National Association Construction Frameworks

By the public sector,
For the public sector

NACF Market Intelligence Report
Q1 2022

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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 2021: Overview

Tender Workload

Average increase in tender workload across all regions	+6%
Groundworks	+12%
Steelwork	+10%
M&E	+8%
Windows	+6%

See full data set for Tender Workload

Building Cost

Average increase in building cost across	+13%
Windows	+19%
Steelwork	+18%
Dry Lining	+13%
Groundworks	+13%

See full data set for Building Cost

Material and Labour Availability

Average increase in lead time	+1 week
Brickwork	+2weeks
M&E	+2 weeks
Dry Lining	+2 weeks

See full data set for Material Availability

Employment

Average increase in employment	+1%
Groundwork	+5%
Curtain Walling	+2%
Dry Lining	+2%

See full data set for Employment

Comparison to Q4 2021

South

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

- +15% increase for M&E
- +10% increase for Groundworks
- +6% increase for Windows

Building Cost
Average increase in building cost was +18% *(5% greater than national average)*

- +30% increase for Windows
- +26% increase for Concrete Frame
- 25% increase for Steelwork

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

- +6 week lead time increase for M&E
- +4 week lead time increase for Dry Lining

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

- +2% increase for Curtain Walling
- +2% increase for M&E

Wales

Tender Workload
A +7% increase in tender workload *(1% greater than national average)*

- +30% increase for Steelwork
- +20% increase for Groundwork
- 12% increase for Carpentry & Joinery

Building Cost
The average increase in building cost was +17% *(5% greater than national average)*

- +33% increase for Windows
- +24% increase for Steelwork
- +20% increase for Groundworks

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

- Increase of +5 weeks lead time for Concrete Frame
- Increase of +3 week lead time for Brickwork

Employment
A -1% decrease in employment *(2% less than national average)*

- +1% increase for Curtain Walling
- -3% decrease for Groundworks
- -5% decrease in Brickwork

Midlands

Tender Workload
A +7% increase in tender workload *(1% greater than national average)*

- +21% increase for Steelwork
- +15% increase for M&E
- +15% increase in Brickwork

Building Cost
A +12% increase in Building cost *(1% less than national average)*

- +22% increase for Steelwork
- +17% increase for Brickwork
- +13% increase for Curtain Walling

Material Availability
Lead time increased by +1 weeks *(equal to national average)*

- Increase of +4 weeks lead time for Brickwork
- Increase of +3 weeks lead time for Dry Lining

Employment
+2% increase in employment *(1% more than national average)*

- +7% increase for Groundworks
- +3% increase for Dry Lining
- +3% increase for Curtain Walling

North

Tender Workload
No change in tender workload (6% less than national average)

- No change in trades

Building Cost
A +5% increase in building cost *(8% less than national average)*

- +10% increase for Steelwork
- +9% increase for Brickwork
- +7% increase for Concrete Frame

Material Availability
No change in lead time (1 week less than national average)

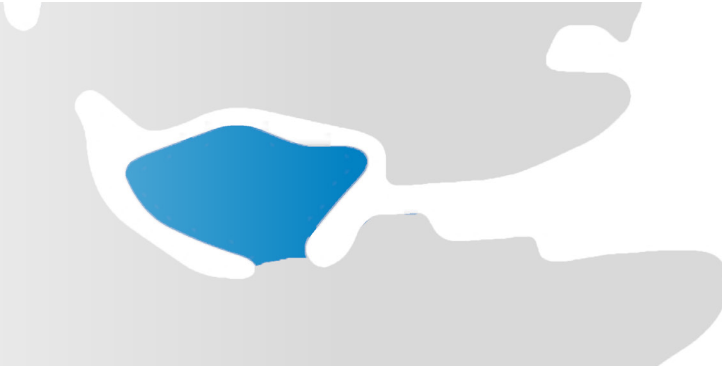
- No change in trades

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

- No change in trades

Comparison to Q4 2021

London



Tender Workload

A +8% increase in tender workload *(2% greater than national area)*

- +15% increase for Groundworks
- +11% increase for Dry Lining
- +10% increase for Windows

Building Cost

A +12% increase in Building cost *(1% less than national average)*

- +19% increase for Dry Lining
- +14% increase for Windows
- +14% increase for Curtain Walling
- +14% increase for Steelwork

Material Availability

Lead time increased by +1 week (same as national average)

- +3 week increase for Carpentry & Joinery
- +2 week increase for Concrete Frame
- +2 week increase for Windows

Employment

A +3% increase in employment (2% more than national average)

- +13% increase for Groundworks
- +3% increase for Dry Lining
- +3% increase for Curtain Walling
- +3% increase for Windows

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United in our commitment to deliver value for the public sector

National Forecast Q1 2023: Overview

Tender Workload

Average forecast in tender workload **+5%**

Groundworks **+12%**

M&E **+7%**

Curtain Walling **+6%**

Steelwork **+5%**

Building Cost

Average increase in building cost across **+17%**

Windows **+32%**

Concrete Frame **+18%**

Groundworks **+17%**

Brickwork **+9%**

Material Availability

Average forecast in material and regions **+3 week**

Brickwork **+9 weeks**

M&E **+4 weeks**

Concrete Frame **+3 weeks**

Employment

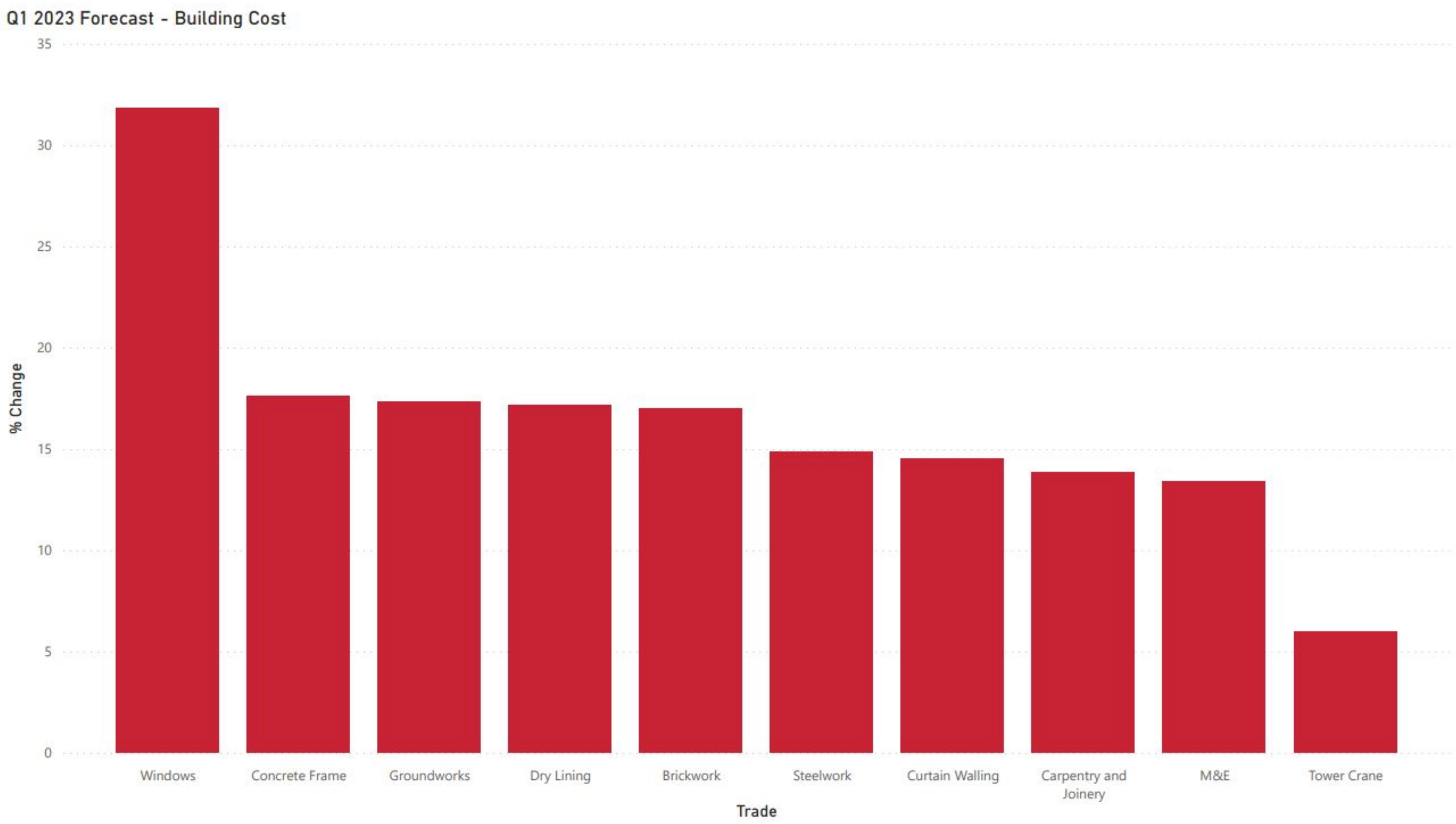
Average increase in employment across all regions **+2%**

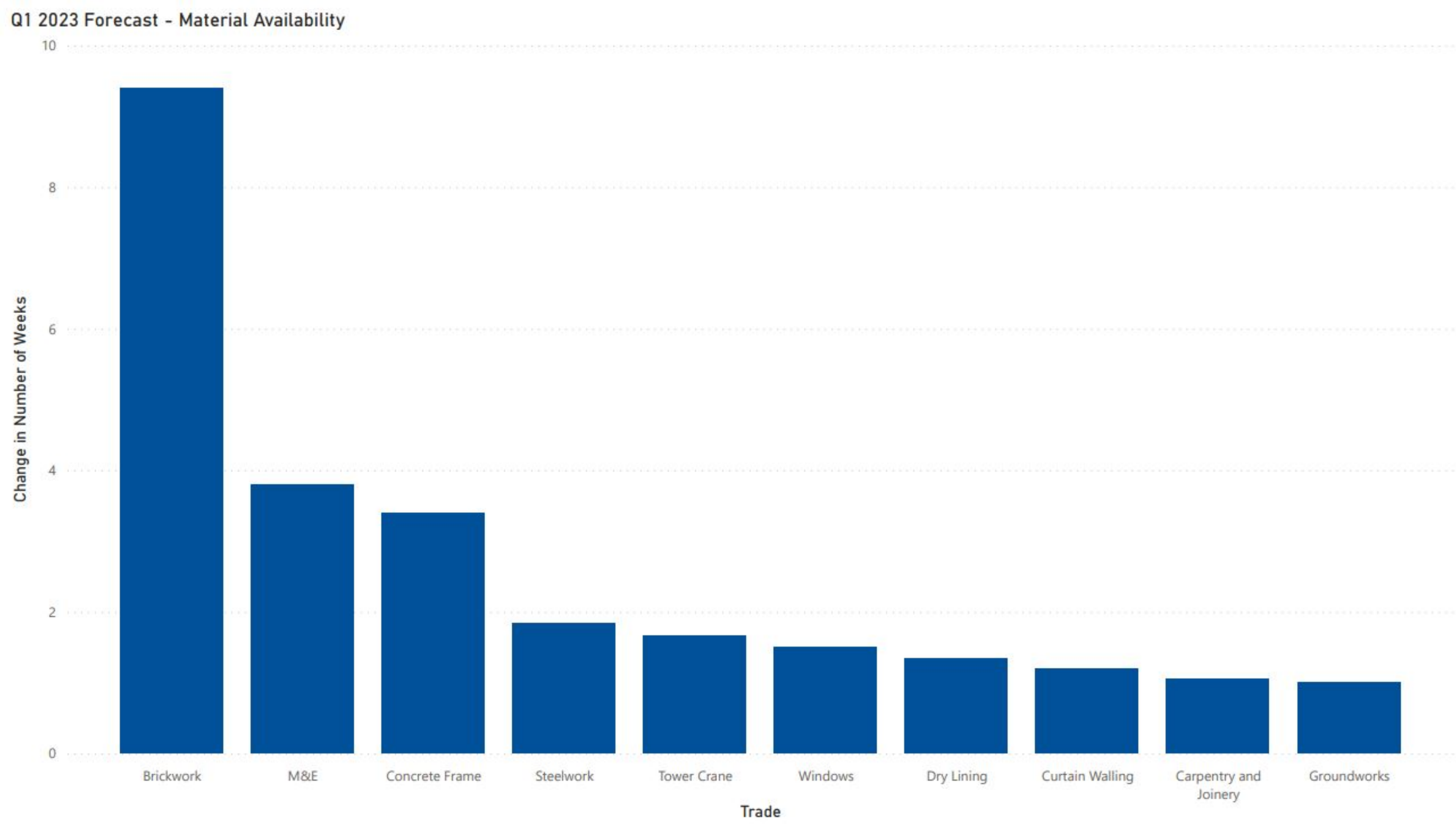
Curtain Walling **+4%**

M&E **+4%**

Steelwork **+4%**

Groundworks **+4%**





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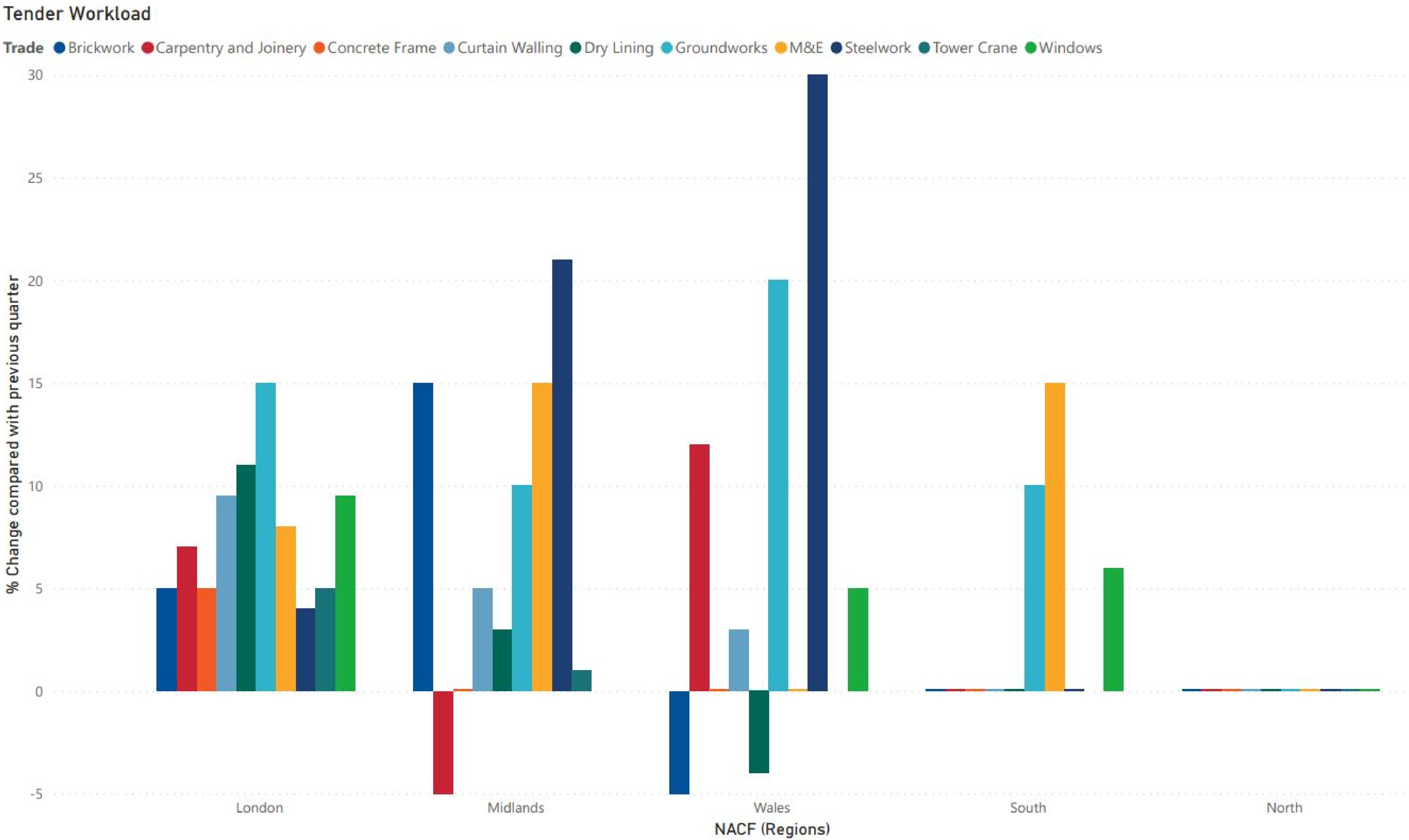

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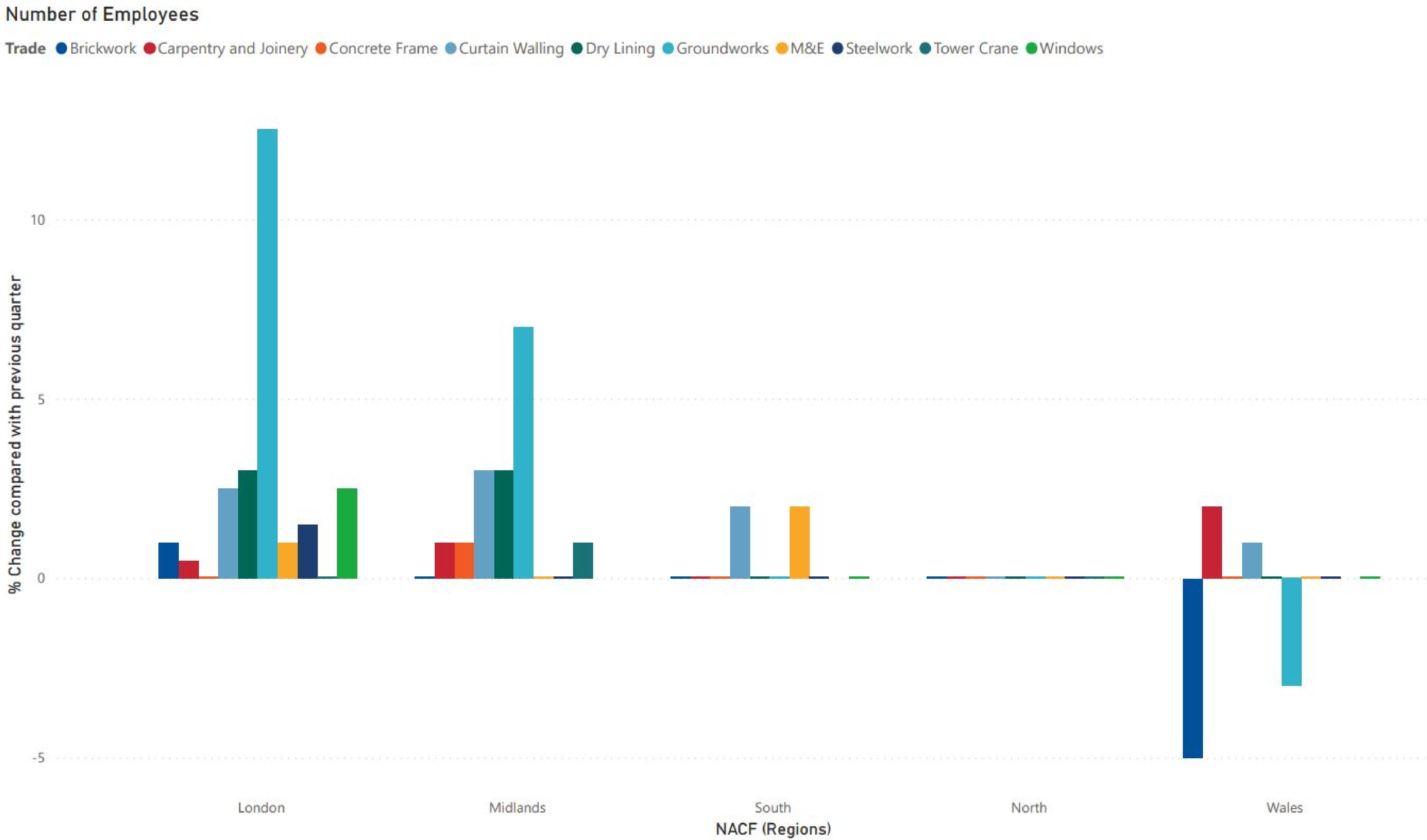

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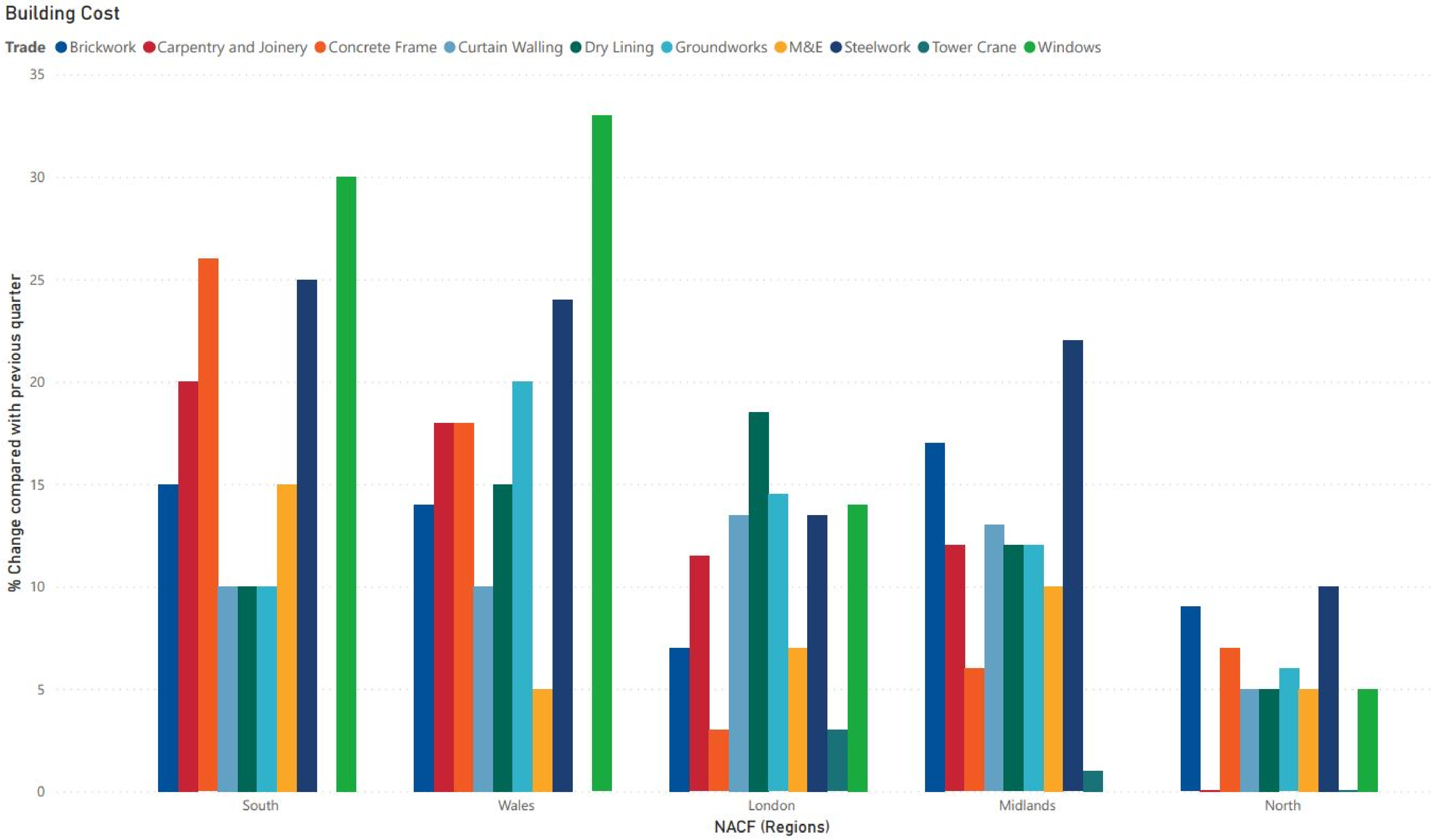

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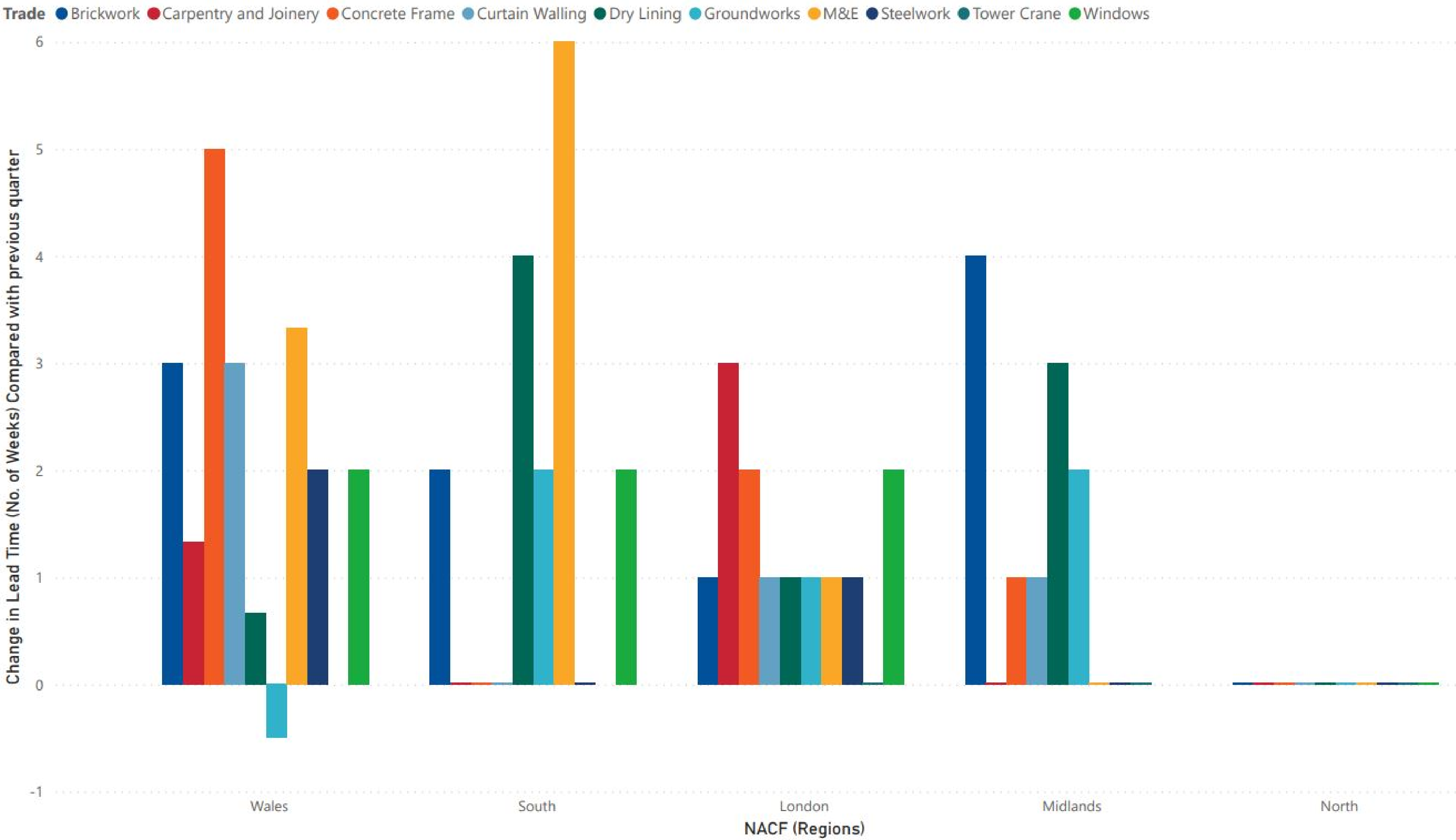
Material Availability



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