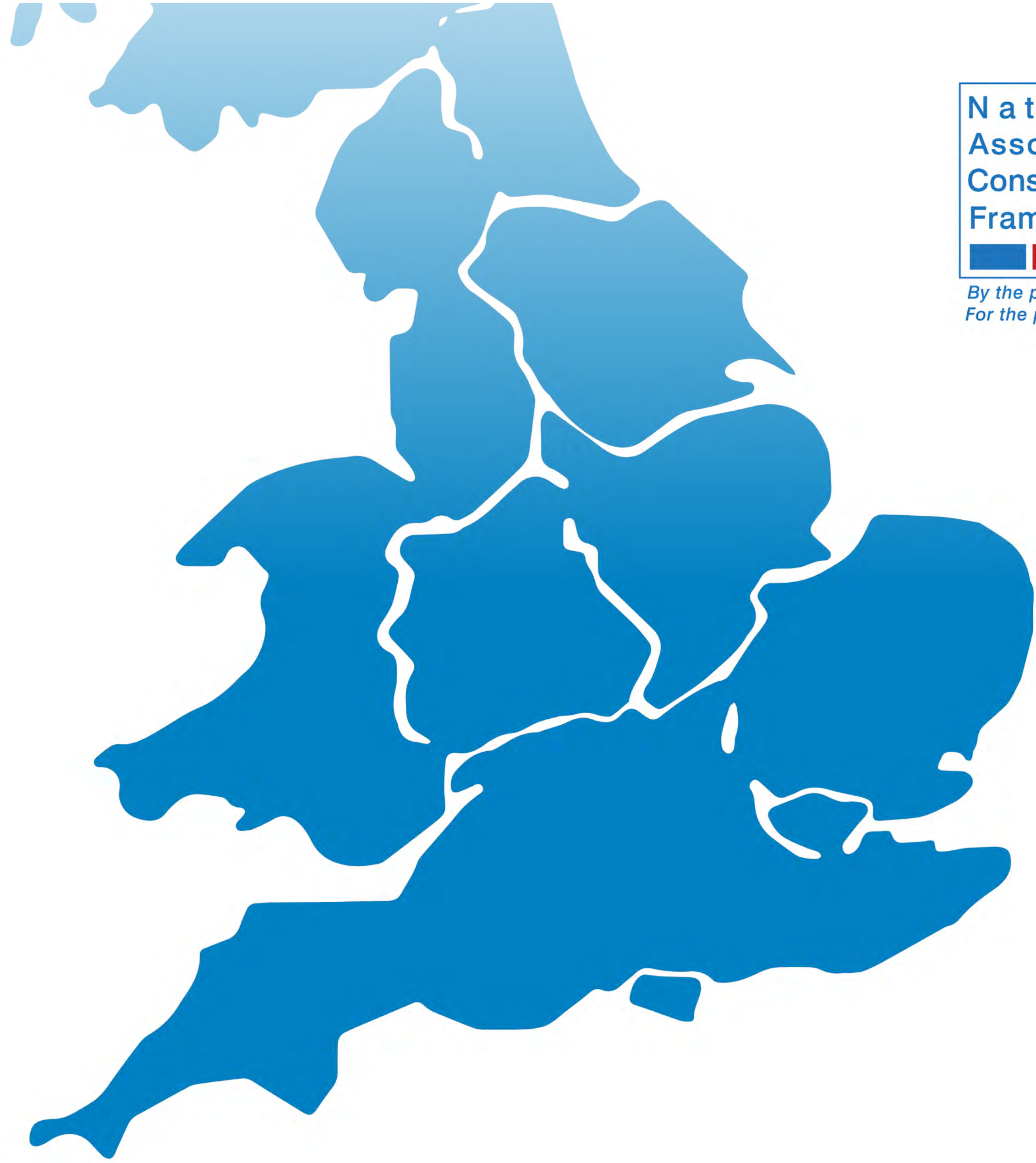
National Association Construction Frameworks

By the public sector,
For the public sector

NACF Market Intelligence Q4 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 Q3 2022: Overview

Tender Workload

Average increase in tender workload across all regions	2%
Increase for Windows	7%
Increase for Groundworks	5%
Increase for Curtain Walling	3%
Increase for Concrete Frame	3%

See full data set for Tender Workload

Building Cost

Average increase in building cost across all regions	9%
Increase for Windows	12%
Increase for Dry Lining	12%
Increase for Groundworks	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 Groundworks and Curtain Walling	3 weeks
Increase of weeks for M&E and Concrete Frames	2 weeks

See full data set for Material Availability

Employment

Average increase in employment across all regions	2%
Increase for Concrete Frames	4%
Increase for Windows	4%
Increase for Dry Lining	3%
Increase for Curtain Walling	3%

See full data set for Employment

Comparison to Q3 2022

South

Tender Workload
No change in tender workload *(2% less than national average)*

- 6% increase for windows
- 5% increase for Concrete Frame
- 4% increase for Curtain Walling
- 9% decrease for Steelwork

Building Cost
The average increase in building cost was 7% *(2% less than national average)*

- 15% increase for Windows
- 14% increase for Dry Lining
- 13% increase for Curtain Walling
- 7% increase for Brickwork

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

- 6 week lead time increase for Curtain Walling
- 4 week lead time increase for Windows
- 1 week lead time increase for Dry Lining, Groundworks and M&E

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

- 10% increase for Concrete Frame
- 4% increase for Windows
- 3% Curtain Walling
- 2% decrease for M&E

Wales

Tender Workload
No change in tender workload *(2% less than national average)*

- 4% increase for Curtain Walling
- 3% increase for Carpentry & Joinery and Groundworks
- 3% decrease for Brickwork and M&E

Building Cost
The average increase in building cost was 15% *(6% greater than national average)*

- 23% increase for Steelwork
- 18% increase for Groundworks and M&E
- 15% increase in Brickwork

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

- 13 week lead time increase for Curtain Walling
- 8 week lead time increase for M&E
- 5 week lead time increase for Curtain Walling and Carpentry & Joinery

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

- 8% increase for Curtain Walling

Midlands

Tender Workload
A 3% increase in tender workload *(1% greater than national average)*

- 8% increase for Carpentry & Joinery
- 7% increase for Groudworks
- 6% increase for Curtain Walling
- 5% increase for M&E

Building Cost
A 12% increase in building cost *(3% greater than national average)*

- 22% increase for Brickwork
- 17% increase for Dry Lining
- 16% increase for Steelwork
- 13% increase for Carpentry & Joinery

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

- 6 week lead time increase for Tower Crane
- 5 week lead time increase for M&E
- 3 week lead time increase for Brickwork and Carpentry & Joinery

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

- 19% increase for Dry Lining
- 7% increase for Carpentry & Joinery
- 5% increase for Brickwork
- 4% increase for Curtain Walling

North

Tender Workload
A 3% increase in tender workload *(1% greater than national average)*

- 10% increase for Groundworks
- 9% increase for Windows, M&E and Brickwork

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 3 weeks *(1 week greater than national average)*

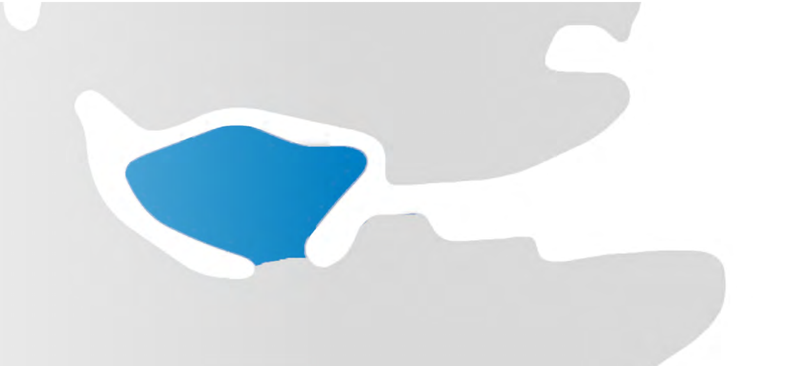
- 9 week lead time increase for Steelwork and Groundworks
- 2 week lead time increase for Concrete Frame and M&E

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

- 7% increase for Windows
- 3% increase for Brickwork
- 2% increase for Groundworks and Steelwork

Comparison to Q2 2022

London



Tender Workload

A 4% increase in tender workload *(2% greater than national average)*

- 5% increase for Windows, Tower Crane, M&E and Curtain Walling

Building Cost

A 6% increase in Building cost *(3% less than national average)*

- 9% increase for Windows and Curtain Walling
- 8% increase for Dry Lining and Steelwork

Material Availability

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

- 1 week lead time increase for Windows, Steelwork, M&E and Groundworks

Employment

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

- 1% increase for Windows, Carpentry & Joinery, Concrete Frame and Steelwork

National Forecast Q3 2023: Overview

Tender Workload

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

Increase for Windows — 8%

Increase for Tower Crane Walling — 6%

Increase for Curtain Walling — 3%

Increase for Groundworks — 2%

Building Cost

Average increase in building cost across all regions — 7%

Increase for Carpentry & Joinery — 11%

Increase for Groundworks — 9%

Increase for Dry Lining — 9%

Increase for Windows — 9%

Material Availability

Average increase in material and labour availability across all regions — 1 weeks

Increase of weeks for Carpentry & Joinery, Brickwork, M&E and Ground Works — 1 weeks

Employment

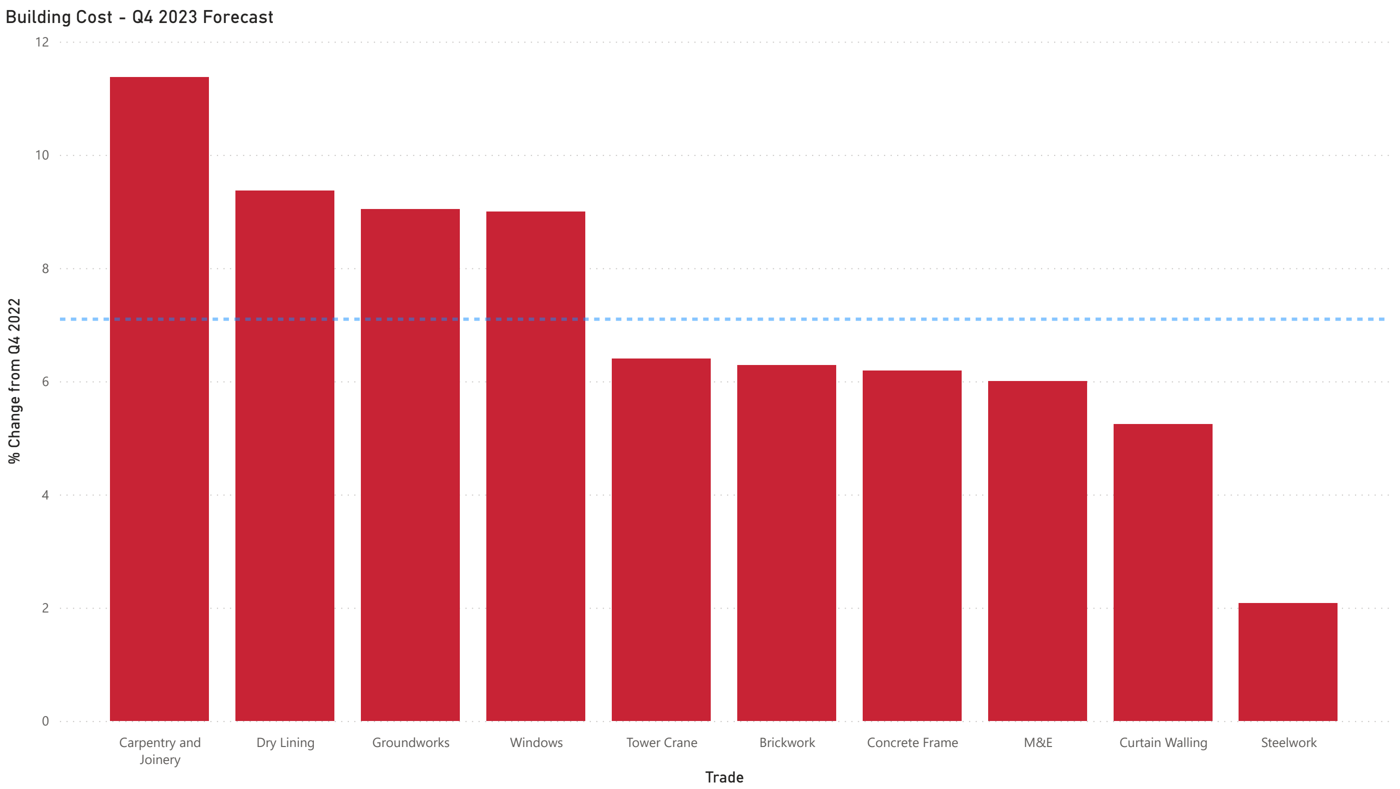
Average increase in employment across all regions — 3%

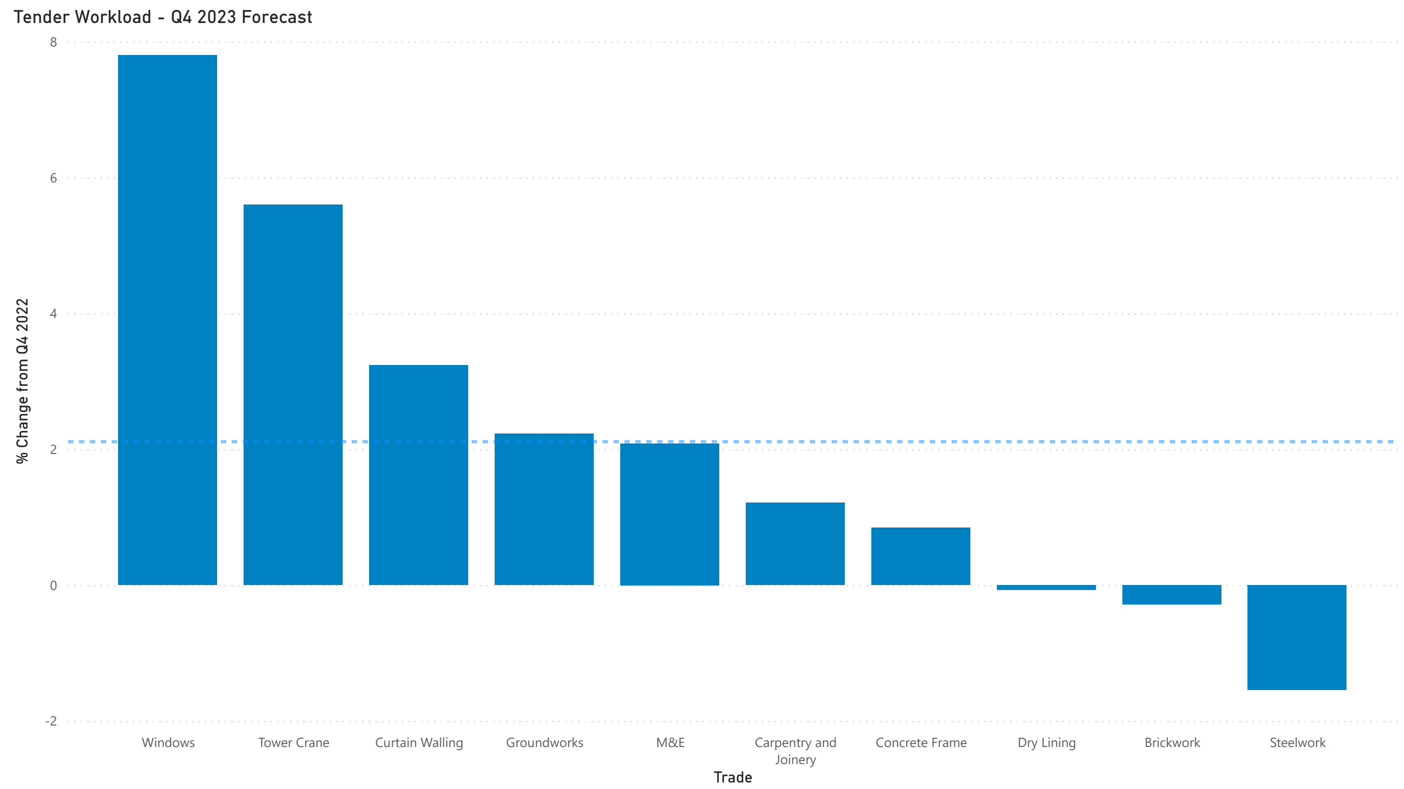
Increase for Windows — 8%

Increase for Dry Lining — 5%

Increase for Concrete Frame — 4%

Increase for Brickwork — 3%





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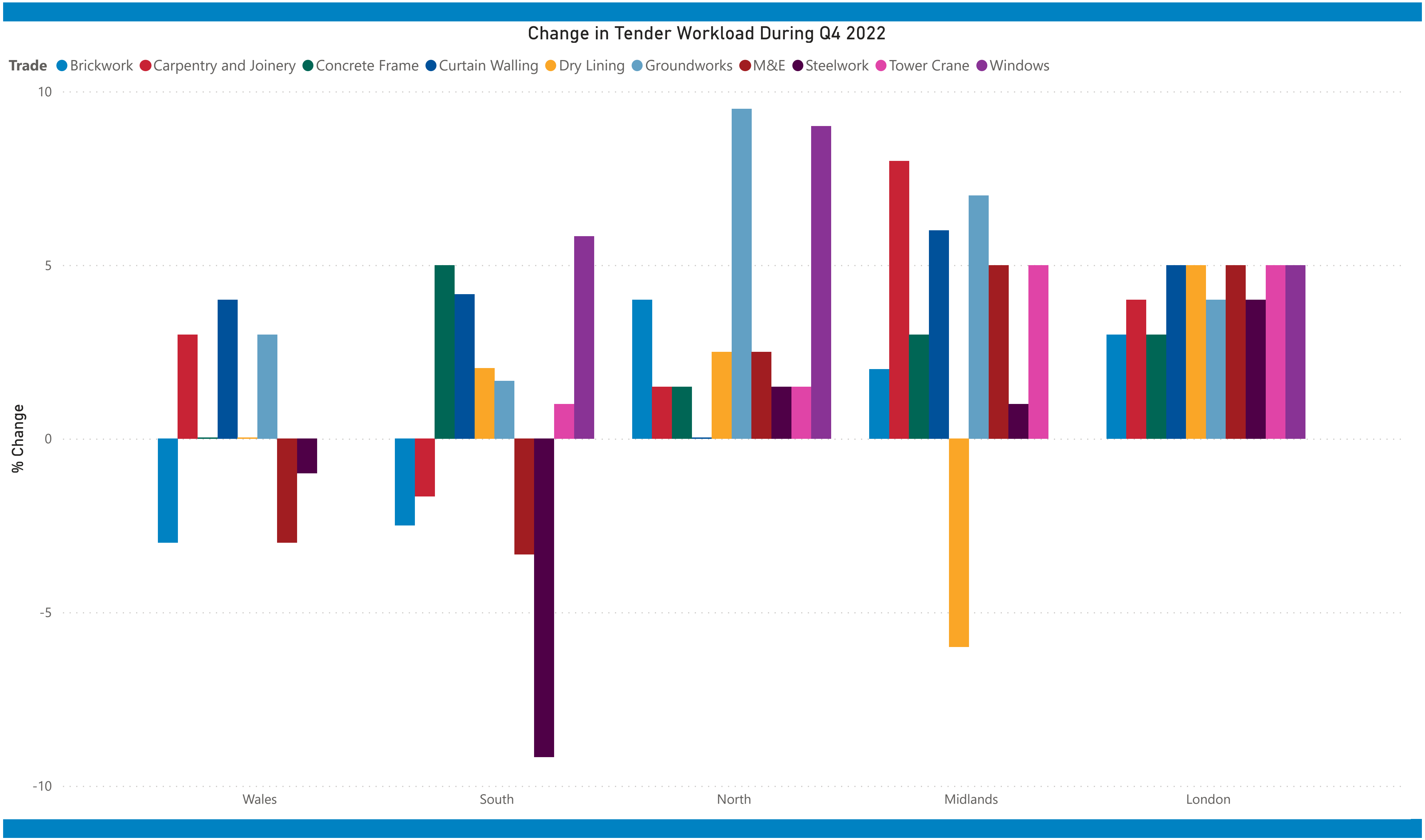

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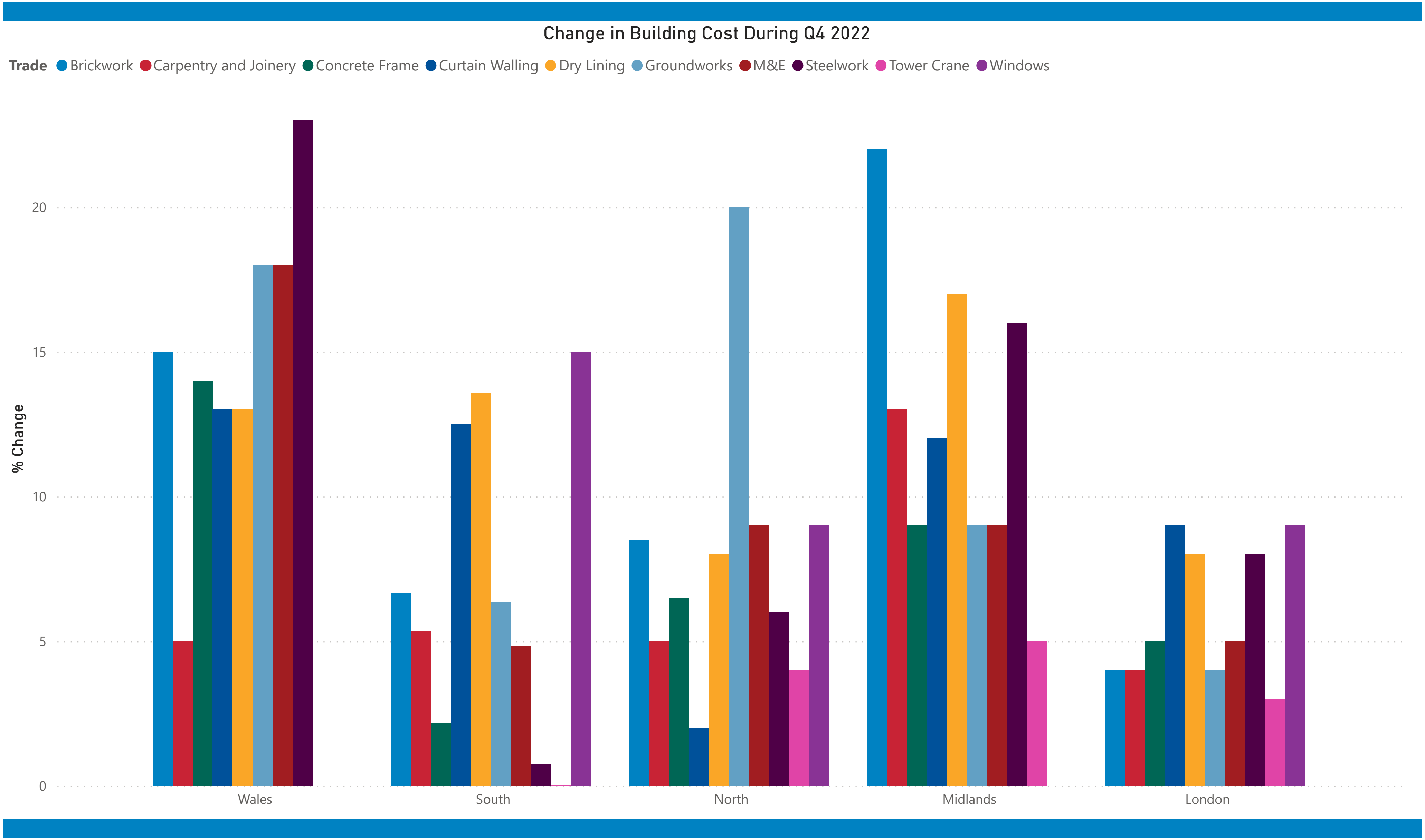

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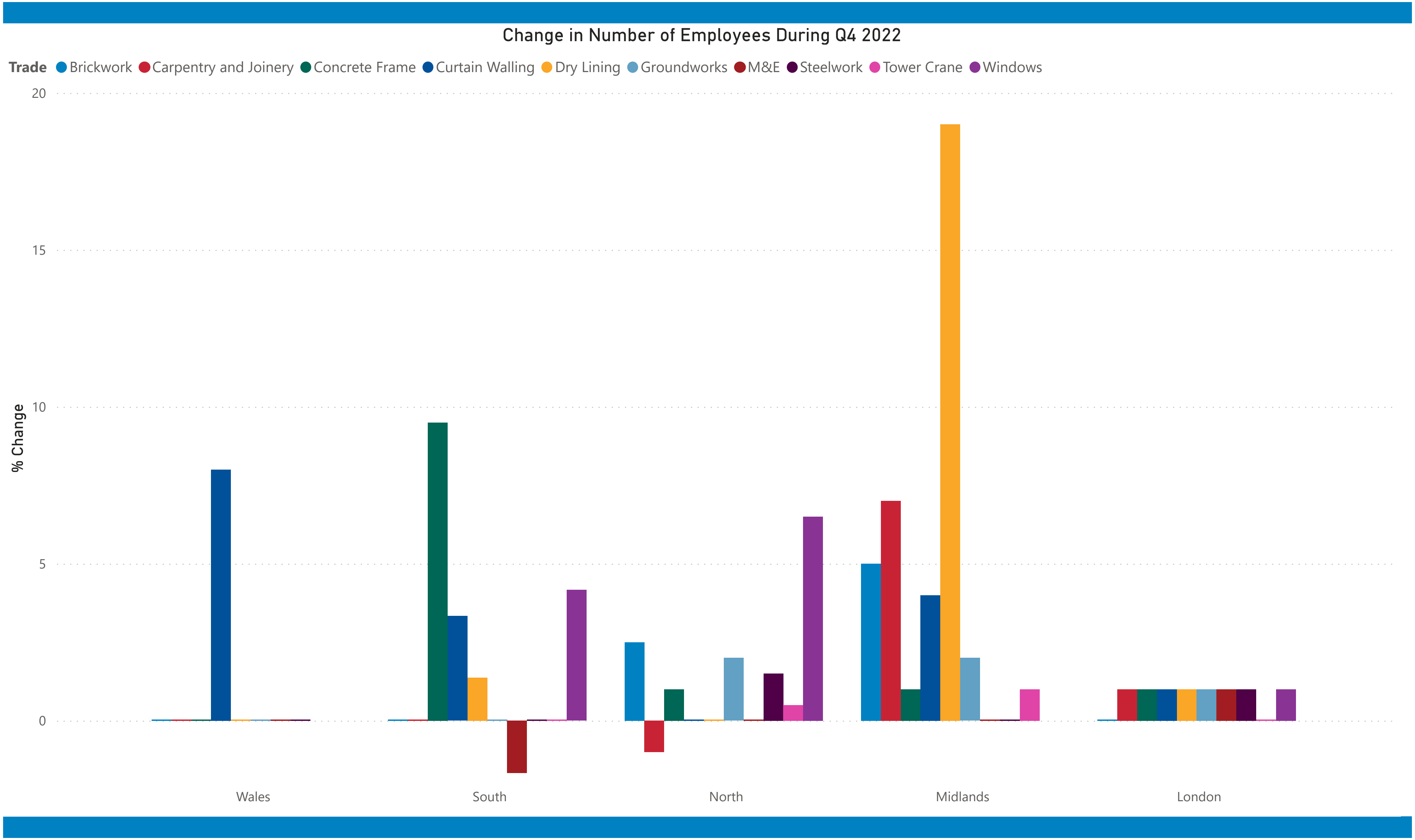

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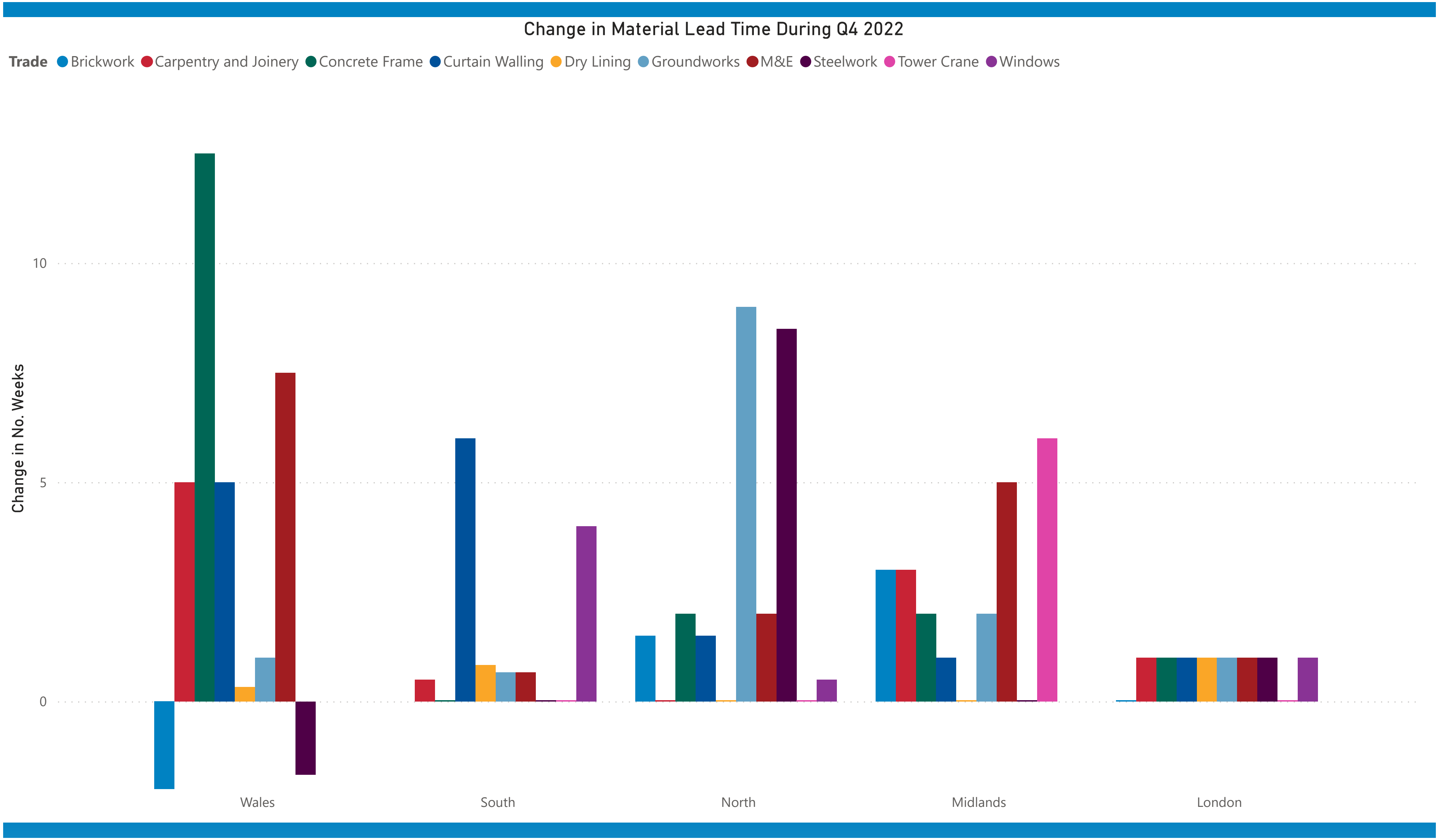

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