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15th October 2021

**Panel Discussion On
Supply Chain Capacity
and the risk to our
industry**



Monthly Price Movement Dashboard

Business Function
Procurement

Document Owner
Relevant Construction Board Director

Document Type
REFERENCE DOCUMENT

Market Update Dashboard

Procurement Ireland Material Price Movements September 2021



MATERIAL	CHANGE	CURRENT MOVEMENT	OVERALL SINCE 2019	FORECAST	MATERIAL	CHANGE	CURRENT MOVEMENT	OVERALL SINCE 2019	FORECAST	MATERIAL	CHANGE	CURRENT MOVEMENT	OVERALL SINCE 2019	FORECAST
SOFTWOOD TIMBER	●	5%	65%	→ 0%	CONCRETE	●	3%	5%	↑ 3%	PLASTERBOARD	●	0%	14%	↑ 7%
PLYWOOD	●	8%	55%	→ 0%	BRICKS	●	0%	16%	↑ 11%	METAL STUD	●	0%	41%	↑ 25%
INSULATION	●	0%	58%	→ 0%	BLOCKS	●	0%	10%	↑ 3%	PAINT	●	0%	24%	→ 0%
BUILDERS MERCHANTS	●	0%	25%	→ 0%	AGGREGATES	●	0%	11%	→ 0%	MAINS AND DRAINS	●	0%	38%	→ 0%
CONCRETE ACCESSORIES	●	0%	18%	→ 0%	IRONMONGERY	●	0%	30%	→ 0%	COPPER	●	-1%	52%	→ 0%
REBAR	●	0%	50%	→ 0%	SANITARY	●	0%	25%	→ 0%	ALUMINIUM	●	7%	43%	→ 0%
MESH	●	0%	90%	→ 0%	STEEL	●	0%	57%	→ 0%	ROLLED GAV STEEL COIL	●	-8%	74%	→ 0%
MEP - HVAC	Click on the icon to the left-hand side to view the latest commentary on HVAC materials price and availability				MEP - CABLE & ASSOCIATED ITEMS	Click on the icon to the left-hand side to view the latest commentary on cable & associated materials price and availability								



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Supply Chain Capacity & Risk to our Industry



Covid -19



**Reduced
Factory Output**



**Unforeseen Demand
Internationally**



**Global
Competition**



**Resource
Shortages**

Harris says there is significant shortage of skilled tradespeople

Minister says building and climate plans will draw from the same pool unless changes made

Construction labour shortage: 'If they come, we will build it'

Cost of living barrier to attracting enough builders to Ireland, says company owner

Labour shortage threatens target of 40,000 new homes each year, builders warn

The Construction Industry Federation also want the planning process streamlined

In 2007 there were 23,700 apprenticeships in Ireland — by 2015 that had fallen to 4,400.

A report commissioned by the Construction Industry Federation (CIF) last year revealed that Ireland had failed to register any new floor and wall tiling apprentices since 2012.

In 2019, the CIF warned that nine out of 10 firms were experiencing “severe difficulties” in sourcing tradespeople.

Shortage of tradespeople 'holding back construction'

Supply Chain Capacity & Risk to our Industry



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Causes



COVID-19



Global Demand
and Other Forces



BREXIT

Challenges

- Severe manufacturing delays, most manufacturers still not back to pre pandemic levels
- High levels of repatriation of migrant workers
- Reduced construction activity – forcing workers into other industries

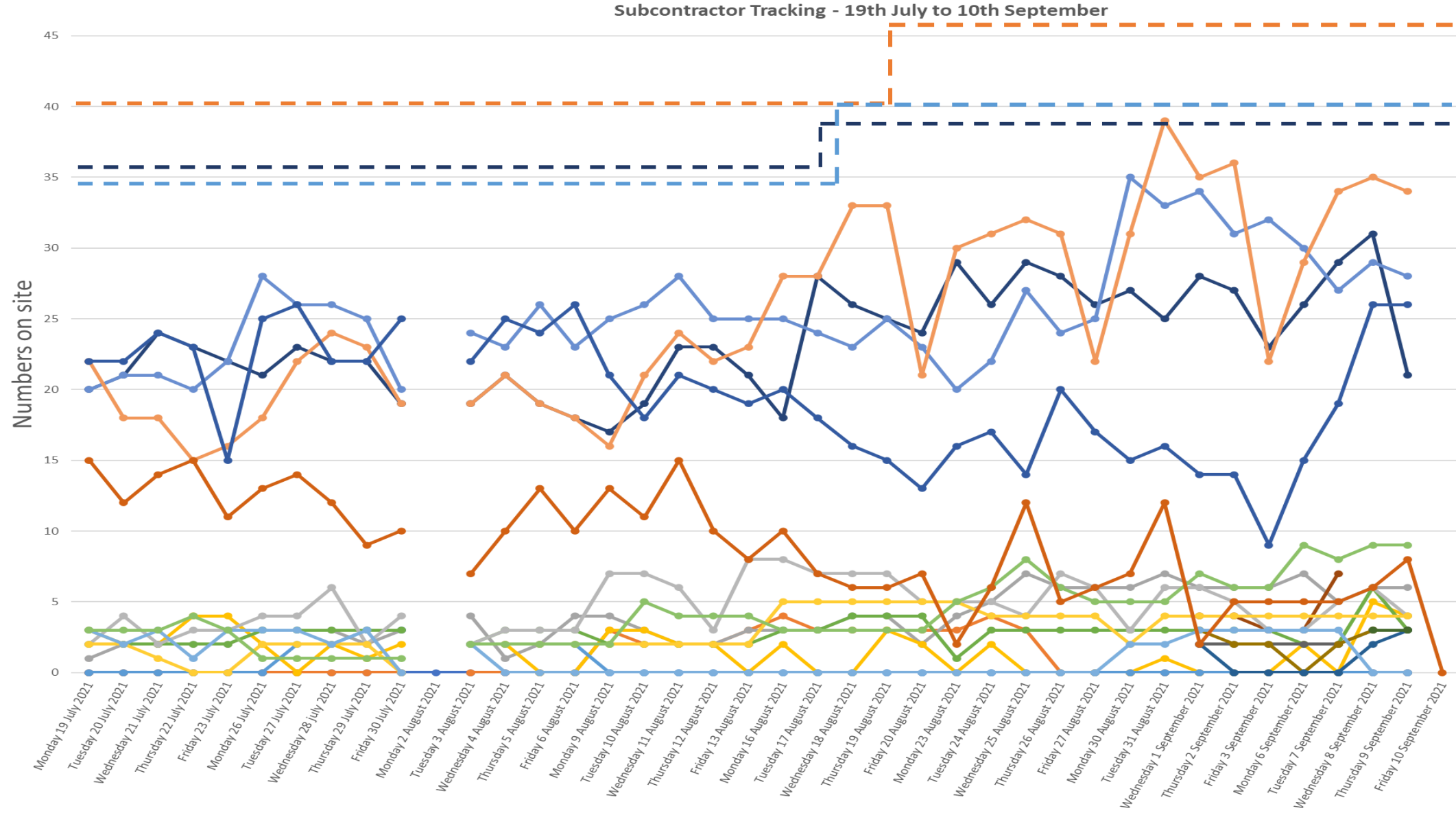
- High demand for workforce globally
 - America
 - Australia
 - UK
- Shifts in economic conditions – particularly in emerging economies
- Huge stockpiling of raw materials
- Alternative distribution of materials

- New Trading Relationship
- Supply Chain Readiness
- Tariffs (Rule of Origin)
- Steel Quotas
- VAT on Imports
- Additional Administration
- CE Certification
- Increased Lead Times

Mitigation

- Alternative Supply chains – widen the load
- Innovate - towards off site fabrication were possible
- Productivity – focus on improved outputs
- Knowledge – know your supply chain ‘intimately’

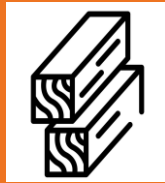
Subcontractor Numbers



Supply Chain Capacity & Risk to our Industry



Material Availability



Manufacturing Capacity



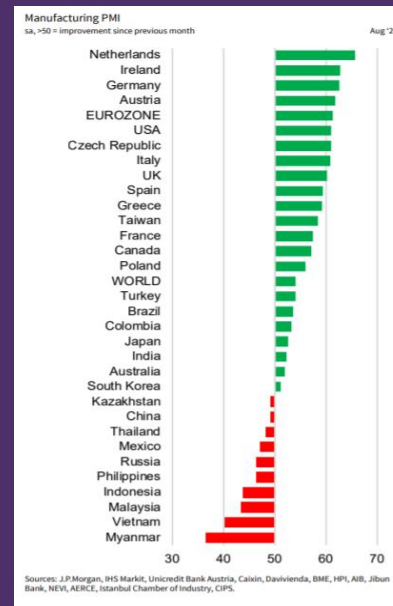
Labour Availability

Market updates hub

Procurement Ireland Material Price Movements September 2021

MATERIAL	CHANGE	CURRENT MONTH	OVERALL 2021	FORECAST	MATERIAL	CHANGE	CURRENT MONTH	OVERALL 2021	FORECAST	MATERIAL	CHANGE	CURRENT MONTH	OVERALL 2021	FORECAST
SOFTWOOD TIMBER	↓	5%	10%	↓	CONCRETE	↓	5%	5%	↓	PLASTERBOARD	↓	5%	14%	↓
PLYWOOD	↓	5%	10%	↓	BRICKS	↓	5%	10%	↓	METAL STUD	↓	5%	4%	↓
INSULATION	↓	5%	10%	↓	BLOCKS	↓	5%	10%	↓	PAINT	↓	5%	14%	↓
BULKHEAD MERCHANTS	↓	5%	10%	↓	AGGREGATES	↓	5%	10%	↓	WALL AND CEILING	↓	5%	14%	↓
CONCRETE ACCESSORIES	↓	5%	10%	↓	MANUFACTURING	↓	5%	10%	↓	GLASS	↓	5%	14%	↓
STEEL	↓	5%	10%	↓	GLASS	↓	5%	10%	↓	ALUMINIUM	↓	5%	14%	↓
WIRE	↓	5%	10%	↓	STEEL	↓	5%	10%	↓	WALL AND CEILING	↓	5%	14%	↓
MEP WORK	↓	5%	10%	↓	MEP WORK	↓	5%	10%	↓	MEP WORK	↓	5%	14%	↓

Click on the link to the left hand side to view the latest commentary on the material price and availability.



127 k

V's

150k



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