

**SECTION 6b -
CRITICAL ECONOMY
SECTOR:
CONSTRUCTION**

Overview of Data Sources

<http://www.statcentral.ie/viewstats.asp?type=Construction>

<http://www.cso.ie/px/pxeirestat/statire/SelectTable/Omrade0.asp?PLanguage=0> Rol CSO data. In Themes at LHS, click on Business Sectors, Construction. At state level only, many are dated.

http://www.cso.ie/px/pxeirestat/Database/eirestat/Annual%20Enterprise%20Statistics%20on%20Building%20and%20Construction/Annual%20Enterprise%20Statistics%20on%20Building%20and%20Construction_statbank.asp?SP=Annual Rol Construction data, state level, many discontinued

http://www.detini.gov.uk/dc_briefing-43.xls Employment in NI Districts

http://www.cso.ie/en/media/csoie/releasespublications/documents/construction/2012/prodbuild_q22012.pdf Rol, Dec 2012, CSO Building & Construction Bulletin, at state and EU level

6b.1 Significance of Construction Sector

The ‘construction industry’ is the broad term that relates to the building of houses, commercial property, infrastructure, etc. including builders, joiners, plumbers, machine operators, etc. and property developers. The data includes civil engineering, but not the host of related employment categories including quarrying / mining’, property ‘professionals’ (architects, QS, planners / building control, estate agents, mortgage advisors, etc.), ‘manufacturing’ of building products or the ‘retailing’ of building supplies.

There has been a long tradition of skilled craftsmen and other construction employment in the Central Border Region, which really expanded from the 1980’s onwards - climaxing towards the peak of the ‘Celtic Tiger’ property boom around 2006/7. The craftsmen from the Region epitomised the entrepreneurialism of the past 30 years, the ‘white van men’ who set up their own businesses, sub-contracting, contracting and becoming ‘property developers’ - within the area, elsewhere and throughout Ireland, GB and internationally. Indeed, the construction sector has a ubiquitous business base across the Region and has built upon the strengths, mobility and work ethic of this rural people. Many firms were extremely successful, providing substantial direct employment as well as making a massive contribution to investment / spending in the wider economy of Rol / NI.

Because this Region was a ‘powerbase’ for the construction industry, it has been disproportionately affected by the downturn since 2006/7 - with the reduction in employment in the trades, related professions, collapse in land / property values / indebtedness and closures / bankruptcies all resulting in contraction of (public and private sector) spending in the economy, unemployment and fuelling emigration from the Region. Nevertheless, the Central Border Region retains many excellent and internationally performing firms e.g. Kingspan Century Homes (Monaghan - timber frame buildings internationally) or McAleer & Rushe (Cookstown) who build / develop major hotels in London. The construction firms / tradesmen are increasingly mobile - travelling to take on

contracts throughout Ireland and GB, and there is diversification into renewables - heating systems, windfarm construction, etc.

In summary, the construction sector (and related businesses) has been a significant driver of the Region's economy in recent decades, it still has many great firms and there is undoubted potential for further employment and wealth generation in the future. Key data on the construction sector follows:

6b.2 Number of Construction Firms

Commentary

It can be seen from the following tables that there has been an ongoing, significant and disproportionate reduction (when compared to the reduction in overall firms) in the number of construction firms in the Central Border Region, even from 2009 onwards. There are over 6,000 firms registered in the Region, though it has lost 913 firms (12.5%) between 2009 and 2010/11. All districts have been severely affected - in terms of the number of firms registered and nearly all of the construction firms will have reduced their scale of activity / employment significantly.

Table 41: No. of Construction Firms in Central Border Region 2009 - 2010/11*

Area	Number of Construction Firms 2009	Total Firms 2009	Number of Construction Firms 2010 /2011*	Total Firms 2010 /2011*	Reduction in Construction Firms 2009-2010/11		Reduction in Total Firms 2009-2010/11
Cavan	969	3,261	852	3,056	117	12.1%	6.3%
Donegal	1,868	6,176	1,521	5,649	347	18.6%	8.5%
Leitrim	389	1,408	326	1,330	63	16.2%	5.5%
Monaghan	750	2,792	673	2,641	77	10.3%	5.4%
Sligo	680	2,607	606	2,458	74	10.9%	5.7%
Armagh City, Banbridge and Craigavon Borough	1,475	8,390	1,335	8,100	140	9.0%	3.5%
Fermanagh & Omagh District Council	1,640	8,315	1,540	8,140	100	6.1%	2.1%
Mid Ulster District Council	1,245	7,560	1,095	7,345	150	12.0%	2.8%
ICBAN Region	9,016	40,509	7,948	38,719	1,068	11.8%	4.42%
Rep of Ireland*	46,665	206,575	40,459	195,431	6,206	13.3%	5.4%
Northern Ireland	12,215	70,620	10,910	67,955	1,305	10.7%	3.8%

*RoI Latest figures are 2010, NI figures are 2011.

Source: CSO & DETI / NISRA

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=BRA18&PLanguage=0> RoI 2009/10

http://www.detini.gov.uk/facts_and_figures_edition_12_dec_2009-3.pdf p2 Link, Table 1.5, NI 2009

http://www.detini.gov.uk/idbr_publication.pdf Page 2 Link, Table 1.5 or

6b.3 Number Employed in Construction

Commentary

The census figures confirm just how much the construction employment had grown from 2001/02 and then how much it has contracted subsequently, though differentially between the various LGDs. In particular, the RoI counties all expanded significantly, by over 55% (for example becoming 15.6% of all employment in Leitrim in 2006) before falling back by 59% in 2011 (to 64% of its 2002 level). The proportion of each county's employment also collapsed to an average of 6% - which is still slightly above the state level. It is notable that Sligo never became as dependent on construction as the other counties, though it too has shrank significantly.

Construction employment has been important in all of the NI districts of the Central Border Region and particularly in Mid Ulster where the % employed in construction is 13.2%. Whilst the numbers and percentages employed in construction will undoubtedly have swollen considerably at the height of the 'Celtic Tiger' boom, the figures do not appear to have collapsed to quite the same extent as the RoI neighbours. Nevertheless, employing over 29,000 persons in 2011, construction employment remains important in all of the LGDs of the Central Border Region.

Table 42: Employment in Construction in Central Border Region - Census 2001/02 - 2011

Area	2001 / 02		2006		2011	
	Number*	% of total pop that is At Work	Number	% of total pop that is At Work	Number*	% of total pop that is At Work
Cavan	2,569	11.5%	4,082	14.4%	1,765	6.5%
Donegal	5,439	11.2%	8,124	14.3%	3,298	6.2%
Leitrim	1,140	11.4%	1,971	15.6%	700	5.8%
Monaghan	2,250	10.7%	3,543	14.0%	1,591	6.9%
Sligo	2,064	8.6%	3,155	11.5%	1,224	4.8%
Armagh City, Banbridge and Craigavon Borough Council	7,562	10.2%	N/A	N/A	7,722 (233)	8.6%
Fermanagh & Omagh District Council	5,624	13.6%	N/A	N/A	5,533	11.2%
Mid Ulster District Council	7,168	15.1%	N/A	N/A	8,108	13.2%
ICBAN Region	33,816	11.71%**	N/A	N/A	29,941	8.8%***
Rep of Ireland	149,271	9.1%	215,184	11.1%	90,357	5.0%
Northern Ireland	64,321	9.4%	N/A	N/A	65,059 (1,972)	8.2%

Source: RoI Census - CSO & NI Census - NISRA

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=CD319&Planguage=0>
RoI 2011 Census (& 2006) Profile 3, Table CD319, Broad Ind. Group - Construction
<http://census.cso.ie/Census/TableViewer/tableView.aspx?ReportId=1485> RoI 2002 Census,
Interactive Tables, Volume 5, Table 13

http://www.nisra.gov.uk/Census/key_stats_bulletin_2011.pdf 2011 NI Click on p 31 link to Table
KS605NI (Persons) (or KS607NI (Males), KS608NI (Females))
<http://www.nisra.gov.uk/Census/2001%20Census%20Results/Key%20Statistics/KeyStatisticstoOutputArealLevel.html> 2001 NI Scroll down to Table KS11a.

* Note that the NI 2001 figure included Mining & Quarrying as well as Construction. (In 2011, the M&Q figures were given separately, these are given in brackets, for the reader to make an estimate of what the M&Q element might have been in 2001)

**Total of 288,890 working in ICBAN region in 2001

***Total of 341,314 working in ICBAN region in 2011

6b.4 The Construction Firms of the Central Border Region

Some of the main construction firms across the Region are detailed in the 'Main Firms' and 'Renewables Businesses' tables at the start of Section 6. However, the following data sources give details of many other, often small, construction firms located in all areas:

http://www.build.ie/builders/ireland/1_14-14.htm Example of lists of construction firms, for each of the RoI and NI counties, click on rhs menu

<http://www.yourlocal.ie/search/county-cavan/builders> Example of lists of construction firms, across each of the RoI counties, click on A-Z at bottom

<http://www.goldenpages.ie/builders/cavan-cavan-county/> 56 building firms listed for Co. Cavan

<http://www.goldenpages.ie/builders/donegal-donegal-county/> 102 building firms listed for Co. Donegal

<http://www.goldenpages.ie/builders/leitrim-leitrim-county/> 30 building firms listed for Co. Leitrim

<http://www.goldenpages.ie/builders/monaghan-monaghan-county/> 60 building firms listed in Co. Monaghan

<http://www.goldenpages.ie/builders/sligo-sligo-county/> 49 building firms listed for Co. Sligo

http://www.manta.com/world/Europe/United+Kingdom/-/Armagh/building_construction--E0/

105 construction firms listed for Armagh

http://www.manta.com/world/Europe/United+Kingdom/-/Cookstown/building_construction--E0/

93 construction firms listed for Cookstown

http://www.manta.com/world/Europe/United+Kingdom/-/Dungannon/building_construction--E0/

164 construction firms listed for Dungannon

http://www.manta.com/world/Europe/United+Kingdom/-/Enniskillen/building_construction--E0/

103 construction firms listed for Enniskillen

http://www.manta.com/world/Europe/United+Kingdom/-/Omagh/building_construction--E0/

151 construction firms listed for Omagh

http://www.manta.com/world/Europe/United+Kingdom/-/Magherafelt/building_construction--E0/?ftoggle-frontend-prod-on=abTests.engagement.rebrand_a&utm_expid=82789632-28.cEgZ_XOVRPa6jwvn6oKhQ.2&utm_referrer=http%3A%2F%2Fwww.manta.com%2Fworld%2FEurope%2FUnited%2BKingdom%2Fbuilding_construction--E0%2F%3Fftoggle-frontend-prod-on%3DabTests.engagement.rebrand_a%26show_all_cities%3D1

103 construction firms listed for Magherafelt

http://www.manta.com/world/Europe/United+Kingdom/-/Maghera/building_construction--E0/?ftoggle-frontend-prod-on=abTests.engagement.rebrand_a&utm_expid=82789632-28.cEgZ_XOVRPa6jwvn6oKhQ.2&utm_referrer=http%3A%2F%2Fwww.manta.com%2Fworld%2FEurope%2FUnited%2BKingdom%2Fbuilding_construction--E0%2F%3Fftoggle-frontend-prod-on%3DabTests.engagement.rebrand_a%26show_all_cities%3D1

103 construction firms listed for Maghera

http://www.manta.com/world/Europe/United+Kingdom/-/Maghera/building_construction--E0/?ftoggle-frontend-prod-on=abTests.engagement.rebrand_a&utm_expid=82789632-28.cEgZ_XOVRPa6jwvn6oKhQ.2&utm_referrer=http%3A%2F%2Fwww.manta.com%2Fworld%2FEurope%2FUnited%2BKingdom%2Fbuilding_construction--E0%2F%3Fftoggle-frontend-prod-on%3DabTests.engagement.rebrand_a%26show_all_cities%3D1

103 construction firms listed for Maghera

http://www.manta.com/world/Europe/United+Kingdom/-/Maghera/building_construction--E0/?ftoggle-frontend-prod-on=abTests.engagement.rebrand_a&utm_expid=82789632-28.cEgZ_XOVRPa6jwvn6oKhQ.2&utm_referrer=http%3A%2F%2Fwww.manta.com%2Fworld%2FEurope%2FUnited%2BKingdom%2Fbuilding_construction--E0%2F%3Fftoggle-frontend-prod-on%3DabTests.engagement.rebrand_a%26show_all_cities%3D1

103 construction firms listed for Maghera

[%2FUnited%2BKingdom%2Fbuilding_construction--E0%2F%3Ftoggle-frontend-prod-on%3DabTests.engagement.rebrand_a%26show_all_cities%3D1](#)

28 construction firms listed for Maghera

<http://www.intertradeireland.com/researchandpublications/publications/name,13337,en.html>

Report on Construction Materials sector, ROI and NI, at state level, May 2012.

Local construction firms go into administration. Example articles to demonstrate the scale and previous 'success' of some local construction firms:

<http://www.bbc.co.uk/news/uk-northern-ireland-21296949>

<http://www.bbc.co.uk/news/uk-northern-ireland-21043432>

<http://www.bbc.co.uk/news/uk-northern-ireland-20084686>

<http://www.bbc.co.uk/news/uk-northern-ireland-12578500>

<http://namawinelake.wordpress.com/2011/04/22/p-elliott-group-facing-an-uncertain-future-as-loans-transfer-to-nama/>