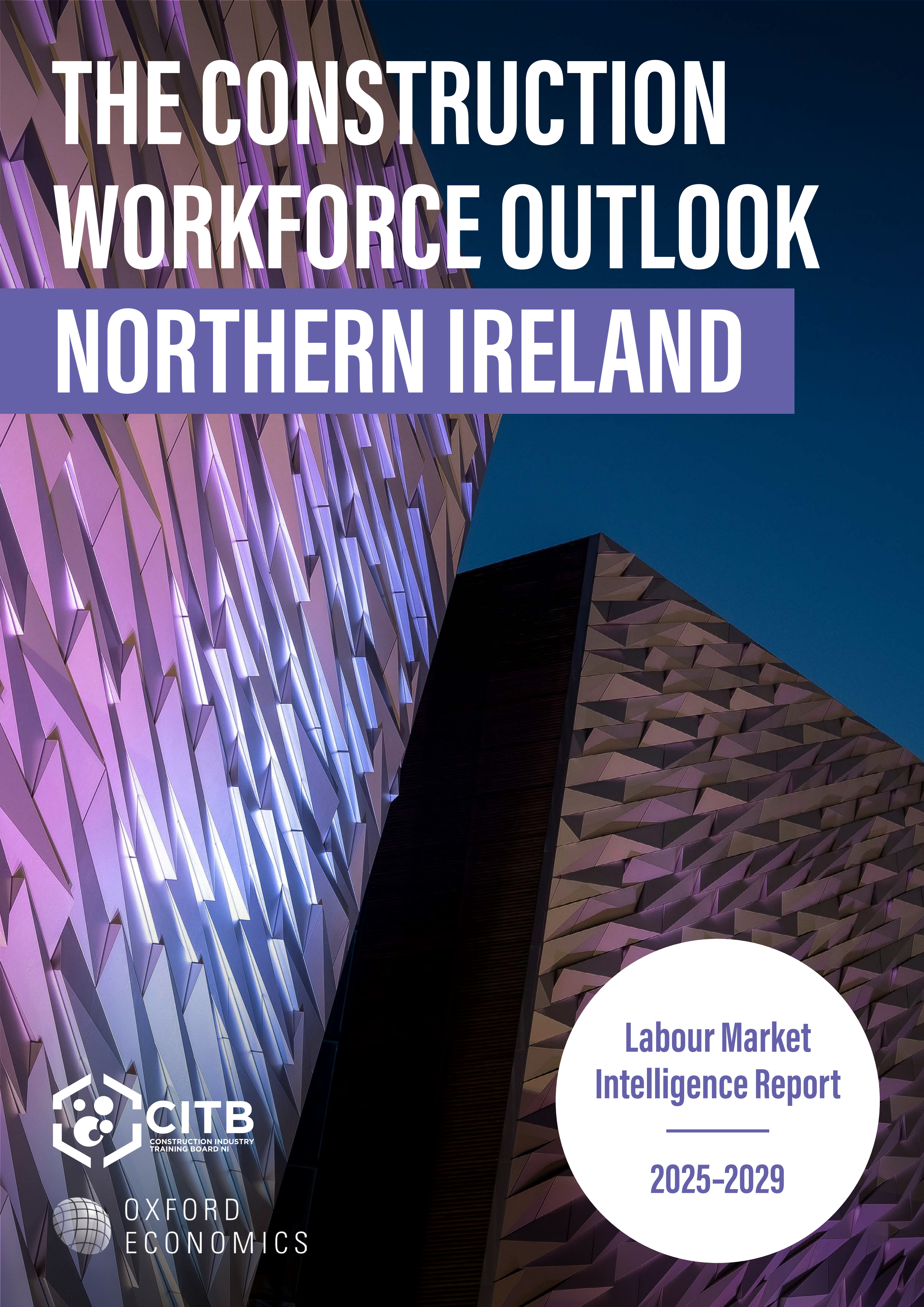
THE CONSTRUCTION WORKFORCE OUTLOOK

NORTHERN IRELAND



Labour Market Intelligence Report

2025–2029

CITB
CONSTRUCTION INDUSTRY TRAINING BOARD NI

OXFORD ECONOMICS

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FOREWORD

Can we build it? Yes, with investment in training that leads to jobs now.

The construction industry is facing a crucial choice. To continue to recruit, train and develop its workforce as it has done in recent years, or to change and rethink how it attracts, trains, and retains talent.

If the industry does not move with the times, it will remain on a path where vacancies are hard to fill, the loss of aging workers leads to a growing loss of expertise, and CITB NI continues to highlight the need for 5,450 extra workers over the next five years. It also means the opportunities identified in this report to build new homes, infrastructure, and improve energy efficiency will not be realised. Employers will struggle to find skilled, site-ready individuals, leading to project delays and increased costs.

If construction can change how it attracts, trains, and retains people, it could build a more capable and diverse workforce, better equipped for growing demand and new technologies.

The recently published NI Executive Housing Supply Strategy (Dec 2024) highlighted the need to tackle housing pressures by building 100,000 homes over the next 15 years. The aim of this strategy is to create a housing system that meets needs while aligning with emissions targets.

Training is key to delivering these targets and building the workforce needed now and in the future. The Northern Ireland Skills Barometer 2023–2033 identified an undersupply of workers with qualifications at Level 3 and above in many construction roles. Continuous learning and upskilling will be essential, especially in digital skills and green technologies. New technologies are already reshaping how we build and work, fostering a culture of innovation and supporting the shift to modern construction methods.

Training must be widely available, adaptable, and suited to the evolving needs of those starting careers and those already in the industry. Apprenticeships in Northern Ireland are crucial to getting more people into construction and are currently showing high enrolment. In fact, 43% of all NI apprenticeships in 2024 were in construction-related roles. It is vital these participants are guided into the right occupations, and this report highlights where extra workers are needed now and in the future. In recent years, CITB NI has supported apprenticeships by providing employers over £3 million in grants, helping fund and sustain more than 1,100 apprentices.

Recruitment practices must also change, as traditional approaches are struggling to find the workers industry needs in a competitive job market. The industry must support more young people starting apprenticeships or college courses and create new pathways to attract adults into construction. Investment in training that supports people into jobs is crucial and central to CITB NI's Business Plans.

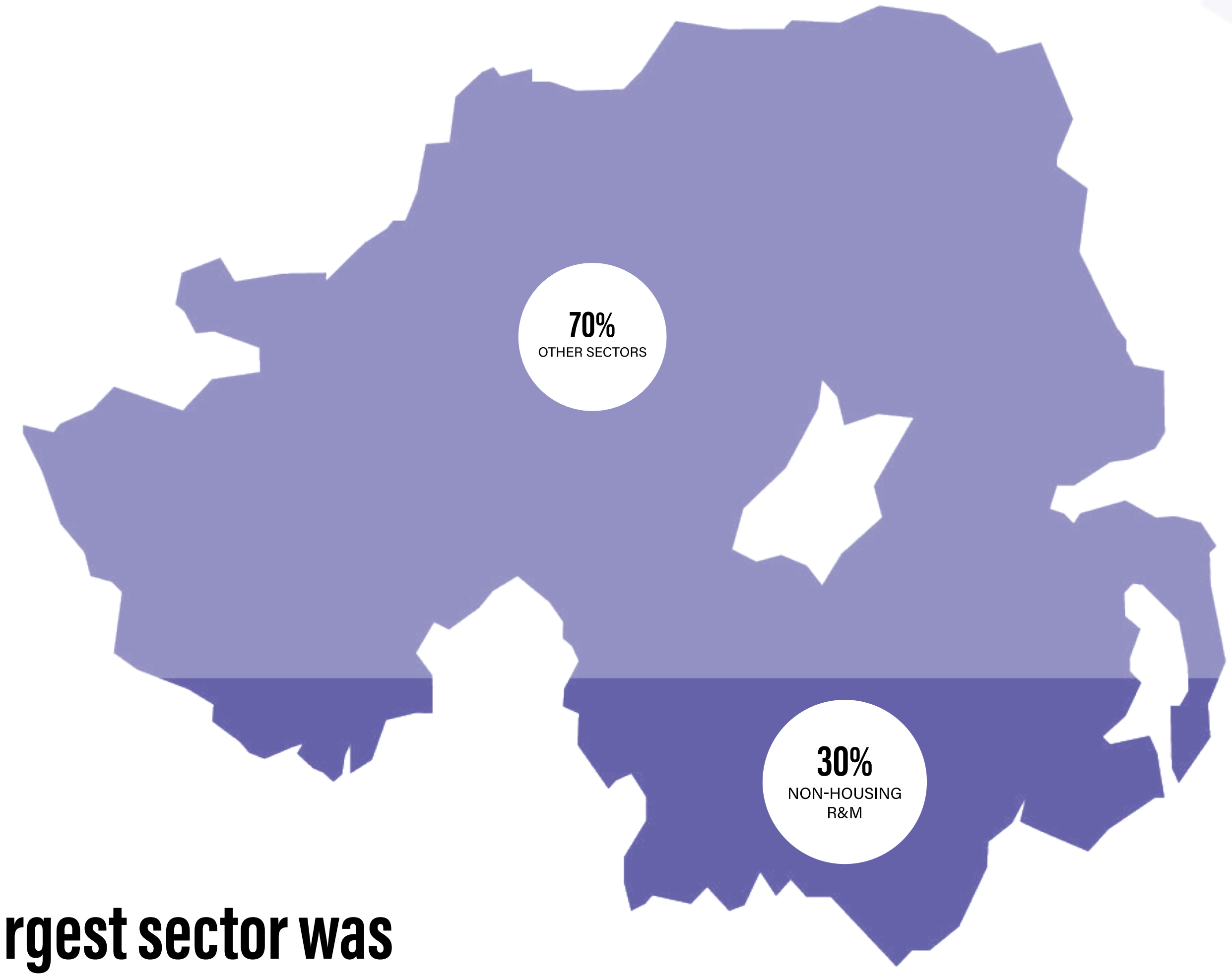
This outlook shows there are opportunities ahead. Achieving them requires long-term commitment from employers, government, training providers, CITB NI, and other partners to support training that leads to jobs. If we don't train more people and ensure they can join the industry, we won't have the skilled, capable, productive workforce needed to build the homes, hospitals, schools, and infrastructure of the future.

Barry Neilson OBE
CEO CITB NI

KEY FACTS & FIGURES

In 2024, construction output reached

£4.1 billion.



The largest sector was **non-housing R&M with £1.2 billion output (30%).**

2025 to 2029 average annual output growth:

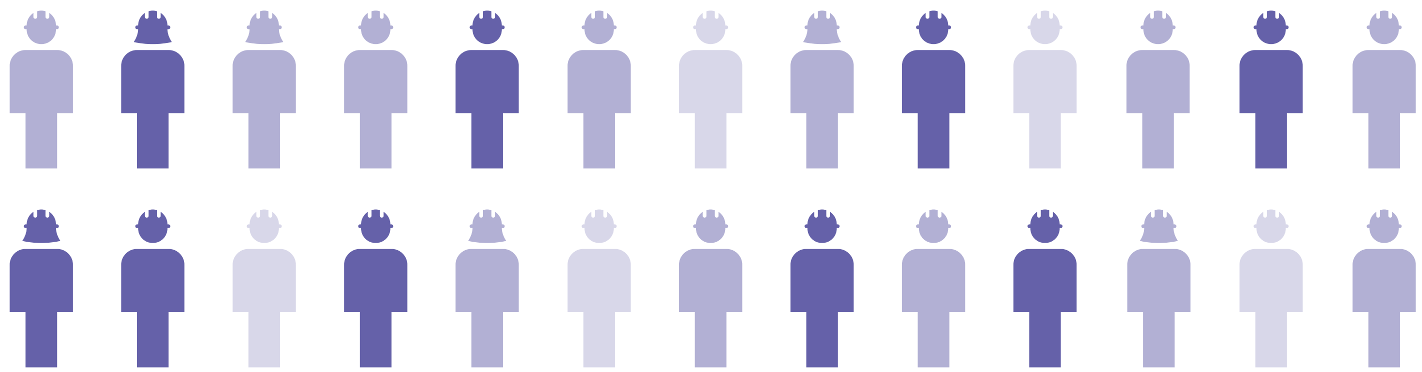
2.3%

2029 workforce:

71,990

Extra workers needed per year:

1,090



ECONOMIC OVERVIEW

Northern Ireland was the fastest-growing UK economy in 2024, with a GVA growth rate of 1.2% compared to 0.9% across the UK.

Health and social care and real estate were the main drivers of growth, altogether accounting for over a third of GVA gains made this year. Economic growth should continue at a similar rate in 2025, before improving to average 1.8% per year over the 2025–2029 period. However, there are significant downside risks to the forecast, as ongoing uncertainty regarding US tariffs could undermine economic growth. Employment also grew rapidly, at 1.6%, equivalent to close to 15,000 net new jobs this year. This represented stronger jobs growth than the UK average last year, but the pace of employment growth is expected to cool in 2025. Total employment in Northern Ireland is forecast to grow by an average of 1.0% per year between 2025 and 2029.

Growth in the construction sector was also strong last year. Output grew by 6.1%, largely driven by non-housing repairs & maintenance (20.8%) and public non-housing (16.2%). In contrast, public new housing saw a marked decline (-12.1%), while the commercial and infrastructure sectors also contracted, though to a lesser extent. Non-housing repair & maintenance is by far the largest subsector, accounting for close to 30% of Northern Ireland's construction output in 2024. This is followed by infrastructure (17.8% of output) and private new housing (16.5%).

There were an estimated 6,035 construction businesses employing people in Northern Ireland in 2024, representing 3.1% of UK construction employers. Like elsewhere in the UK, most construction businesses are very small in size. Micro-businesses (less than 10 employees) accounted for 90% of the total, 9.0% were small (10 to 50 employees), and 1.4% were medium or large (above 50 employees).

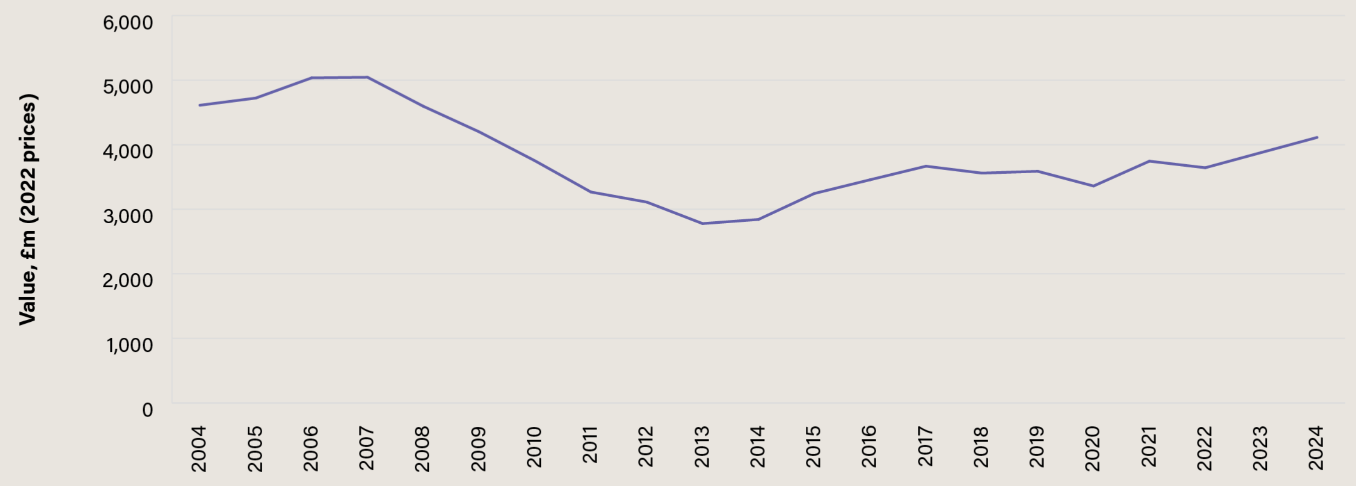
Recruitment difficulties remain in the construction sector, stemming from a limited supply of qualified workers. Construction employment grew by 0.5% in 2024 in Northern Ireland, equivalent to about 400 net new jobs. This was a better performance than the UK average, which saw construction employment fall by 2.3%. Total job vacancies have broadly been declining in Northern Ireland in recent years and were down to 1,440 vacancies in March 2025.

Construction wages grew by 5.8% in 2024, slightly above the all-industry average of 5.6%. The median gross hourly pay in the construction sector was set at £16.22, above the Northern Ireland average of £15.20.

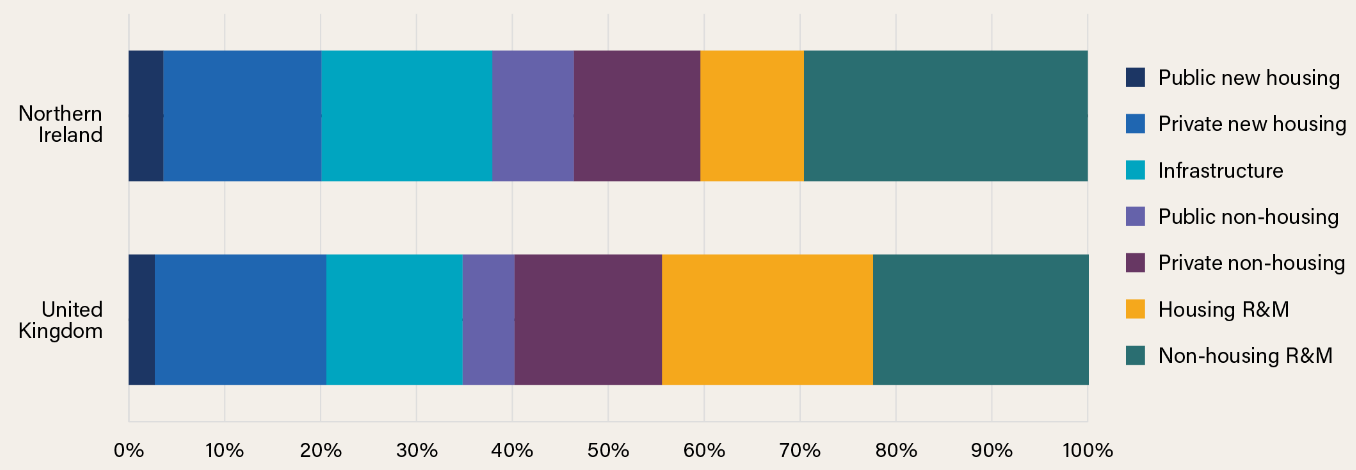
We expect construction output in Northern Ireland to grow at a more moderate pace in 2025, but output is forecast to pick up in the following years, with an average growth rate of 2.3% between 2025 and 2029. This acceleration in growth is the result of expected improved economic conditions, along with government support to the infrastructure development and homebuilding priorities.

In 2024, construction output grew strongly, increasing by 6.1%.

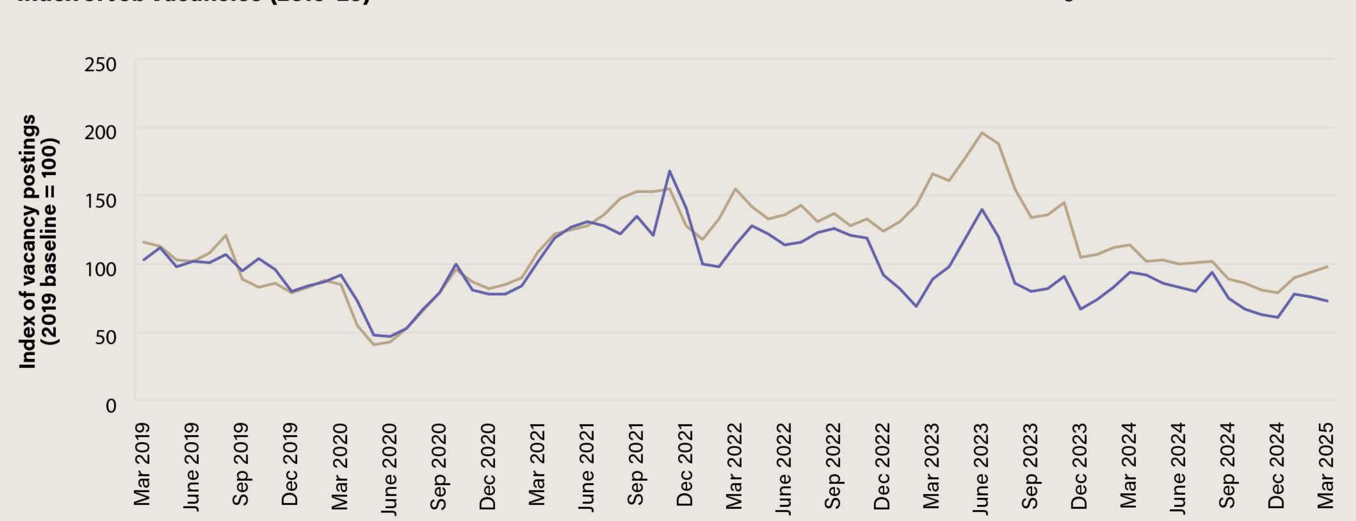
Northern Ireland Construction Output (2004-24)



Northern Ireland Construction Industry Structure by Sector (2024)



Index of Job Vacancies (2019-25)



CONSTRUCTION OUTPUT

Construction output is expected to grow by 1.0% in 2025 in Northern Ireland. This is slower growth than the 6.1% gains in output seen last year. However, growth is expected to pick up over the next few years and is set to average 2.3% per year across the entire 2025–2029 period, outpacing the UK construction growth rate of 2.1% over the same period.

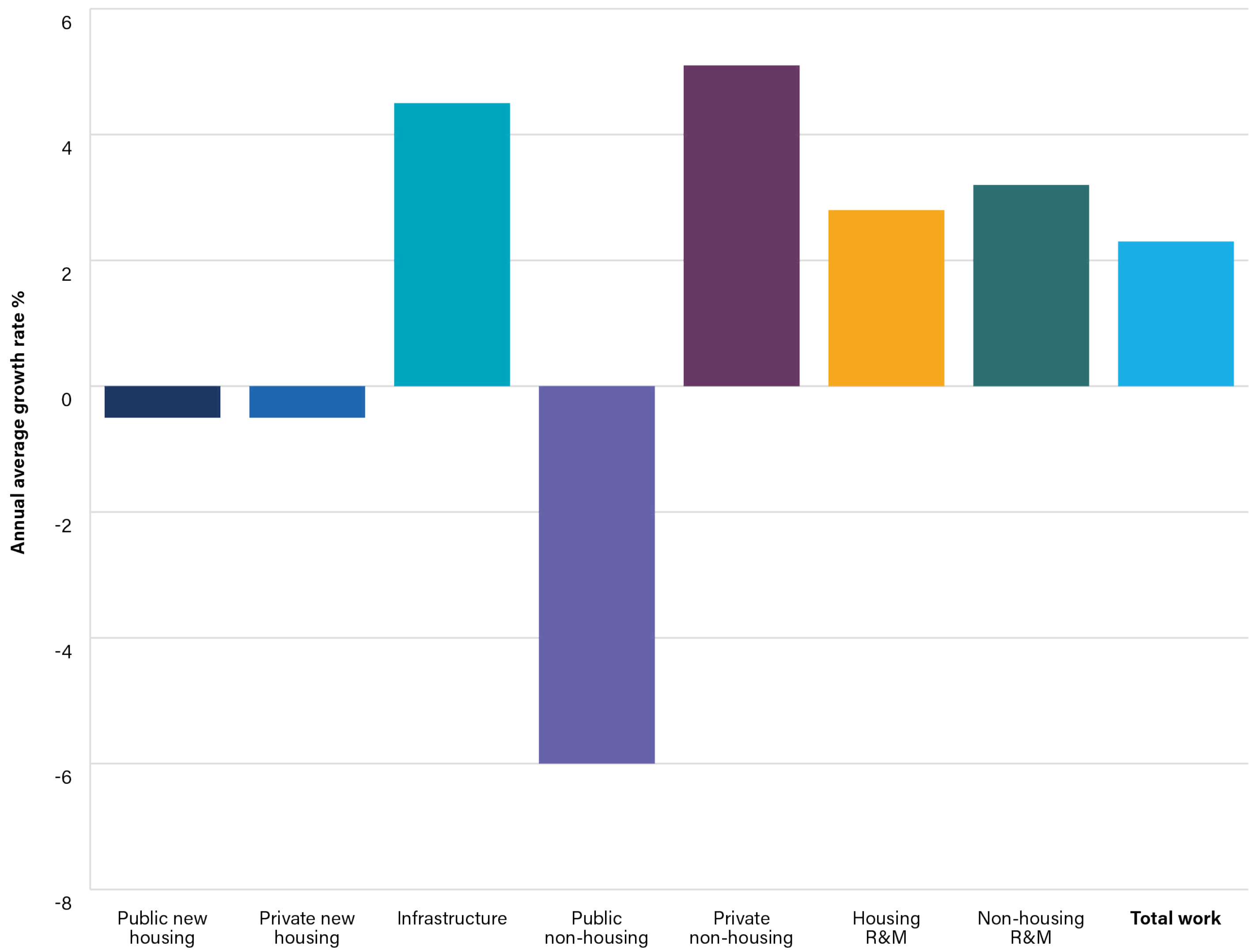
For Northern Ireland, the private non-housing sector covers commercial and Industrial new build work, and it is expected to expand at the fastest pace between 2025 and 2029, growing by an average of 5.1% per year. The sector has grown markedly over recent years, and projects such as Strabane town centre redevelopment are set to take place over coming years. The pace of growth is expected to outpace the UK average of 2.4% per year over the next five years.

Infrastructure is also projected to see strong annual growth through to 2029, with output set to expand by 4.5% per year. This is stronger than the UK average of 4.2%. Investment across Northern Ireland is likely to gain from the planned rise in public capital spending outlined in the 2024 UK Autumn Budget, though the exact scale and details have yet to be fully confirmed. Several important infrastructure projects are planned, including the extension of the A5 dual carriageway between Derry and Tyrone. We also expect rapid growth in the non-housing repairs & maintenance subsector, which will be the largest contributor to growth in absolute terms, increasing in size by over £200 million over the next five years.

By contrast, output in new housing construction, including both public and private sectors, is expected to decline in Northern Ireland over the next five years. We anticipate that output will fall by an average of 0.5% per year over the period, compared to 3.3% growth across the UK. However, it is important to note that, given the relatively small size of the construction sector in Northern Ireland, even modest changes can appear disproportionately significant. Although growth in new housing is expected to remain limited, output in housing repairs and maintenance is projected to increase by 2.8% per year between 2025 and 2029, outpacing growth in other UK nations.

Average output growth of 2.3% over the next five years means that Northern Ireland is one of the fastest growing areas of the UK.

Northern Ireland Annual Average Output Growth Rate by Sector (2025-29)



Northern Ireland Construction Output, £m (2022 prices) (2024-29)

Output sector	2024	2025	2026	2027	2028	2029
Public new housing	149	152	145	147	146	145
Private new housing	680	680	669	670	669	664
All new housing	**829**	**832**	**815**	**817**	**816**	**809**
Infrastructure	730	790	823	856	885	912
Public non-housing	348	316	303	287	272	256
Private non-housing	542	578	610	640	669	696
All new work	**2,450**	**2,516**	**2,551**	**2,600**	**2,642**	**2,673**
Housing R&M	445	453	464	481	496	511
Non-housing R&M	1,217	1,186	1,258	1,309	1,368	1,422
All R&M	**1,663**	**1,639**	**1,722**	**1,790**	**1,865**	**1,933**
Total work	**4,112**	**4,155**	**4,272**	**4,390**	**4,507**	**4,606**

WORKFORCE

Although the UK construction and built environment workforce decreased by just over 2% in 2024, this was not the case in Northern Ireland, where the workforce grew by 0.5%.

In 2024, there were 69,920 people working in the industry, and with the increases in work identified in the report, we are forecasting that the workforce will grow to reach around 71,990 by 2029. This is an annual average growth rate of 0.6% over the five-year period, just slightly lower than the UK rate of 0.8%.

While 71,990 by 2029 is an increase of over 2,000 workers when compared to the workforce in 2024, it is roughly in line with the pre-Covid-19 level of 71,200 in 2019.

Compared to the rest of the UK, Northern Ireland has a significantly larger proportion of skilled trades occupation, accounting for 61% of the construction workforce compared to 49% in the UK. These roles are also expected to account for over half of the workforce growth in the next five years. At the same time, Northern Ireland has a smaller proportion of managers & supervisors (8%) compared to the rest of the UK (15%).

The construction-specific occupations projected to see the strongest annual average growth over the five years to 2029 are:

- Construction project managers **(1.4%)**
- Construction trades supervisors **(1.1%)**
- Directors, executives and senior managers **(1.0%)**

The strongest growth in the skilled trades professions is projected for plant mechanics/fitters (1.0%), and among professional services, surveyors (0.6%). Non-construction professional and technical office-based staff will lead growth among office support roles, increasing by 0.9% per year.

Although we forecast that workforce growth will be at a slightly lower rate than the UK over the next five years, there will still be growth across the full range of occupations in Northern Ireland's construction and built environment.

61% of Northern Ireland's construction workforce is skilled trades (UK: 49%).

Northern Ireland Construction Workforce (2024-29)

Occupational group	2024	2029	Annual extra workers	Extra as a % of 2024 workforce
Manager & supervisor				
Directors, executives and senior managers	3,780	3,980	90	2.4
Construction project managers	820	870	<50	-
Construction trades supervisors	790	830	<50	-
Skilled trades & site based				
Electrical installation trades	4,780	4,880	60	1.3
Carpenters and joiners	9,830	10,000	110	1.1
Plumbing and HVAC trades	4,460	4,600	60	1.3
Labourers	3,640	3,750	50	1.4
Painters and decorators	2,520	2,600	<50	-
Bricklayers and masons	1,530	1,560	<50	-
Plasterers	2,550	2,590	<50	-
Logistics	900	940	<50	-
Plant operatives	1,830	1,870	<50	-
Roofers	720	740	<50	-
Plant mechanics/fitters	790	830	<50	-
Floorers and wall tilers	930	960	<50	-
Groundworkers	960	990	<50	-
Scaffolders	620	640	<50	-
Road and rail construction operatives	880	910	<50	-
Glaziers and window trades	400	420	<50	-
Steel erectors and metal workers	760	780	<50	-
Other construction and building trades	3,310	3,430	<50	-
Non-construction trades and operatives	1,120	1,150	<50	-
Professional & technical				
Surveyors	1,850	1,910	<50	-
Civil engineers	1,790	1,840	<50	-
Architects	590	590	<50	-
Other professional and technical staff working in construction	6,310	6,420	110	1.7
Office based				
Non-construction professional and technical office based staff	6,090	6,380	130	2.1
Other non-construction office-based staff	5,380	5,500	90	1.7
TOTAL	**69,920**	**71,990**	**1,090**	**1.6**

EXTRA WORKERS

The modelling supporting the forecast looks at the expected employment growth against the flow of people moving in and out of the construction workforce.

These flows are illustrated on the diagram and show that, in a typical year, the construction industry needs to replace around 8% of its workforce due to natural churn.

When calculating the number of extra workers needed to meet expected demand, the process takes account of the fact that there will be a level of inflow and outflow of workers between different industries, unemployment, and inactivity. The figure for the number of extra workers is therefore based on:

- The difference between the number of people that leave or join the industry
- Replacement of workers who will be retiring and
- Estimate of workers needed for additional growth

The number of extra workers needed for the 2025–2029 period is estimated at 1,090 per year in Northern Ireland. This means the industry needs to recruit the equivalent of 5,450 extra workers over the next five years.

In absolute terms, the highest annual average values for extra workers are for:

- Non-construction professional and technical office-based staff, such as financial account managers and business sales executives **(130 extra workers needed per year)**
- Carpenters and joiners **(110)**
- Other professional and technical staff working in construction, such as environment professionals and building and civil engineering technicians **(110)**

For occupational groups that require fewer than 50 additional workers, the expectation is that recent levels of recruitment will be able to meet future needs if they are maintained and job vacancy postings remain at current levels.

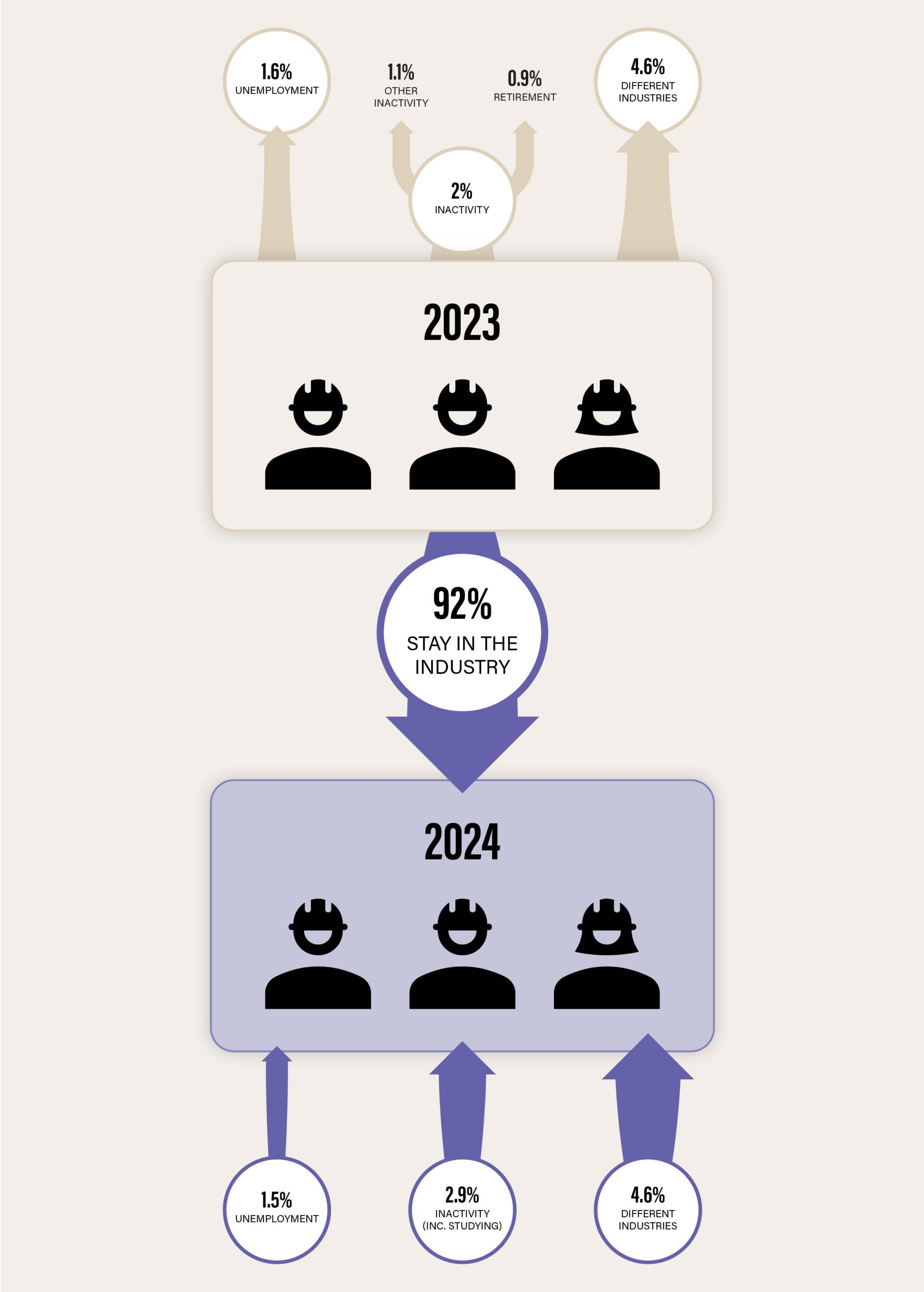
Occupational groups that account for a larger share of the workforce may have larger extra worker values. Viewing extra workers as a percentage of the workforce for each group helps to show occupations that are likely to have stronger demand, such as:

- Directors, executives and senior managers **(2.4%)**
- Non-construction professional and technical office-based staff **(2.1%)**
- Other professionals and technical staff working in construction **(1.7%)**

All show relatively stronger demand, highlighting that recruitment must cover the full range of roles from site to office-based locations.

As the report sets out, there is a clear demand for workers in the coming years and meeting it needs sustained investment in training that supports people into jobs. This will be a challenge, however, changing how the construction industry looks to attract, train, and retain its people will lead towards a more capable workforce that is better equipped for the scale of future demand.

1,090 extra workers needed per year.



Source: ONS LFS longitudinal, 2024.
Note: results might not sum to 100 due to rounding.

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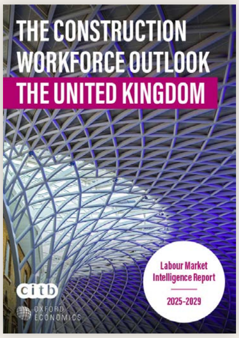

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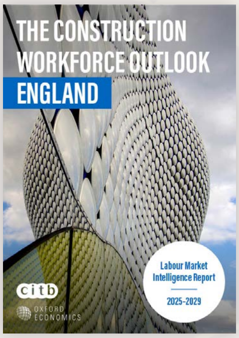

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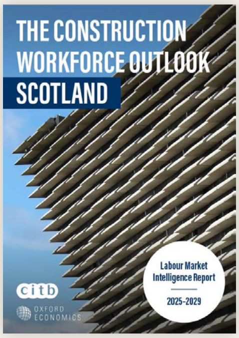

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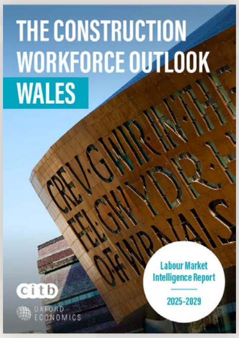

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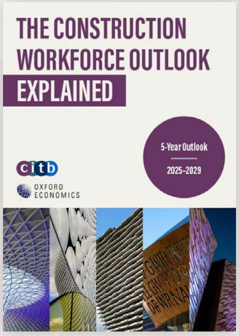

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