National Association Construction Frameworks

By the public sector, For the public sector

Market Intelligence Report

Q1 2023

Overview

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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.

CWM Constructing West Midlands
MHA Midlands Highway Alliance Plus
nepo
Partneriaeth Adeiladu Gogledd Cymru North Wales Construction Partnership
NORTH WEST CONSTRUCTION HUB
SCAPE
scf Southern Construction Framework
sewscap
Fframwaith Contractwyr Rhanbarthol De-Orllewin Cymru South West Wales Regional Contractors Framework
YORhub

Comparison to Q4 2022: Overview

Tender Workload

Average increase in tender workload across all regions	**1%**
Increase for M&E	**4%**
Increase for Dry Lining	**4%**
Increase for Curtain Walling	**3%**
Decrease for Carpentry & Joinery	**8%**

Building Cost

Average increase in building cost across all regions	**3%**
Increase for Dry Lining	**8%**
Increase for Groundworks	**5%**
Increase for Tower Crane	**4%**
Increase for Curtain Walling	**4%**

Material Availability

No change in average material lead time across all regions	**-**
Increase for Dry Lining	**1 week**
Increase for Carpentry & Joinery	**1 week**
Increase for M&E	**1 week**

Employment

Average increase in employment across all regions	**1%**
Increase for Brickwork	**2%**
Increase for Groundworks	**2%**
Increase for Dry Lining	**2%**
Decrease for Carpentry & Joinery	**2%**

Comparison to Q3 2022: Overview

South

Tender Workload
The average increase in tender workload was 3% (2% greater than national average)

- 13% increase for M&E
- 10% increase for Dry Lining
- 5% increase for Windows
- 5% decrease for Concrete Frame

Building Cost
The average increase in building cost was 4% (1% greater than national average)

- 14% increase in Tower Crane
- 13% increase in Dry Lining
- 9% increase in Groundworks
- 5% increase in Brickwork

Material Availability
No change in average lead time (equal to national average)

- 2 week lead time increase for Brickwork
- 1 week lead time increase for M&E
- 1 week lead time increase for Dry Lining

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

- 3% increase for Dry Lining
- 3% increase for Groundworks
- 3% increase for M&E
- 3% decrease for Concrete Frame

Comparison to Q3 2022: Overview

Wales

Tender Workload

The average increase in tender workload was 2% (1% greater than national average)

- 13% increase for Brickwork
- 3% increase for Curtain Walling
- 3% increase for Dry Lining
- 3% increase for Steelwork
- 6% decrease for Carpentry & Joinery

Building Cost

The average increase in building cost was 6% (3% greater than national average)

- 14% increase for Dry Lining
- 12% increase for Concrete Frame
- 8% increase for Brickwork
- 5% increase in Curtain Walling

Material Availability

No change in average lead time (equal to national average)

- 3 week lead time increase for Dry Lining
- 1 week lead time increase for M&E
- 1 week lead time increase for Curtain Walling

Employment

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

- 3% increase for M&E
- 5% decrease for Carpentry & Joinery

Comparison to Q3 2022: Overview

Midlands

Tender Workload
No change in average tender workload (1% less than national average)

- 2% increase for Steelwork
- 2% increase for Concrete Frame
- 2% decrease for Carpentry & Joinery
- 2% decrease for Tower Crane

Building Cost
Average 1% decrease in Building Cost (4% less than national average)

- 6% decrease for Brickwork
- 4% decrease for Carpentry & Joinery
- 3% decrease for Concrete Frame
- 3% decrease for Steelwork

Material Availability
No change in average lead time (equal to national average)

- 2 week lead time increase for Dry Lining
- 2 week lead time increase for M&E
- 3 week lead time decrease for Brickwork

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

- 1% increase for Concrete Frame
- 1% increase for Curtain Walling
- 1% increase for Steelwork
- 1% decrease for Carpentry & Joinery

Comparison to Q3 2022: Overview

North

Tender Workload
No change in average tender workload (1% less than national average)

- 2% decrease for Tower Crane

Building Cost
An average 2% increase in Building Cost (1% less than national average)

- 5% increase for Curtain Walling
- 5% increase for Dry Lining
- 5% increase for M&E
- 3% increase for Groundworks

Material Availability
No change in average lead time (equal to national average)

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

Comparison to Q3 2022: Overview

London

Tender Workload
Average 2% increase in tender workload (1% greater than national average)

- 4% increase for Tower Crane
- 3% increase for Curtain Walling
- 3% increase for Windows
- 2% increase for Concrete Frame

Building Cost
A 1% increase in building cost (2% less than national average)

- 6% increase for Dry Lining
- 5% increase for Curtain Walling
- 4% increase for Groundworks
- 4% increase for M&E

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

- 2 week lead time increase for Carpentry & Joinery
- 1 week lead time increase for Groundworks
- 1 week lead time increase for Steelwork
- 1 week lead time increase for Windows

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

- 5% increase for Brickwork
- 3% increase for Dry Lining
- 3% increase for Groundworks
- 3% decrease for Carpentry & Joinery

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National Forecast Q1 2024

Overview

Forecast to Q1 2024: Overview

Tender Workload

Average increase in tender workload across all regions +3%

- Increase for Groundworks +5%
- Increase for Steelwork +4%
- Increase for Curtain Walling +3%
- Increase for Windows +3%

Building Cost

Average increase in building cost across all regions +5%

- Increase for Groundworks +9%
- Increase for Windows +7%
- Increase for Curtain Walling +7%
- Increase for Dry Lining +6%

Forecast to Q1 2024: Overview

Material Availability

No change in average material lead time across all regions

- Increase of weeks for M&E +1 week
- Increase of weeks for Curtain Walling +1 week
- Increase of weeks for Carpentry & Joinery +1 week
- Increase of weeks for Window +1 week

Employment

Average increase in employment across all regions +3%

- Increase for Brickwork +6%
- Increase for Groundworks +5%
- Increase for Concrete Frame +3%
- Increase for Steelwork +3%

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