Building Insulation Products Market Report - UK 2017-2021 Analysis
Published: 19/09/2017 / Number of Pages: 68 / Price: £895.00

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.

List of Report Contents

Contents Listing

1. INTRODUCTION 8
   1.1 BACKGROUND 8
   1.2 SOURCES OF INFORMATION 8
   1.3 GLOSSARY 9

2. SUMMARY 10
   2.1 MARKET BACKGROUND 10
   2.2 MARKET PROSPECTS 11

3. ECONOMIC ENVIRONMENT 13
   3.1 GDP 13
   3.2 INFLATION & INTEREST RATES 14
3.3 UNEMPLOYMENT 15

3.4 HOUSEHOLD CONSUMPTION 16

3.5 HOUSING & CONSTRUCTION 16

3.6 STERLING 17

3.7 POPULATION PROFILE 18

3.8 CONCLUSIONS 18

4. UK BUILDING INSULATION PRODUCTS MARKET 20

4.1 DEFINITION 20

4.2 MARKET SIZE AND RECENT TRENDS 20

4.2.1 Insulation Market Size 20

4.2.2 Insulation Market Prospects 23

4.3 KEY MARKET INFLUENCES 24

4.3.1 EU / Government Initiatives 24

4.3.2 The Building Regulations Part L 2013 25

4.3.3 Energy Prices 27

4.3.4 Housebuilding and Construction 28

4.3.5 Non-Domestic Construction 30

5. PRODUCT MIX 32

5.1 OVERVIEW OF BUILDING INSULATION PRODUCTS 32

5.2 BUILDING INSULATION PRODUCTS 33

5.2.1 Glass Wool 33

5.2.2 Stone Wool 34

5.2.3 Polyurethane (PUR) / Polyisocyanurate (PIR) Foam 34

5.2.4 Expanded and Extruded Polystyrene Foam (EPS and XPS) 35

5.2.5 Other 35

5.3 PRE-FABRICATED/OFFSITE AND COMPOSITE PRODUCTS 36
6. MARKET MIX BY END-USE SECTORS 38
6.1 OVERVIEW 38
6.2 DOMESTIC RMI/RETROFIT 39
6.2.1 Housing Stock 39
6.2.2 Recent Market Trends 40
6.2.3 Domestic Retrofit Market Prospects for Insulation Products 41
6.3 HOUSEBUILDING 42
6.3.1 Profile of Housebuilding 42
6.3.2 Recent Market Trends 42
6.3.3 Housebuilding Market Prospects for Insulation Products 42
6.4 NON-DOMESTIC BUILDINGS 43
6.4.1 Non-Domestic Building Stock 43
6.4.2 Market Trends 43
6.4.3 Non-domestic Buildings Market Prospects for Insulation Products 43
7. APPLICATIONS 45
7.1 INTRODUCTION 45
7.2 LOFTS / PITCHED ROOFS 45
7.2.1 Profile of Dwellings with Lofts 45
7.2.2 Recent Trends in Loft Insulation 45
7.2.3 Market Prospects for Loft Insulation 48
7.3 FLAT ROOFS 49
7.3.1 Profile of Buildings with Flat Roofs 49
7.3.2 Recent Trends in Flat Roof Insulation 50
7.3.3 Market Prospects for Flat Roof Insulation 51
7.4 CAVITY WALLS 52
7.4.1 Profile of Dwellings with Cavity Walls 52
CHART 8: UK INDICES FOR OVERALL AVERAGE ANNUAL ENERGY PRICES FOR INDUSTRY (EXCLUDING CLIMATE CHANGE LEVY) AND AVERAGE ANNUAL INSULATION PRODUCT PRICES (2010 = 100) 2010 TO 2016

TABLE 9: TOTAL INSULATION MEASURES DELIVERED UNDER GREEN DEAL AND ECO - UP TO MARCH 2017

TABLE 10: BUILDING REGULATION AMENDMENTS IMPACTING ON THE BUILDING INSULATION MARKET

TABLE 11: BUILDING REGULATIONS PART L 2013 NOTIONAL BUILDING SPECIFICATION VS LIMITING U-VALUES BY INSULATION APPLICATION

CHART 12: UK FUEL PRICE INDICES FOR THE INDUSTRIAL SECTOR IN CURRENT TERMS (EXCLUDING THE CLIMATE CHANGE LEVY) 2010 = 100, 2010 TO 2016

TABLE 13: HOUSE BUILDING STARTS AND COMPLETIONS (UK) 2012 TO 2021 - BY VOLUME

CHART 14: NON-RESIDENTIAL CONSTRUCTION OUTPUT (GREAT BRITAIN) NEW WORK & RMI - CURRENT PRICES (£BN) 2012 -2021

CHART 15: NON-RESIDENTIAL CONSTRUCTION OUTPUT NEW WORK ANALYSIS BY SECTOR 2016 AND 2021 - % BY VALUE GB

CHART 16: MIX OF BUILDING INSULATION PRODUCTS BY MATERIAL % BY VALUE - POLYSTYRENE, PHENOLIC, MINERAL, PUR ETC, 2016

CHART 17: UK SUPPLIERS OF GLASS WOOL ESTIMATED MARKET SHARES, 2016

CHART 18: UK SUPPLIERS OF PUR / PIR BOARDS ESTIMATED MARKET SHARES, 2016

TABLE 19: MAIN PRE-FABRICATED BUILDING PRODUCTS INCORPORATING INSULATION

CHART 20: UK MARKET SHARE - INSULATION PRODUCTS BY VOLUME BY END USE SECTOR, 2016

CHART 21: GB DWELLING STOCK BY AGE BAND (%)

CHART 22: GB DWELLING STOCK BY TYPE OF PROPERTY (% OF DWELLINGS)

CHART 23: TOTAL NUMBERS OF INSULATION MEASURES DELIVERED UNDER GREEN DEAL AND ECO BY TYPE (LOFTS, SOLID WALLS, ETC). TOTAL 1,374K INSTALLATIONS

CHART 24: UK GB RETROFIT INSULATION MARKET BY APPLICATION BY AREA INSTALLED 2016. INSTALLED VOLUME = ~18 MILLION M²

TABLE 25: GB POTENTIAL FOR INSULATION MEASURES IN EXISTING PROPERTIES AS OF DECEMBER 2016

CHART 26: UK NEW HOUSEBUILDING MARKET FOR INSULATION BY AREA INSTALLED BY APPLICATION - GROUND, LOFTS,
The 'Building Insulation Products Market Report - UK 2017-2021 Analysis' costs £895+VAT (if applicable) for a PDF version.

Other formats are available - click here for information about available report formats. All AMA reports are sold with a single user licence as standard. For more information about AMA licences click here.