

FOR IMMEDIATE RELEASE MARCH 2009

## Building Insulation Market UK 2009-2013

New AMA report reviews the UK Building Insulation market

Following continuous growth to 2007, the market has declined in 2008 to an estimated size of £725 million. A further decline is anticipated in 2009 with a flat market in 2010, before recovery in 2011. The market has been underpinned largely by the impact of CERT and the Building Regulations 2006. These drivers are expected to help sustain the building insulation market that is estimated to reach a size of £760 million by 2013.

This report is the 3<sup>rd</sup> edition and is widely recognised as one of the key reviews of the insulation market in the UK. A brief summary of the report is included on the following page.

Priced at £650, the report is currently available from AMA Research Ltd, Telephone 01242 235724 or e-mail at [sales@amaresearch.com](mailto:sales@amaresearch.com).

### **Editors Note:**

Attached is a summary of the report. Please use brief extracts if you wish, **but we would request that references to company market shares are not published without our prior permission.**

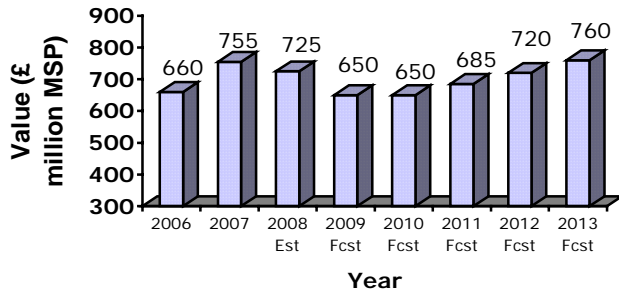
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Keith Taylor or Chris Moore on (01242) 235724.

Please include our web address and telephone number on any review printed, it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

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# UK Building Insulation Market: 2009-2013

## UK Building Insulation Market 2006-2013



UK Building Insulation Market 2006-2013

AMA Research has published a new report covering the building insulation market. Available for purchase at £650 from [www.amaresearch.co.uk](http://www.amaresearch.co.uk), the report provides a comprehensive analysis of the different material sectors (including mineral wools, PUR, PIR and phenolic). A detailed review of the supply chain, end-use sectors and distribution channels are provided. The report also provides a forecast of the market prospects to 2013.

The building insulation market is a mature market but in recent years has experienced good levels of growth, mainly as a result of amendments to the Building Regulations, Government energy saving initiatives and growth in the construction output in the newbuild housing and commercial sectors. The market experienced good growth until 2007 but by the end of the year the impact of the 'credit crunch' began to affect the UK economy and the insulation market. The start of the recession in 2008 severely impacted the building insulation market with prospects deteriorating for 2009. However, the market is anticipated to begin recovery in 2011 and reach an estimated market size of £760 million by 2013. The market is expected to continue to be underpinned by CERT, the Building Regulations and public spending (particularly in the education and health sectors) Forecasting at this time is extremely difficult and should the recession be longer and deeper than expected, this forecast could prove to be optimistic.

The market is dominated by a leading group of two manufacturers (Knauf Insulation and Kingspan Insulation) with a group of four other companies being prominent in the market. The distribution channels have remained unchanged in recent years with the key distributors being SIG and Encon. Mineral wool remains the largest sector in the building insulation market reflecting the strength of the product in the structural and roofing sectors. However, the product has lost share to PIR and PUR in recent years; also penetrating the market further is phenolic foam. The UK is a net exporter of mineral insulation materials.

The focus of product development is to increase the thermal performance of the products, lowering their U-values. Sustainability continues to be important in both the building and insulation industries with many manufacturers developing their products to reduce the impact on the environment.

Other factors affecting the building insulation market include changes to the building mix, the volatility of the Sterling exchange rate against the US dollar and Euro as well as price increases across the market, primarily due to increasing fuel and energy prices.

AMA Research's report "**Building Insulation Market – UK 2009 - 2013**" is available in hard copy or electronic format for £650 and can be ordered online at [www.amaresearch.co.uk](http://www.amaresearch.co.uk) or by calling 0871 3103450.