National Association Construction Frameworks

By the public sector,
For the public sector

NACF Market Intelligence Q1 2021

Every quarter, NACF's Main Contractors gather market intelligence from within the construction industry.

Data is collected for 10 high level construction trades across 7 cities within the UK. This data is grouped into 5 regions: South, London, Wales, Midlands, and the North.

This information is used to identify national and regional market trends and forecast for the following year by commenting on changes in tender workload, employment, building costs and material & labour availability.

The NACF shares this information amongst partners in order to highlight key areas of risk that may impact future project delivery. This data is also made publicly available to the benefit of the wider industry and can be used to help specialist suppliers better manage their workflows and labour forces to serve NACF's contractors in the best way possible.

Comparison to Q4 2020: Overview

Tender Workload

Average **increase** in tender workload across all regions	5%
Increase in curtain walling for tender workload	10%
Increase for windows	8%
Increase for steelwork	7%
Dry Lining	7%

See full data set for Tender Workload

Building Cost

Average increase in building cost across all regions	6%
Increase in steelwork for building cost	11%
Increase in building cost for carpentry and joinery	6%
Increase for brickwork	6%
Increase in dry lining	6%

See full data set for Building Cost

Material Availability

Average increase in material and labour availability across all regions	2 weeks
Increase of weeks for steelwork	4 weeks
Increase of weeks for Brickwork, Curtain Walling, windows, Dry Lining	2 weeks

See full data set for Material Availability

Employment

Average increase in employment across all regions	2%
Increase for windows for employment	2%
Increase for M&E	2%
Increase for groundworks	2%
Increase for Curtain Walling	2%

See full data set for Employment

Comparison to Q4 2020

South

Tender Workload
A 9% increase in tender workload *(4% greater than national average).*

- 30% increase for Steelwork
- 20% increase for Dry Lining
- 15% increase for M&E

Building Cost
The average increase in building cost was 10% *(4% greater than national average)*

- 30% increase for Steelwork
- 12% increase for M&E
- 10% increase for Dry Lining and Groundworks

Material Availability
Lead time increased by 4 weeks (2 weeks greater than national average)

- 10 week lead time increase for Steelwork
- 5 week lead time increase for Windows and Curtain Walling

Employment
A 4% increase in employment *(2% greater than national average)*

- 10% increase for M&E and Brickwork
- 7% increase for Curtain Walling and Windows

Wales

Tender Workload
A 2% increase in tender workload *(3% less than national average).*

- 20% increase for Tower crane
- 9% increase for Curtain Walling
- -5% for M&E and Concrete Frame

Building Cost
The average increase in building cost was 5% *(1% less than national average)*

- 13 % increase for Carpentry and Joinery
- 10% increase for Brickwork
- 7% increase for Groundwork

Material Availability
Lead time increased by 2 weeks *(equal to national average)*

- Increase of 3 weeks lead time for Curtain Walling
- Increase of 3 weeks lead time for M&E, Groundworks, and Dry Lining

Employment
A 1% increase in employment *(equal to national average)*

- 2% increase for Carpentry and Joinery
- -2% for Groundworks

Midlands

Tender Workload
A 3% increase in tender workload *(2% less than national average)*

- 6% increase for steelwork
- 4% increase for curtain walling

Building Cost
A 5% increase in Building cost *(1% less than national average)*

- 10% increase for steelwork
- 9% increase for Groundworks
- 6% increase for Dry Lining and Concrete Frame

Material Availability
Lead time increased by 3 weeks *(1 week greater than national average)*

- Increase of 7 weeks lead time for Steelwork
- Increase of 3 weeks lead time for M&E, Groundworks, and Dry Lining

Employment
A 1% increase in employment *(equal to national average)*

- 2% increase for M&E, Steelwork, Dry Lining and Curtain Walling

North

Tender Workload
A 7% increase in tender workload (2% greater than national average)

- 16% increase for Curtain Walling
- 13% increase for Brickwork
- 11% increase for Windows

Building Cost
A 5% increase in building cost*(1% less than national average)*

- 9% increase for steelwork
- 8% increase for Brickwork
- 7% increase for Carpentry and Joinery

Material Availability
Lead time increased by 2 weeks (equal to national average)

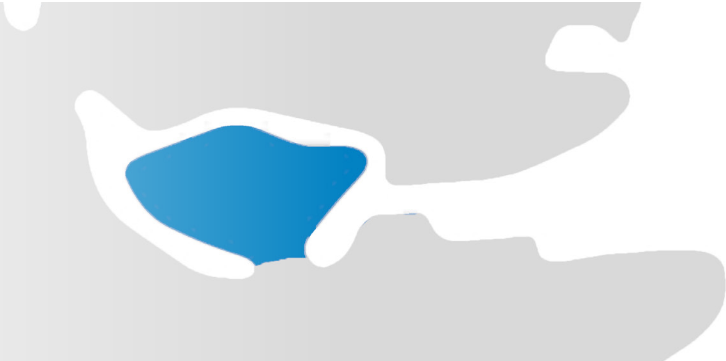
- 3 weeks increase for Carpentry and Joinery
- 2 week increase for Windows, Curtain Walling, Dry Lining and Brickwork

Employment
No change in employment *(1% less than national average)*

- -5% employment for Carpentry and Joinery
- 2% increase for Brickwork

Comparison to Q4 2020

London



Tender Workload

A 3% increase in tender workload *(2% less than national average)*

- 4% increase for Steelwork, Dry Lining and Groundworks

Building Cost

A 4% increase in Building cost *(2% less than national average)*

- 10% increase for Steelwork
- 6% increase for Concrete Frame and Groundwork

Material Availability

No change in material lead time *(2 weeks less than national average)*

Employment

No change in employment *(1% less than national average)*

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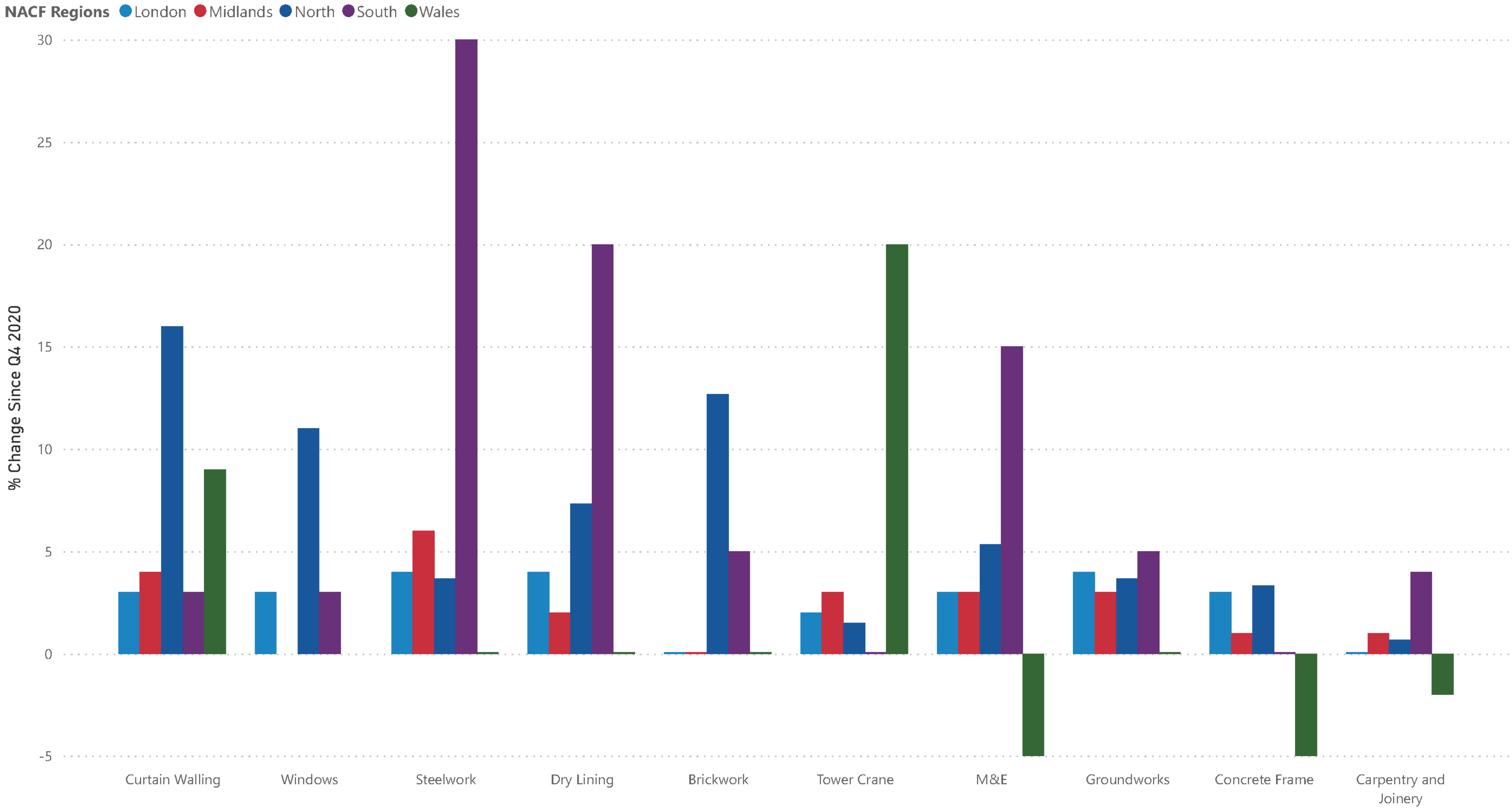
Tendering Workload



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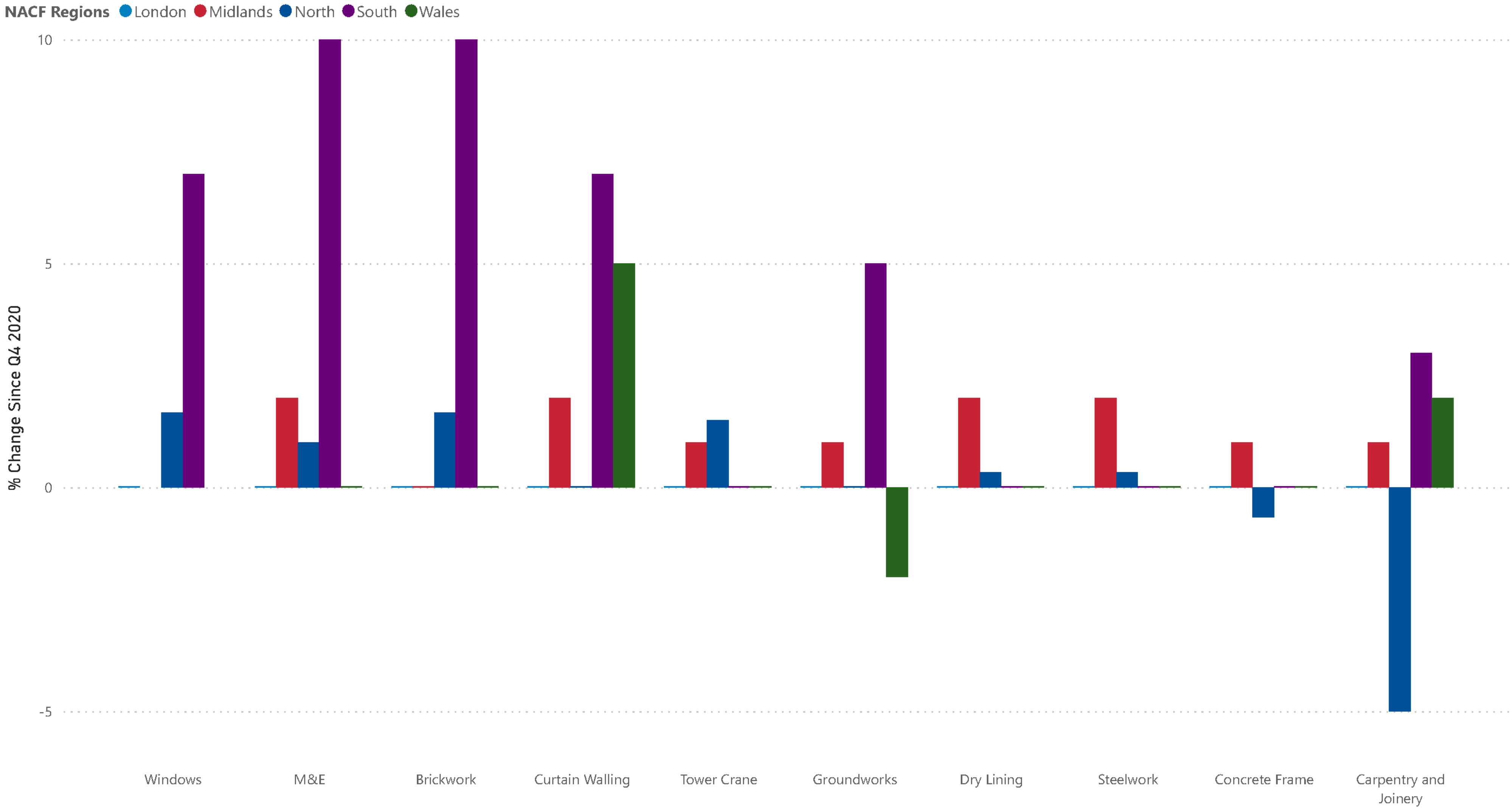
Employment



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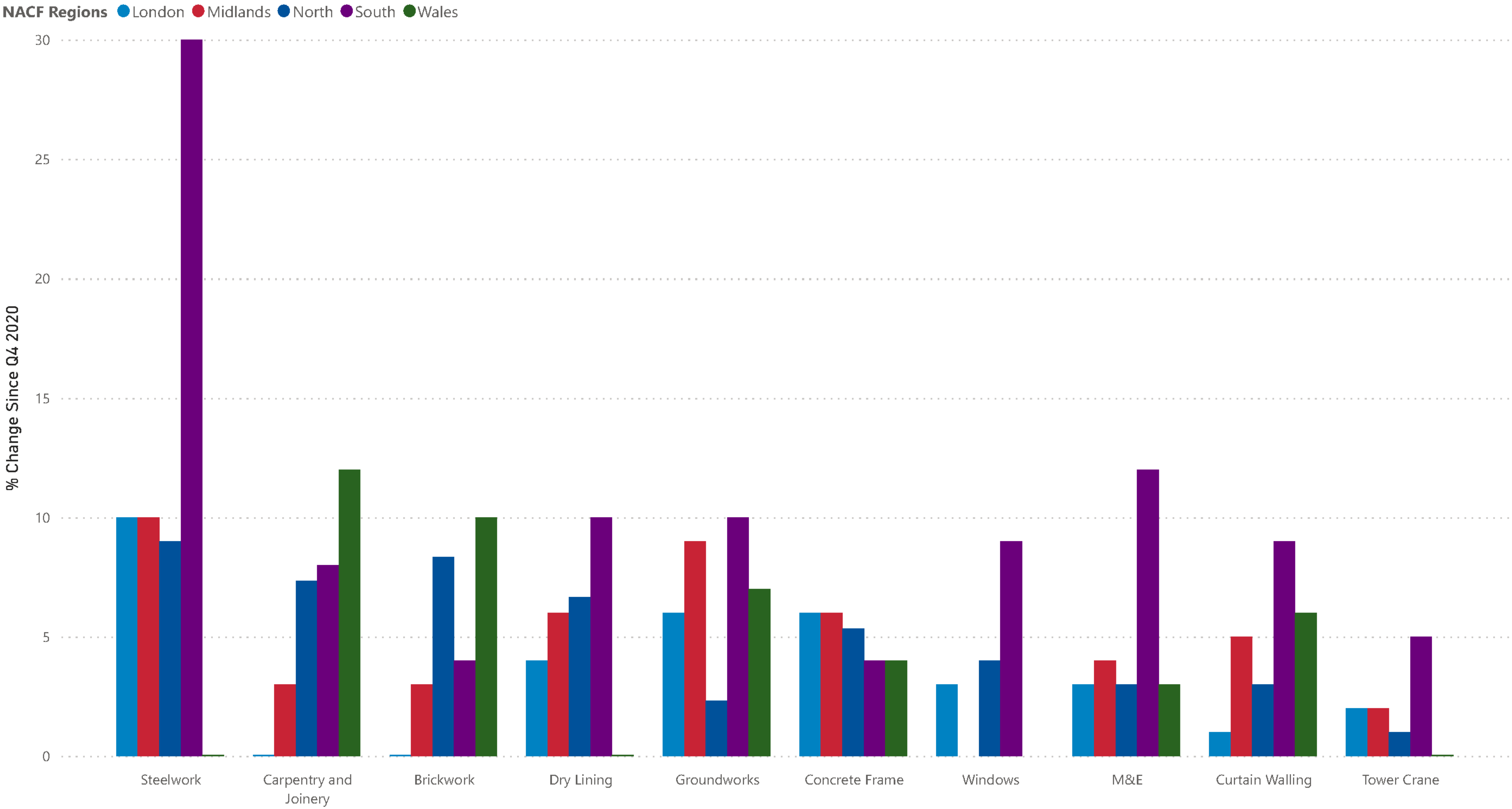
Building Cost



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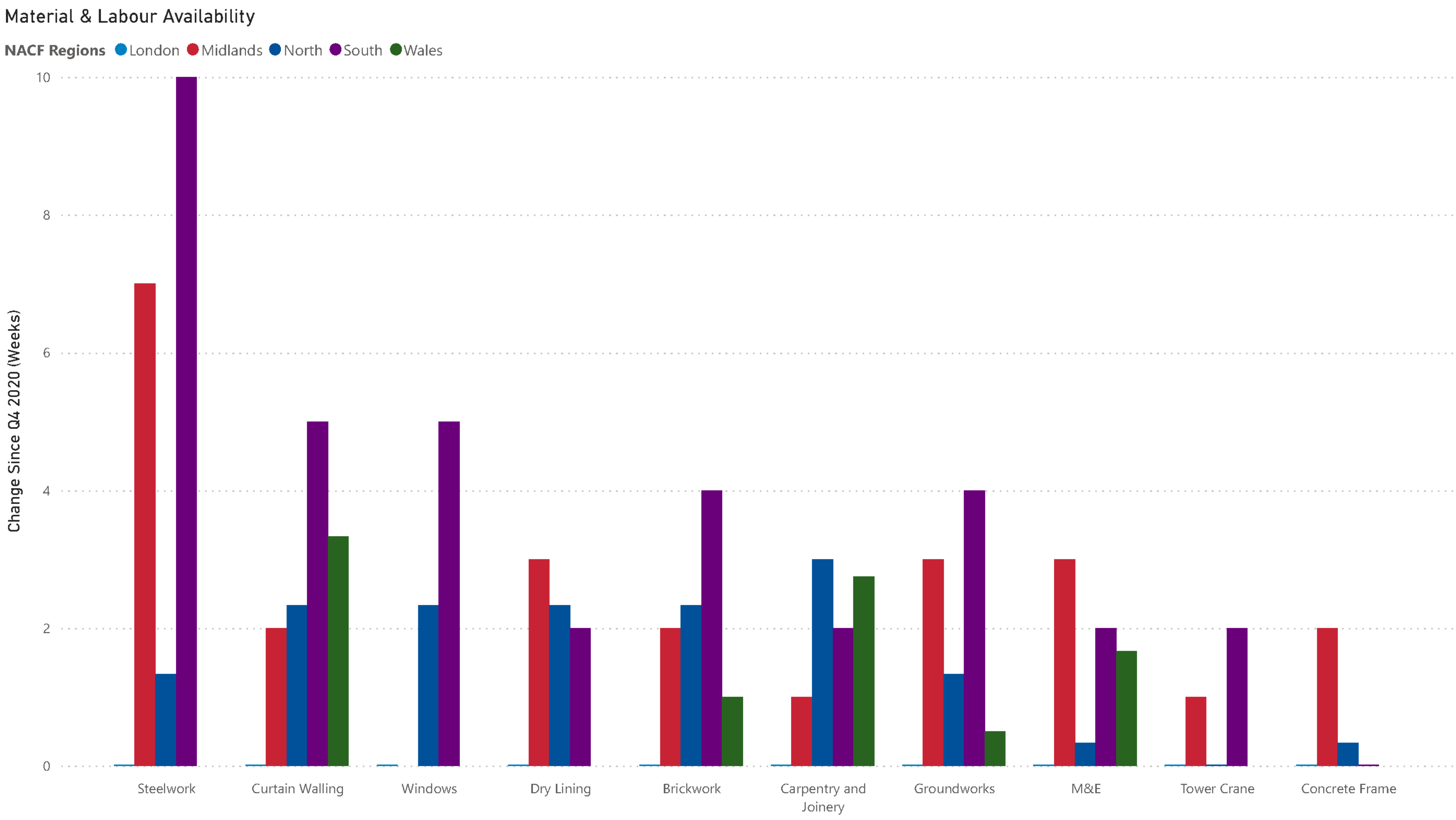

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