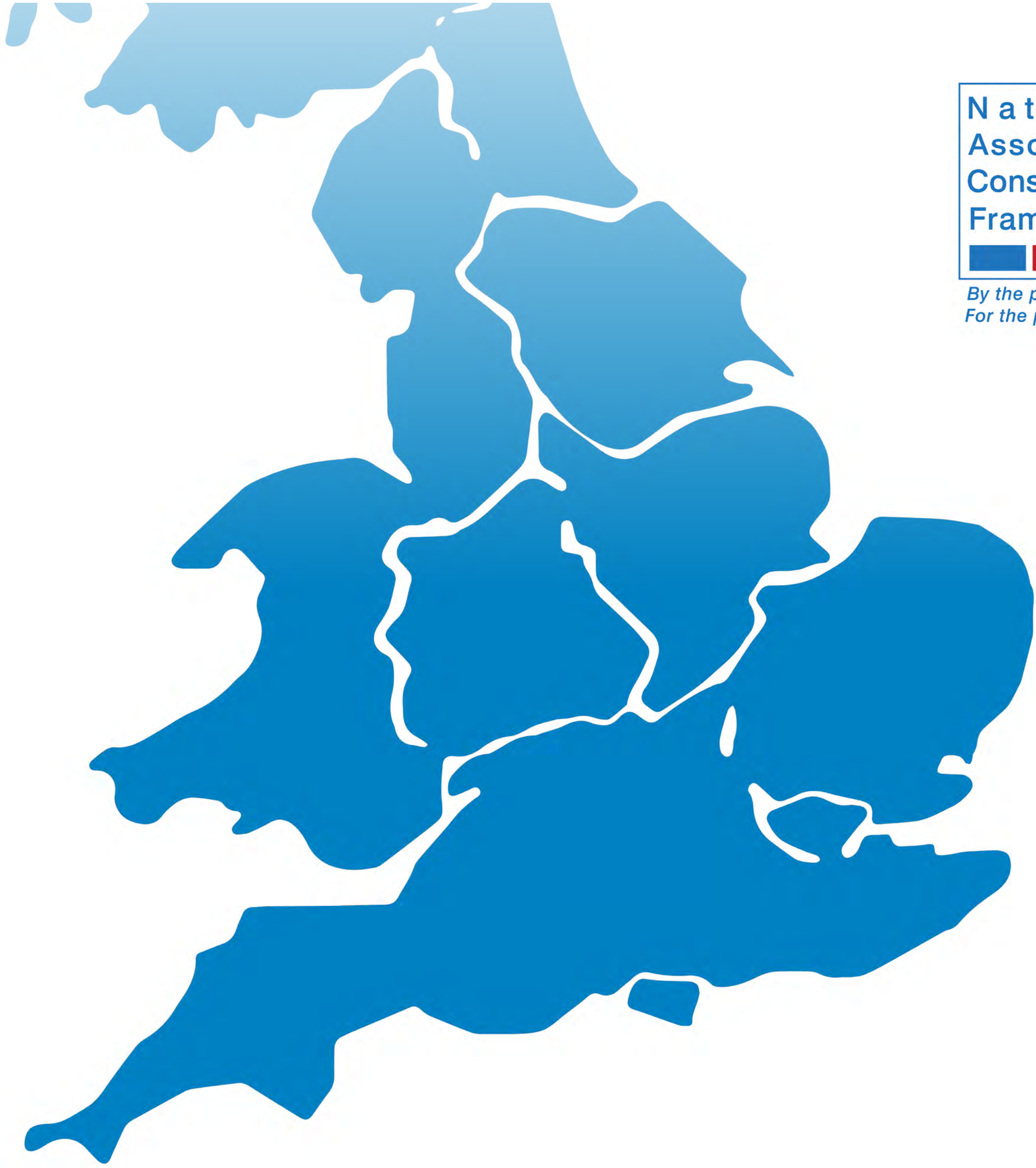
National Association Construction Frameworks

By the public sector, For the public sector

NACF Market Intelligence Q3 2022



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 2022: Overview

Tender Workload

Average increase in tender workload across all regions	3%
Increase for Carpentry and Joinery	8%
Increase for M&E	8%
Increase for Dry Lining	6%
Increase for Brickwork	4%

See full data set for Tender Workload

Building Cost

Average increase in building cost across all regions	10%
Increase for Windows	15%
Increase for Dry Lining	15%
Increase for Steelwork	11%
Increase for Brickwork	10%

See full data set for Building Cost

Material Availability

Average increase in material lead time across all regions	2 weeks
Increase of weeks for steelwork	4 weeks
Increase of weeks for Groundworks and Brickwork	3 weeks
Increase of weeks for Curtain Walling	2 weeks

See full data set for Material Availability

Employment

Average increase in employment across all regions	2%
Increase for Windows	3%
Increase for Brickwork	4%
Increase for Dry Lining	7%
Increase for Carpentry and Joinery	2%

See full data set for Employment

Comparison to Q2 2022

South

Tender Workload
A 2% increase in tender workload *(1% less than national average)*.

- 12% increase for M&E
- 6% increase for Carpentry & Joinery
- 5% increase for Tower Crane
- 4% decrease for Concrete Frame

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

- 16% increase for M&E
- 15% increase for Curtain Walling
- 15% increase for Windows
- 12% increase for Dry Lining

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

- 2 week lead time increase for Tower Crane
- 1 week lead time increase for Carpentry & Joinery, Curtain Walling and Windows

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

- 5% increase for Curtain Walling and Windows
- 2% increase for Concrete Frame
- 1% increase for Groundworks

Wales

Tender Workload
A 1% decrease in tender workload *(4% less than national average)*.

- 5% increase for Brickwork
- 3% increase for M&E
- 3% increase for Concrete Frame
- 12% decrease for Dry Lining

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

- 32% increase for Dry Lining
- 8% increase for Groudnworks, Steelwork and Brickwork

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

- Increase of 5 weeks lead time for M&E
- Increase of 3 weeks lead time for Concrete Frame
- Increase of 2 weeks for Curtain Walling

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

- 1% increase for Dry Lining

Midlands

Tender Workload
No change in tender workload *(3% less than national average)*

- 8% increase for M&E
- 5% increase for Carpentry and Joinery
- 3% increase for Concrete Frame
- 11% decrease for Steelwork

Building Cost
A 6% increase in building cost *(4% less than national average)*

- 18% increase for Carpentry and Joinery
- 12% increase for Dry Lining
- 9% increase for Curtain Walling and M&E

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

- Increase of 4 weeks for M&E
- Increase of 2 weeks for Curtain Walling and Brickwork
- Decrease of 2 weeks for Carpentry and Joinery

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

- 10% increase for Brickwork and Carpentry and Joinery
- 5% increase for M&E
- 2% increase for Dry Lining

North

Tender Workload
A 6% increase in tender workload (3% greater than national average)

- 17% increase for Dry Lining
- 13% increase for Carpentry and Joinery
- 7% increase for Brickwork and M&E

Building Cost
A 11% increase in building cost*(1% greater than national average)*

- 18% increase for Windows
- 17% increase for Brickwork
- 15% increase for Dry Lining
- 14% increase for Steelwork

Material Availability
Lead time increased by 5 weeks (3 weeks greater than national average)

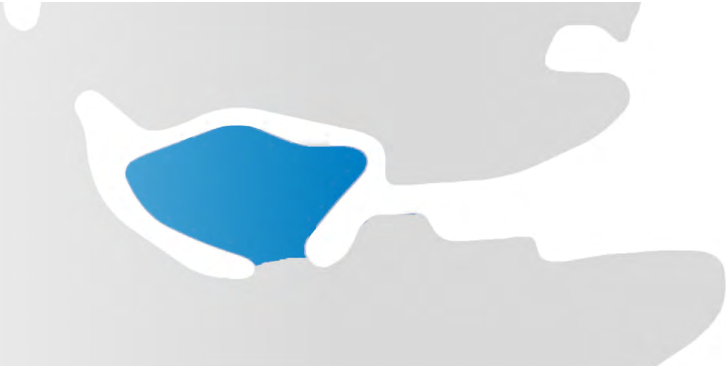
- 13 week lead time increase for Steelwork
- 8 week lead time increase for Groundwork
- 6 week lead time increase for Brickwork
- 4 week lead time increase for Concrete Frame

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

- 18% increase for Dry Lining
- 6% increase for Brickwork
- 3% increase for Steelwork
- 3% increase for Steelwork

Comparison to Q2 2022

London



Tender Workload

A 6% increase in tender workload *(3% greater than national average)*

- 10% increase for Curtain Walling
- 6% increase for Groundworks, M&E and Carpentry and Joinery

Building Cost

A 9% increase in Building cost *(1% less than national average)*

- 14% increase for Steelwork
- 12% increase for Carpentry and Joinery
- 11% increase for Curtain Walling
- 10% increase for Concrete Frame

Material Availability

A 1 week increase in material lead time *(1 weeks less than national average)*

- *2 week lead time increase for Steelwork*
- *2 week lead time increase for Carpentry and Joinery*

Employment

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

- 1% increase for M&E, Steelwork, Curtain Walling and Brickwork

National Forecast Q3 2023: Overview

Tender Workload

Average **increase** in tender workload across all regions **2%**

Increase for Windows **5%**

Increase for Dry Lining **4%**

Increase for Tower Crane **4%**

Increase for Brickwork **4%**

Building Cost

Average increase in building cost across all regions **9%**

Increase for Windows **13%**

Increase for Dry Lining **10%**

Increase for Curtain Walling **12%**

Increase for Brickwork **10%**

Material Availability

Average increase in material lead time across all regions **2 weeks**

Increase of weeks for Concrete Frame **4 weeks**

Increase of weeks for M&E, Carpentry and Joinery and Windows **2 weeks**

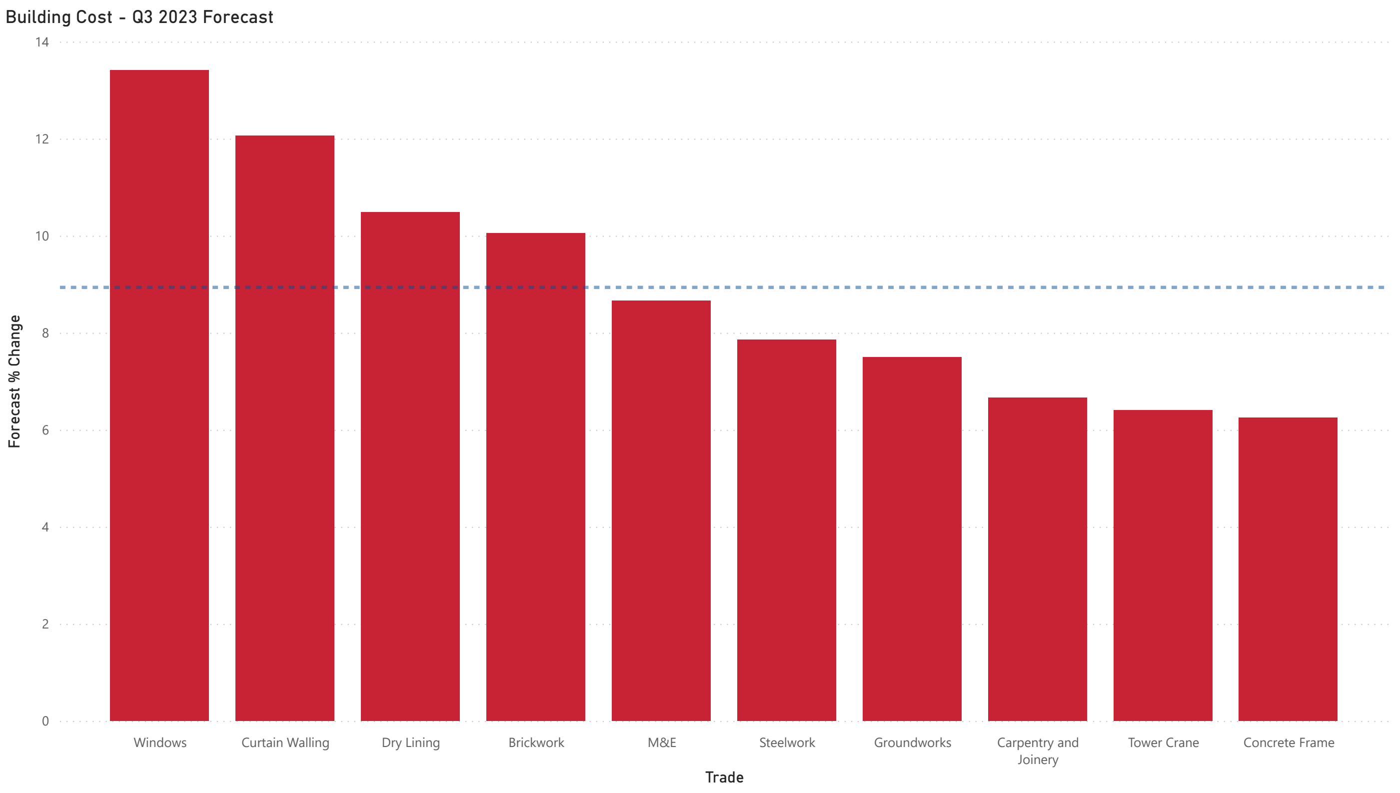
Employment

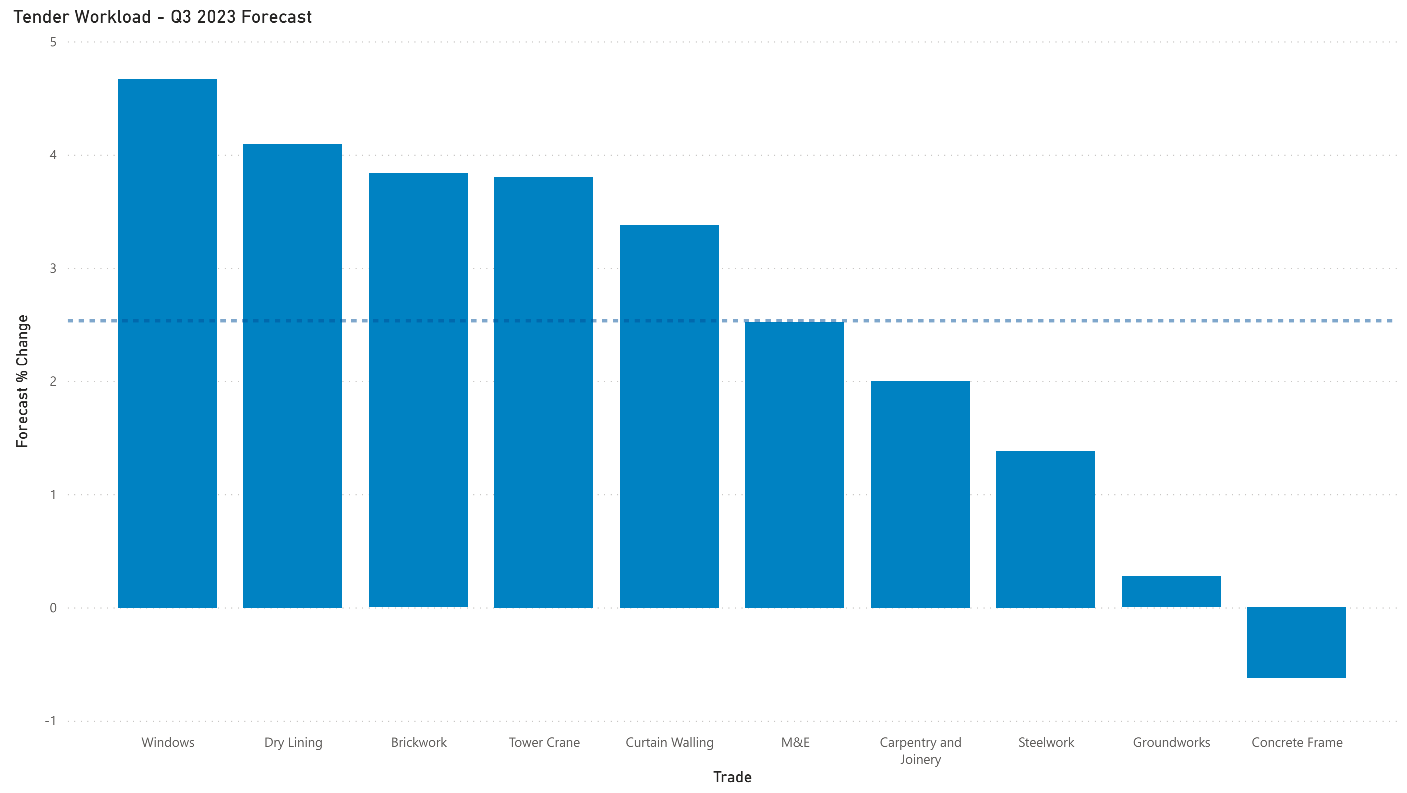
Average increase in employment across all regions **4%**

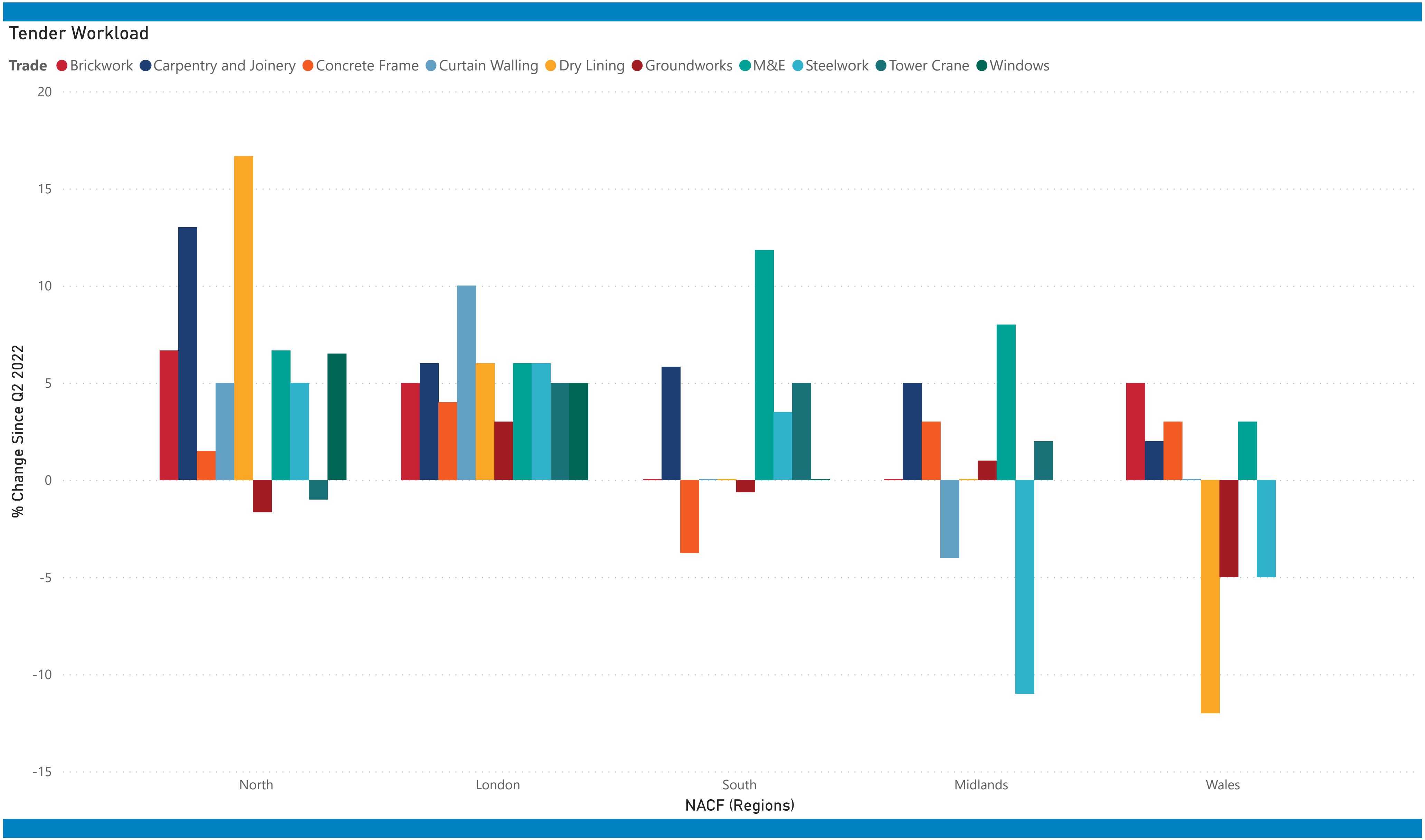
Increase for Dry Lining **10%**

Increase for Curtain Walling **6%**

Increase for Concrete Frame and Steelwork **5%**







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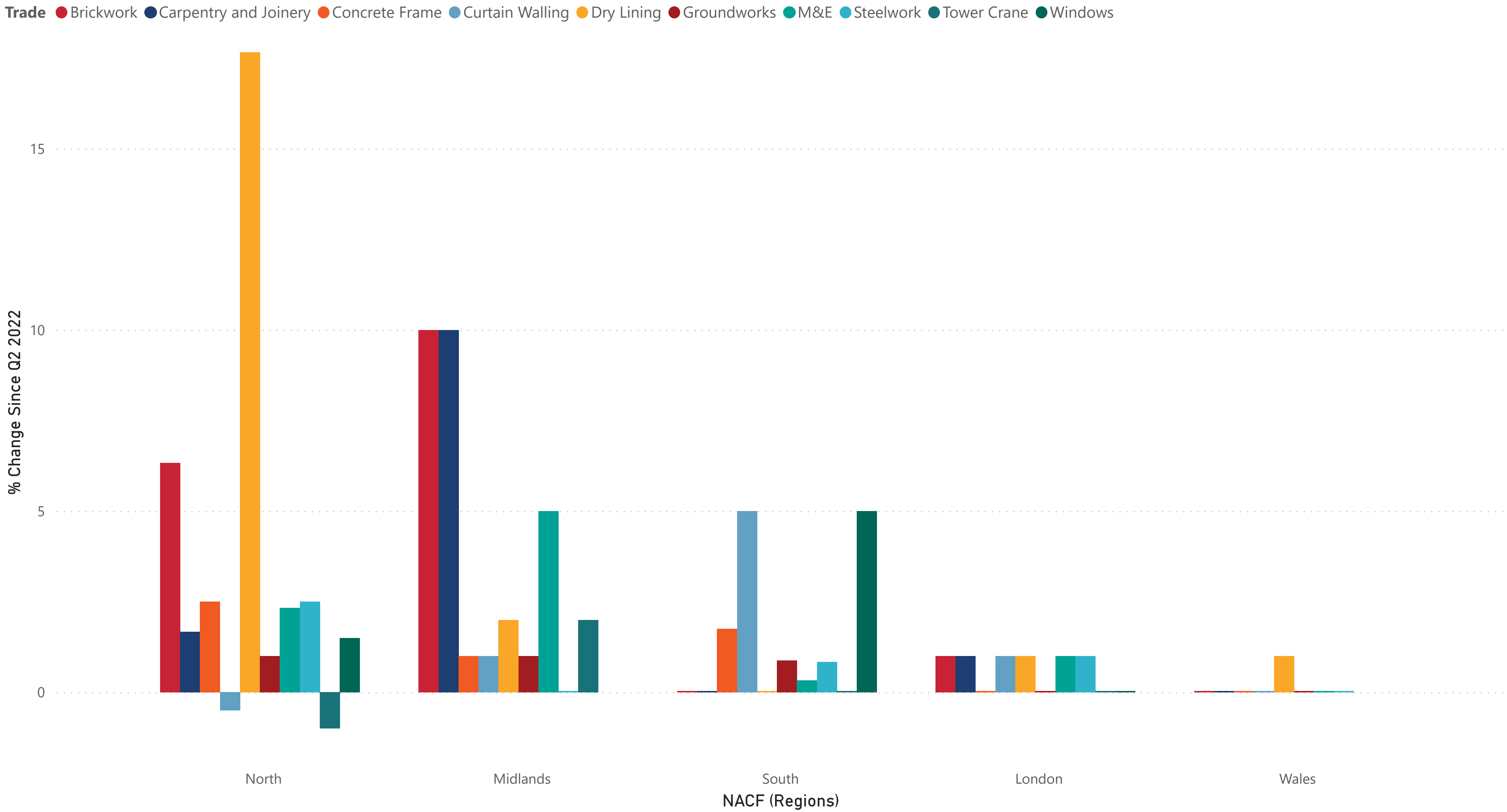
Number of Employees



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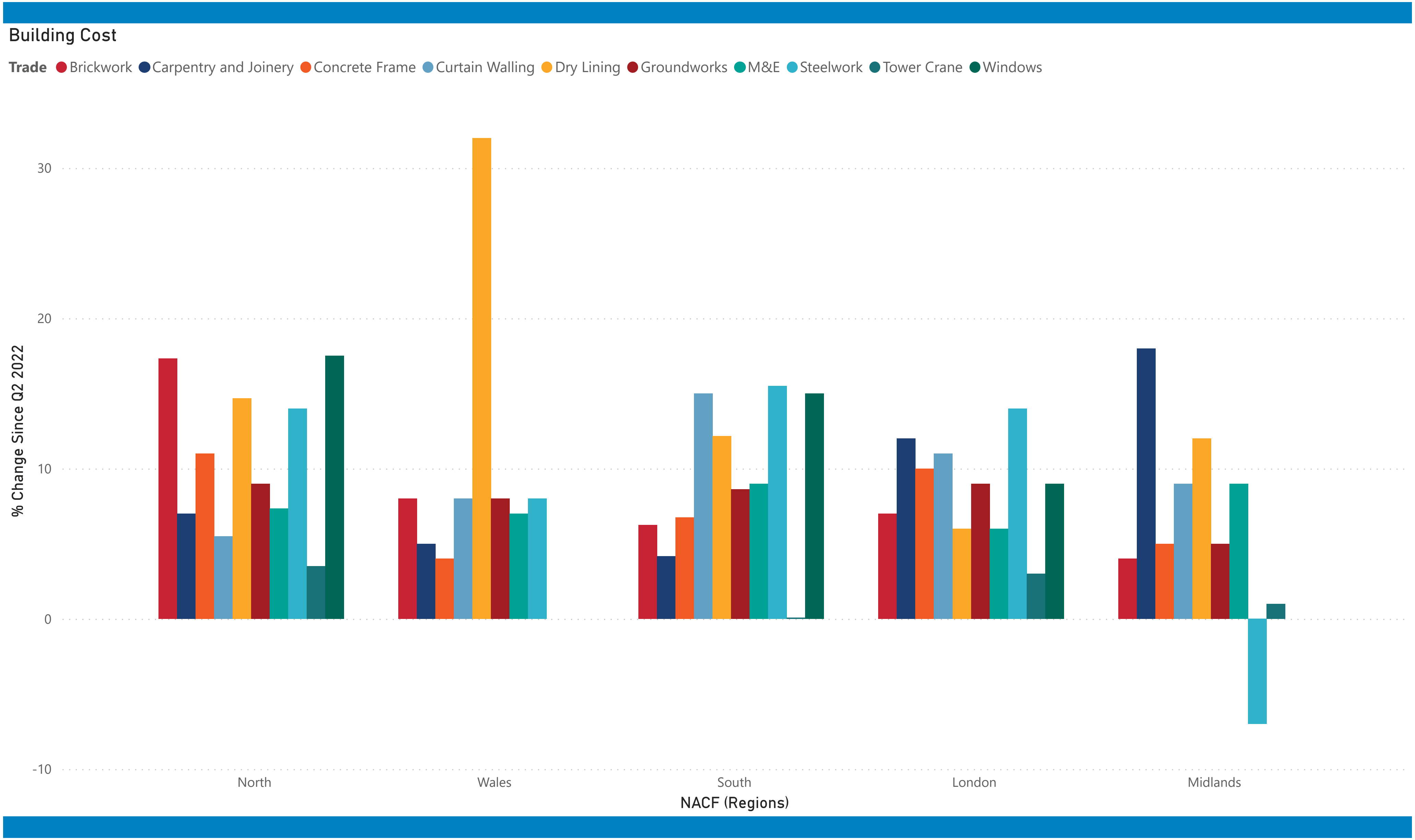

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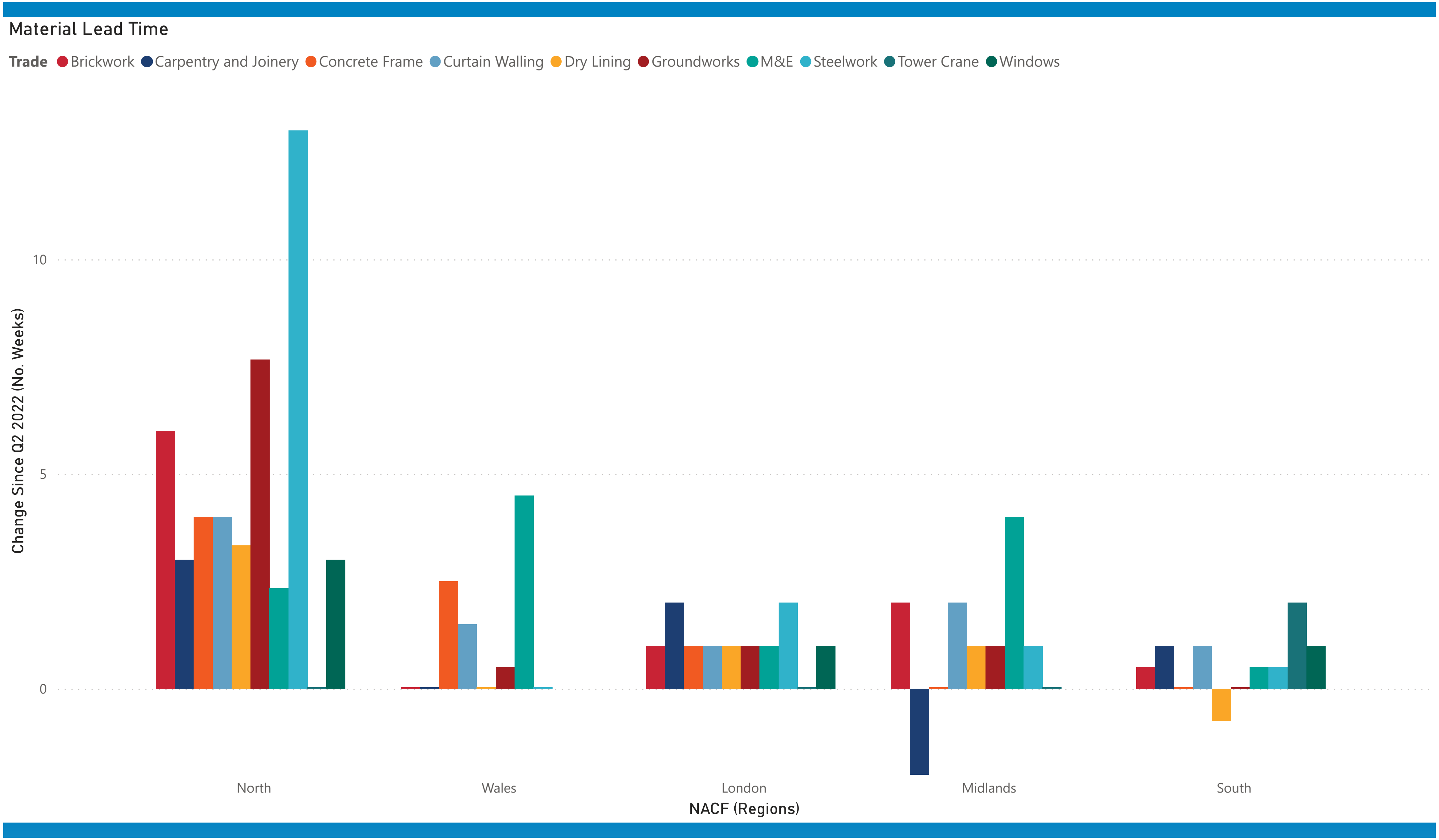

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For the public sector