



Building Research & Forecasting Solutions



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BUILDING FORECASTING

BIS Shrapnel is the leading provider of industry research, advisory and forecasting services across all sectors of the building and construction industry in Australia, New Zealand and throughout Asia. Through a range of building related services listed below, we help our clients better understand the markets in which they operate, through reliable and detailed market data, briefings on developments and drivers, and thoroughly researched forecasts.

Building Industry Prospects has been running for 40 years and is Australia's leading forecasting publication in the building industry. This subscription service monitors developments affecting the building industry, with detailed quarterly forecasts for the next 2 years of both dwelling and non-dwelling building activity. Forecasts include commencements of commercial and industrial building (including offices, shops and hotels), commencements of social and institutional building, plus housing and other dwelling commencements. Building Industry Prospects considers alterations and additions, demography, interest rates, housing finance and real estate prices. The annual subscription comprises a Monthly Bulletin (10 issues per year) and two complimentary attendances to our Building Briefing Conferences held in March and September each year, in your capital city.

Building in Australia provides a respected and independent medium term assessment of the Australian building industry. It contains demographic trends and annual forecasts of the residential (housing, other dwellings) and non-residential (commercial, industrial, social and institutional) sectors, and the alterations and additions market, by state, ahead 5 years and beyond. The report covers key drivers for housing demand, when sub sectors will likely show signs of recovery, prospects for the home improvement market, outlook for building material costs, and the non-residential building cycle. We also provide analysis of the economic environment, covering items such as interest rates, population growth and government policy. The main report is delivered in June, followed by an update in December. Downloadable data in excel form are available, along with digital charts.

Work Done (Short Term Work Done: 2 year horizon & Long Term Work Done: 5 year horizon)

The work done forecasts in the non-residential and residential building sectors by state are based on the work flow for each building category by value range, and more accurately determine future demand for building materials and labour, by quarter. In the residential sector, work done forecasts are estimated separately for houses and other dwellings. Quarterly forecasts are updated every May and November.

The **Regional Building** service analyses trends and prospects in demand and supply for residential and non-residential building in regional areas. The service is available for all states and regions across Australia. The analysis and forecasts provide useful information on the regional markets for a variety of purposes, including resource planning, marketing and performance analysis. Regional forecasts are based on BIS Shrapnel's established methodology for forecasting building markets: demand is compared with recent trends in construction, to provide estimates of supply-demand balances, and contribute to forecasts of construction. Analysis of local employment and population drivers provides insights into the property outlook at the regional level. Growth opportunities in specific regional centres are identified. The forecast horizon is two years and will be split between non-residential, houses and other dwellings. This service provides a report each six months, with the subscription covering two editions of the forecasts; the report is produced on a June/December cycle each year. A quarterly option is available.

Our reports are available to subscribers via web access in PDF format with downloadable excel spread sheets and chart files. We also offer briefings, presentations and workshops. For more information visit www.bis.com.au

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Building Materials Demand Forecasting

We are the market leader in this work for Australia. This service provides detailed projections of materials to be used in new building and construction – by sector and type of material – ahead 5 years or more. We can model one or more of the following applications:

- » External wall cladding (bricks, timber, composite, etc)
- » Internal wall and ceiling linings (plasterboard, fibre cement, etc)
- » Concrete and cement
- » Paint
- » Roofing and Insulation
- » Fittings (plumbing, electrical etc)
- » Flooring (carpet, vinyl, timber etc)
- » Paving and Fencing
- » Windows and Doors and Garage Doors
- » Guttering and Drainage
- » Kitchens (benchtops, cupboard doors etc) and Bathrooms
- » Scaffolding and other building related services

These studies are a continuation of an ongoing series spanning back over 20 years.

Urban Policy + Industry Directions

We analyse the role played by market barriers and public policies in shaping the cities and regions of tomorrow. The work is commissioned by urban institutes, policy thinktanks, peak industry bodies, government agencies, and building related companies. Issues affecting the supply side of the market and the urban framework are looked at, including evaluating the current policy mix against alternative proposals. Examples include the metropolitan building mix, planning issues, land supply, first home owner policies, taxation settings, generational

change and the role of transport and employment networks. We help prepare submissions prior to the annual round of budgets at both State and Federal levels, to address tax and incentive rates for the construction sector and optimise the policy settings for building. We can assist with media and public relations upon release of the report.

Commissioned Research

BIS Shrapnel provides customised research to meet a wide range of building related needs, including industry analysis, new market segment research, and forecasting models for short term budgeting and long term planning. Our geographic expertise extends across Australia, New Zealand, and North and Southeast Asia. Examples of recent private client research include Building Cost Escalation Factors, Growth Areas for Warehousing, Projected Insolvencies in the Construction Industry, Home Loan Market analysis with Business Case, Industry forecasting and Import analysis, and Demand Outlook for Holiday and Park Accommodation Services.

Expert Opinion

BIS Shrapnel can provide forecasts and analysis of building activity and markets that are independent and designed for your specific needs:

- » Provision of an independent expert opinion for a prospectus or information memorandum or legal proceeding
- » Assessment of market size and outlook for a specific product or service for third parties such as banks or JV partners
- » Tailored information for annual reports and investor guidance, which provide a source of due diligence and risk assessment
- » Presentations to the company board or management, providing an opportunity for discussion of business outlook and strategic issues

Contact Us

To discuss further, please call or email us:

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