Roofing Contractors Market Report - UK 2012-2016 Analysis

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Introduction and Overview

AMA Research are pleased to announce the publication of the second edition of the report **'Roofing Contractors Market Report - UK 2012-2016 Analysis'**. The report provides an informed and up-to-date analysis of this market and includes a review of the recent market performance and issues that continue to impact on the market, with forecasts over the next few years.

The report contains:

- Detailed assessment of the market - including recent developments in both domestic and non-domestic sectors
- Forecasts of market developments to 2016.
- Roofing contractors - structure of market, key players, key characteristics, operational issues and types of work undertaken.
- Key customers - including housebuilders, non-domestic public and private sectors.
- Analysis by product group - review of materials installed by roofing contractors including market size, product mix and sector trends.

The health of the roofing contractors market is directly related to the performance of the UK housebuilding and construction sector. As a result, the market has been severely impacted by the recession and variable performances of its core end-use sectors (housebuilding, commercial and industrial sectors).

Of particular interest:

- Analysis of market performance in 2010-2012.
- Structure of Roof Contracting market - market structure, leading players, material sourcing, trade accounts held, skills shortages, pricing etc.
- Identification of key customer groups in roofing contractors market.

- Product sector analysis - market size, product mix, influences and trends.
- Forecast of market performance in 2013 and through to 2016.
- Detailed market data and insight on the roofing contractors market by AMA Research, a leading UK provider of construction market intelligence.

Key contractors and consultants included:

Acclaim Contracts, Avonside Group Services, Bracknell Roofing, Breyer Group, Briggs Amasco, CA Group, Central Roofing & Building Services, EJ Roberts Roofing, Everlast Waterproofing,F. Brown, Jennings Roofing, Lakesmere, M H Massey Roofing & Cladding, Met-clad Contracts, Mitie Tilley Roofing, Norman & Underwood Group, Progressive Systems, Richardson Roofing Company, Roofdec, Roofline Group, RS Miller Roofing, SD Samuels (Special Projects), Southwest Roofing Services, Survey Roofing, Swifts Roofing Contracts, Topek Limited, W Swindells & Son, Weatherproofing Advisors, Western Counties Roofing.

The Roofing Contractors

- Overview of roofing contractors industry - structure, market fragmentation, dominance of smaller players with few nationally operating companies, geographical coverage.
- Key roofing contractors - profiles including turnover, main product types installed, end-use sectors served and regions of operation.
- Types of work undertaken - domestic/non-domestic and new work/RMI, mix of materials installed depending on end-use sector.

The Market

- Roofing contractors market - key characteristics of the market, analysis by value from 2006-2012, annual rates of change, trends and forecasts to 2016.
- Market trends and major factors influencing market development - impact of economic downturn, fluctuating performances of housebuilding, private and public non-domestic construction and RMI.
- Market infrastructure - manufacturers, suppliers, distributors and roofing contractors.
- Key application areas - housebuilders, public sector, commercial & industrial sectors, new build and RMI - mix by value, trends.
- Materials distribution channel mix - including direct supply, roofing merchants, builders merchants and specialists - channel shares, key players etc.
- Future prospects - forecasts to 2016, positive and negative factors impacting on the market and potential growth areas.

Roofing Contractors Characteristics and Issues

- Contractors characteristics -company turnover, regional coverage and services offered.
- Operational issues - pricing of quotations, specification involvement, skills shortages and sources of information important to contractors.
- Material Sourcing - multiple sourcing/trade accounts held, influencing factors, internet usage.

Products and Suppliers

- Product groups reviewed - roof tiling systems, membranes & felts, metal roofing systems and roof glazing - market size 2006-2012 and estimated shares of main product groups in 2012.
- Analysis by product group - market size, product mix (clay/slate/concrete tiles; single ply/reinforced bitumen membranes/liquid roofing/ mastic asphalt/green roofs; sheeting/tiles and fully supported metal roofing etc) - influences and trends. Identification of growth areas.

Report Summary

This 2nd edition of the Roofing Contractors Market report provides a comprehensive analysis of the sector in terms of size, structure and leading players. The market's recent performance is assessed, while analysis of material usage and key end use sectors are also reviewed.

Factors including construction levels, in particular the key end-use sectors for roofing contractors, are reviewed, together with a forecast of market prospects up to 2016.

The health of the roofing contractors market is directly related to the performance of the UK building and construction sectors, primarily influenced by new-build. Following steady growth to 2007, the impact of the economic crisis had a dramatic effect on the market, declining from its peak in 2007 of £3bn to an estimated £2.19bn in 2011. In 2008 the UK economy entered a period of more difficult trading due to the effects of the credit crunch causing the roofing contractors market to decline to around £2.8bn due to the decline in housebuilding. The economic recession in 2009 caused further deterioration of the market due to the contraction of the core end-use sectors including commercial and industrial sectors. In 2009 it is estimated that the roofing contractors market was worth around £2.3bn at installed prices. Market decline continued to 2010 before stabilising in 2011, with similar prospects forecast for 2012.

The roofing contractors market is highly fragmented comprising mainly of small companies (with less than 10 employees) and only a few companies operating nationally. Many companies reacted to the economic downturn and adopted appropriate strategies such as job losses, improve efficiencies and competitive pricing, with some operating around or just above cost price. Although there have been signs of improvement with margins beginning to increase, albeit it very slowly, in 2012.

Future prospects are more optimistic, with margins expected to gradually improve and companies taking on more staff as the volume of works increases. Essentially those roofing contractors that work in the private sectors are better placed than those focusing on other public sectors, with key sectors being office, industrial and housing sectors.

The non-domestic sector provides the majority of opportunities for roofing contractors installing a range of products including membranes & felts, metal roofing systems and roof glazing. Roofing tiling systems are predominately installed in domestic applications, with the domestic sector accounting for around 40-45% of the roofing contractors market. Changes to the housebuilding mix affect different sectors of the roofing contractors market. The recent switch back in favour of the construction of houses has benefited the roof tiling contractors, but the shortage of land favours the construction of flats and apartments that will benefit the metal roofing contractors.

Direct supply is the main source of roofing materials for roofing contractors, accounting for around 60% of the market. Roofing merchants, dominated by SIG, are also a key source for roofing materials.

There are concerns in the market regarding the loss of roofers, in particular skilled roofers, from the market in recent years and the possibility of labour shortages (again particularly for skilled workers) when the market begins to grow and expand.

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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.

We offer the following:

- **Consultancy and bespoke research projects**
- **Published research reports** - 150+ high quality, detailed research reviews covering a wide range of environmental, building and construction products.

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