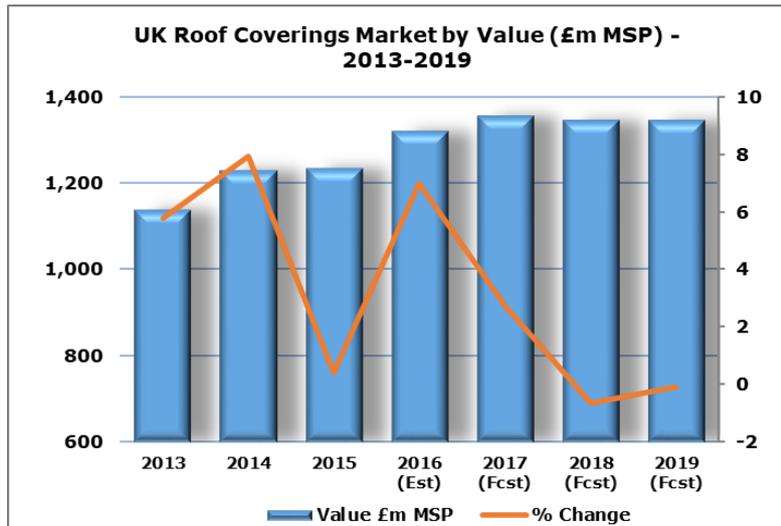




## PRESS RELEASE

### The UK roofing market sees growth of 7% in 2016

September 2017 – Cheltenham, UK



The overall UK roofing market has grown by 7% in value terms in 2016, according to a new report by AMA Research. Since 2012, demand for roof coverings has been supported by the growth of housebuilding and domestic RMI, along with increased output in a number of commercial and industrial new build & refurbishment markets. However, tendering for commercial and housebuilding roofing projects has remained highly competitive, and year on year performance has varied.

Overall market trends are largely determined by levels of demand for concrete roof tiles and metal panel systems, which together accounted for around half of total sales in 2016. While concrete tiles are predominantly used on commercial buildings, the main source of increasing demand has been volume housebuilding. Demand for roof tiles and slates is relatively lower within the commercial and industrial newbuild & major re-roofing and RMI sectors, with flat roofing and metal roofing systems being used to an increasing extent.

Distribution of roofing materials varies significantly between different product sectors. Builders' merchants and roofing merchants are the key routes to market for suppliers of concrete and clay tiles, while independent importers and distribution networks are the main channels in the roofing slates sector, as the majority of products are imported. With flat roofing systems mainly used on commercial buildings, the main channels are roofing merchants and direct sales, while direct supply from the manufacturer is the main route to market for profiled metal roofing projects, which often require bespoke design, structures and close collaborations with manufacturers.

Several factors are threatening the construction market, and are likely to have a knock-on effect for the roofing market. Uncertainty following Brexit and the general election result appears to be undermining confidence within the UK construction industry at present, with Q2 2017 state of trade data from the Construction Products Association and ONS new orders and output statistics, suggesting major investors are starting to hold off from funding major commercial and industrial construction projects. Since 2015, an acceleration in the shortage of skilled roofers, which is likely to be exacerbated by the Brexit issue and a potential reduction of EU workers, has resulted in a demand for higher wages and contributed towards an overall reduction in margins.

However, there are also a number of positive factors supporting the UK's roofing market. A significant share of roofing materials goes into RMI and replacement projects, which support the market even during difficult economic times. The markets for EPDM and other types of single ply membranes (SPMs) have grown strongly over the last half dozen years, also taking some share from bitumen sheets within the commercial sector.

Keith Taylor, Director at AMA research, said: *"The housebuilding market remains very positive in the sense that demand levels are high, and the Government has indicated that it wants to support the affordable sector with various schemes, something which should have a positive impact on the roofing sector. In addition, a large part of the roofing sector is driven by repair and maintenance and as such the market value has good support, even if the wider construction market turns more negative."*

Bearing these factors in mind, we forecast a stabilisation in demand for roofing products through to 2021, with more positive market growth in the latter part of the forecast period, reflecting some improvement in confidence and the economy as the impact of the EU exit settles down. As such the overall market is forecast grow by a very modest 4% between 2016 and 2021.

The '**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 within 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 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.

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