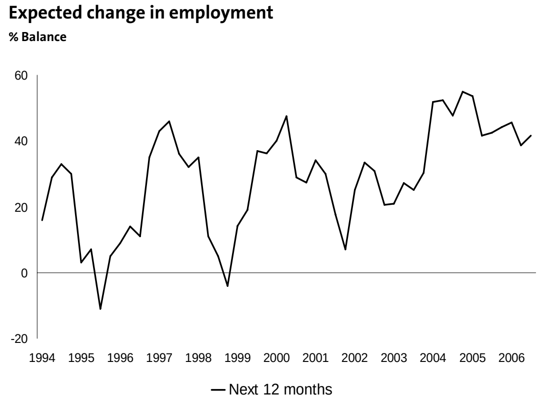
Surveyors' workload expectations for the year ahead remained very bullish in Q3. For the second consecutive quarter 48% more surveyors expect workloads to be higher in 12 months time than expect a fall, which is 4% above year ago levels. This marked the eleventh consecutive quarter of above average optimism.

Industry confidence is being driven by the strength of the economy, which has recovered since the weakness in mid-2005. Booming housing and commercial property markets are also likely to be lifting confidence.



Expected employment

Expectations for employment over the next twelve months rose slightly, partly offsetting last quarter's fall. For the next twelve months 42% more surveyors expect a rise in employment than a fall, up from 39% in Q2, and equal to where expectations were a year ago. Employment expectations peaked at the end of 2004/ begining of 2005, but have drifted down only slightly.



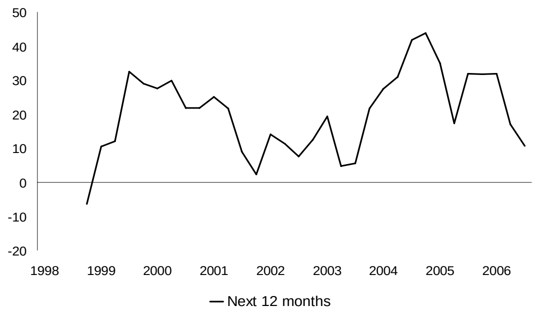
Expected profit margins

Confidence in the profit outlook over the next twelve months fell for the second consecutive quarter. In Q3, 11% more surveyors expect a rise in profit margins than a fall, down from 17% in Q2, which is the lowest confidence level in the profit outlook since Q3 2003 as output price rises are lagging input costs by a small margin.

One explanation for this decline in confidence is that current high energy and raw materials are becoming embedded in respondents expectations. Nevertheless confidence in the profit outlook is still positive.

Expected change in profit margins

% Balance



Labour availability

The proportion of respondents reporting recruitment difficulties for trades persons fell in Q3 reversing the increase that took place in the previous quarter.

The decline in the proportion of respondents reporting recruitment difficulties for trades persons is supported by further evidence in the total number of people employed in the construction sector. The latest DTI estimates suggest that the seasonally adjusted total number of people employed in the construction sector has come of from the peak levels reached in Q1. Year-on-year growth in employment in the construction sector is now flat, which is the lowest reading of this measure since Q3 2003. This slow down maybe a lagged response to the weakness of the industry.

Surveyors reporting recruitment difficulties, trades persons

% reporting "yes"

Regional information

London and South East

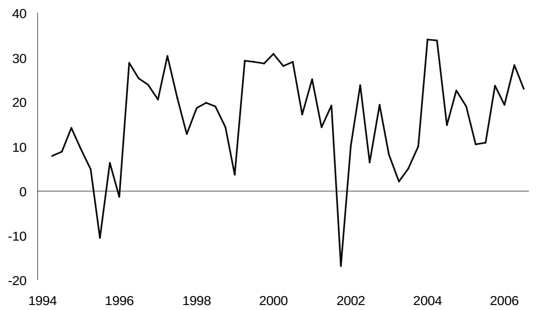
Growth in total workloads was firm in Q3 2006, although slowing marginally compared to the previous quarter.

Workloads rose sharply in the private housing sector, and strong growth was also recorded in the private commercial and other public works sectors. The public housing sector saw moderate growth in workloads as did the private industrial and infrastructure sectors.

Expectations for workloads over the next twelve months rose to their highest level since Q4 2004. Employment expectations over the next twelve months also rose sharply, to their highest level since Q3 2005, after falling during the previous two quarters.

Change in workloads, London and South East

% Balance



North

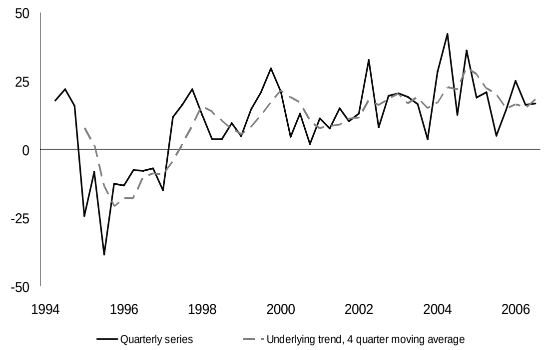
Growth in total workloads picked up slightly in Q3 2006, after having fallen in the previous quarter.

Growth in public housing workloads accelerated sharply having stabilised in the previous quarter, while growth in the private commercial and private housing sectors also picked up. Infrastructure workloads rose firmly, though the pace slowed marginally compared to last quarter, while private industrial workloads stabilised and other public works declined for the first time since Q3 2004.

Both workload and employment expectations for the next twelve months fell for the second consecutive quarter, remaining only slightly higher than their respective troughs of Q3 2005.

Change in workloads, North

% Balance



Scotland

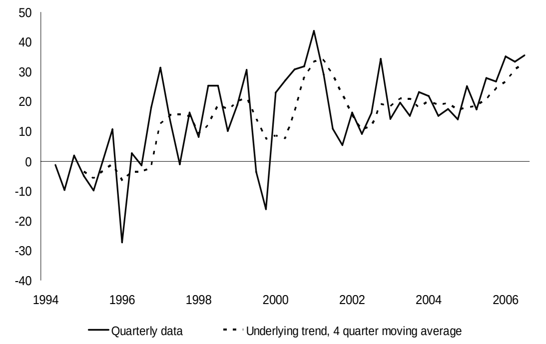
Growth in total workloads rose in Q3 2006 to the highest pace since the beginning of the year.

Private housing workloads rose at their fastest pace since 2001 Q2, while infrastructure workloads rose at their fastest pace in the survey's history. Growth in other public works also rose sharply, while public housing workloads rose at their same pace as last quarter. Private industrial workloads grew moderately following six consecutive quarters of solid above average rises, while private commercial workloads continued to rise very strongly.

Both workload and employment expectations for the next twelve months rose sharply to their highest levels since Q1 2006.

Change in workloads, Scotland

% Balance



Northern Ireland

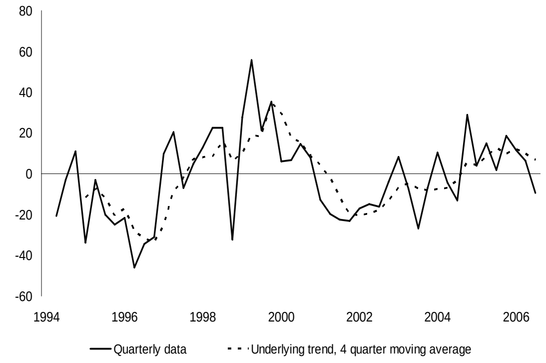
Total workloads declined for the first time since Q3 2004 marking an end to seven quarters of consecutive increases.

Public workloads saw the heaviest decline in activity, which fell for the second consecutive quarter. The private industrial and infrastructure sectors saw workloads stabilise having risen during the previous quarter. Moderate growth in workloads was recorded in the private commercial sector, while workloads in the private housing sector grew firmly having declined in the previous quarter.

Workload expectations for the next twelve months rose to their highest level since Q1 2005. Employment expectations for the next twelve months also picked up sharply, rising at their highest level since Q1 2006.

Change in workloads, Northern Ireland

% Balance



South West

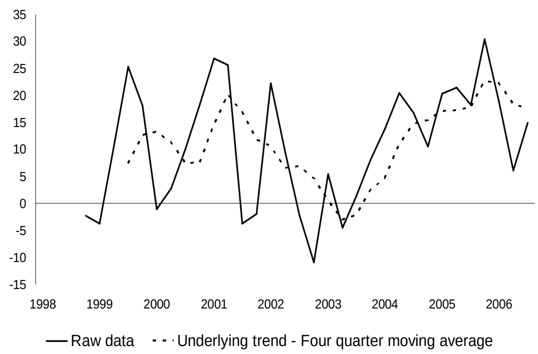
Growth in total workloads rose in Q3 2006 to the highest rate since the beginning of the year.

Private housing workloads rose sharply having stabilised in the previous quarter, while private commercial workloads rose moderately after stabilising in the previous two quarters. Growth in infrastructure and pubic housing workloads stabilised after both rising sharply in the previous quarter. In the other public works and private industrial sectors workloads both declined.

Confidence in workloads over the next twelve months declined and confidence in the employment outlook over the next twelve months increased.

Change in workloads, South West

% Balance



Wales

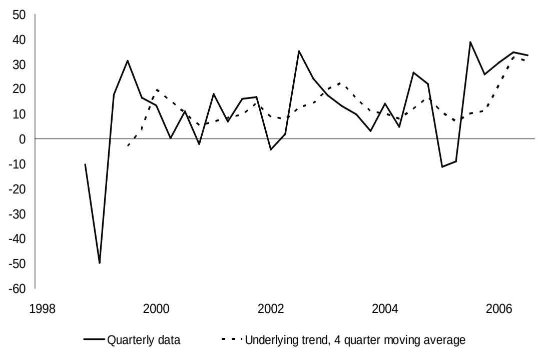
Workloads rose strongly in Q3 2006, although the pace slowed fractionally compared to last quarter.

Growth in private housing workloads rose after stabilising in the previous quarter, while in the private commercial and public housing sectors workloads grew at the same strong pace as in the previous quarter. Workloads in the infrastructure and other public works rose very strongly although at a slightly slower pace than in the previous quarter.

Confidence in the workload and employment outlook for the next twelve months declined after reaching the highest level in the survey's history last quarter, although still remaining very high.

Change in workloads, Wales

% Balance



Midlands and Eastern

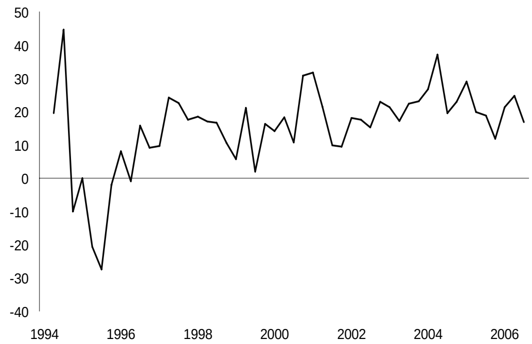
Workloads continued to rise in Q3 2006, although the pace of increase has moderated compared to last quarter.

Growth in public housing workloads picked up, rising at the fastest pace since Q3 2005. Private housing workloads grew at about the same pace as last quarter. In the private commercial sector workload growth almost halved although the pace remains around the long run average. Workload growth in the infrastructure and other public works sector's also moderated, while in the private industrial sector workload's showed signs of stabilising.

Confidence in the workload and employment outlook for the next twelve months declined in Q3 although it still remains firm.

Change in workloads, Midlands and Eastern

% Balance



Chartered Surveyor market comments

East Midlands
Holden Esq MRICS
A. E. Thornton-Firkin & Partners
"A number of contractors appear to be seeking the better opportunities perhaps more so than six months ago. Workload and new opportunities could be levelling out."

McKinlay Esq FRICS
Gleeds
"Recruitment of non-core business professional staff to service, growing workload in the absence of fully trained and qualified professionals."

Robinson Esq FRICS
Tompkins Robinson Surveyors
"Public sector budget constraints are having a slowing down affect, although private sector seems to be holding up well, despite uncertainty created at Westminster (more accurately at No 10 and No 11!)"

Eastern
Austin Esq FRICS
Haden Young Limited
"No specific factors to report. Market generally buoyant."

Hadden Esq MRICS
V B Johnson LLP
"The effect of the Olympics development is still someway off. More immediate effects will result from the easing of costs of motor fuel prices. Medium term we need to keep our eyes on business confidence as Mr Blair considers his exit strategy."

Sherriff Esq FRICS
Sherriff Tiplady Associates
"Construction activity has remained high within the region now for most of the year and looks to continue, certainly in the short term. Shortage of good professional staff still a continuing problem."

London
Abisogun Esq BSc (Hons) MRICS
Accessible Advice - City
"Fluctuation in confidence levels (exacerbated by both GA6, MPC and Bank of England interest rates) is showing in new private sector housing which appears to have peaked and showing signs of a temporary slowdown."

Barnes Esq G, BSc FRICS
Brook Barnes James
"Our area will experience cost increases/labour shortages as the Olympics gather momentum."

Martin Esq FRICS
Rider Hunt
"Commercial activity in London is picking up but not as fast as expected. There still seems to be nervousness in pressing the button on some projects."

North East
Jonas Esq FRICS
R. H. Duns
"Local contractors are continuing to report a downturn in medium size contracts. The larger, (mainly housing) contracts are dominated by national contractors. Tender prices remain competitive."

North West
Hayward Esq FRICS
Hayward Associates (Cumbria) Ltd
"Framework agreements for HAs and RSCs taking time to get onto site. Loss of flexibility with RSLs wider new rules. Planning restrictions on new housing and contamination issues all contributing to delay and increased costs of provision."

Nixon Esq BSc FRICS
Thornber & Walker
"Planning problems now seem to be about environmental issues such as habitats for bats and great crested newts and travel plans. The appearance of a building seems secondary."

Pritchard Esq FRICS
John Magnall & Associates
"The framework process in the Housing Association movement still appears to be taking a long time and is affecting start dates for various projects. The other factor affecting completion dates is the electricity supply industry which is causing considerable delays to handovers."

Shea Esq FRICS
Kevin Shea Associates
"Delays associated with service connections, particularly electric."

Williams Esq MRICS
Fletcher McNeill
"Workload has remained consistent although one cannot look to far ahead in this sector of business"

Northern Ireland
Carson Esq FRICS
V B Evans & Co
"PPP Schools bidding is a drain on resources for professionals"

Howkins Esq BSc FRICS
Northcroft Constructions Consultants
"Shortage of professional staff, sub-contractor labour (plasterers, dry liners etc), shorter lead times required by government clients increasing pressure on private practices."

Scotland
Atkinson Esq LLM, FRICS, MAPM,MAICA
Atkinson Partnerships
"Market is busy but delays in progressing projects are increasing with the growth in regulatory controls applicable to construction."

Cation Esq MRICS
Systems Aluminium Limited
"Increasing number of PFI projects."

Dool Esq FRICS BSc
Turner & Townsend
"Extreme shortages or capable and competent resource in the marketplace, particularly senior quantity surveyors."

Fletcher Esq FRICS
John Fletcher Associates
"Continuing buoyancy in the housing market."

Greig Esq FRICS
Gardiner & Theobald
"There are a considerable number of large projects particularly in the Health and Education Sectors which are taking up a considerable resource and this together with the lack of mid size Contractors, procuring Tenders is more difficult than in the past."

Harris Esq FRICS
Vaughan Fisher
"Industry overloaded, pushing prices up."

McBroom Esq MRICS
Brownriggs
"Continued strong growth over all sectors"

Meechan Esq FRICS
Gardiner & Theobald
"The availability of tradesmen and professional staff is and will continue to be an issue unless more people can be attracted to the industry. The market is buoyant at present with many retail and commercial developments being considered but pressure on the labour market will affect tenders."

Stockan Esq BSc FRICS
Pentarq
"Shortage of skilled labour."

Thomson Esq MRICS
Thomson Gray Partnership
"Based on recent tender returns we consider there is a definite 'softening' in the tender market. This would appear to be due slightly to seasonal work at schools, colleges etc now being complete."

South East
Burchell Esq FRICS
Northcroft Cost and Construction Consultants
"1. Annual summer vacation time in the University Colleges causes a 'spike' in workload.2. Enhanced levels of public spending.3. Vigorous housing market (new houses)"

Colston Esq FRICS
Nigel Rose and Partners
"Recruitment of PQSs has become more difficult. There is little movement of quality personnel."

Dougall Esq MRICS
The Andrews Partnership
"July and August are traditionally quiet months (relatively speaking) and so we will need to see what happens in September and October before we can see what is happening in the industry - and the economy. Generally we expect to see some nervousness and uncertainty."

Dougall Esq MRICS
The Andrews Partnership
"It would appear that the industry is now working at full capacity, input costs are rising steadily and yet margins are being eroded. A sharp upward correction in tender levels may be just around the corner."

Goddard Esq BSc MRICS
Brodie Plant Goddard
"Contractors are reporting a rise in the cost of skilled labour which is also reflected by shortages in good employees. This is likely to continue in the longer term. Separately, Clients are keen to embrace sustainability but in some cases, are frightened by the costs!"

Green Esq MRICS
Hadland Manning Bullock & Partners
"Poor procurement advice from some professionals is resulting in inflated costs which become apparent during the construction period leading to disputes and delays."

Harvey-Browne Esq BSc FRICS
CM Parker Browne
"The effect of the significant influx of Polish labour is beginning to stem pay increases."

Jones Esq FRICS
Ridge & Partners
"The sub-contract market appears to be very busy, obtaining three competitive quotations is currently a challenge."
Read Esq FRICS
Christopher Smith Associates
"Contractors are increasingly selective when considering invitations to tender due to the large number of enquiries particularly for design and build projects."

South West
Stubbs Esq MRICS
Nixey Powell Partnership
"Level of activity remains high with the private sector taking up the fall in areas of public funding schemes."

Tipling Esq FRICS
Jenkins Hansford & Partnership
"Lower level of funding for public sector projects in parts of the region leading to uncertainties and to future workload and keener lenders."

Varey Esq FRICS FFB
Beaufort Ellis Associates
"Bristol and Oxford - steady conditions: competition in tendering still keen: Part L still a factor in future construction costs (+10-15%)"

Wales
Soady Esq BSc MRICS
RPA Chartered Quantity Surveyors
"Still key shortage of quantity surveyors both graduate and chartered level."

West Midlands
Aston Esq FRICS MAPM
Wakemans Ltd
"Planning approvals continue to add time to overall project programmes."

Yorkshire & Humberside
Bassett Esq FRICS
Stace
"Large number of major projects mean large national contractors very busy."

Beard Esq FRICS
Monaghans
"The lack of planning policy has led to many developers speculating in land and architects drawing up large multi-storey schemes that are uneconomical and unviable and never getting built, sterilising land for commercial development for owner occupier offices."

Howkins Esq BSc FRICS
Northcroft Construction Consultants
"Employment agents targeting staff and thus raising wage levels?"

Thomas Esq FRICS
E. C. Harris
"Professional recruitment remains very difficult and whilst a growing order book should enable us to attract quality staff they are not becoming available. Perhaps we are paying the cost of reducing numbers of graduates in the 90s."

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