National Association Construction Frameworks

By the public sector, For the public sector

NACF Market Intelligence Report Q2 2021

NACF Market Intelligence Q2 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 Q1 2021: Overview

Tender Workload

Average **increase** in tender workload across all regions	8%
Curtain Walling	18%
Brickwork	12%
M&E	9%
Groundworks	8%

See full data set for Tender Workload

Building Cost

Average increase in building cost across all regions	10%
Steelwork	20%
Carpentry and joinery	15%
Brickwork	11%
Groundworks	10%

See full data set for Building Cost

Material and Labour Availability

Average increase in lead time across all region	4 weeks
Steelwork	9 weeks
Carpentry & Joinery and Groundworks	4 weeks

See full data set for Material Availability

Employment

Average increase in employment across all regions	2%
Brickwork	6%
Carpentry and Joinery	3%
Dry Lining, Tower Crane and Curtain Walling	2%

See full data set for Employment

Comparison to Q1 2021

South

Tender Workload
A 3% increase in tender workload *(5% less than national average)*

- 30% increase for Brickwork
- 10% increase for M&E
- 15% decrease for Curtain Walling

Building Cost
The average increase in building cost was 13% *(3% greater than national average)*

- 23% increase for Carpentry
- 20% increase for Steelwork & Dry Lining
- 15% increase for M&E

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)*

- 11% increase for Carpentry
- 10% increase for Brickwork and Tower Crane

Wales

Tender Workload
A 4% increase in tender workload *(4% less than national average)*

- 15% increase for Curtain Walling
- 13% increase for Groundwork
- -20% for Steelwork

Building Cost
The average increase in building cost was 12% *(2% more than national average)*

- 20% increase for Steelwork
- 15% increase for Dry Lining, Curtain Walling, Groundwork and Carpentry

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

- Increase of 6 weeks lead time for Brickworks
- Increase of 4 weeks lead time for Carpentry & Joinery

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

- 13% increase for Brickwork
- 8% Curtain Walling and Dry Lining

Midlands

Tender Workload
A 3% increase in tender workload *(5% less than national average)*

- 5% increase for Steelwork and Tower Crane
- 4% increase for Groundworks and Carpentry and

Building Cost
A 7% increase in Building cost *(3% less than national average)*

- 23% increase for steelwork
- 9% increase for Carpentry and Joinery
- 7% increase for Brickwork and Groundwork

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

- Increase of 10 weeks lead time for Steelwork
- Increase of 4 weeks lead time for and M&E and Groundworks

Employment
A 1% increase in employment *(1% less than national average)*

- 2% increase for Tower Crane, Dry Lining and Curtain Walling

North

Tender Workload
10% increase in tender workload (2% greater than national average)

- 29% increase for Curtain Walling
- 12% increase for Windows
- 11% increase for Brickwork

Building Cost
10% increase in building cost *(equal to national average)*

- 22% increase for steelwork
- 15% increase for Carpentry & Joinery
- 11% increase for M&E

Material Availability
Lead time increased by 4 weeks (equal to national average)

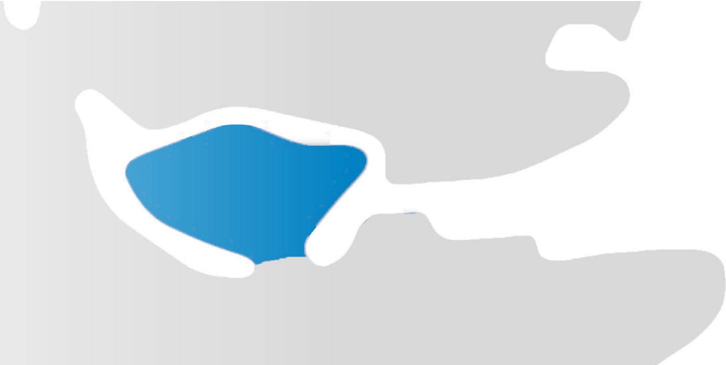
- 11 weeks increase for Steelwork
- 5 week increase for Windows
- 4 weeks increase for Carpentry, Groundworks and Dry Lining

Employment
2% increase in employment *(equal to national average)*

- 4% employment for Brickwork
- 2% increase for Groundwork and Dry Lining

Comparison to Q1 2021

London



Tender Workload

A 7% increase in tender workload *(1% less than national average)*

- 8% increase for Windows, Curtain Walling, Concrete Frame and Brickwork

Building Cost

A 7% increase in Building cost *(3% less than national average)*

- 12% increase for Steelwork
- 11% increase for Carpentry

Material Availability

Lead time increased by 2 weeks (2 weeks less than national average)

- 5 week increase for Steelwork
- 2 week increase for Windows, Concrete Frame, Brickwork and Carpentry

Employment

A 1% increase in employment (1% less than national average)

- 1% increase for Windows, Groundworks, Concrete Frame, Brickwork and Carpentry

National Forecast Q2 2022: Overview

Tender Workload

Average forecast in tender workload across all regions	7%
Brickwork	12%
Dry Lining	9%
M&E, Tower Crane and Concrete Frame	8%

See forecast for Tender Workload

Building Cost

Average increase in building cost across all regions	11%
Steelwork	14%
Carpentry and joinery	15%
Brickwork	11%
Windows, M&E and Curtain Walling	12%

See forecast for Building Cost

Material Availability

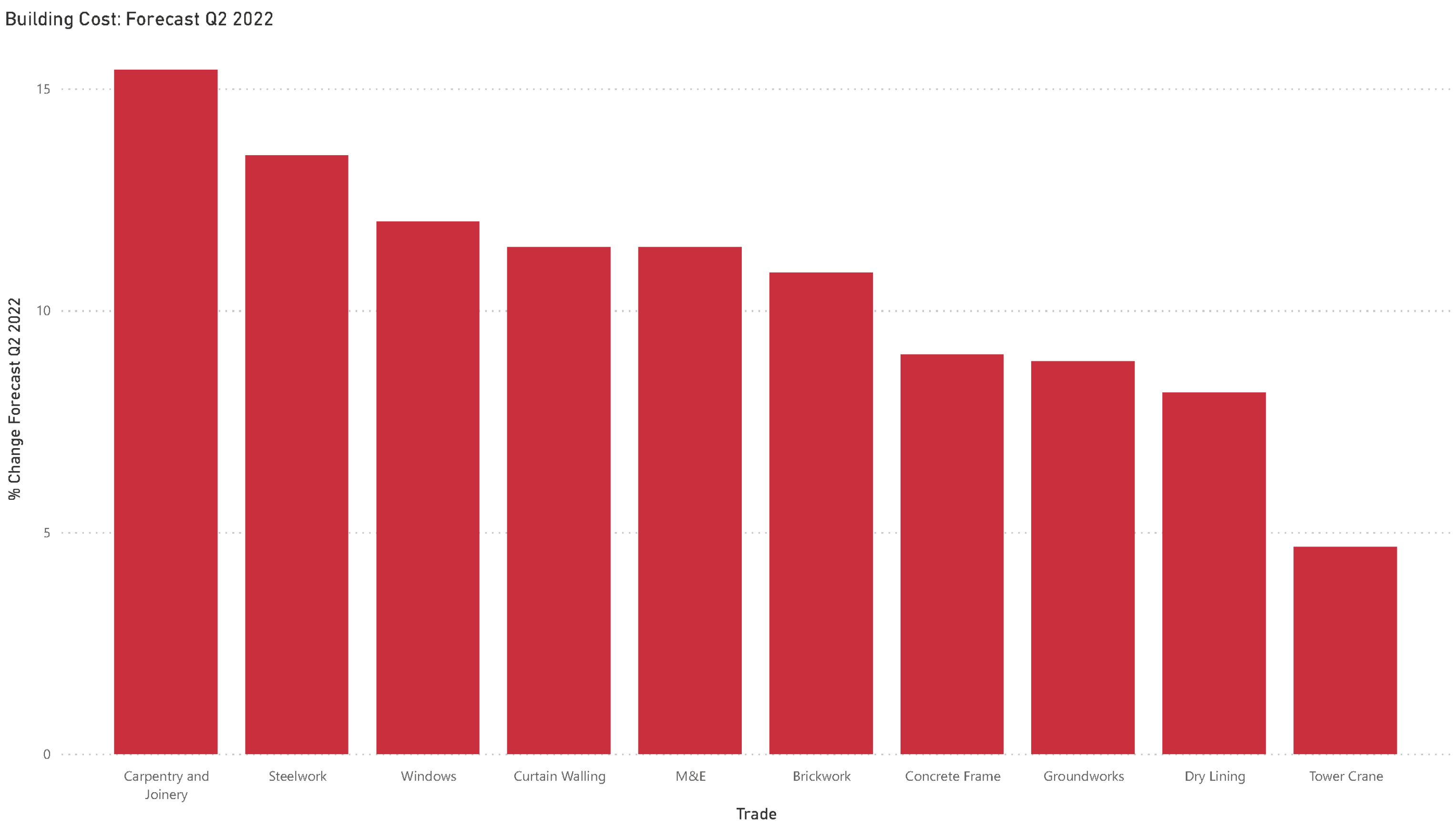
Average forecast in material and labour availability across all regions	4 weeks
Steelwork	7 weeks
Brickwork	7 weeks
Windows, Groundworks and Curtain Walling	4 weeks

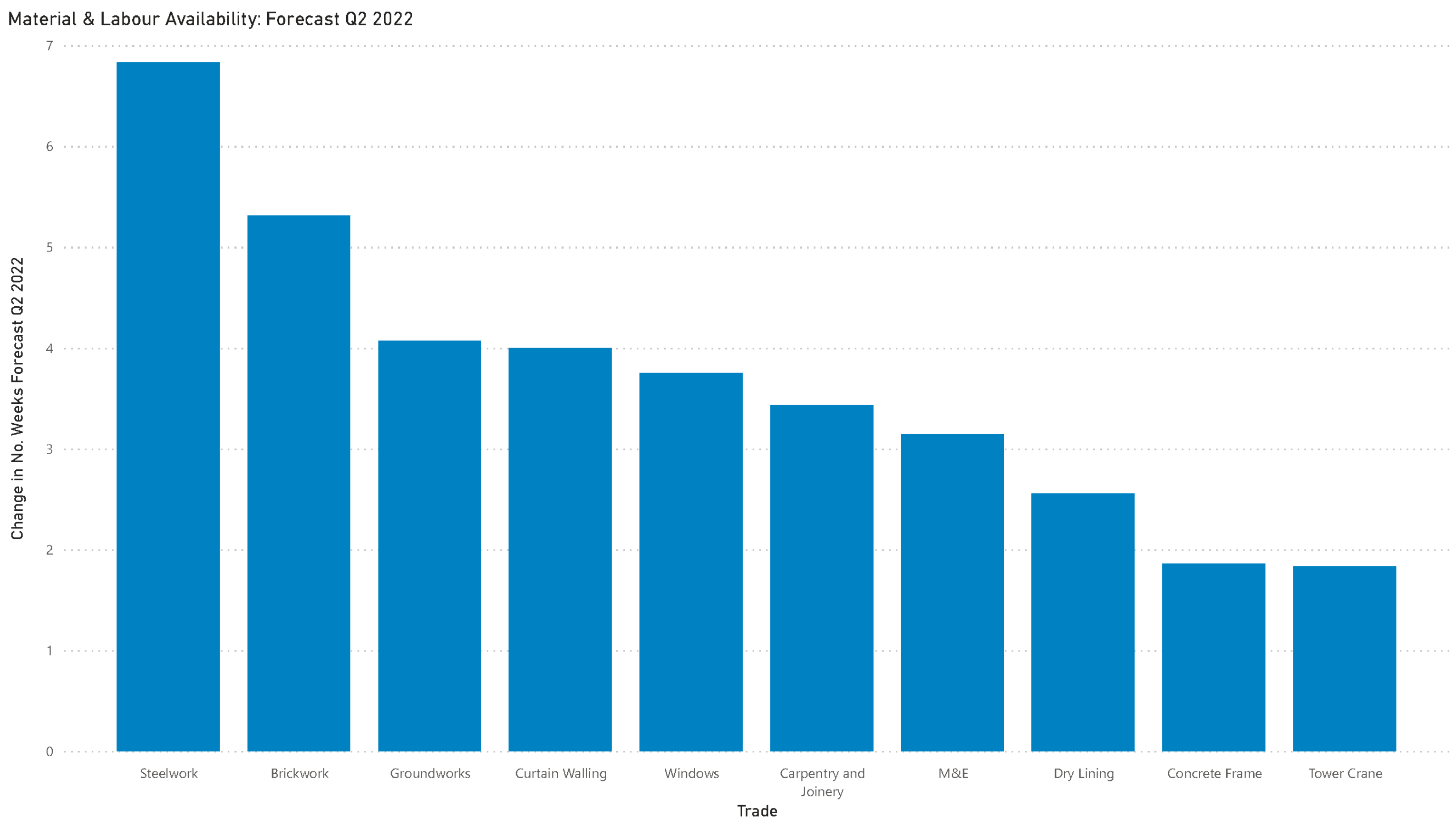
See forecast for Material Availability

Employment

Average increase in employment across all regions	5%
Brickwork	9%
Tower Crane	7%
Windows and Curtain Walling	6%
M&E and Steelwork	5%

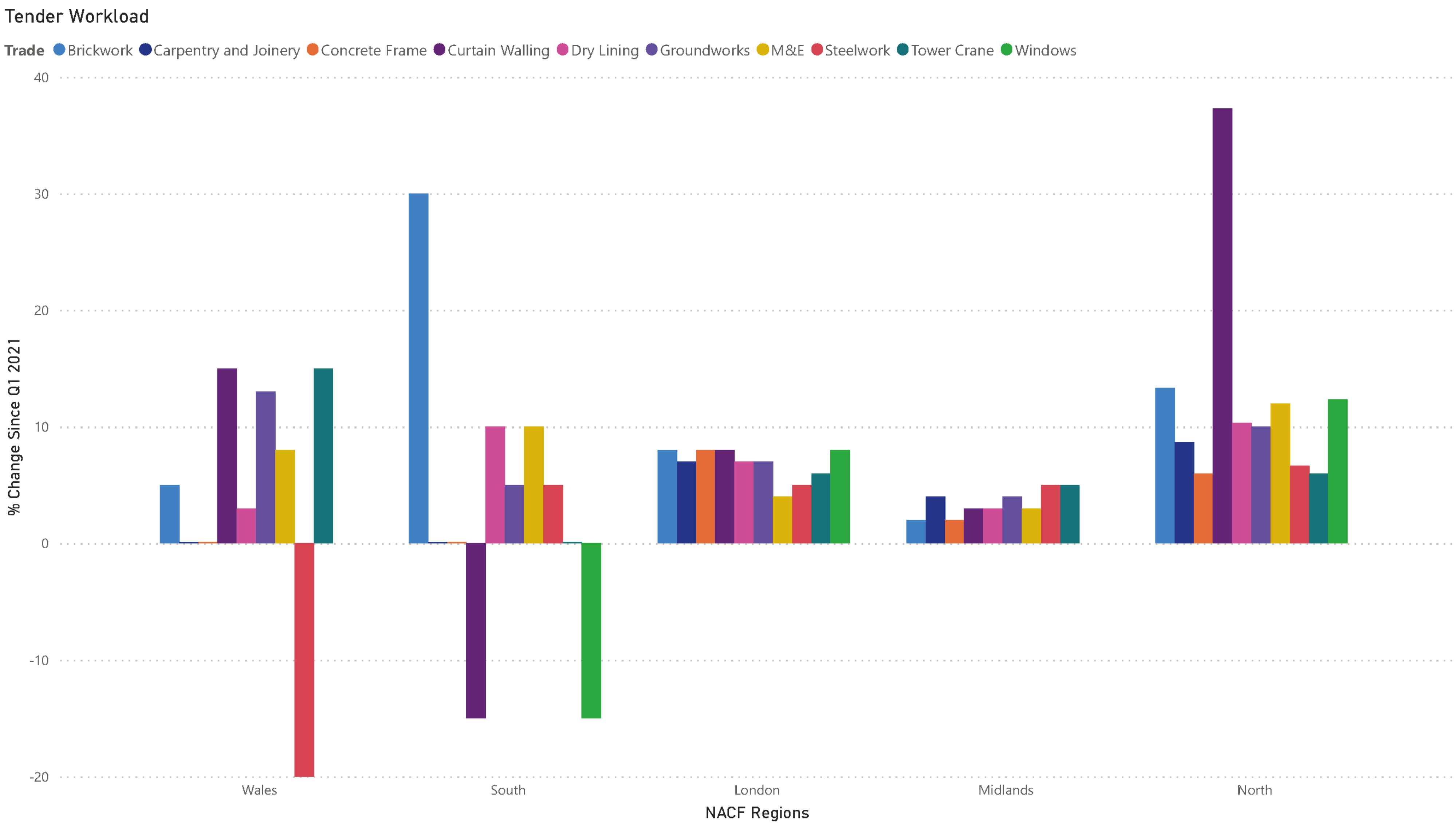
See forecast for Employment



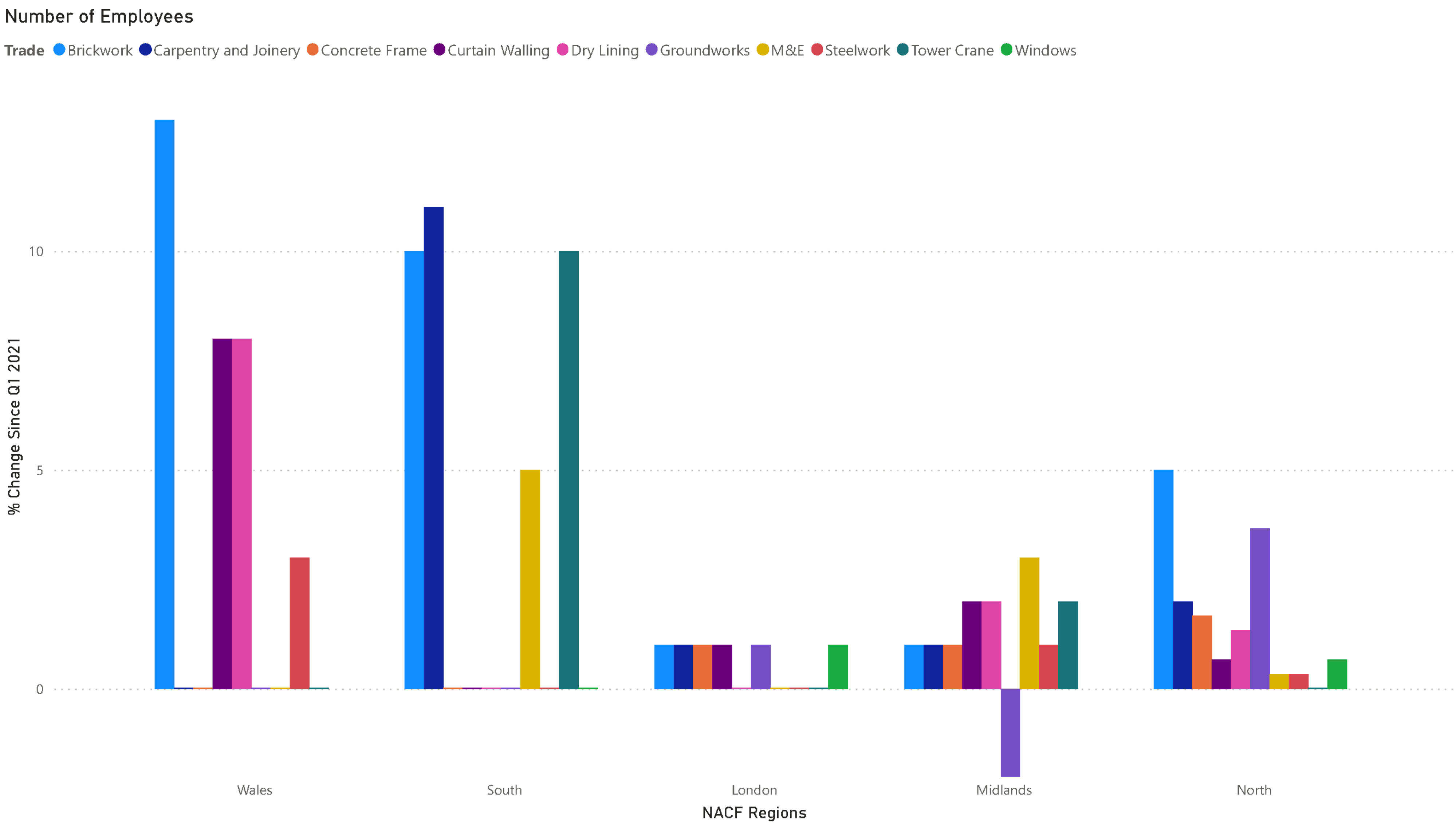


National Association Construction Frameworks

By the public sector,
For the public sector

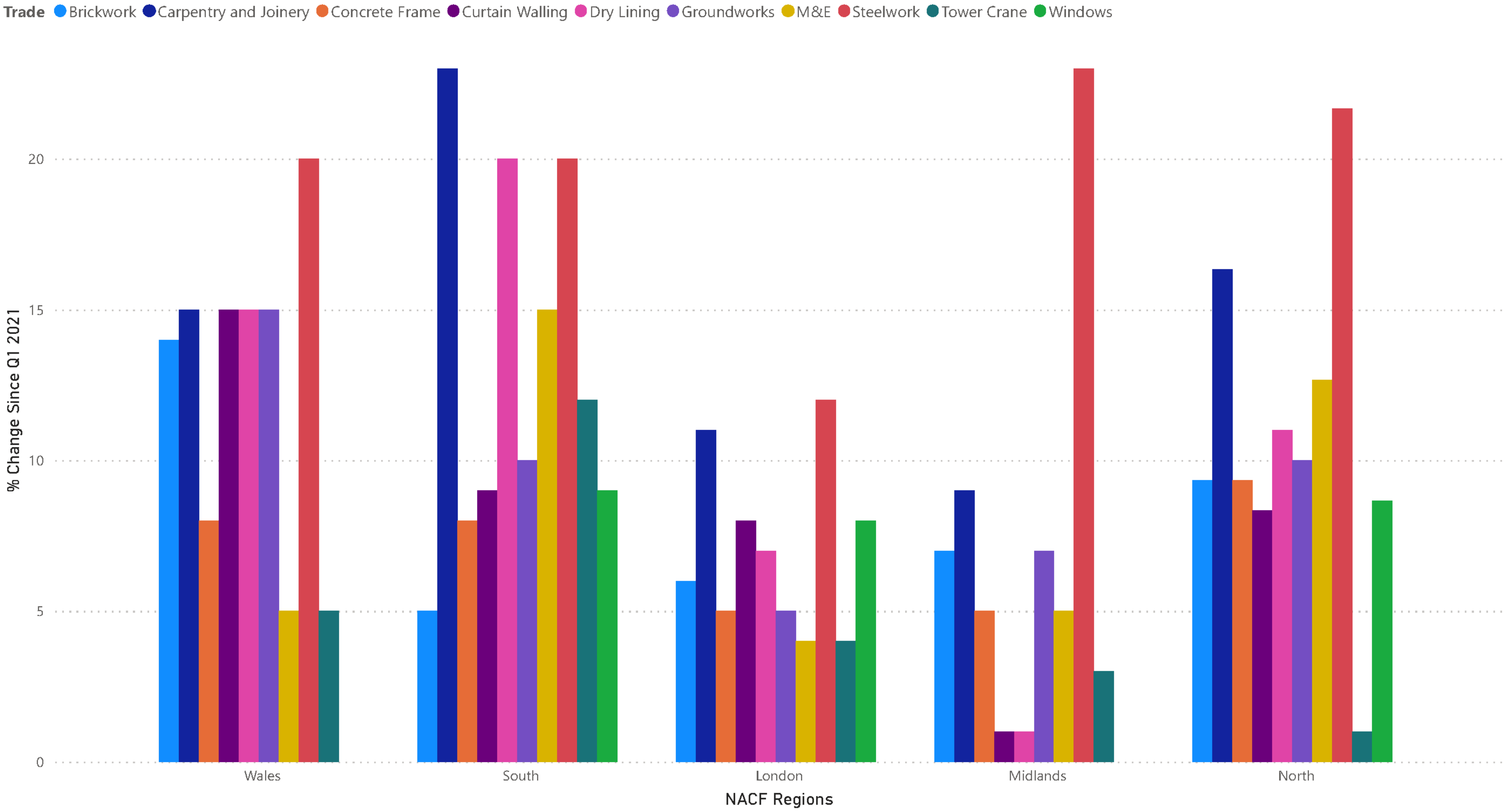


[Go back to comparison]

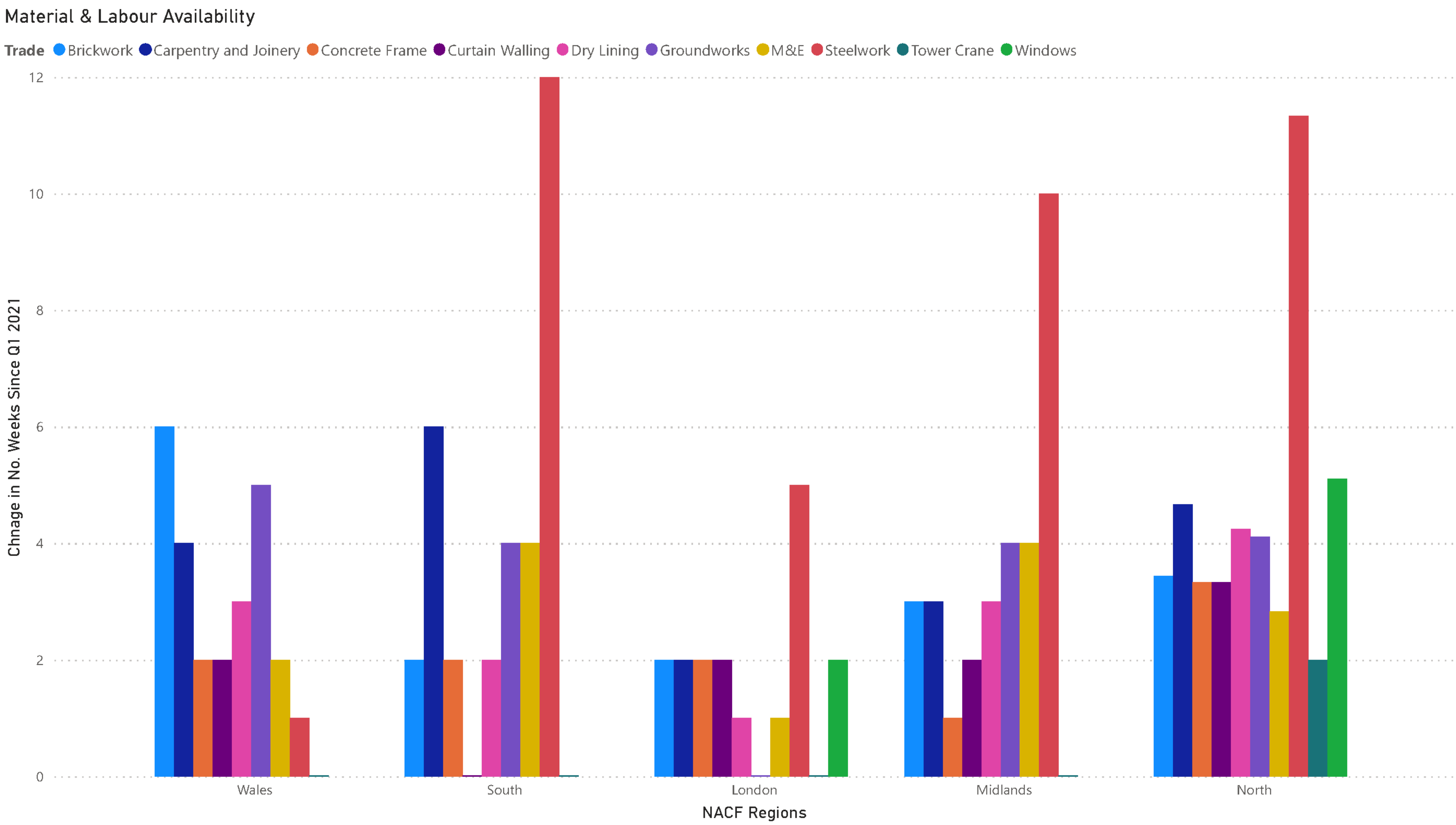


Go back to comparison

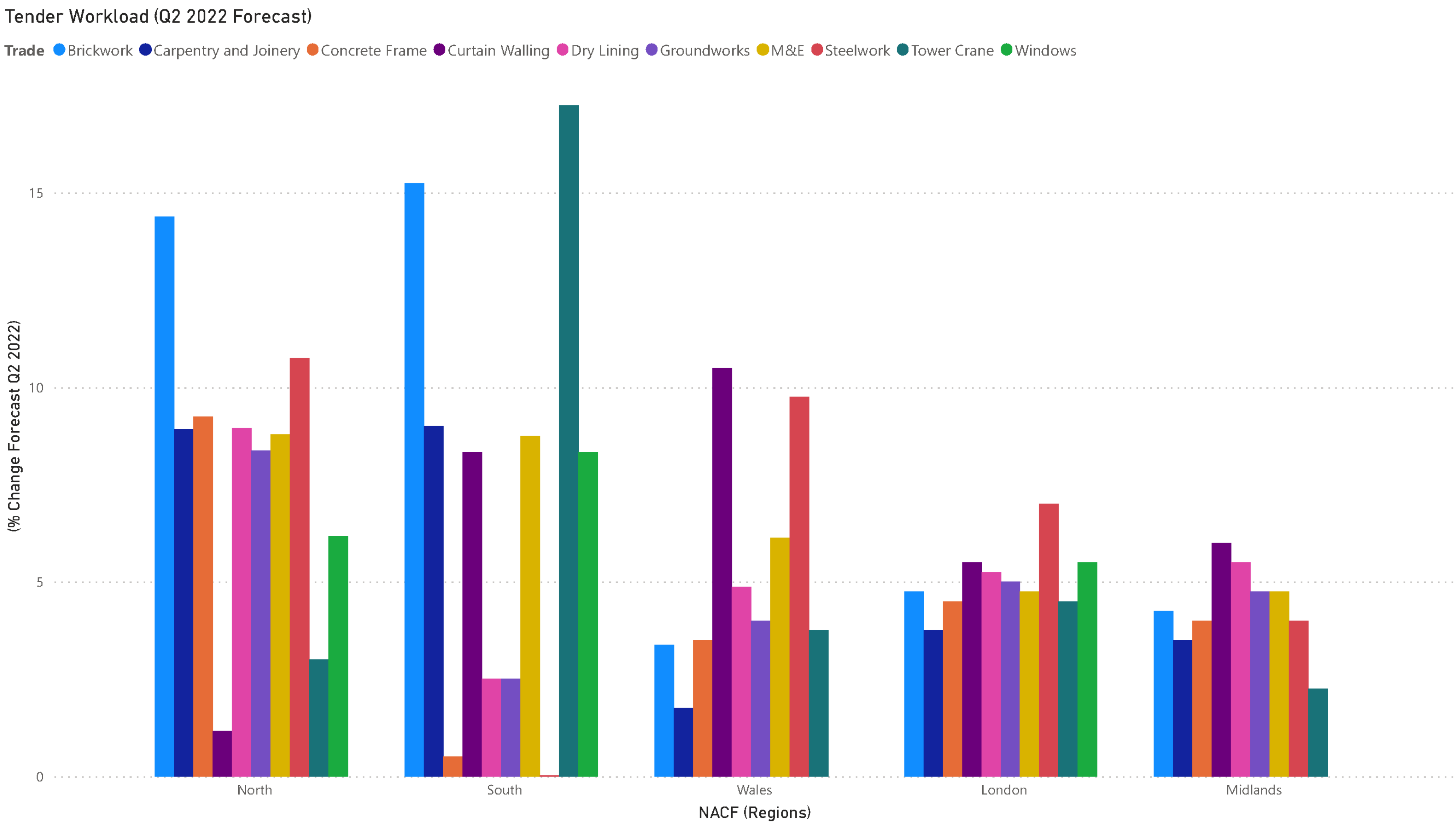
Building Cost



[Go back to comparison]

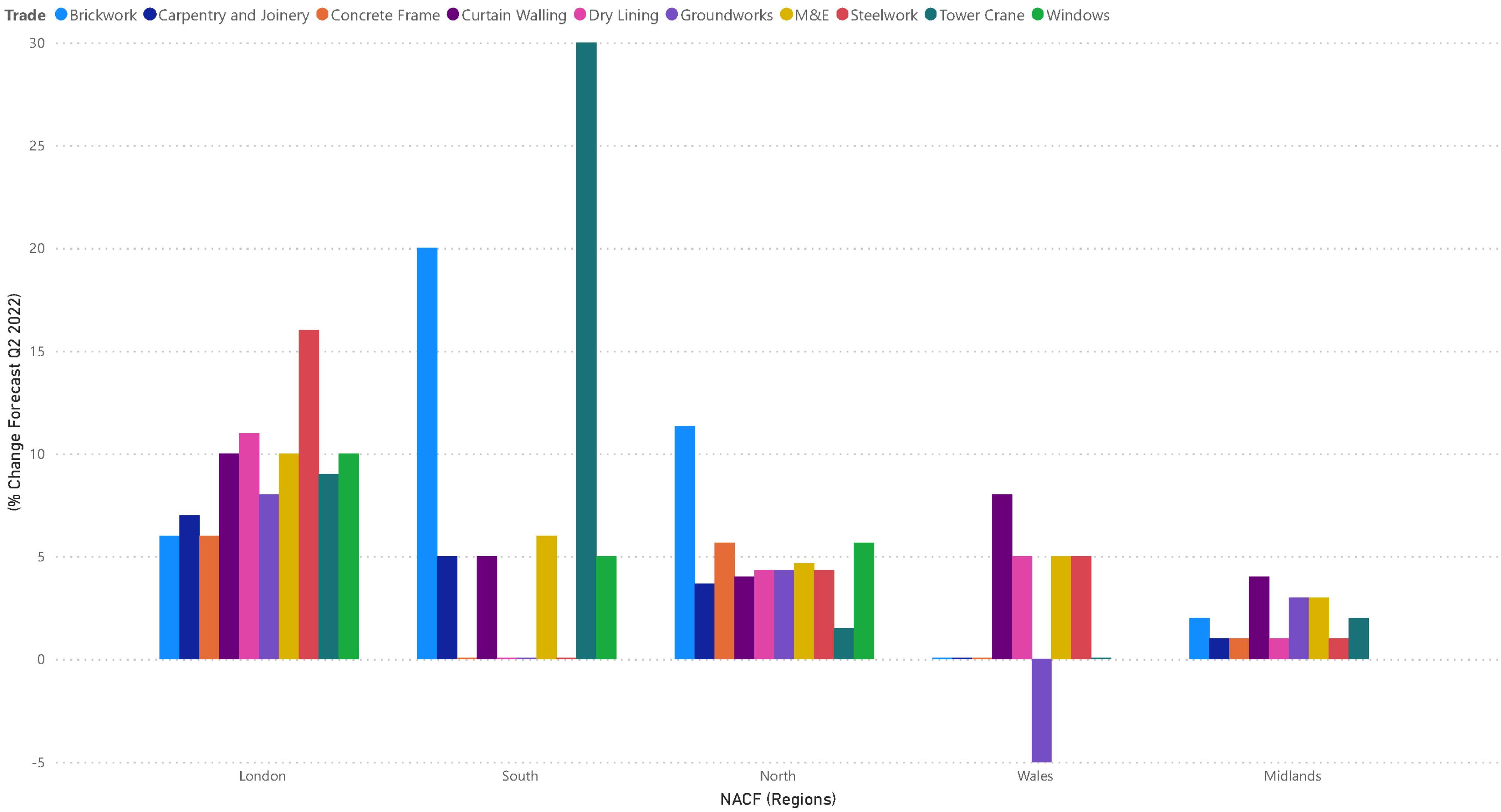


[Go back to comparison]

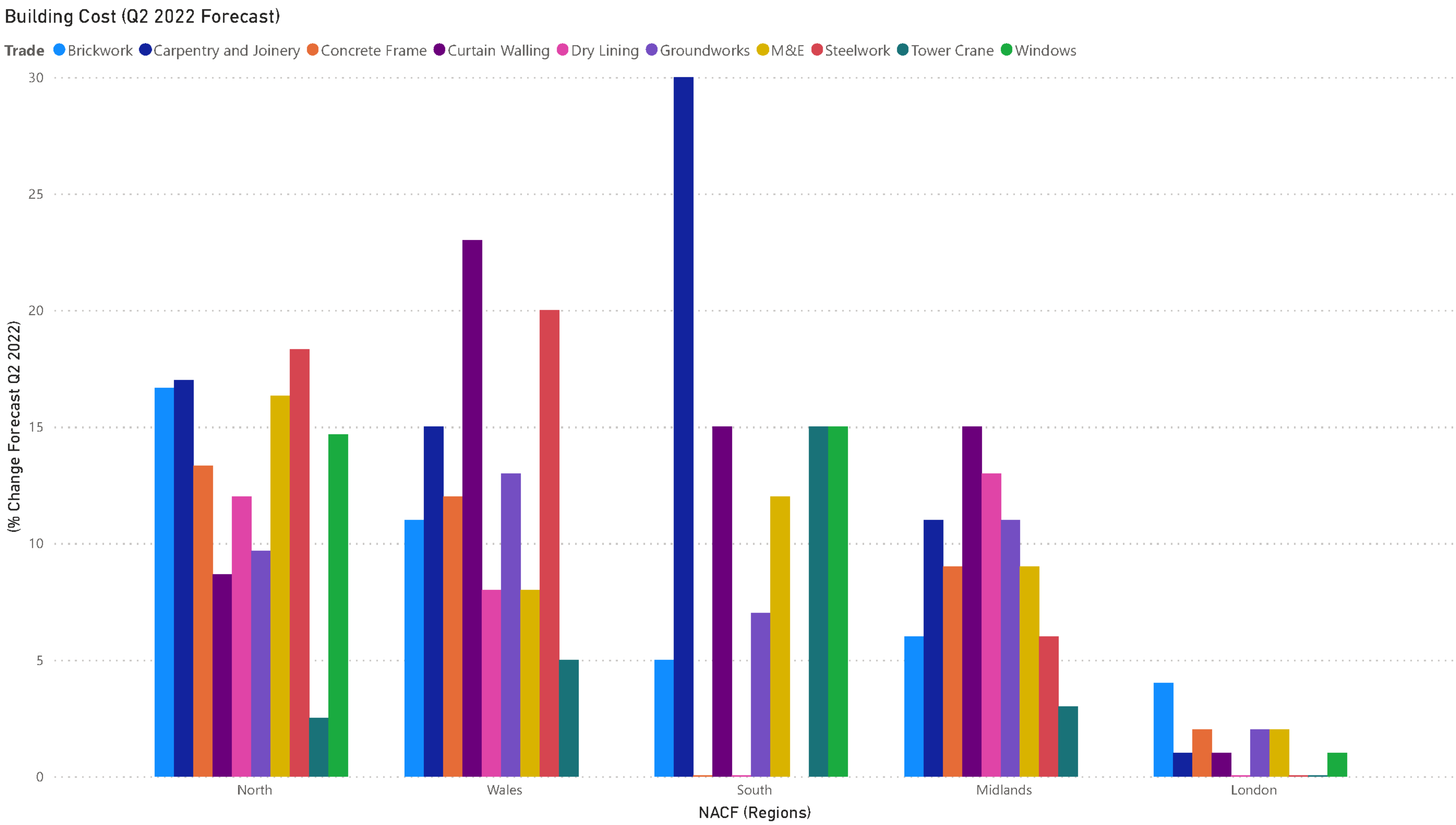


[Go back to comparison]

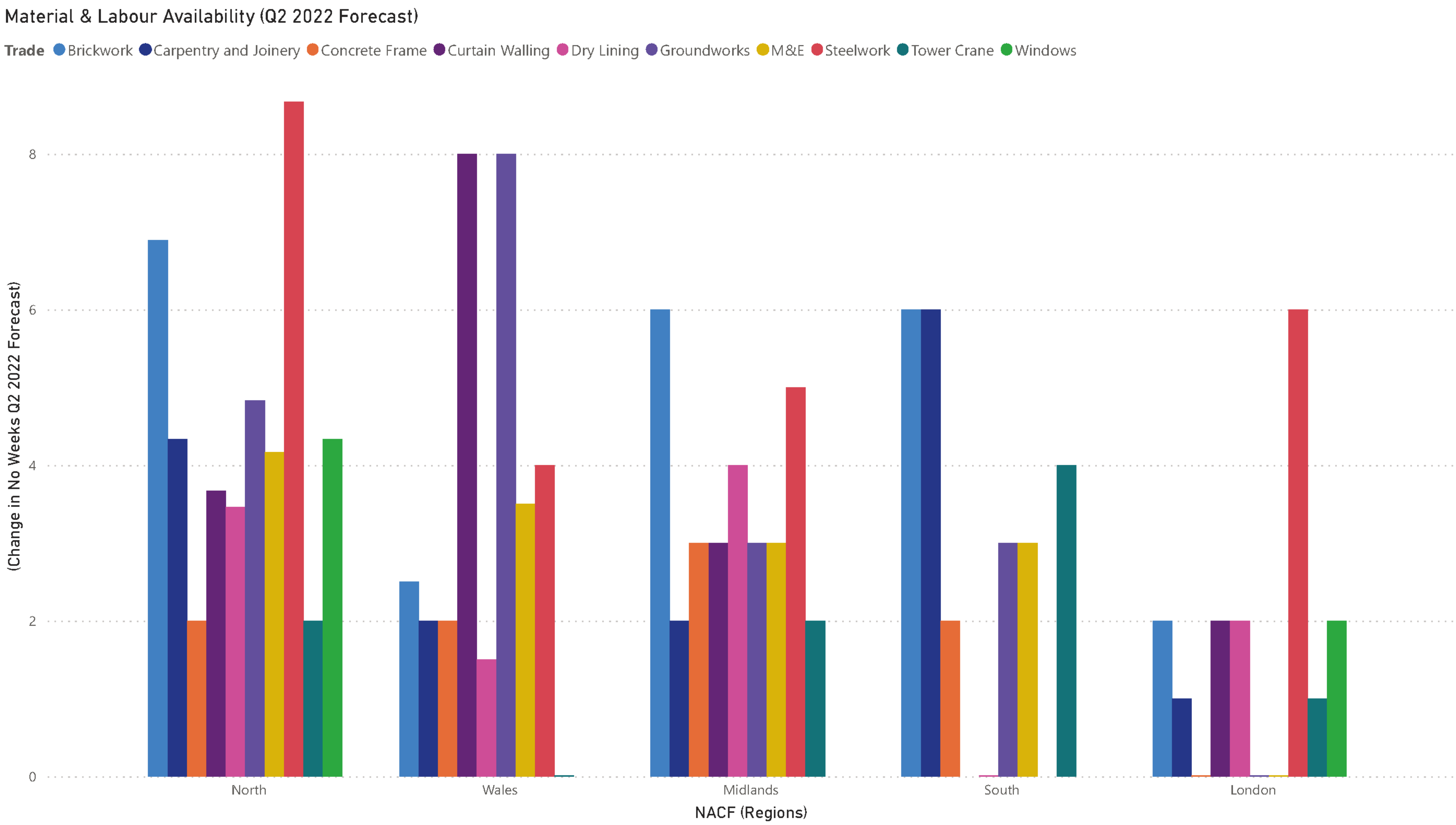
Number of Employees (Q2 2022 Forecast)



Go back to comparison



Go back to comparison



Go back to comparison