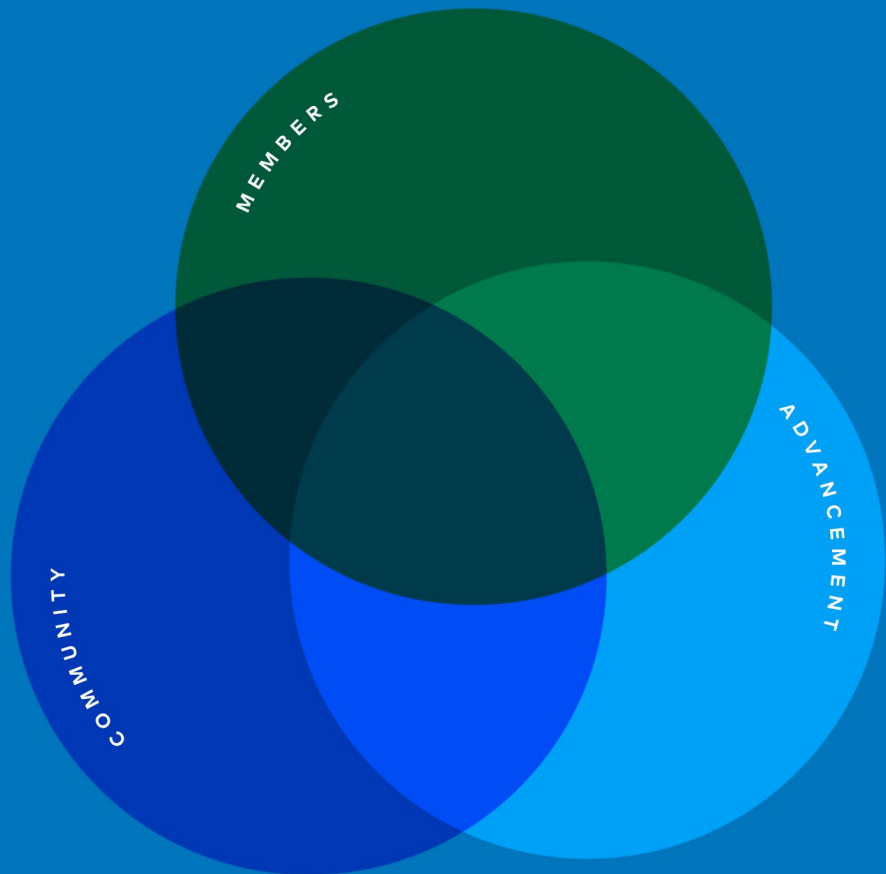


Our Vision: Enabling Professionalism in Plumbing and Heating

State of Trade Q3 2025



“ ”

After a softer quarter two, Q3's results are welcome, showing that the profession has steadied with a firmer pipeline of work and broadly resilient cashflow.

However, while confidence within our profession is holding up, views of the wider UK economy remain subdued, reflecting trends seen across other national indicators.

Firms also remain cautious about expanding the operative workforce, so we will continue to champion skills and apprenticeships to build capacity.

Fiona Hodgson
Chief Executive
SNIPEF

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About:

Scottish and Northern Ireland Plumbing Employers Federation (SNIPEF)

The **Scottish and Northern Ireland Plumbing Employers Federation (SNIPEF)** is the principal trade association representing plumbing and heating businesses across Scotland and Northern Ireland. As a UK-recognised industry body, SNIPEF champions excellence, professionalism and best practice within the profession. It supports members through high-quality training, industry advocacy, business promotion and expert guidance, helping firms of all sizes navigate the evolving challenges and opportunities of today's built environment.

Understanding the:

State of Trade

To gain a comprehensive understanding of the current plumbing and heating profession, SNIPEF launched its longitudinal State of Trade research project in 2024. It aims to assess trading performance, payment practices, profit margins, supply chain issues and the profession's future outlook from an employer's perspective.

Through analysing these insights, SNIPEF aims to identify key trends, address critical concerns and develop strategies to support its members effectively. The findings will also inform stakeholders and policymakers, fostering informed decisions that benefit the profession and the broader economy.

Q3 2025 State of Trade: Stable

Headline position: **Stable**

- Movement since Q2 2025: **Up** from **Stable to Weak** to **Stable**.
- Compared with Q3 2024: **Down** from **Stable to Strong** to **Stable**.

State of Trade summary

Q3 2025: Trading performance

Workloads over the last quarter, and looking ahead to the next six months, have both improved notably from Q2. Payment delays remain broadly consistent, although delays linked to local authorities and housing associations rose to **11%**. The share of firms receiving payments within usual terms eased from **62%** to **56%**, which is a watch point rather than a reversal. Retention values remain consistent with previous quarters. Profit margin signals are still tight but have improved from Q2, now more in line with the levels reported in Q3 2024, while reports of insolvency issues have also fallen this quarter.

Q3 2025: Costs and the economy

A very high share of firms (**94%**) continue to report input price increases, albeit the balance skewed to *slight* rather than *significant rises*, suggesting persistent but not accelerating cost pressure. Year-on-year, more firms are experiencing price increases than in Q3 2024 and availability is less favourable than last year's very strong baseline. Product availability remains clustered around *average to good*, with a contained poor share, and reported project disruption is mostly minor.

Q3 2025: Confidence: Profession and UK

Confidence in the plumbing and heating profession is broadly stable on the quarter, centred on *neutral to confident*, although down year-on-year from **54%** *confident* or *very confident* in Q3 2024 to 33% this quarter. Views of the UK economy remain subdued, again clustering around *neutral to pessimistic*, which is consistent with wider indicators of weak business sentiment, persistent inflation and modest economic growth.

Q3 2025: People

Hiring intent has steadied. In Q3, **29%** of firms are *likely* to increase headcount, almost unchanged from Q2, while the *very unlikely* share has eased from **35%** to **30%**, indicating a modest reduction in caution. This quarter also introduces a new Question 14, distinguishing overall headcount growth from recruitment of plumbing and heating operatives. The new measure shows a more cautious stance on expanding the operative base, with **1%** *very likely*, **23%** *somewhat likely*, **30%** *no change*, **6%** *somewhat unlikely* and **39%** *very unlikely*, a combined **45%** unlikely compared with **39%** for general hiring. Apprenticeship recruitment remains subdued, with **82%** stating they are *somewhat* or *very unlikely* to take on an apprentice, up from **68%** in Q2 but slightly improved from **88%** in Q3 2024. The availability of skilled professionals continues to be tight, limiting capacity for expansion.

What changed this quarter: Q3 2025 vs Q2 2025

Trading conditions steadied in Q3 after the softer picture in Q2.

Forward workload strengthened: order books above expectations rose to **10% much higher** and **22% slightly higher**, up from **2%** and **15%** in Q2, while the combined lower-than-expected share fell from **37%** to **29%**. This points to a firmer near term pipeline. Payment behaviour remains mixed but manageable, with on time payments at **56%** in Q3 versus **62%** in Q2 and a small fall in delays from Tier One and Two contractors to **10%** from **12%**. Cost pressure remains elevated but not accelerating, product availability is broadly steady, and most project slippage is minor.

Together these dynamics justify a return to **Stable**.

Year-on-year view: Q3 2025 vs Q3 2024

This is the first quarter where we can compare the full set of Q3 results year-on-year, and this will now become a regular feature of State of Trade reporting.

The comparison shows the profession operating at a cooler temperature than in Q3 2024. Last year the forward order book balance was concentrated at *as expected* (**66%**) with fewer *lower* responses (**16%**). In Q3 2025, *as expected* is **40%** and *lower* responses are **29%**, indicating a more polarised and less predictable demand profile. Confidence in the profession is also lower than a year ago, and while payment practices have normalised from the acute challenges reported last year, overall trading momentum is softer than in Q3 2024.

Conclusion: Why we judge Q3 2025 as Stable

Our rating reflects stabilisation after Q2 and a balance of positives and pressures.

- **Improving forward pipeline:** The shift to **32% higher** order books and fewer *lower* responses supports a steadier outlook for workloads.
- **Cashflow resilient, though mixed:** On time payments dipped, but contractor delays eased and the overall pattern remains manageable.
- **Costs elevated but contained:** Input prices continue to rise for most, yet the balance is towards *slight* rather than *significant* increases and availability is steady.
- **People steady but constrained:** General hiring intent is flat to slightly better, but firms are cautious about adding operatives, apprenticeship appetite is weak, and skilled availability is limited.

These elements together place the profession squarely in Stable territory for Q3. This is an improvement on Q2 2025, when softer trading, weaker order books, and declining margins prompted a Stable to Weak call. It is weaker than Q3 2024, when stronger workloads, more confident sentiment and better availability supported a Stable to Strong position. In short, Q3 2025 shows recovery from mid-year softening but remains below last year's stronger footing.

Richard Campbell

October 2025

State of Trade Scale

**Very
Strong**

Significant growth in trade, widespread business success, high demand and very positive outlook.

Strong

Trade levels above expectations, more opportunities than challenges, increasing demand and positive outlook.

Stable

Trade levels consistent with expectations, balanced challenges and opportunities, steady demand and neutral outlook.

Weak

Moderate decline in trade, challenges outweigh opportunities, reduced demand and cautious outlook.

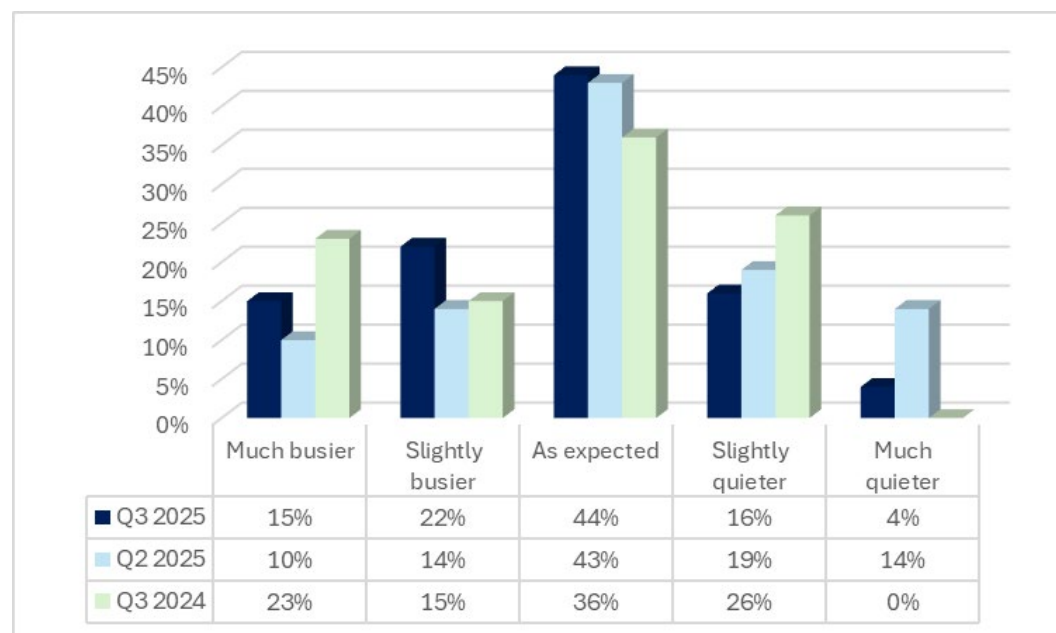
**Very
Weak**

Significant decline in trade, widespread business struggles, low demand and negative outlook.

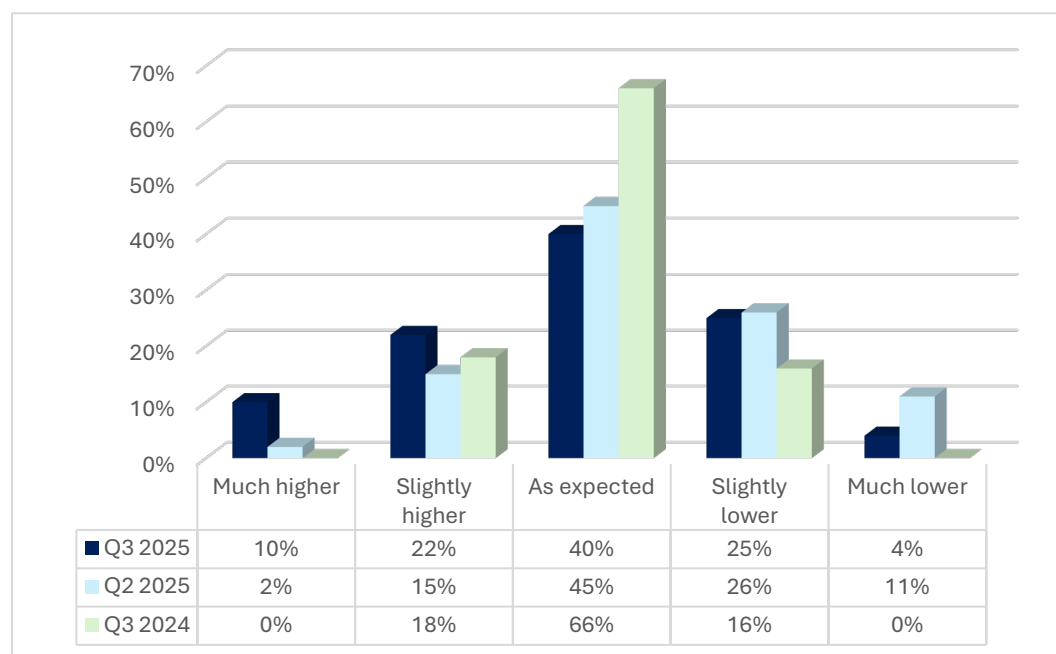
Q3 2025 State of Trade

Trading Performance

Question One: How has your **last quarter of trading** been compared to your expectations?



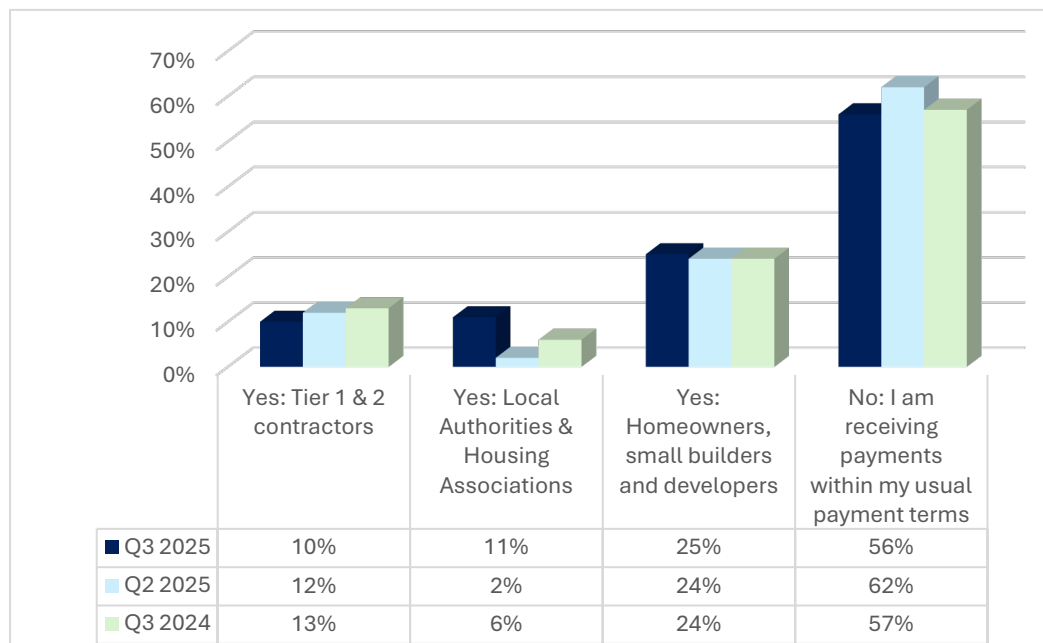
Question Two: Are your order books for the **next six months** higher or lower than you expected?



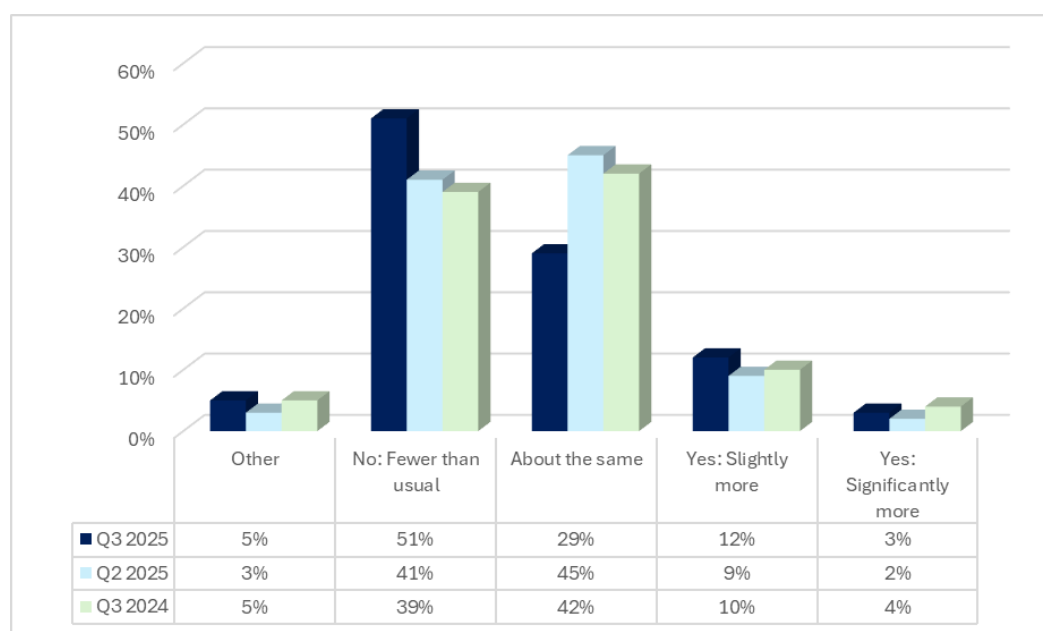
Q3 2025 State of Trade

Trading Performance

Question Three: Have you **experienced any payment delays** beyond your typical payment terms with any of the following customers? (Multiple options allowed)



Question 4: Have you **experienced issues with non-payment for work** that your business has undertaken in the last six months?



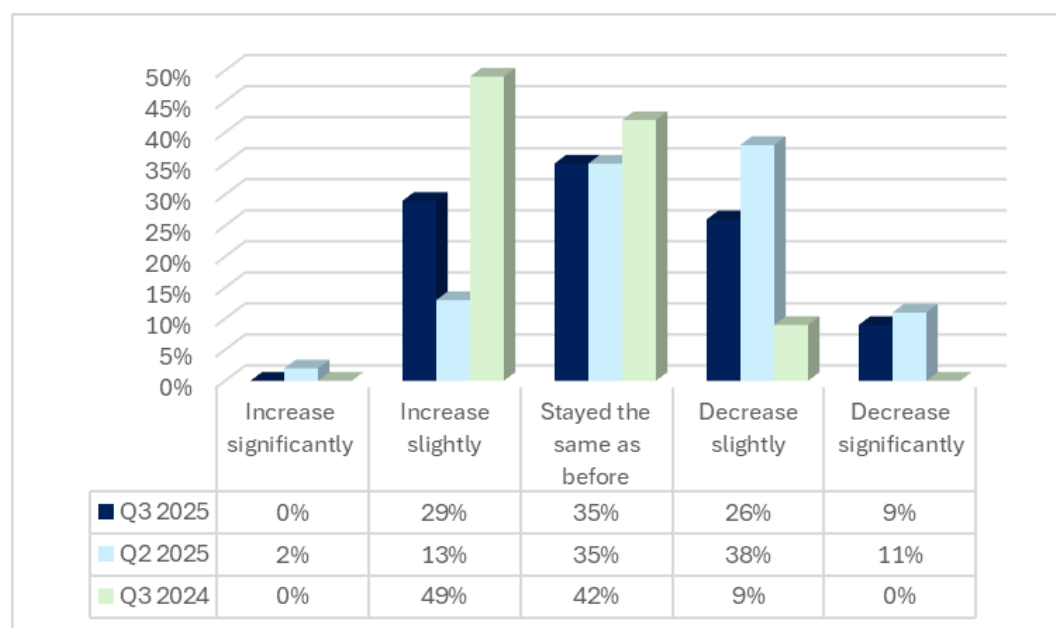
Q3 2025 State of Trade

Trading Performance

Question Five: How much money does your company currently have held in **retentions**?



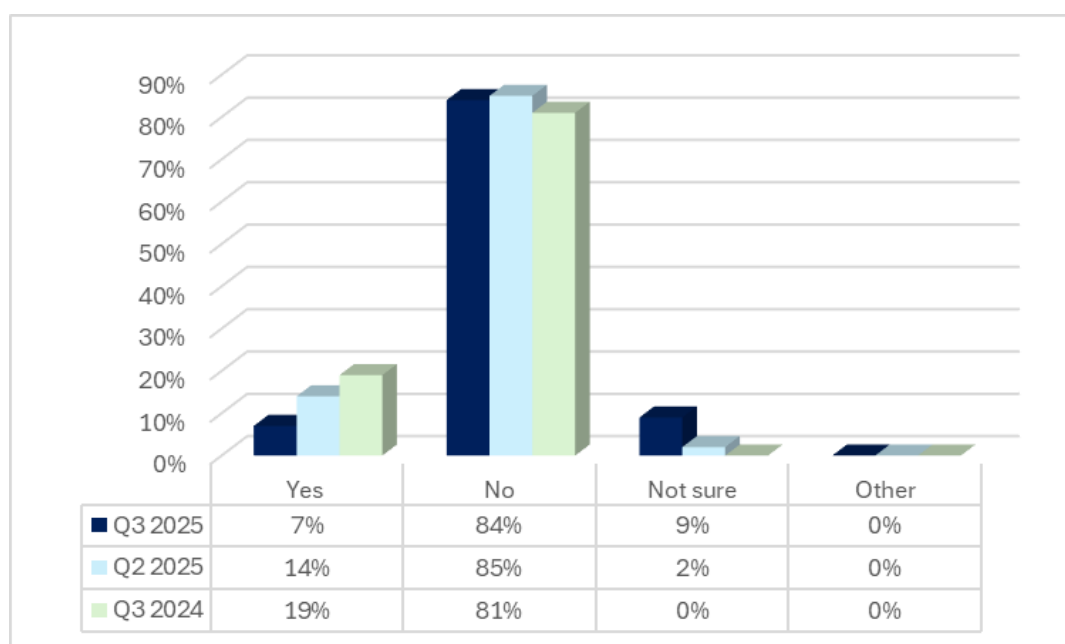
Question Six: Have you seen your **profit margins increase or decrease** in the last quarter?



Q3 2025 State of Trade

Trading Performance

Question Seven: Have any contractor or **supply chain insolvencies** affected your business in the past six months?



Trading Performance Summary

Quarter-on-quarter comparison: Q3 2025 vs Q2 2025

Trading conditions in Q3 steadied after the softer picture reported in Q2. Forward workload improved clearly. The share of firms reporting order books above expectations rose to **10% much higher** and **22% slightly higher**, up from **2%** and **15%** in Q2. At the same time, the combined lower-than-expected responses fell from **37%** to **29%**, and the *as expected* balance eased from **45%** to **40%**. This shift suggests a firmer pipeline for the months ahead compared with early summer.

Payment behaviour remains mixed but manageable. Reports of delays from Tier One and Two contractors edged down to **10%** from **12%** quarter-on-quarter, while delays linked to local authorities and housing associations rose to **11%** from **2%**. Homeowners and small developers were broadly unchanged at **25%** versus **24%**. The share saying they are receiving payments within usual terms reduced from **62%** to **56%**, which warrants attention but does not indicate a material deterioration overall.

Indicators outside the payment and pipeline picture remain consistent with a steady rather than strong quarter. Q2 results showed most businesses unaffected by contractor or supply chain insolvencies, and that pattern appears broadly similar in Q3 based on the distribution shown in the chart. The overall balance of trading performance therefore points to stabilisation rather than further weakening.

Year-on-year comparison: Q3 2025 vs Q3 2024

Against the same quarter last year, the trading backdrop is cooler. In Q3 2024, the forward order book profile was dominated by *as expected* responses at **66%** with only **16%** lower and **18%** slightly higher. The Q3 2025 profile shows a smaller *as expected* share at **40%**, with a higher proportion reporting lower-than-expected order books at **29%**, even though there is a larger positive tail in the *much higher* and *slightly higher* categories. The year-on-year picture therefore confirms that demand is less predictable and more polarised than it was in late 2024.

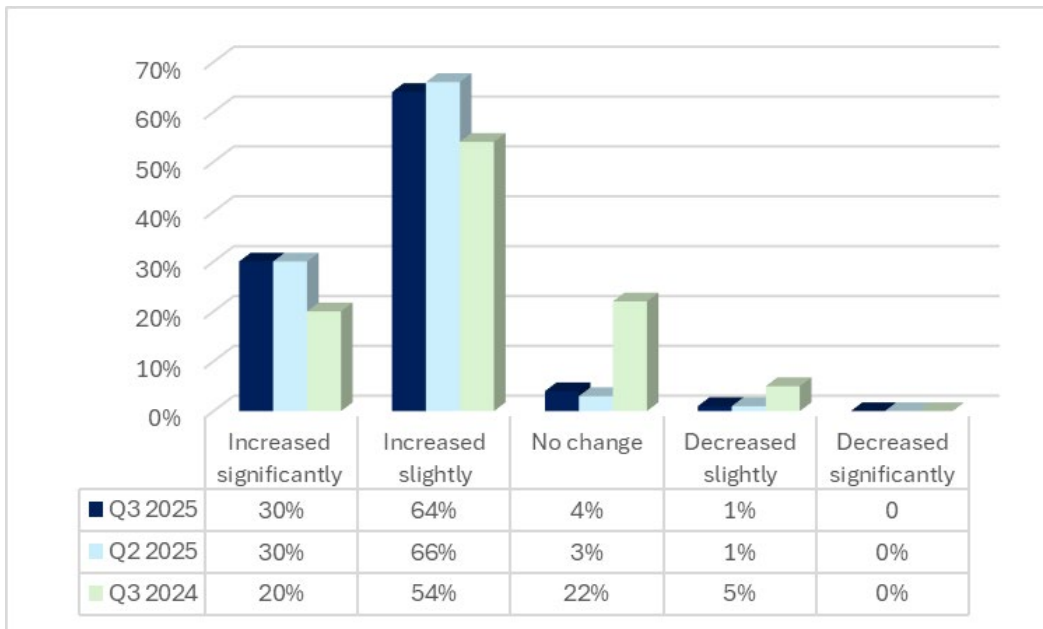
Payment practices have normalised from the acute conditions reported last year. In Q3 2024, delays beyond typical terms were reported by **68%** for Tier One and Two contractors and **14%** for small builders and similar, with only **18%** reporting no delays. In Q3 2025, the balance is more even, with **10%** citing Tier One and Two delays, **25%** citing homeowners or small developers, and **56%** receiving payments within usual terms. This is a year-on-year improvement in cashflow reliability even if quarter on quarter there is a small step back in the on-time share.

Other trading indicators last year sat within a *Stable to Strong* context, including a higher share of firms busier than expected and fewer reporting quieter conditions. The present quarter lacks that breadth of strength, which is consistent with the softer year-on-year tone.

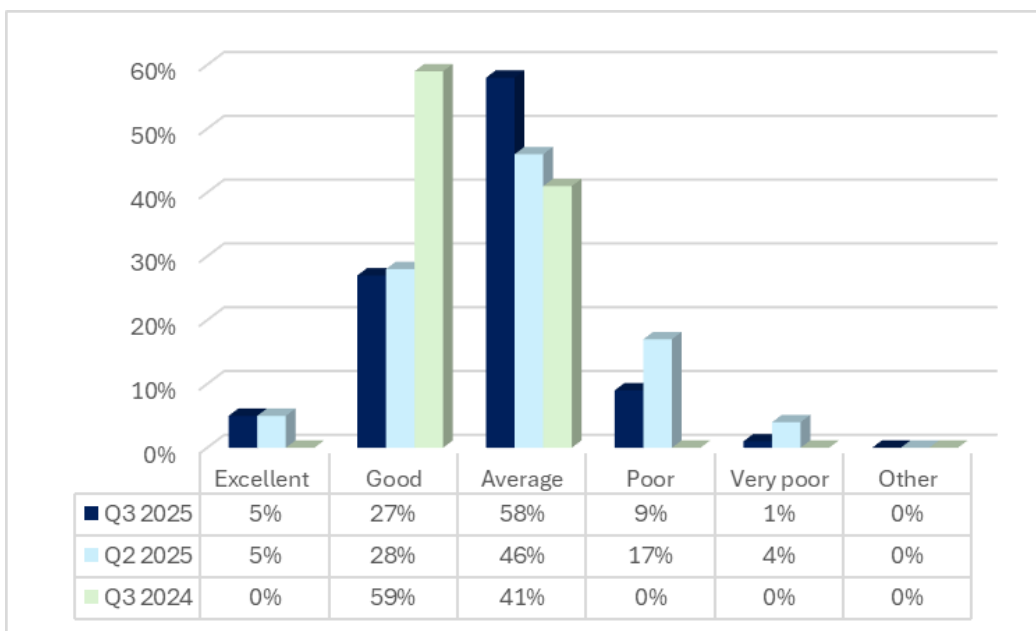
Q3 2025 State of Trade

Costs & Economy

Question Eight: Have the **prices of your purchased products** increased or decreased in the last quarter?



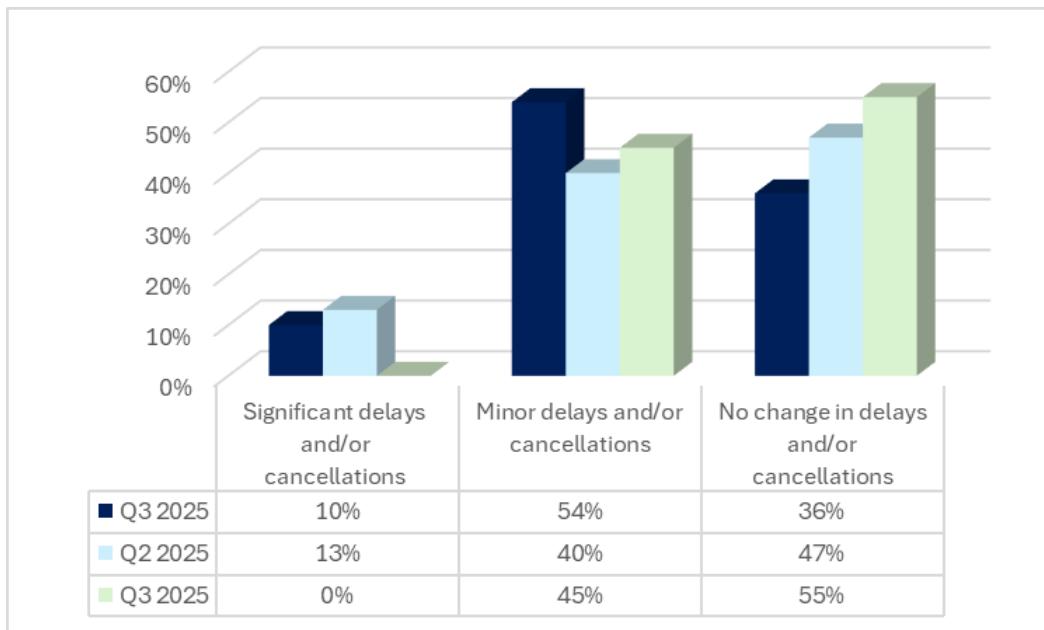
Question Nine: How would you rate the **availability of products** in the last quarter?



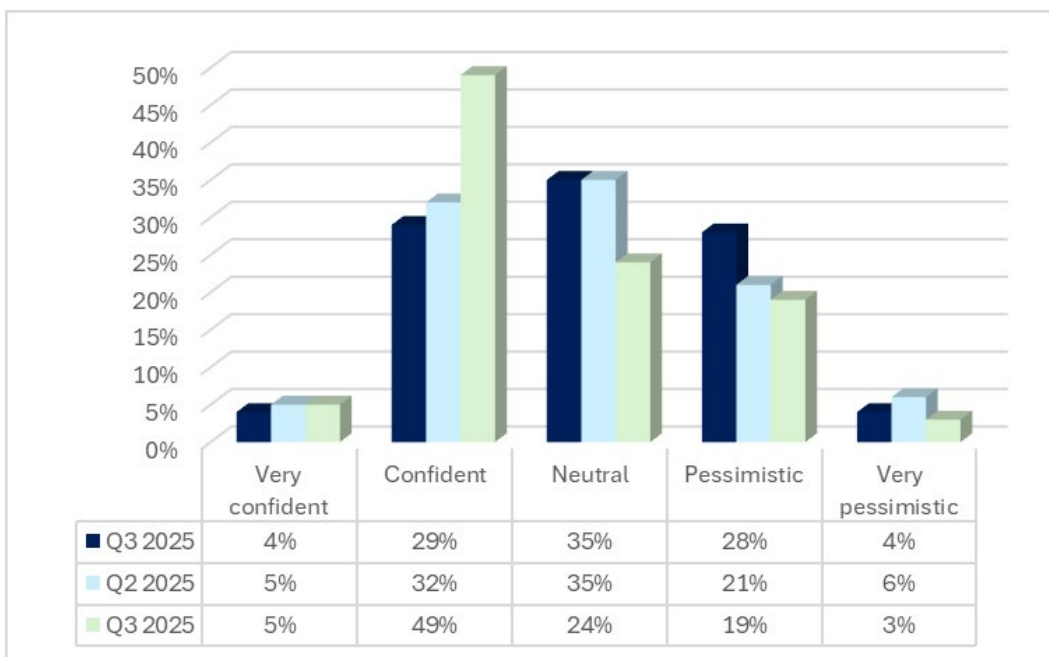
Q3 2025 State of Trade

Costs & Economy

Question Ten: Have you **experienced any delays or cancellations** of projects in the last six months?



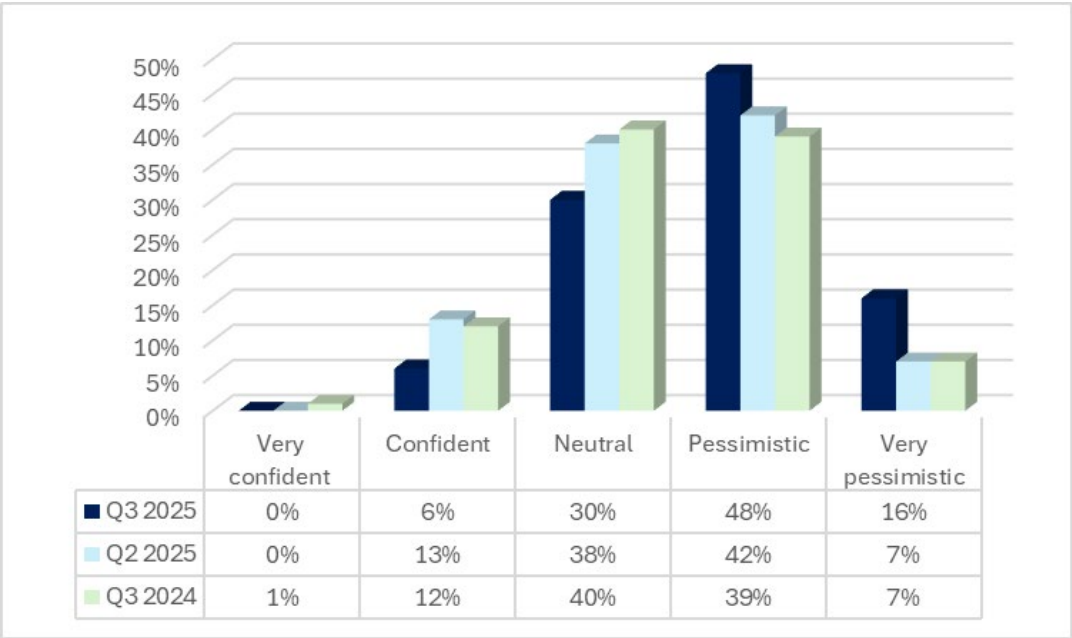
Question Eleven: How confident are you about the **strength of trade in the plumbing and heating profession** over the next year?



Q3 2025 State of Trade

Costs & Economy

Question Twelve: What is your **confidence level for the UK economy** over the next year?



Costs & Economy Summary

Quarter on quarter comparison Q3 2025 vs Q2 2025

Input cost pressure remains elevated in Q3 and broadly in line with Q2, with **94%** of firms reporting rising purchased product prices (**30%** *significant* increases and **66%** *slight* increases). This reflects persistent inflationary pressure but no clear acceleration compared with early summer.

Product availability remains steady, clustering around *average to good* levels, meaning stock access is generally manageable even as costs stay high. Project timelines also remain contained: **36%** of firms report *no change* in delays or cancellations, **54%** report *minor delays*, and **10%** *significant delays*. The pattern continues to be dominated by minor disruption, suggesting operational continuity remains intact for most businesses.

Year-on-year comparison Q3 2025 vs Q3 2024

Compared with the same quarter last year, cost pressures remain materially higher. In Q3 2024, **74%** reported rising purchased product prices, split **20%** *significant* and **54%** *slight*, with **22%** *no change* and **5%** *slight decreases*. The Q3 2025 charts show a more pervasive incidence of increases than last year, reflecting cumulative inflation across the period.

Product availability has cooled from the very positive 2024 baseline. In Q3 2024, **59%** rated availability *good* and **41%** *average*, with virtually no *poor* responses. Q3 2025 presents a more mixed picture, with fewer good ratings and a visible share reporting poor availability, indicating tighter conditions in parts of the supply chain even if access remains serviceable overall.

Project disruption is modestly higher year-on-year. In Q3 2024, **0%** reported significant delays, with **55%** *no change* and **45%** *minor delays*. Q3 2025 shows significant delays now present for a subset of firms and a higher incidence of minor disruption, pointing to a slightly more challenging delivery environment than last year.

Conclusion

Across Questions 8, 9 and 10, Q3 2025 depicts persistent input cost inflation, steady but not worsening stock availability, and project slippage that is mostly minor. Quarter-on-quarter, conditions are broadly unchanged from Q2. Year-on-year, costs are more pervasive, availability is less favourable than the very strong 2024 baseline and disruption is slightly higher. This supports a Stable overall State of Trade, with the sector operating reliably but under sustained cost headwinds.

Confidence: Profession vs National

Quarter on quarter comparison Q3 2025 versus Q2 2025

Confidence in the plumbing and heating profession appears broadly stable relative to Q2, with **4%** *very confident*, **29%** *confident*, **35%** *neutral* and **32%** *pessimistic or very pessimistic*. Sentiment towards the UK economy remains subdued, with pessimism increasing in Q3 to **64%**, largely drawn from those who were previously neutral. This movement highlights a deepening sense of caution about the broader economy, even as confidence within the plumbing and heating profession itself remains relatively steady.

Year-on-year comparison Q3 2025 vs Q3 2024

Confidence in the profession is lower than a year ago. In Q3 2024, **54%** of respondents felt *confident* or *very confident*, while in Q3 2025 this has fallen to **33%**, with the *neutral* to *pessimistic* balance rising to **67%**, reflecting a cooler demand backdrop and continued margin pressure.

Views of the UK economy have also deteriorated sharply year on year. In Q3 2024, **13%** were *confident* or *very confident*, **40%** were *neutral* and **46%** were *pessimistic* or *very pessimistic*. By Q3 2025, only **6%** report *confidence*, while *pessimism* has increased to **64%**, with neutral responses falling to **30%**. This shift underscores a much more cautious macroeconomic environment than a year ago, reflecting broader national sentiment and ongoing economic uncertainty.

Conclusion

Taken together, the confidence data show steady but subdued optimism about the profession and markedly weaker sentiment about the wider UK economy compared with last year. External indicators across business confidence, purchasing managers' surveys, inflation, official growth commentary and consumer sentiment all point to a neutral to pessimistic national environment, which agrees with the distribution we observe in Q3 2025.

How our national sentiment compares with external research

Our respondents' national outlook closely reflects wider UK evidence. Business sentiment remains weak, with ICAEW's Business Confidence Monitor continuing to decline in Q3 2025 and manufacturing output still contracting, as shown by the S&P Global PMI reading of **46.2** in September.

Inflation remains stubborn at **3.8%** year-on-year, according to the ONS, while the Bank of England's August Monetary Policy Report highlights minimal GDP growth of around **0.1%** in Q2 and only a modest recovery ahead.

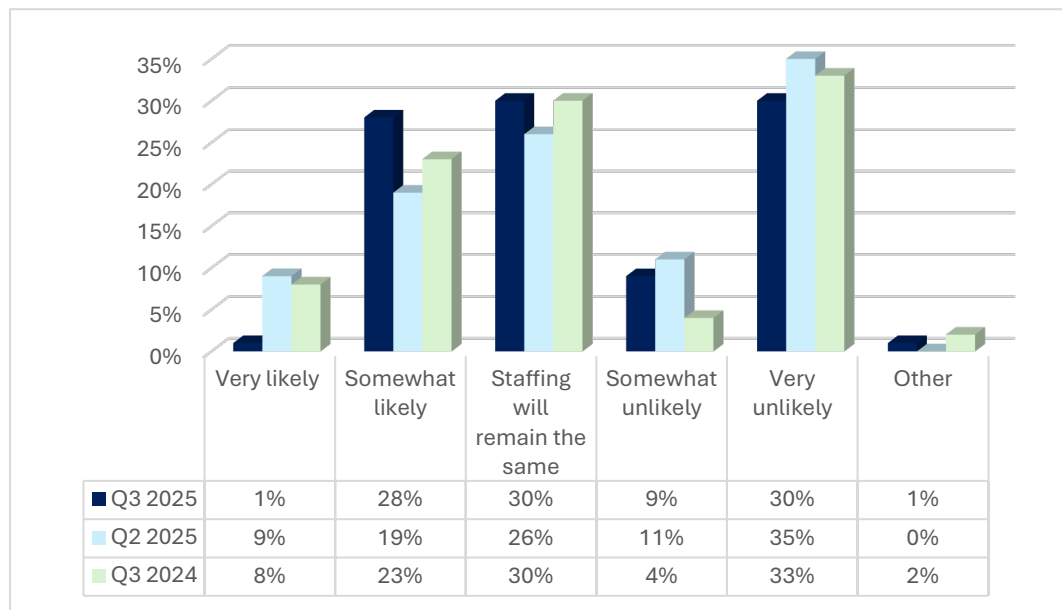
The British Chambers of Commerce also reports a cautious tone among firms, and household confidence has slipped, with GfK's Consumer Confidence Index falling to **-19** in September.

Together, these indicators reinforce the neutral to pessimistic sentiment expressed by respondents about the UK economy.

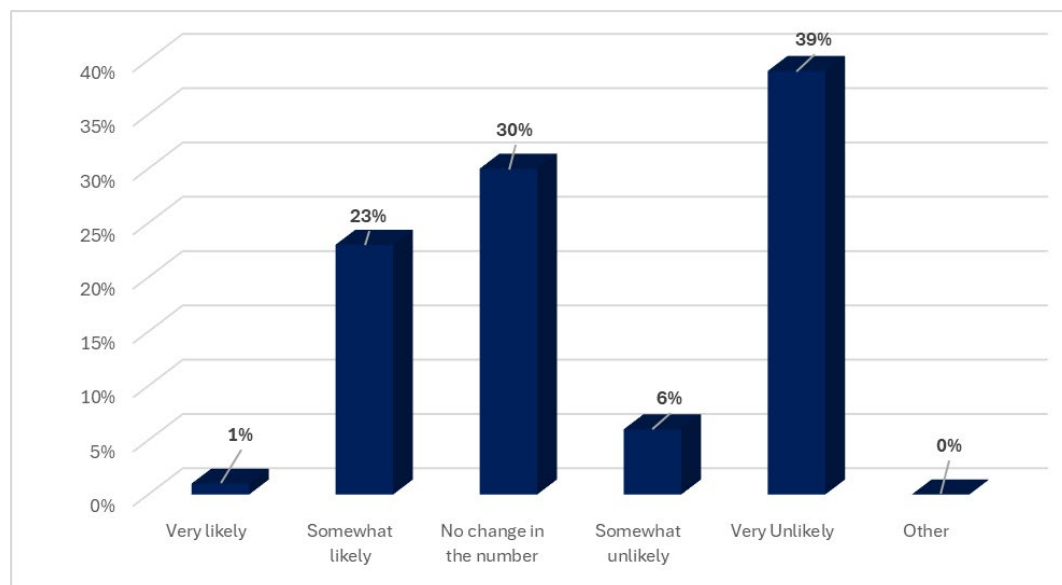
Q3 2025 State of Trade

People

Question Thirteen: How likely will your business **increase its number of employees** in the next six months?



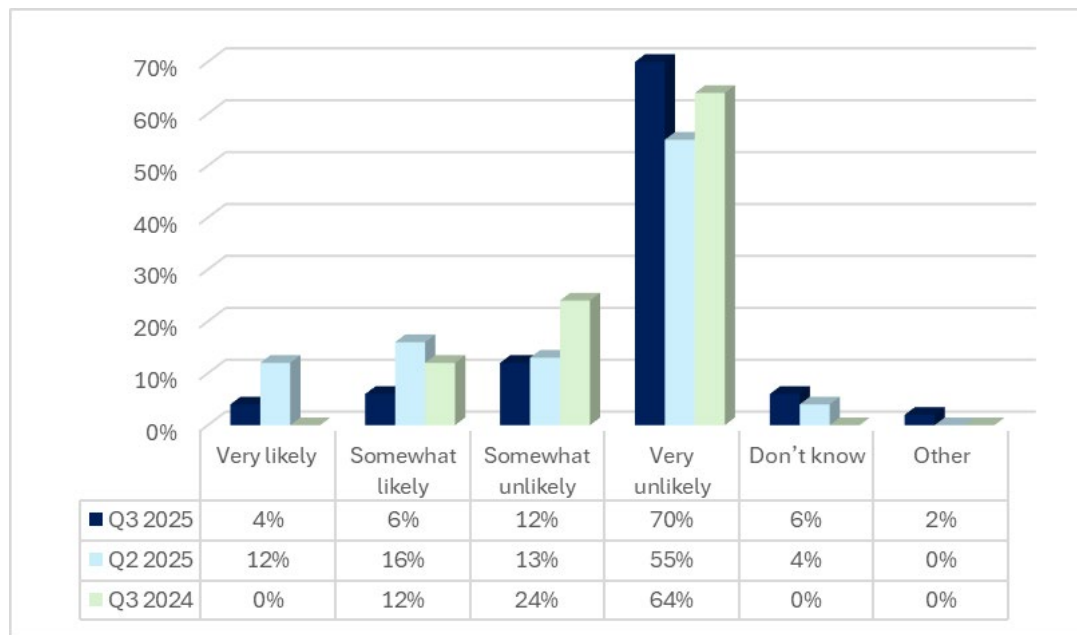
Question Fourteen: How likely is your business to specifically **increase the number of plumbing & heating professionals** it employs in the next six months? *(New Question)*



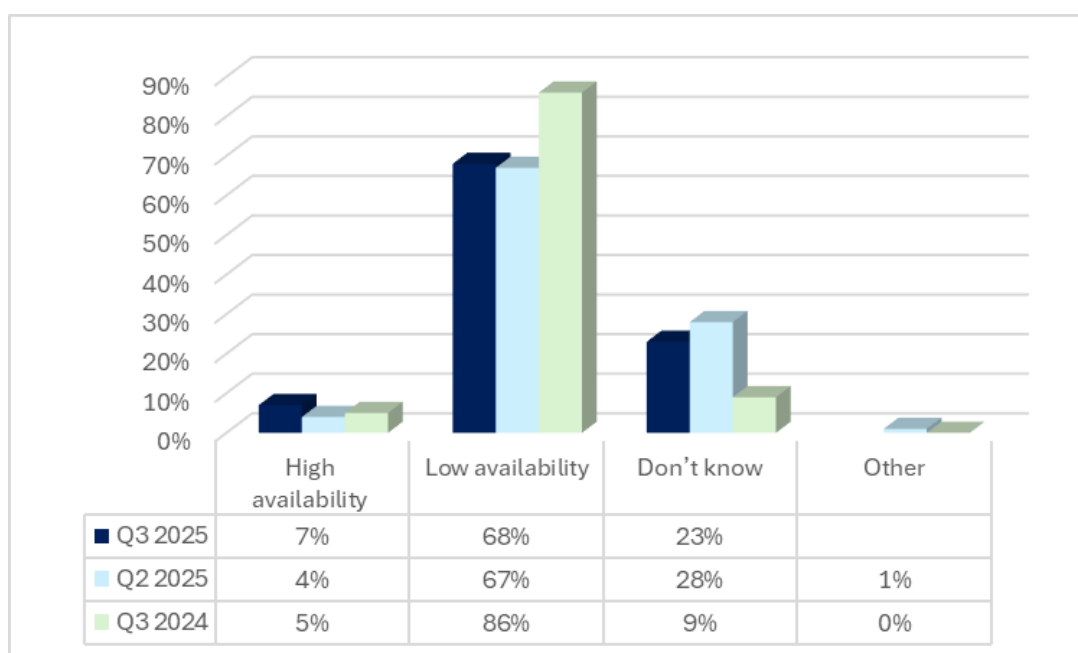
Q3 2025 State of Trade

People

Question Fifteen: How likely is your business to **recruit a plumbing and heating apprentice** in the next six months?



Question Sixteen: What is the current **availability of skilled plumbing and heating professionals** in your area?



Q3 2025 State of Trade

People Summary

New Question

In Q3 2025 we introduced a new question, now Question 14, to separate overall headcount plans from intentions to hire plumbing and heating operatives specifically. This reflects SNIPEF's focus on the technical core of the profession. Firms may add support roles without expanding their skilled workforce, so this new measure helps us understand whether growth is feeding through to operatives.

Quarter on quarter comparison Q3 2025 vs Q2 2025

Overall hiring intentions have steadied. In Q3 2025, **1%** were *very likely* and **28%** *somewhat likely* to increase headcount, giving **29%** combined likely, almost unchanged from **28%** in Q2. The share expecting staffing to *remain the same* rose slightly to **30%**, while the *very unlikely* share fell from **35%** in Q2 to **30%** in Q3, indicating a modest easing in caution.

The new Question 14 shows a more cautious stance on adding **plumbing and heating operatives**: **1%** very likely, **23%** somewhat likely, **30%** no change, **6%** somewhat unlikely and **39%** very unlikely. That is **45%** unlikely overall, compared with **39%** combined unlikely in the general hiring question, suggesting firms are slightly more hesitant about expanding skilled operatives than overall headcount.

Apprenticeship plans (now **Question 15**) remain subdued and broadly consistent with Q2, with qualitative feedback pointing to cost and supervisory capacity as the main constraints. Availability of skilled professionals (**Question 16**) remains tight, with most firms continuing to report low local availability, which acts as a brake on hiring ambitions.

Year-on-year comparison Q3 2025 vs Q3 2024

Compared with the same quarter last year, overall hiring intentions are slightly more cautious. In Q3 2024, the combined share of firms *very likely* or *somewhat likely* to recruit was **31%**, compared with **29%** in Q3 2025, indicating a modest softening year on year, even as the *very unlikely* share eased from **33%** to **30%**.

There is no direct year-on-year comparison for the new Question 14, but the Q3 2025 results show that where firms do plan to recruit, they remain selective and cautious about expanding the operative workforce. Apprenticeship recruitment (Question 15) remains weak compared with the Q3 2024 baseline, when **64%** of firms were *very unlikely* to take on an apprentice, rising to **70%** this quarter. The availability of skilled professionals (Question 16) continues to be a structural constraint, although it has improved from **86%** reporting low availability in Q3 2024 to **68%** in Q3 2025.

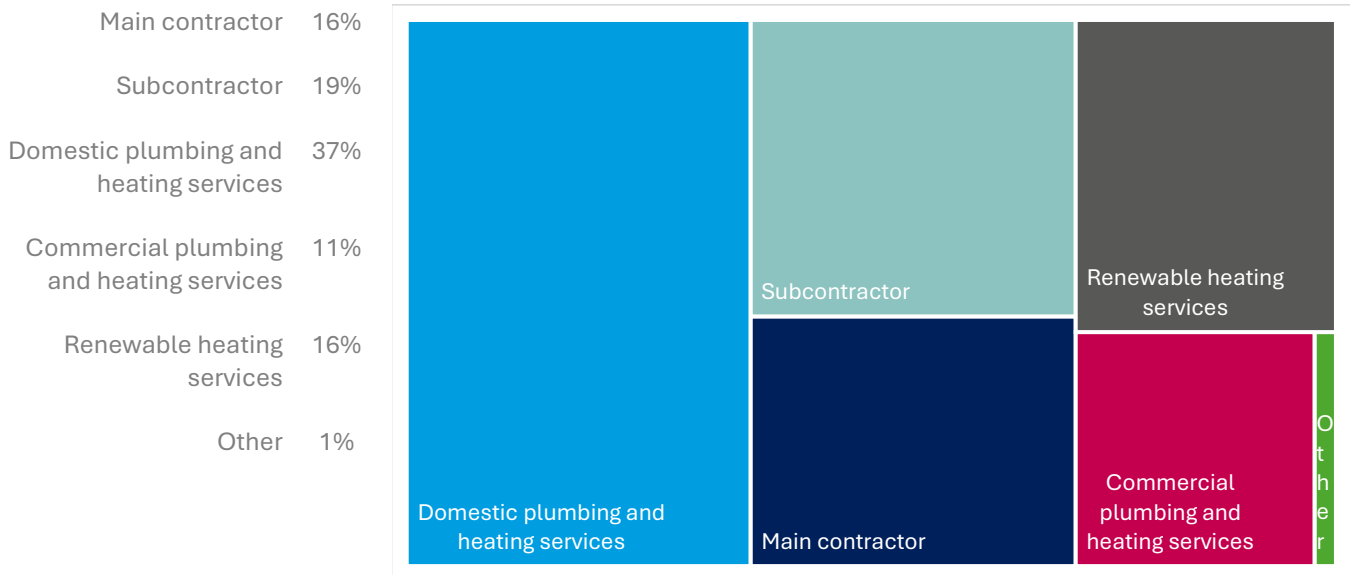
Conclusion

Across Questions 13 to 16, Q3 2025 shows stability with persistent caution. Overall hiring intent is flat on the quarter and a touch softer than last year. The new Question 14 reveals that businesses are more hesitant about expanding the number of plumbing and heating operatives than they are about headcount in general, underlining the ongoing challenge of committing to skilled roles when capacity and costs are tight. Apprenticeship appetite remains subdued and the availability of qualified tradespeople continues to limit growth, reinforcing the need for targeted action to strengthen the profession's skills pipeline.

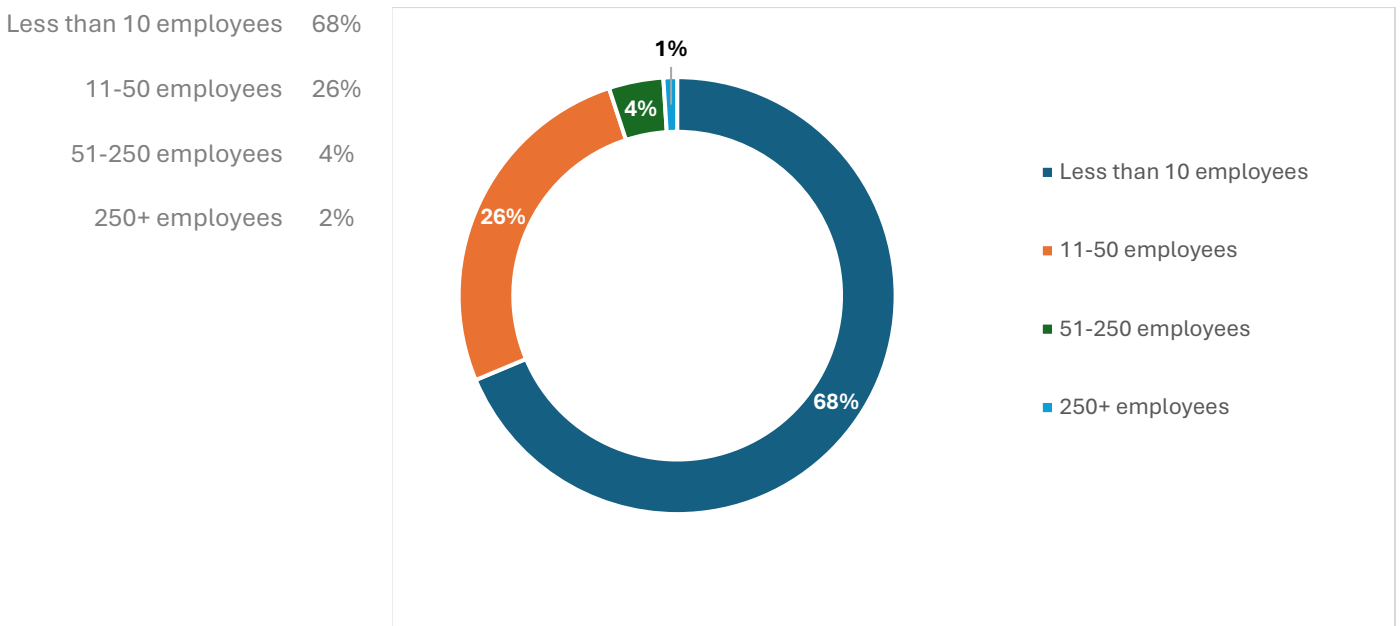
Q3 2025 State of Trade

Research Respondents

Question Seventeen: Which of the following best describes **your plumbing and heating business?**
(Multiple options allowed)



Question Eighteen: What is the **size of your company?**



Regional variations

This is the second report to include an analysis of regional trends across Scotland. To enable meaningful comparison while maintaining robust sample sizes, we have grouped responses into three broad areas: West of Scotland, which includes Glasgow, surrounding western regions and Dumfries; East of Scotland, covering Edinburgh, Fife, Dundee and the Borders; and Northern Scotland, which brings together Aberdeen, Inverness, Banff and Moray.

This regional mapping draws loosely on SNIPEF's local association boundaries and geographic logic. While it may not perfectly reflect the full operating footprint of every business, it offers useful insight into local variations within the profession. A more granular breakdown would risk weakening data reliability due to smaller sample sizes, so this structure provides a balanced and practical framework. Although we received responses from Northern Ireland, the volume of feedback was too limited to support any meaningful regional analysis. We hope to produce a more complete view in future reports as participation grows.

A caution on interpretation: regional splits in Q3 are based on relatively small sub-samples within the total returns. While the patterns are comparable with Q2 and the results appear consistent with the past report, the smaller base means findings should be read as directional rather than definitive.

West of Scotland

Trading performance

The West continues to hold the softest trading profile of the three regions, although there are early signs of stabilisation from the weaker Q2 position. Around half of firms report slightly lower than expected order books, with a smaller higher tail and roughly a third as expected.

This mix indicates that workloads are no longer deteriorating, but have yet to show a convincing recovery. Project disruption remains mainly minor, with a material minority still reporting significant delays. Delivery risk therefore persists but is better contained than earlier in the year.

Costs and the economy

Cost pressures are universal across the West, with a greater share of firms reporting significant rather than slight increases. Product availability remains mostly average with a small good share, suggesting that supply access, while steady, is not yet easing the margin strain. The picture points to sustained cost inflation with limited local relief.

People and skills

Hiring intent remains cautious, though marginally less negative than in Q2. The very unlikely share has fallen slightly, while more respondents now expect staffing to remain unchanged. Intentions to hire operatives under the new Question Fourteen are even more restrained, showing that expansion of the skilled workforce remains a low priority. Skilled labour availability continues to be reported as low by most businesses, holding back growth despite modest operational improvement.

Conclusion West of Scotland: Stable to Weak (up from Weak in Q2 2025)

The Q3 results show that trading in the West has steadied after a weaker Q2, with no further deterioration in order books and project disruption largely contained. However, persistent cost pressure, limited improvement in product availability, and ongoing recruitment caution prevent a stronger rating.

I consider this a very modest uplift from Weak to Stable, to Weak. It reflects stabilisation rather than recovery, a region that is no longer declining but still operating at the lower end of the Stable range. *This judgement took more time to consider than any other part of the report; however, it is, in my opinion, the most accurate reflection of the balance of evidence.*

East of Scotland

Trading performance

The East remains the most balanced trading profile. Order books are broadly even with a near half as expected centre, a clear higher tail and a smaller lower tail. Project disruption is largely minor with low significant disruption, which supports operational continuity.

Costs and the economy

Price increases are widespread but skew to slight more than significant. Product availability sits mostly between average and good. Taken together, costs are elevated but manageable and availability is more supportive than in the West.

People and skills

Overall hiring intent is mixed but not as negative as the West. However, operative hiring under the new Question Fourteen remains cautious, with a larger very unlikely share than likely. Reported skilled availability is generally low, though not as acute as the North.

Conclusion East of Scotland: Stable (No change from Q2 2025)

Balanced order books, limited significant disruption and serviceable availability outweigh caution on hiring. The evidence points squarely to the centre of the scale. In Q2 we described the East as the most balanced region and set it at Stable. The Q3 distributions mirror that balance, so the scale remains Stable.

Northern Scotland

Trading performance

The North shows the firmest forward pipeline of the three regions, with the strongest share of firms reporting higher order books and the smallest lower share. Nearly half of respondents describe workloads as *expected* and around a third report higher activity, signalling improved trading confidence since Q2. Project disruption remains mostly minor, with only a small proportion experiencing significant delays. Overall, the North's trading picture is constructive and the most positive regionally in Q3.

Costs and the economy

Input costs continue to rise but are now more often described as *slight* rather than *significant* increases. Product availability is also the most favourable among the regions, with almost half rating access as *good* and most of the remainder *average*. This combination of easing supply constraints and less severe price pressure supports more reliable delivery conditions.

People and skills

Hiring intentions are firmer than in other parts of the country. A larger share of businesses are *somewhat likely* to recruit, and fewer are *very unlikely* to do so. Intentions to take on new operatives show a similar pattern, though the region's long-standing shortage of skilled professionals remains a clear limiting factor. The majority continue to report low availability, which constrains growth despite a willingness to hire.

Conclusion Northern Scotland: Stable (Up from Stable to Weak in Q2 2025)

The North combines the firmest forward order books, the most supportive product availability and the most constructive hiring sentiment, marking a clear improvement from Q2 when the region was rated *Stable to Weak*. However, continuing cost pressures and the persistent shortage of skilled labour prevent a stronger rating. The balance of evidence therefore places the North at *Stable*, a measured step up from last quarter, reflecting progress without yet reaching the stronger conditions seen earlier in 2024.

My final note on consistency with past reporting: Overall and Regional

In my opinion, the overall and regional State of Trade scale choices align with the positions established in Q2 2025 and trace back to Q3 2024 when we first introduced this report. The national picture seems to have marginally improved for parts of the profession, though significant pessimism persists eg. I note that the business confidence index fell further to -7.3 in Q3 2025.

The national pessimism is certainly a reflection of sentiment more broadly, reported commentary, social media and personal interactions all align. These trends appear to be a confluence of sentiment, political uncertainty (notably ahead of the Autumn Budget), and geo-political concerns.

At the same time, within our profession itself there does seem to be a more positive trend in pipeline work, order books above expectations rose and fewer firms report significant delays.

On the regional basis: the West of Scotland continues to show the weakest forward profile and the greatest caution on hiring. This may reflect subdued housing-construction activity in the region, which mirrors the national backdrop of slow new-home approvals and weak residential demand. The East remains balanced, and the North displays the firmest pipeline but remains constrained by acute skills shortages.

These patterns and conclusions mirror the narrative from Q2 2025 and are reinforced by the Q3 2025 raw data. However, regional sub-samples remain small and should be interpreted as directional rather than definitive.

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