

**Proposal On:**

**The Market for Flat Roofs**

**Great Britain 2024**

**A Multi-Client Report**



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## Introduction

Construction Markets has been researching and reporting on the flat roofs market for over 40 years. The reports, based on hundreds of in-depth interviews with a wide range of key specifiers, contractors, clients, manufacturers and suppliers of flat roof products and extensive desk research have gained a reputation for unparalleled detail and accuracy. The report is an essential tool for anyone wishing to identify market dynamics, shares and trends or indeed anyone just wanting reliable and detailed intelligence on the market for flat roofing products.

This highly specialised study provides a detailed market assessment which will analyse the subject comprehensively in terms of market size segmented by:

- Products:
  - Flat roof deck by type
  - Thermal insulation by type
  - Waterproof membranes by type
- Building sectors
- Type of work

The report also:

- Analyses the shares taken by flat roofs against pitched roof systems in the various sectors by type of work
- Examines the important single ply market by type of membrane
- Provides a detailed forecast through to 2028

Data from the extensive Construction Markets database (including over 450 interviews covering the general roof and wall claddings market) will be used as a platform. A further 200 interviews have been conducted specifically to meet the needs of this study in order to provide the in-depth information requirements and to ensure accuracy.

**Note: We will also publish reports covering the following markets in 2024:**

- ***The Market for Roofs Claddings***
- ***The Market for Wall Claddings***
- ***The Market for Rainscreen Claddings***
- ***The Market for Building Insulation***

***Separate proposals are available covering these reports; please contact us for more information:***

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## Report Contents

The following data will be provided on the market for flat roofs in Great Britain in 2023 and 2024:

### 1 - Market Size

The estimated market of flat roofs in Great Britain in 2023 and 2024 in terms of installed area (in m<sup>2</sup>) for each of the following types of products:

- Flat roof deck
- Flat roof waterproof membranes
- Thermal insulation

### 2 - Segmentation by Types of Products - Flat Roof Decks

The total market for flat roof deck (in terms of installed area in m<sup>2</sup>) in 2023 and 2024 will be segmented by the following types of products:

- Metal
- Precast Concrete
- Insitu Concrete
- Timber / Timber Derivative

This data will be further subdivided by the building sectors detailed in section 5.

The new non-domestic buildings market will also be segmented by the following types of flat roof constructions:

- Conventional Flat Roofs
- Green Roofs (this can be extensive or intensive and are also sometimes referred to as 'living roofs')
- Others (this includes brown and blue roofs etc.)

### 3 - Segmentation by Types of Products - Flat Roof Waterproof Membranes

The market for flat roof waterproof membranes (in terms of installed area in m<sup>2</sup>) in 2023 and 2024 will be segmented by the following types of products:

- Single Ply
- Bituminous
- Torched On
- Mastic Asphalt
- Liquid Plastics
- Hot Melt

This data will be further subdivided by the building sectors detailed in section 5.

#### 4 - Segmentation by Types of Products - Thermal Insulation

The market for the thermal insulation of flat roofs (in terms of installed area in m<sup>2</sup>) in 2023 and 2024 will be segmented by the following types of products:

- PIR / Polyurethane
- EPS
- XPS
- Mineral Wool
- Phenolic
- Others

This data will be further subdivided by the building sectors detailed in section 5.

The new non-domestic buildings market will also be segmented by the following types of flat roof constructions:

- Metal
- Precast Concrete
- Insitu Concrete
- Timber / Timber Derivative

#### 5 - Segmentation by Building Sectors and Types of Work

The market for the types of products outlined in sections 2, 3 and 4 by types of products in 2023 and 2024 will be further subdivided within each of the following building sector, sub sectors and types of work:

##### Non-domestic buildings:

The non-domestic buildings market will be further subdivided as follows:

- New buildings:
  - Private Commercial:
    - Offices
    - Retail / shops
    - Leisure / entertainment
    - Private Education
    - Private Health
    - Other private
  - Public Non-Domestic:
    - Public Education
    - Public Health
    - Other public
- Extensions
- Refurbishment

### **Private housing:**

The private housing market will be subdivided as follows:

- New Buildings:
  - Houses
  - Low Rise Flats (up to 18 metres)
  - High Rise Flats (18 metres and over)
- Extensions
- Refurbishment

### **Public housing:**

The public housing market will be subdivided as follows:

- New Buildings:
  - Houses
  - Flats
- Extensions
- Refurbishment

### **Industrial Buildings:**

- New buildings
- Extensions
- Refurbishment

## 6 - Market Segmentation - Membrane Usage in Refurbishment Work

The total market for waterproof membranes is further subdivided by the following building sectors:

- Private housing
- Public housing
- Non-domestic buildings
- Industrial buildings

And by the following types of work:

- New buildings
- Extensions
- Refurbishment:
  - Major refurbishment:
    - Replacement deck + insulation + membrane
    - Replacement insulation + membrane
  - Replacement membrane only

## 7 - Flat Roofs vs. The Remainder of the Market:

The share of the total roof cladding market taken by flat roofs will be provided and subdivided by the following building sectors and types of work:

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li>• Private housing:<ul style="list-style-type: none"><li>○ New:<ul style="list-style-type: none"><li>▪ Houses</li><li>▪ Flats</li></ul></li><li>○ Extensions</li><li>○ Refurbishment</li></ul></li><li>• Public housing:<ul style="list-style-type: none"><li>○ New:<ul style="list-style-type: none"><li>▪ Houses</li><li>▪ Flats</li></ul></li><li>○ Extensions</li><li>○ Refurbishment</li></ul></li></ul> | <ul style="list-style-type: none"><li>• Non-domestic buildings:<ul style="list-style-type: none"><li>○ New:<ul style="list-style-type: none"><li>▪ Private commercial</li><li>▪ Public non-domestic</li></ul></li><li>○ Extensions</li><li>○ Refurbishment</li></ul></li><li>• Industrial buildings:<ul style="list-style-type: none"><li>○ New</li><li>○ Extensions</li><li>○ Refurbishment</li></ul></li></ul> |
|--|--|

## 8 - Forecast to 2028

A forecast of the likely development of the market will be made for the period up to 2028 and this will cover the following:

- The likely changes in building sector activity levels by the main sectors:
  - Private housing
  - Public housing
  - Private commercial buildings
  - Public non-domestic buildings
  - Industrial buildings
- The projected changes in product usage for all of the main types of products (as listed above under items 2, 3 and 4).

The forecast will be based on the following:

- The unique Construction Markets computer-based forecasting model
- A full and detailed analysis of all relevant macroeconomic and other available data and statistics
- Information from the comprehensive field research programme

## Research Programme

The data in the report will be collected from the following research programme:

### 1 - Field Research

Telephone interviews have been conducted with the following types of respondents:

- Private house builders
- Developers of high rise private residential apartment blocks
- Specifiers designing public residential buildings
- Local Authorities
- Housing Associations / RSL's (Registered Social Landlords)
- Specifiers designing non-domestic buildings
- Flat roofing contractors
- Other specialist sub-contractors
- Segments of the distribution network
- Manufacturers supplying into the market
- Others as identified as being relevant sources of information

Over 600 interviews have been conducted with these types of respondents during the whole of 2024.

***Please note that all Construction Markets information is based on original field research and our unique research models. This ensures unparalleled detail and accuracy.***

### 2 - Desk Research:

A major programme of desk research has also been conducted consisting of the following:

- Collection and analysis of all published and other obtainable statistics from both public and private sources
- Information from the unique database held by Construction Markets which has been updated annually since the consultancy was started over 40 years ago
- Data collected from the Internet

## Fees & Timings

### Fee Structure

The fee for the study on The Market for Flat Roofs will be:

- £4,450 +VAT per subscriber

This fee will be invoiced in the following stages

- 60% upon delivery of the draft report and dataset
- 40% on delivery of the final report and dataset

The draft and final reports and datasets will be supplied in electronic format as follows:

- Draft Dataset - MS Excel format
- Final Report - PDF format
- Final Dataset - MS Excel format

*Note: The fee will be invoiced in full if the order is received once the draft data has been published in 2025.*

### Timing

The delivery dates for flat roof report are as follows:

- Draft Data - May 2025
- Final Dataset & Report - June 2025

## Terms and Conditions

The following terms of business apply to engagements accepted by Construction Markets Ltd. All work carried out is subject to these terms except to the extent that changes are expressly agreed in writing.

- Our terms of payment are strictly 30 days from the invoice date.
- The Copyright and intellectual property for any and all information supplied by Construction Markets in any format (contained in a draft report, final report, notes, ad hoc basis or otherwise) is retained by Construction Markets, although the fees you pay us allow you to use those materials for the purposes for which they were created under this engagement.
- Any and all information supplied by Construction Markets in any format (contained in a draft report, final report, notes, ad hoc basis or otherwise) must not be copied, distributed or in any way disclosed outside of the client company (or its group) without the prior written consent of Construction Markets. We recognise that there may be circumstances where you wish to disclose copies of a report we produce for you to other third parties. We may provide consent to such disclosure on condition that the third parties in question sign a hold harmless letter, a reliance letter or an engagement letter in each case in a form acceptable to us. Neither we nor our employees, consultants, agents or directors assume any duty of care to such third parties and we disclaim all responsibility for any consequence whatsoever should any such third party rely upon any report, letter, information or advice without our first having given our written consent that such third party may do so. Our only responsibility in relation to our reports and advice in connection with this engagement is that which is owed to you in the context of this engagement as at the date on which our report or other advice is given to you.
- Where we receive confidential information, we shall take such steps as we in good faith think fit to preserve confidential information from unauthorised disclosure or other misuse both during and after termination of this engagement. If, we nevertheless disclose without authorisation or otherwise misuse your confidential information, thereby causing you loss, we shall be liable to you. Save where there is specific agreement to the contrary, our client relationship with you shall not be treated as confidential information and we may disclose this fact to clients, prospective clients, or other third parties.
- We will provide you with data and services described in this engagement letter and the accompanying document describing the research scope in a timely manner. In the unlikely event that delays occur then these will be promptly advised by email.
- All reasonable endeavours will be made to ensure the accuracy of all data that is supplied and this will be based on the agreed scope and no warranty or representation is made by us as to the completeness of the data or reports or the accuracy of the information we have relied on.
- You agree that any commercial decisions that you make are not within the scope of our duty of care and in taking such decisions you must take into account the restrictions on the scope of our work and other factors, commercial and otherwise, of which you and your other advisers are, or should be, aware from sources other than our work.
- The aggregate of our liability for all Relevant Losses to the Recipient Parties shall be limited in total to ten times our paid fees for this engagement.
- You acknowledge that our employees, consultants, agents or directors do not assume any duty of care to you in a personal capacity. You shall not bring any claim in respect of any Relevant Losses against any of our employees, consultants, agents or directors personally.
- We will not be liable to you for any claim in relation to our reports and advice to the extent that you have a right of recovery from any other person.
- We will not be liable to you for any claim in relation to our reports and advice to the extent that you were aware of the fact, matter, event or circumstances giving rise to the claim prior to the date of the relevant report or advice.

**Order Form**

To:

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I would like to subscribe to **The Market for Flat Roofs Report 2024** as described in the proposal and hereby agree to the terms of conditions contained therein.

My details are as follows:

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Position: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Tel: \_\_\_\_\_

Mobile: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Please invoice me for the relevant stage payment(s) as applicable.

Signed:

\_\_\_\_\_