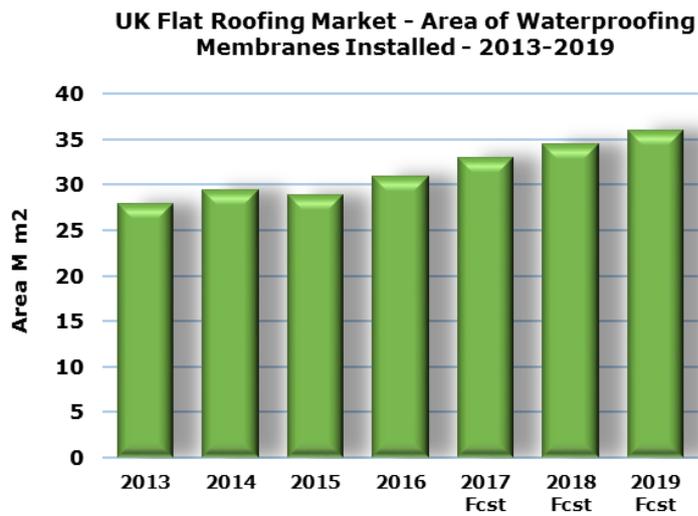




## PRESS RELEASE

### Steady growth expected in the UK Flat Roofing market

March 2017 – Cheltenham, UK



Since 2012, the market for flat roofing has shown steady underlying growth to around 31 million m<sup>2</sup> in 2016, in terms of the coverage of waterproofing membranes fitted. Key demand drivers include increased levels of new build and re-roofing activity in key end-use markets notably; commercial offices, schools, distribution centres, infrastructure & utilities buildings, social housing re-roofing and private housing extensions & garages. Maintenance and repair work to private housing roofs is also an important area of activity while demand for green roofs has also begun to show steady growth.

In 2015 there was a slight fall in the overall market, partly due to a drop in the supply of bituminous membranes, as a result of European bitumen refining capacity declining sharply in recent years. Since then there has been some improvement in demand although RBMs continue to lose share to single ply membranes in the commercial / specification market and EPDM membranes and GRP in the domestic extensions and garage roofing sectors.

The waterproofing sector also accounts for the largest share of the market in terms of value, followed by insulation products and vapour control layers. While the UK market for bituminous waterproofing systems is concentrated among relatively few suppliers, the supply of single ply membranes and liquid waterproofing is more fragmented.

While there is significant production of bitumen membranes and felts in the UK, import levels are significant. In the single ply and liquid waterproofing sectors, imports account for the majority of supply. Distribution is largely split between the specialist roofing merchants and general builders' merchants, typically supplying smaller contractors and general builders, and also direct sales to contractors working on large projects.

Growth in demand for single ply has largely been due to a surge in industrial and infrastructure buildings with large-spanning roofs developed in recent years, particularly in retail distribution centres. Other factors behind growth include inherent properties of single ply relative to RBMs –including the wider range of colours, speed of installation and lower costs of insurance for roofing contractors. In the private housing sector, escalating housing costs have driven up demand for garage conversions and extensions, which in turn has underpinned demand for both EPDM membranes and GRP and other liquid roofing systems.

*"Over the medium term to 2021, it forecast that demand for flat roofing will continue to grow at a steady pace, key drivers being the continuing growth in demand for online retail distribution centres; pressures on housing supply driving up the need for increasing flats construction; increasing office construction output and a likely growth in demand for green roofs"* said Keith Taylor, Director of AMA Research.

*"By the end of the forecast period the market is estimated to be worth some £530m at manufacturers selling prices, thereby showing modest growth over the next 5 years."*

In urban areas, factors likely to drive up demand include; increasing concerns about rainfall run-off, pollution & air quality and lack of private outdoor space. In rural areas, to date the main driver has been planning requirements demanding that buildings merge in with surrounding areas. Budget reductions in public sector capital programmes will impact on the market, with schools and the healthcare sub-sectors mainly affected. However, it may be that the shift to private sector funding in schools and universities will support these sub-sectors, as Academy schools and university development programmes with student accommodation investment continues to rise.

Factors that may have a negative impact on the market include the worsening skills shortages in the roofing trades and other construction trades, and the current uncertainty surrounding Brexit and the outcome of negotiations over the next couple of years.

The '**Flat Roofing Market Report – UK 2017-2021 Analysis**' report is published by AMA Research, a leading provider of market research and consultancy services with over 25 years' experience in the construction and home improvement markets. The report is available now and can be ordered online at [www.amaresearch.co.uk](http://www.amaresearch.co.uk) or by calling 01242 235724.

### **Editors Note:**

If you would like to receive more information on the report, or would like to speak to the author, then please contact Anna Eriksson or Keith Taylor on 01242 235724.

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

AMA Research Ltd  
Montpellier House  
Montpellier Drive  
Cheltenham  
Gloucestershire GL50 1TY  
Tel: +44 (0)1242 235724  
Fax: +44 (0)1242 262948  
E-mail: [annaeriksson@amaresearch.co.uk](mailto:annaeriksson@amaresearch.co.uk)  
Website: [www.amaresearch.co.uk](http://www.amaresearch.co.uk)