National Association Construction Frameworks

By the public sector,
For the public sector

NACF Market Intelligence Report
Q3 2021

NACF Market Intelligence Q3 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 Q2 2021: Overview

Tender Workload

Average **increase** in tender workload across all regions	+10%
M&E	+22%
Concrete Frame	+15%
Groundworks	+12%
Carpentry, Dry Lining & Windows	+8%

See full data set for Tender Workload

Building Cost

Average increase in building cost across all regions	+11%
Steelwork	+21%
Dry Lining	+15%
Carpentry & Joinery	+13%
M&E	+12%

See full data set for Building Cost

Material and Labour Availability

Average increase in lead time across all region	+3 weeks
Windows	+5 weeks
Steelwork	+4 weeks
Curtain Walling	+4 weeks

See full data set for Material Availability

Employment

Average increase in employment across all regions	+2%
Carpentry and Joinery	+4%
M&E	+4%
Brickwork, Concrete Frame & Curtain Walling	+2%

See full data set for Employment

Comparison to Q2 2021

South

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

- +20% increase for Steelwork
- +10% increase for Dry Lining
- -10% decrease for Concrete Frame

Building Cost
The average increase in building cost was +8% *(3% less than national average)*

- +30% increase for Steelwork
- +18% increase for Dry Lining
- +15% increase for M&E & Carpentry

Material Availability
Lead time increased by +4 weeks (1 week greater than national average)

- +14 week lead time increase for Steelwork
- +5 week lead time increase for Groundworks

Employment
A +2% increase in employment *(same as national average)*

- +5% increase for Steelwork
- +5 increase for Carpentry & Joinery

Wales

Tender Workload
A +13% increase in tender workload *(3% greater than national average)*

- +70% increase for Concrete Frame
- +18% increase for Groundwork
- +15% for Tower crane

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

- +25% increase for Steelwork
- +19% increase for M&E
- +18 increase for Carpentry & Joinery

Material Availability
Lead time increased by +2 weeks *(1 week less than national average)*

- Increase of +4 weeks lead time for Brickworks
- Increase of +3 weeks lead time for M&E and Dry Lining

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

- +5% increase for Brickwork
- +8% Steelwork

Midlands

Tender Workload
A +4% increase in tender workload *(6% less than national average)*

- +8% increase for Curtain Walling & Dry Lining
- +4% increase for Tower crane and Carpentry

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

- +21% increase for steelwork
- +13% increase for Curtain Walling and Dry Lining
- +6% increase for M&E

Material Availability
Lead time increased by +3 weeks *(same as national average)*

- Increase of +6 weeks lead time for Tower crane
- Increase of +4 weeks lead time for Steelwork, Dry Lining and Curtain Walling

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

- +2% increase for Carpentry & Joinery, Curtain Walling & M&E

North

Tender Workload
+14% increase in tender workload (4% greater than national average)

- +47% increase for M&E
- +19% increase for Groundworks
- +16% increase for Brickwork

Building Cost
+12% increase in building cost *(1% greater than to national average)*

- +20% increase for Steelwork
- +17% increase for Dry Lining
- +15% increase for Carpentry & Joinery

Material Availability
Lead time increased by +2 weeks (1 week less than national average)

- +7 weeks increase for Windows
- +4 week increase for Curtain Walling & Carpentry
- +3 weeks increase for Groundworks

Employment
+3% increase in employment *(1% greater than national average)*

- +8% increase for M&E
- +7% increase for Carpentry & Joinery

Comparison to Q2 2021

London

Tender Workload
A +6% increase in tender workload *(4% less than national average)*

- +9% increase for Dry Lining
- +8% Concrete Frame & Groundworks
- +7% for Curtain Walling

Building Cost
A +9% increase in Building cost *(2% less than national average)*

- +14% increase for Curtain Walling
- +12% increase for Steelwork & Dry Lining
- +10% for Windows

Material Availability
Lead time increased by +2 weeks (1 week less than national average)

- +4 week increase for Steelwork and Carpentry & Joinery
- +3 week increase for Curtain Walling & Dry Lining

Employment
No change in employment (2% less than national average)

- +1% increase for Concrete Frame and Groundworks

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National Forecast Q3 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

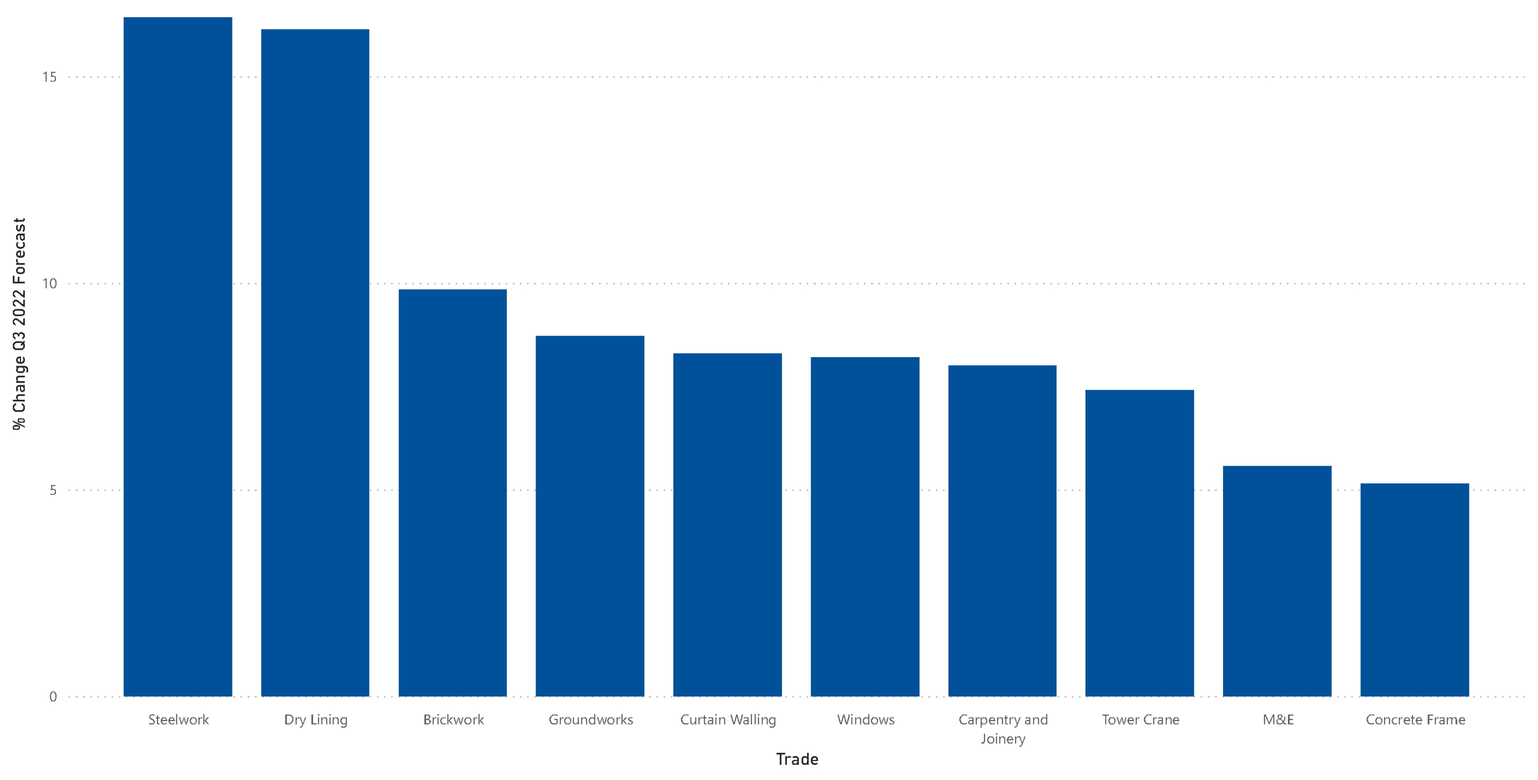
See forecast for Material Availability

Employment

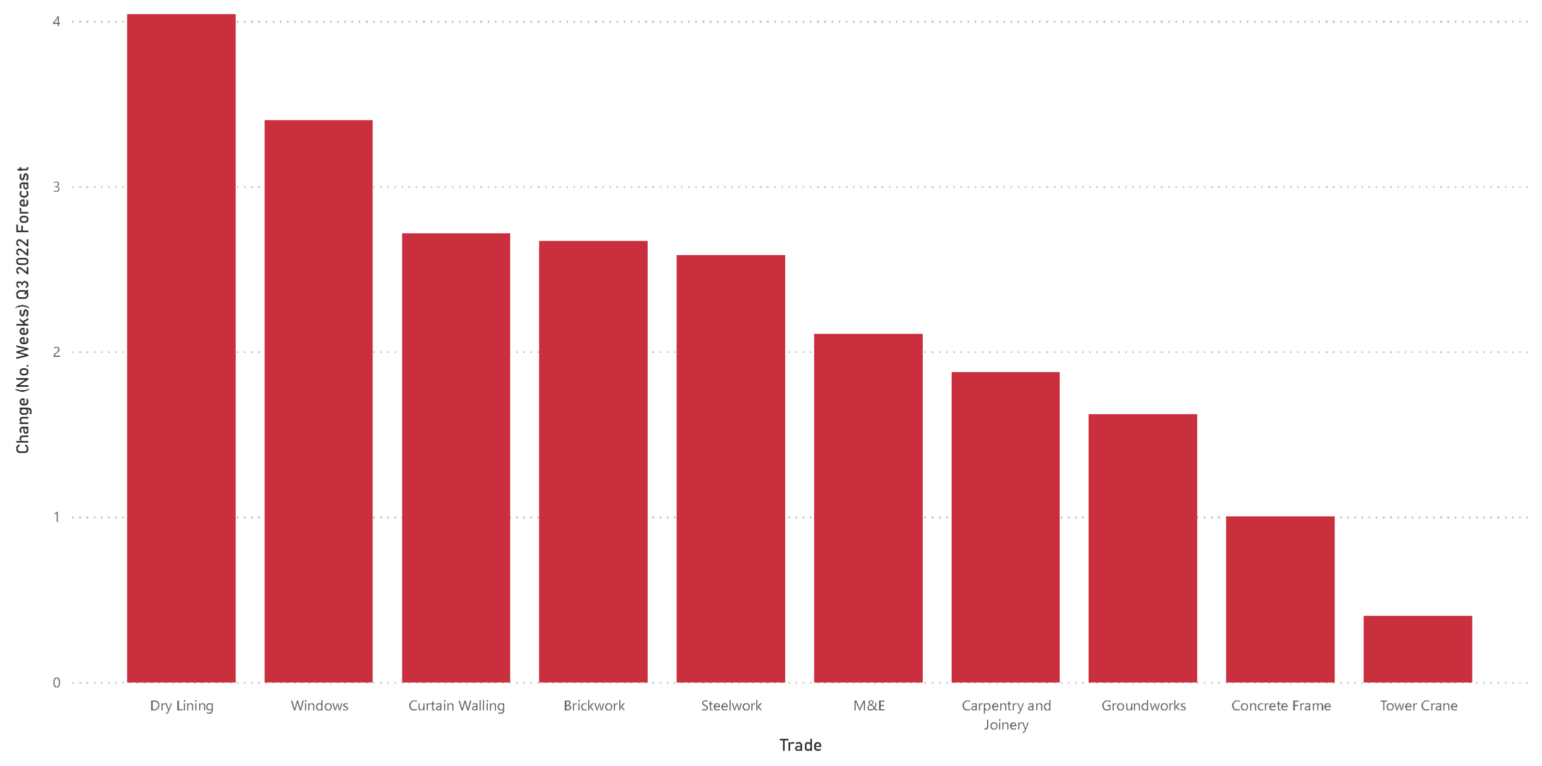
Average increase in employment across all regions	5%
Brickwork	9%
Tower Crane	7%
Windows and Curtain Walling	6%
M&E and Steelwork	5%

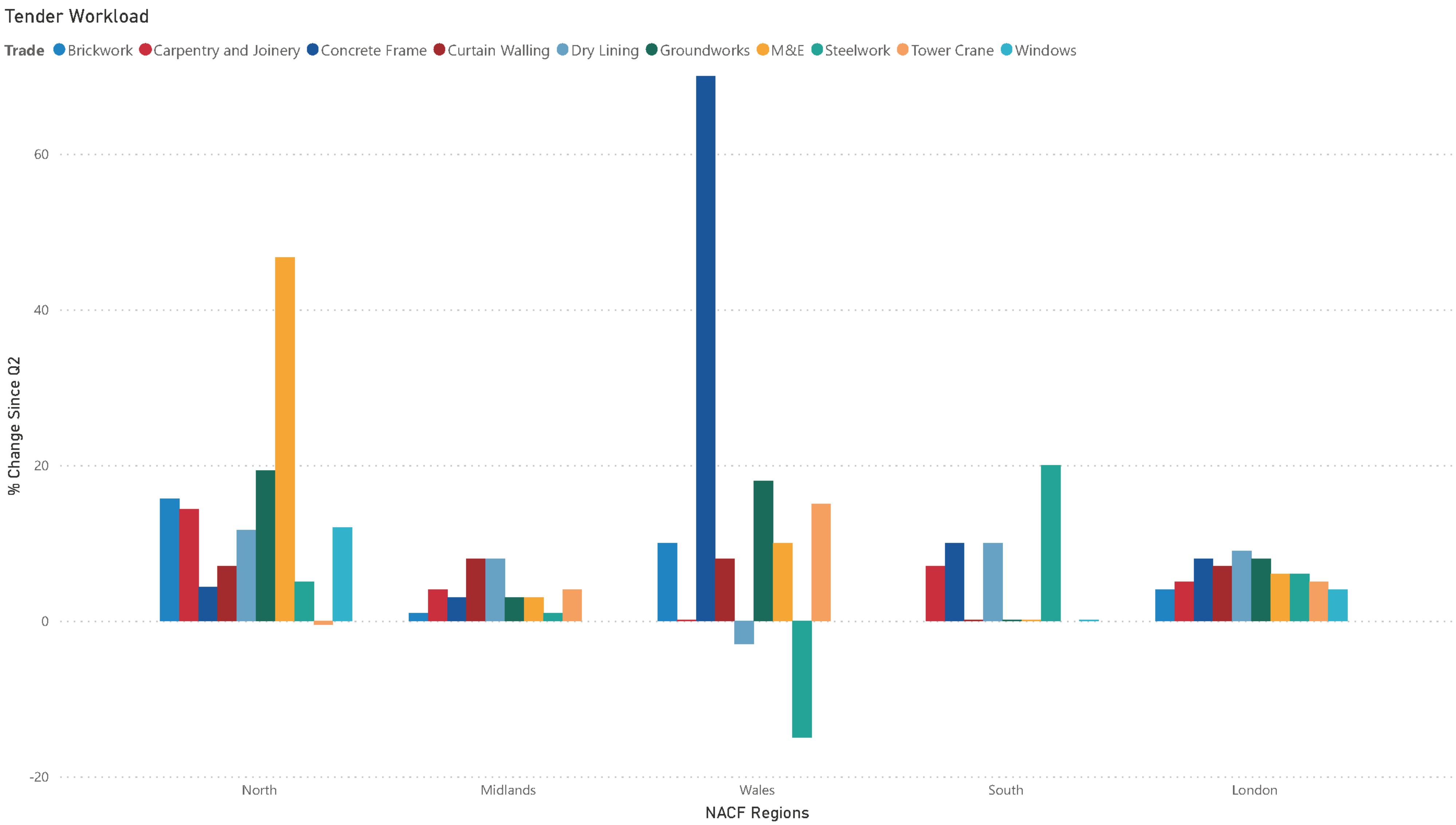
See forecast for Employment

Building Cost



Material & Labour Availability





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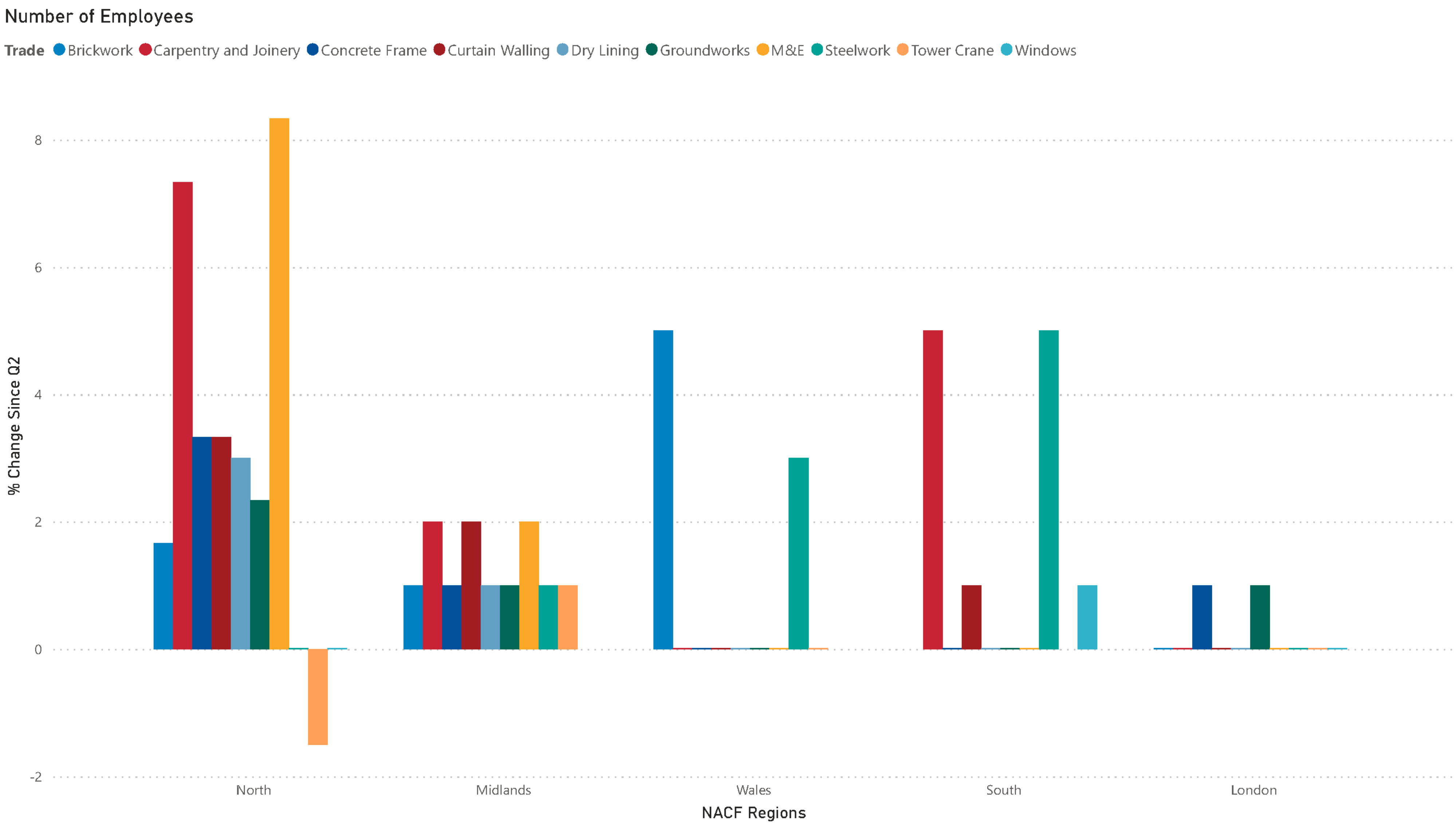

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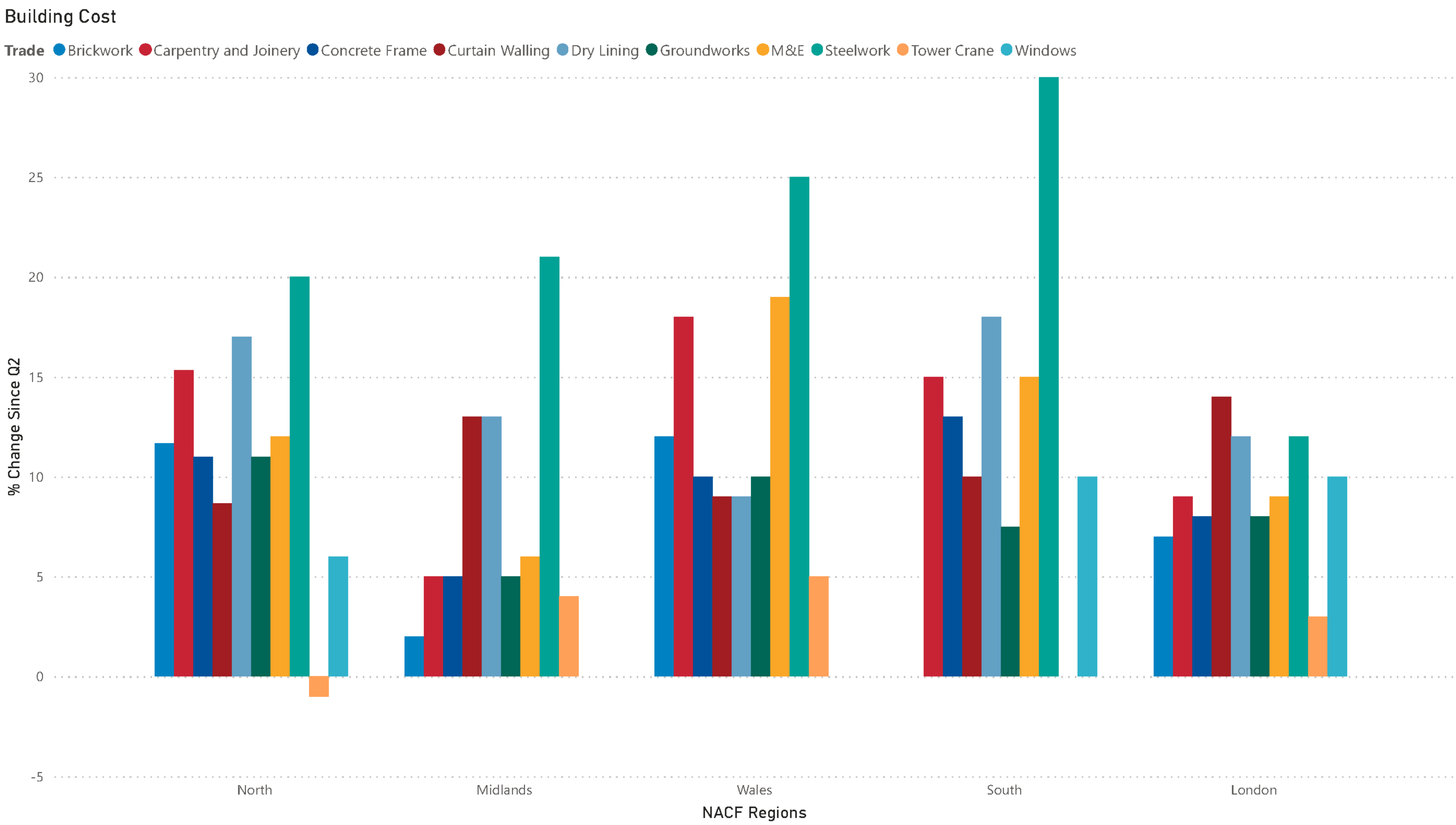

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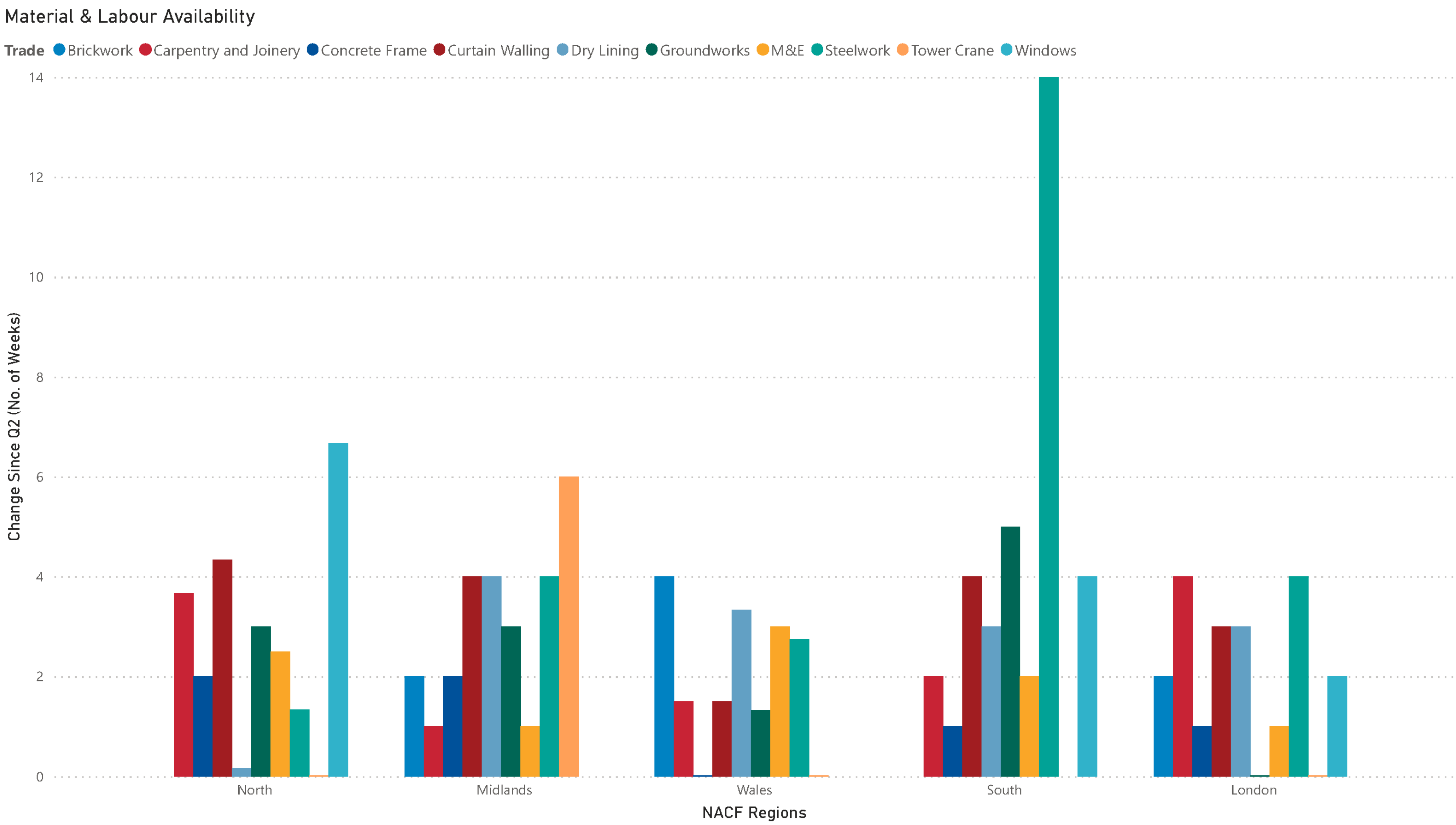

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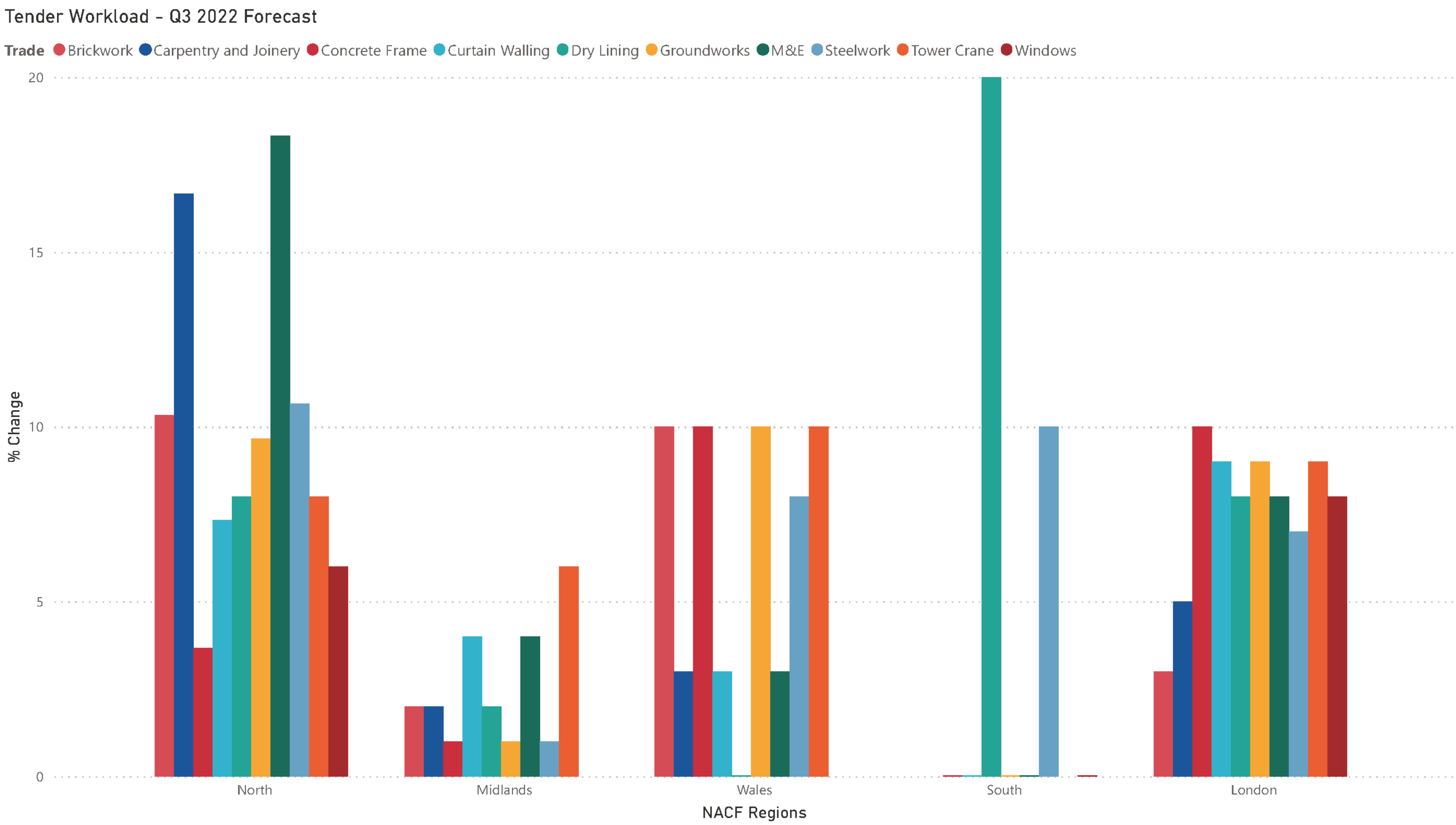

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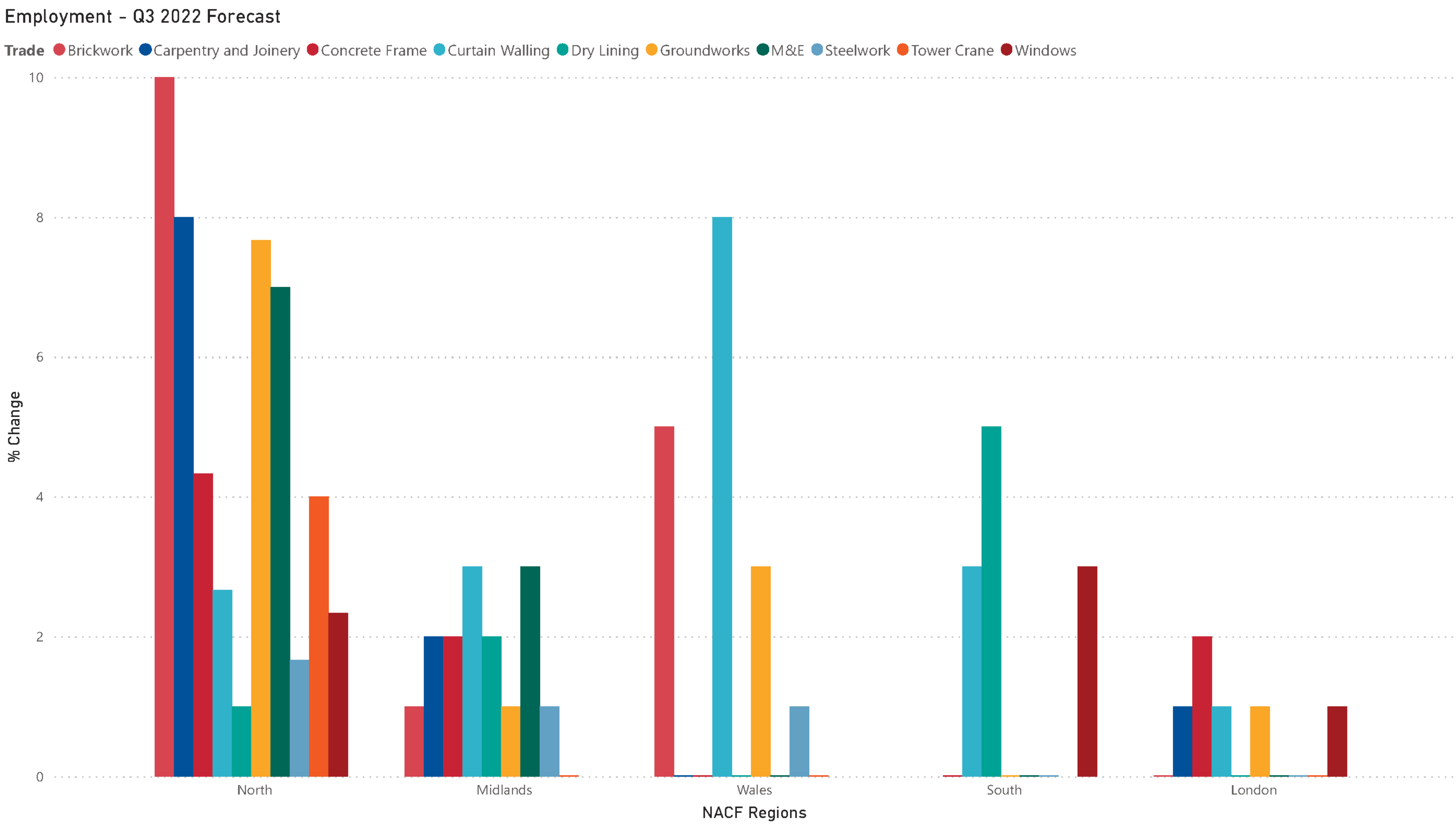

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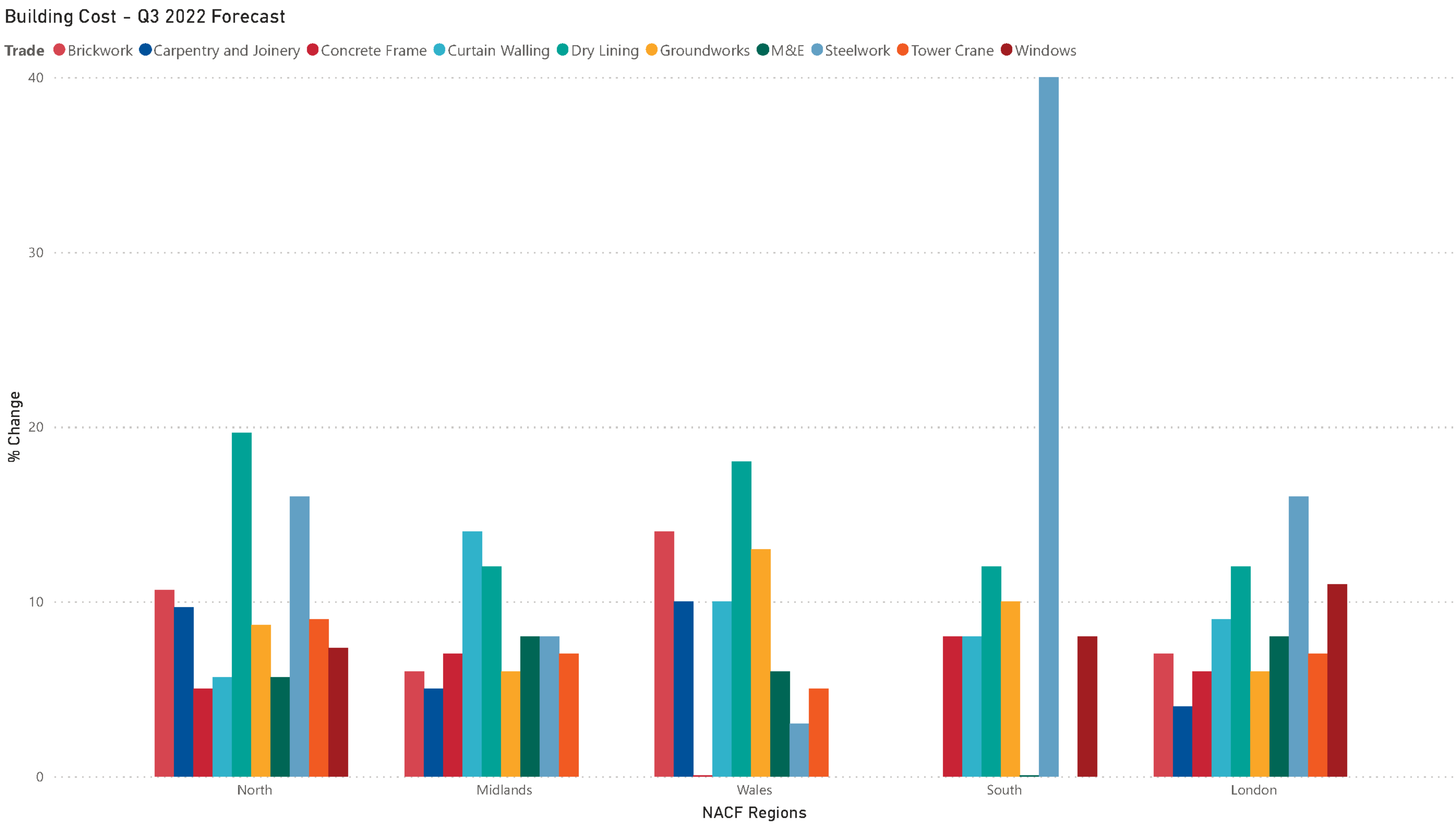

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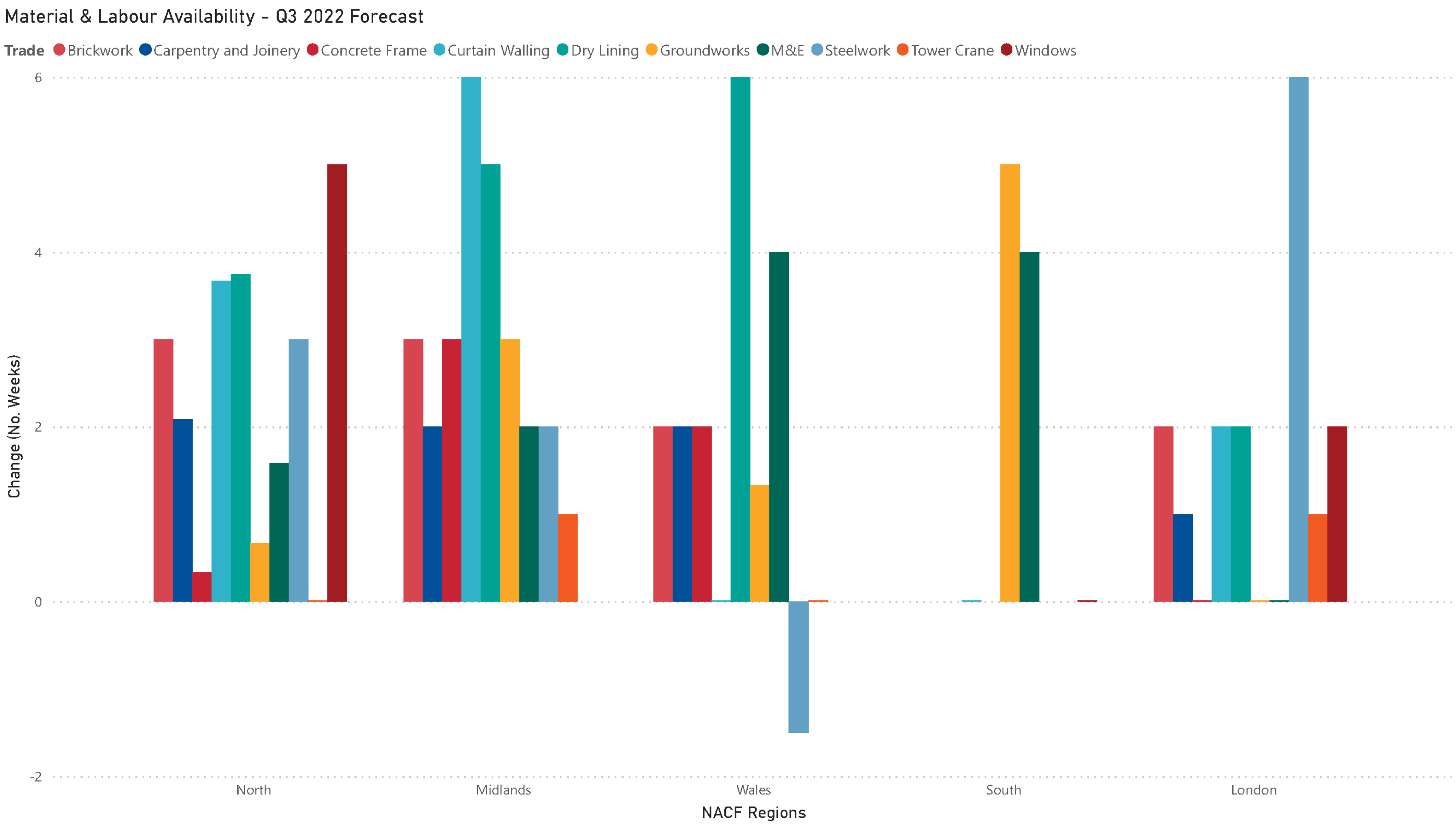

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