National Association Construction Frameworks

By the public sector, For the public sector

NACF Market Intelligence Report
Q2 2022

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North West Construction Hub · London Construction Programme · MHA Midlands Highway Alliance Plus · sewscap · nepo Construction · CWM Constructing West Midlands · SCAPE · Partneriaeth Adeiladu Gogledd Cymru North Wales Construction Partnership · Fframwaith Contractwyr Rhanbarthol De-Orllewin Cymru South West Wales Regional Contractors Framework · YORhub · scf Shaping public construction

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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 Q1 2022: Overview

Tender Workload

Average increase in tender workload across all regions	+5%
Concrete Frame	+12%
M&E	+10%
Dry Lining	+8%
Brickwork	+6%

See full data set for Tender Workload

Building Cost

Average increase in building cost across	+11%
Steelwork	+24%
Dry Lining	+15%
Curtain Walling	+14%
Windows	+13%

See full data set for Building Cost

Material and Labour Availability

Average increase in lead time	+1 week
M&E	+2weeks
Tower Crane	+2 weeks
Concrete Frame	+2 weeks

See full data set for Material Availability

Employment

Average increase in employment	+1%
Windows	+4%
M&E	+3%
Groundworks	+2%

See full data set for Employment

Comparison to Q1 2022

South

Tender Workload
A +11% increase in tender workload *(+6% greater than national average)*

- +50% increase for Concrete Frame
- +20% increase for Brickwork
- +15% increase for M&E

Building Cost
Average increase in building cost was+16% *(+5% greater than national average)*

- +50% increase for Steelwork
- +20% increase for Brickwork
- +15% increase for M&E

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

- +5 week lead time increase for M&E
- +1 week lead time increase for M&E
- -2 week decrease for Curtain Walling

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

- +5% increase for Curtain Walling
- +5% increase for Windows

Wales

Tender Workload
No change in tender workload (-5% less than national average)

- +8% increase for Groundworks
- +5% increase for Brickwork
- -10% for Steelwork

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

- +33% increase for Steelwork
- +18% increase for Dry Lining
- 9% 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 Dry Lining

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

- +6% increase for Groundworks
- +3% increase for M&E
- -3% decrease in Brickwork

Midlands

Tender Workload
A +4% increase in tender workload *(-1% less than national average)*

- +17% increase for Dry Lining
- +17% increase for M&E
- +5% increase in Brickwork

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

- +22% increase for Steelwork
- +16% increase for M&E
- +10% increase for Brickwork

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

- Increase of +5 weeks lead time for M&E
- Increase of +5 weeks lead time for Tower crane
- Increase of +3 weeks for Groundwork

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

- +9% increase for M&E
- +8% increase for Dry Lining
- +1% increase for Brickwork, Curtain Walling & Steelwork

North

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

- +10% increase for M&E
- +8% increase for Groundworks
- +5% increase for Dry Lining

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

- +20% increase for Curtain Walling
- +13% increase for Windows
- +12% increase for M&E

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

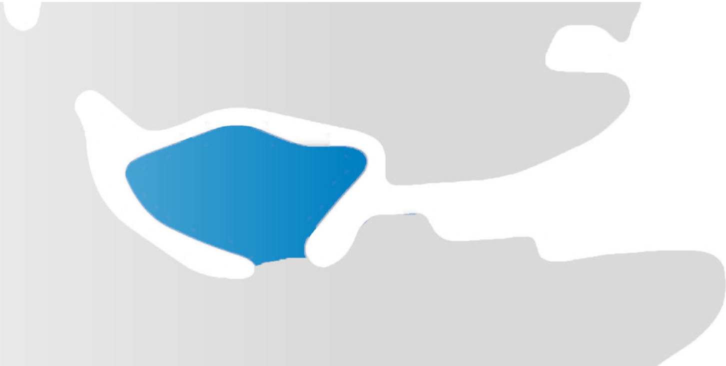
- Increase of +3 weeks in Curtain Walling
- Increase of +1 week in M&E
- Increase of +1 week in Groundworks

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

- +5% increase in Windows
- +4% increase in Groundworks
- + 1% increase in Curtain Walling

Comparison to Q1 2022

London



Tender Workload

A +8% increase in tender workload *(+3% greater than national area)*

- +11% increase for Dry Lining
- +10% increase for Windows
- +10% increase for Curtain Walling
- +9% increase for Steelwork

Building Cost

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

- +18% increase for Dry Lining
- +16% increase for Curtain Walling
- +15% increase for Steelwork
- +15% increase for Windows

Material Availability

Lead time increased by +1 week (equal to national average)

- +3 weeks increase for Carpentry & Joinery
- +3 weeks increase for Dry Lining
- +2 weeks increase for M&E

Employment

A +2% increase in employment (+1% greater than national average)

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

National Association Construction Frameworks

United in our commitment to deliver value for the public sector

National Forecast Q2 2023: Overview

Tender Workload

Average forecast in tender workload **+4%**

Curtain Walling **+10%**

Concrete Frame **+7%**

M&E **+7%**

Windows **+6%**

Building Cost

Average forecast in building cost **+10%**

Dry Lining **+14%**

Curtain Walling **+13%**

Windows **+11%**

Groundworks **+11%**

Material Lead Time

Average forecast in material lead time **+1 week**

Concrete Frame **+3 weeks**

M&E **+2 weeks**

Groundworks **+2 weeks**

Curtain Walling **+2 weeks**

Employment

Average forecast in employment **+2%**

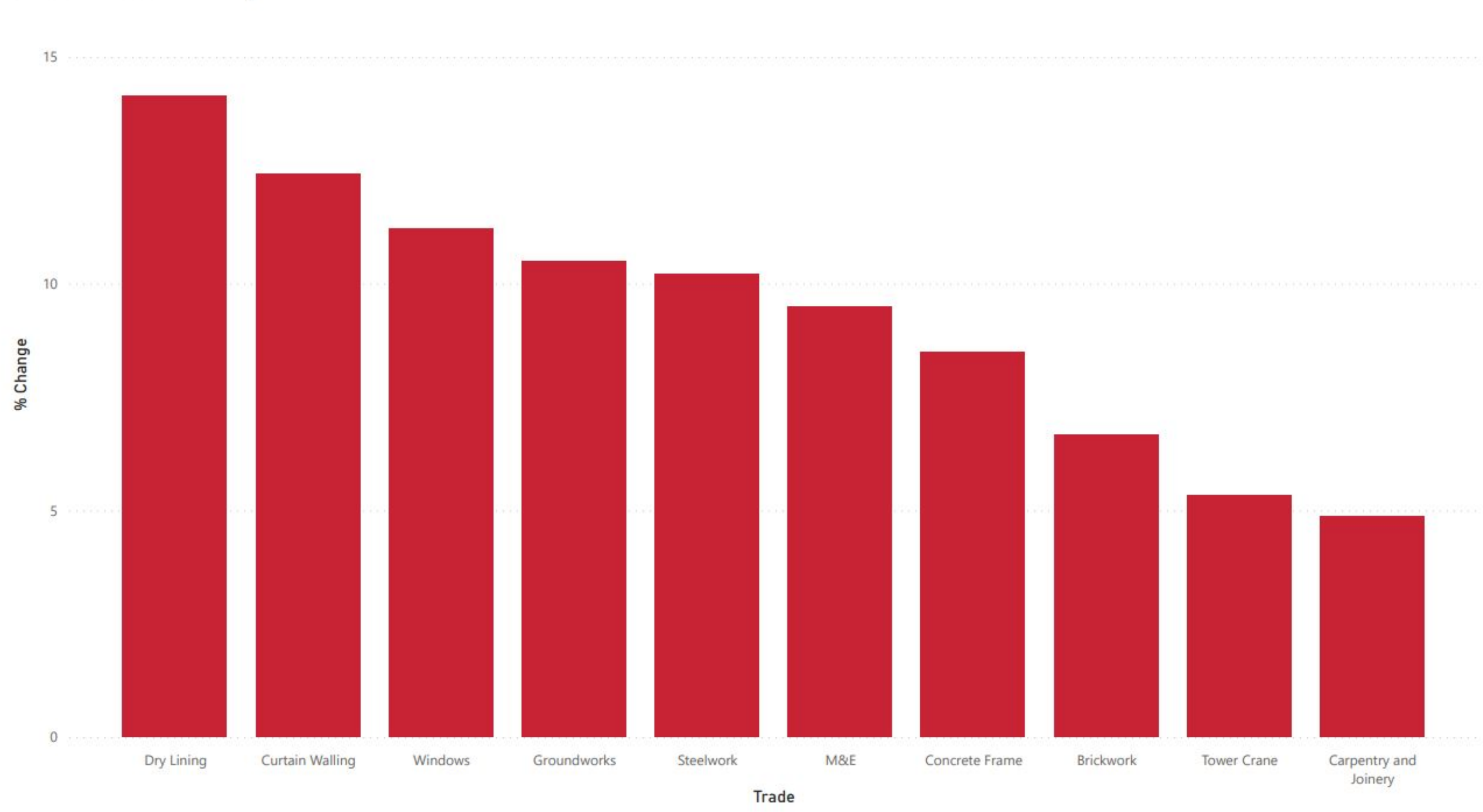
M&E **+5%**

Concrete Frame **+5%**

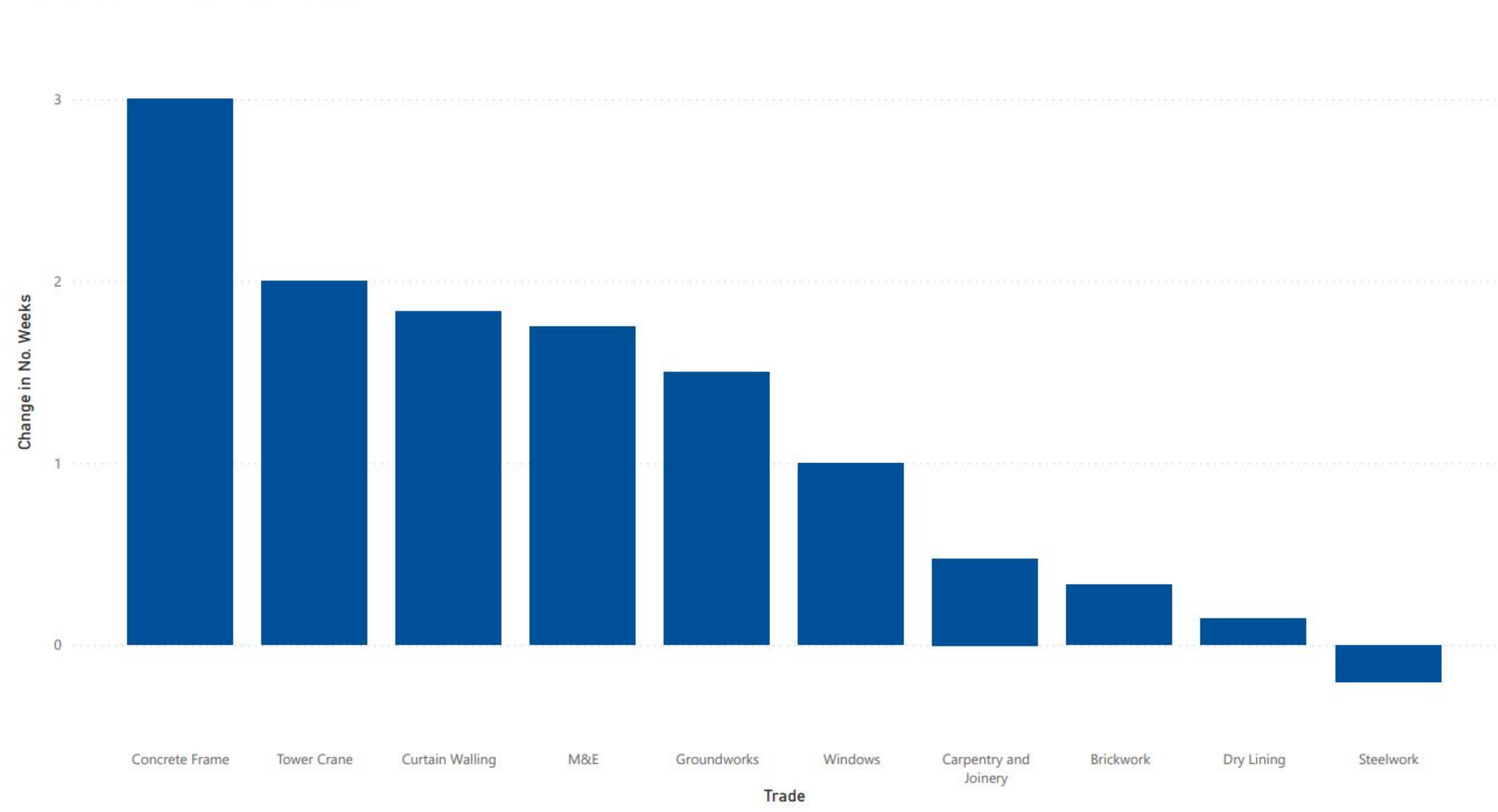
Groundworks **+3%**

Windows **+2%**

Q2 2023 Forecast - Building Cost



Q2 2023 Forecast - Material Lead Time



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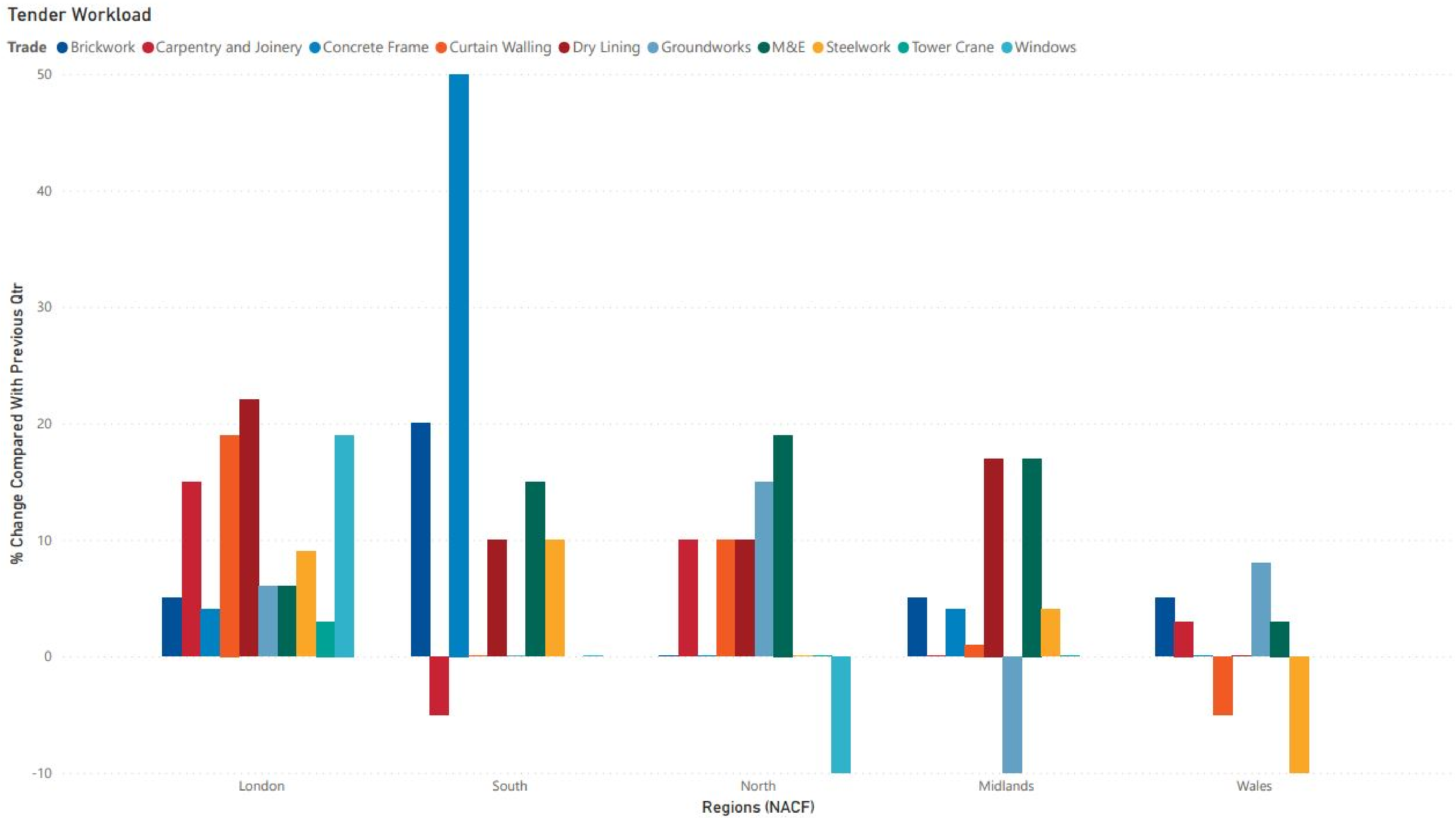

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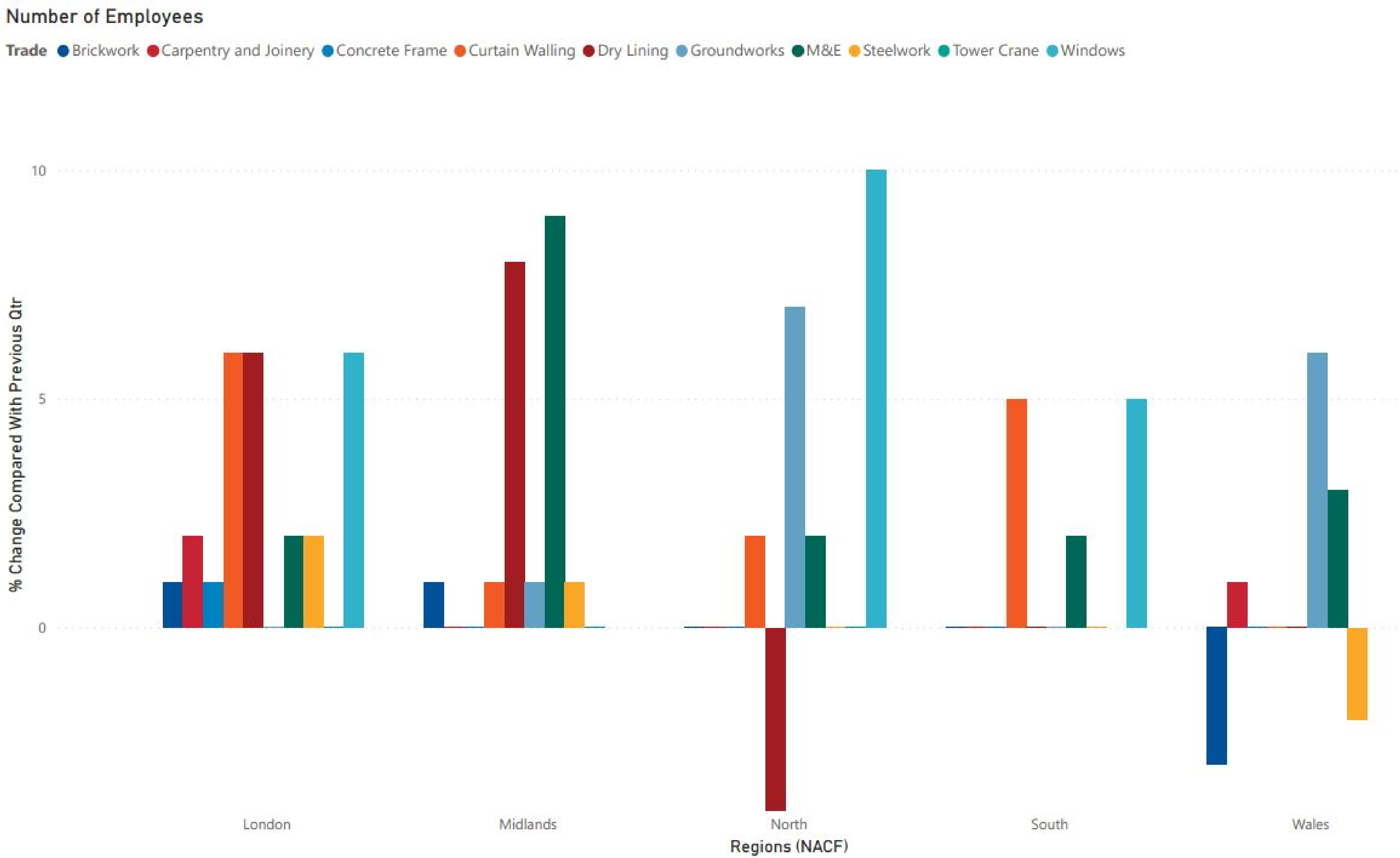

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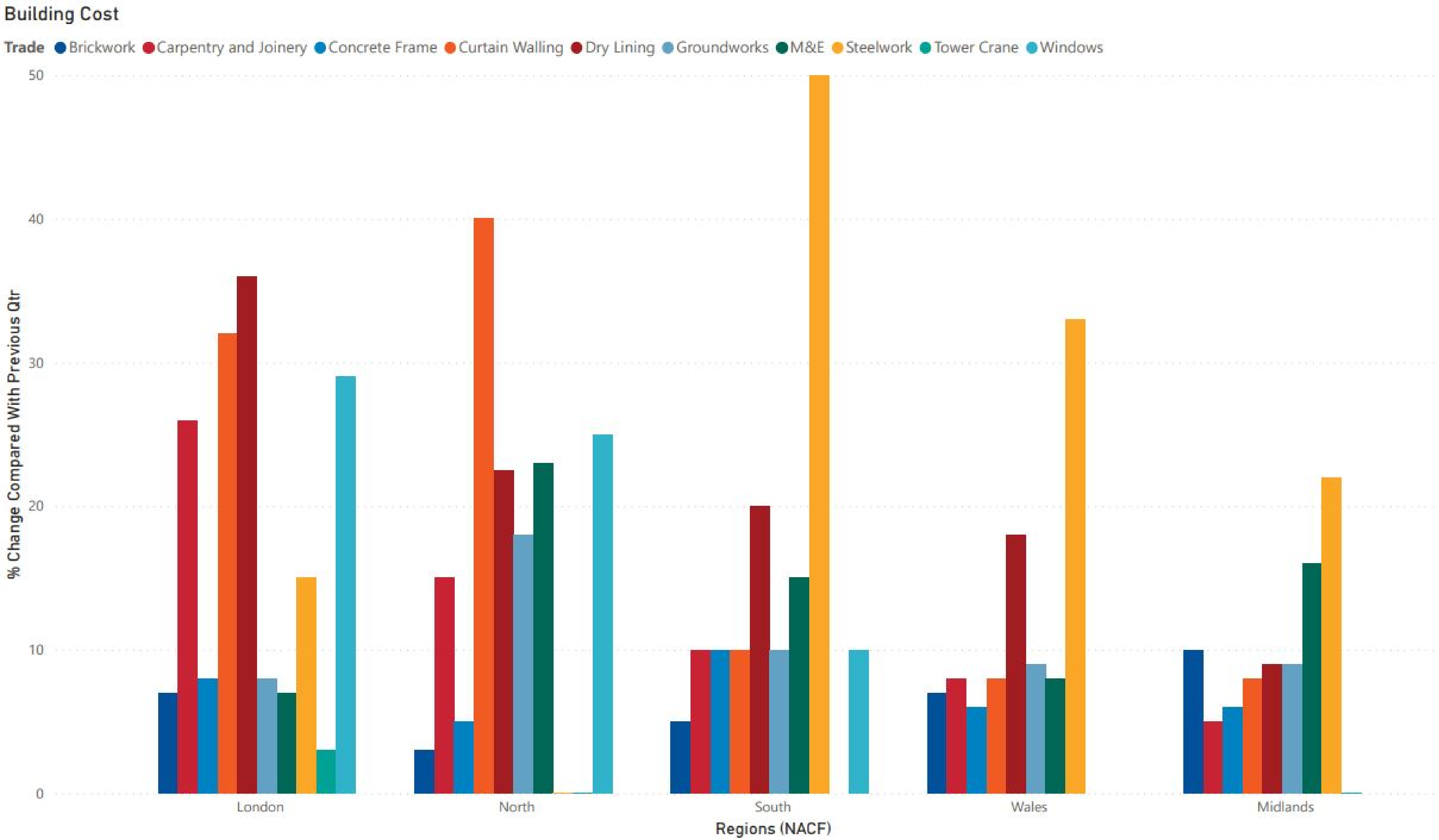

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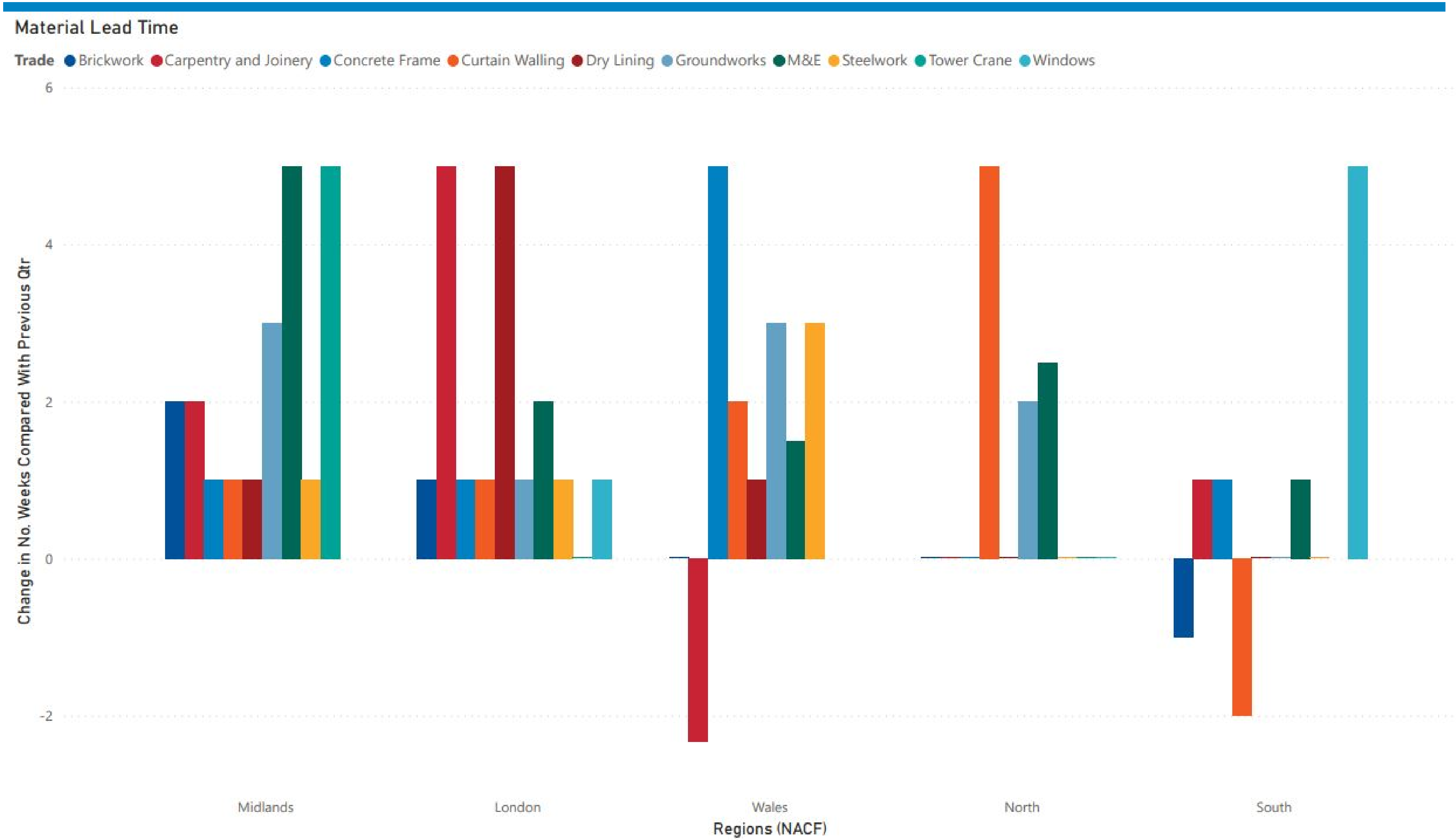

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