Building Insulation Products Market Report - UK 2017-2021 Analysis
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Introduction and Overview
The 7th edition of the report 'Building Insulation Products Market Report - UK 2017-2021 Analysis' has been fully updated to cover the latest developments in the market in terms of the impact of key drivers such as the performance of the UK building market as well as the impact of Government initiatives. The report includes market sizing, drivers, developments and prospects through to 2021, key products with mixes and trends, key suppliers and routes to market.

Key issues covered:
- Forecasts of market development to 2021 - assessment of Green Deal and ECO, impact on glass and mineral wool sector performance, influence of energy price changes etc.
- Detailed assessment of recent market trends - the growing housebuilding market, non-residential construction impacts etc.
- Specific and relevant information - market size, factors influencing the market, key players.
- Analysis by product group - product mix and influences in the main insulation products sectors.
- Analysis by end use sectors - key applications and end use sectors for building insulation.

Key areas of insight include:
- Changing mix of the different material types of insulation products.
- Review of key suppliers, distributors and installers.
- Assessment of market potential by end use application covering domestic RMI and retrofit, new build, non-residential building etc.
- Detailed reviews of key end use applications e.g. lofts, cavity walls, solid walls and flat roofs. Evaluation of impact of government programmes.
- Detailed market data and insight on the building insulation products market by AMA Research, a leading UK provider of construction market intelligence.

Some of the companies included:

**Market Performance - Recent Trends and Forecasts**

- Overall market size & trends in 2016/17 - analysis of impact of Government programmes; assessment of recent trends in energy prices & other market drivers e.g. changes to Building Regulations etc.
- Overall market forecasts to 2021 - assessment of impacts of the building and construction market across the residential and non-residential markets. Review of other key driving factors going forward including likely impact of energy price rises, changing relationship with Europe etc.
- Potential areas for growth in future years, flat roofs in the non-residential sector, added value solutions, 'easy-to-fill' lofts etc.

**Insulation Product Mixes - Glass Wool, Stone Wool etc.**

- By material by value - i.e. glass wool, stone wool, urethane, polystyrene, phenolic foam etc.
- Overview of key materials - identification of key trends and supplier shares.

**Application Market Mixes - Lofts, Cavity Walls, Solid Walls**

- Lofts: profile of homes with lofts in GB; trends in retrofit by area installed, material mix; housebuilding market 2012-21; retrofit market potential.
- Cavity walls: profile of homes with Cavity Walls; trends in retrofit sector by area installed, material mix; housebuilding market 2012-21; retrofit market potential.
- Solid walls: profile of homes with solid walls; trends in retrofit sector by area installed, retrofit market potential.
- Flat roofs: profile of buildings with flat roofs, mixes by end-use & materials, market potential.
- Other including ground floors, intermediate floor, metal cladding - market overviews.

**End User Market Mixes - Retrofit, House Building, Non-Domestic**

- General overview of mix between domestic retrofit, housebuilding and non-domestic sectors.
- Review of domestic retrofit: profile of housing stock; analysis of recent trends, market mix by application; market potential for lofts, cavity & solid wall insulation.
- Review of housebuilding: profile of housebuilding stock; recent trends; market mixes.
- Review of non-domestic: recent trends and assessment of potential demand for retrofit insulation in existing commercial premises.

**Supply Chain & Distribution Profile**

- Supplier review - market shares & trends, company profiles.
Report Summary
The building insulations market saw growth in 2016 following a reduction in market size in 2015, which was in large part due to the government scrapping the Green Deal combined with reduced funding to deliver the Energy Company Obligation (ECO). Despite this slight recovery in 2016 the building insulations products market value is set to decrease again in 2017, albeit only by a small amount. Overall, the building insulations market has suffered greatly since the ending of government initiatives CERT and CESP in 2012, and forecasts suggest it will still be several years before the market recovers to 2012 levels.

The market has seen growth in demand for insulation products from increasing levels of new housebuilding and in non-domestic building, however, the ongoing decline in retrofitted insulation continues to hamper market value. Key market influences include Building Regulations and energy prices. By end-user, the dramatic fall in demand under the Green Deal and ECO means that the most important market is no longer domestic retrofit, with the non-domestic market now having the largest share closely followed by domestic retrofit and new housebuilding.

There has also been changes to the building insulations product mix by value. PUR / PIR products now have the largest market share of insulation products. The market value of mineral fibre products, including glasswool and stone or slag wool, has reduced due to the fall in demand for such products under the Green Deal and ECO, but they still account for a large proportion of the total market in the UK and remain particularly popular in the DIY sector.

Looking forward, the market value of insulation products is likely to show modest growth over the next few years. Growth is impeded by a number of factors, the retro fitting sector seeing further reduction in demand being a significant influencer. Limitations in government funding and new schemes to will also have a negative influence, with evidence suggesting that homeowners are reluctant to implement insulation-based energy saving measures without a strong financial incentive. Additionally, new housebuilding is predicted to slow in comparison to 2016 levels. These factors mean that growth is predicted to remain at a low rate over the next few years.

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Established in 1989, AMA Research is widely recognised as the leading specialist provider of market research to the UK building and construction industries. AMA's research and analysis goes beyond the more commonly available range of statistical and company information to provide expert, informed commentary and in-depth market analysis, making the reports a valuable and relevant resource for understanding the UK's construction and associated markets.

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