

The logo for NFRC, consisting of a stylized white arrow pointing up and to the right, followed by the letters 'NFRC' in a bold, white, sans-serif font.

LEADING ROOFING EXCELLENCE

# State of the UK roofing industry

COMPLETE SECTOR DATA

Q2 2024

Prepared by AMA Research,  
on behalf of NFRC

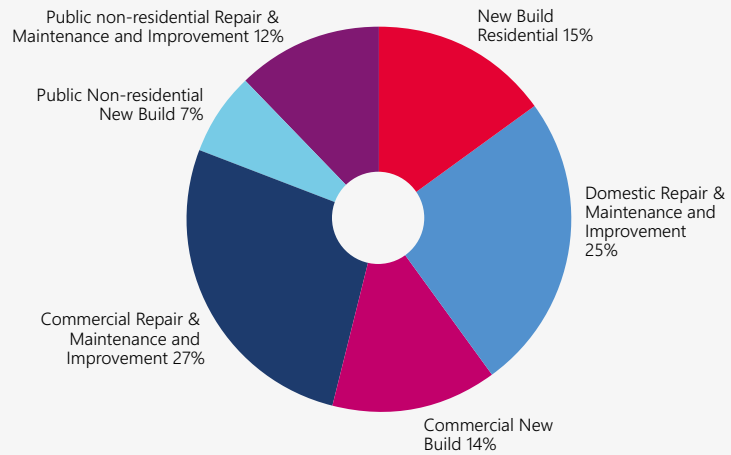
The logo for AMA Research, featuring a stylized white bar chart icon above the text 'AMA Research' in a white, sans-serif font.



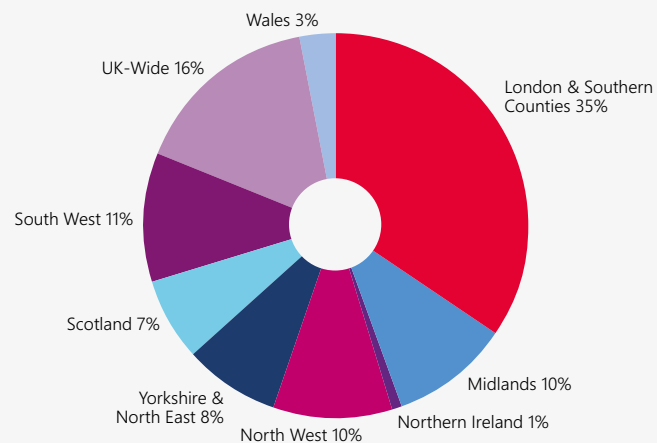
# About the Survey

This report is prepared by AMA Research on behalf of NFRC (The National Federation of Roofing Contractors). This report looks at activity during the three months to June 2024. This survey of NFRC members was conducted between 16 July 2024 and 12 August 2024. Over 100 NFRC members responded to the survey.

## Response by sector



## Response by region

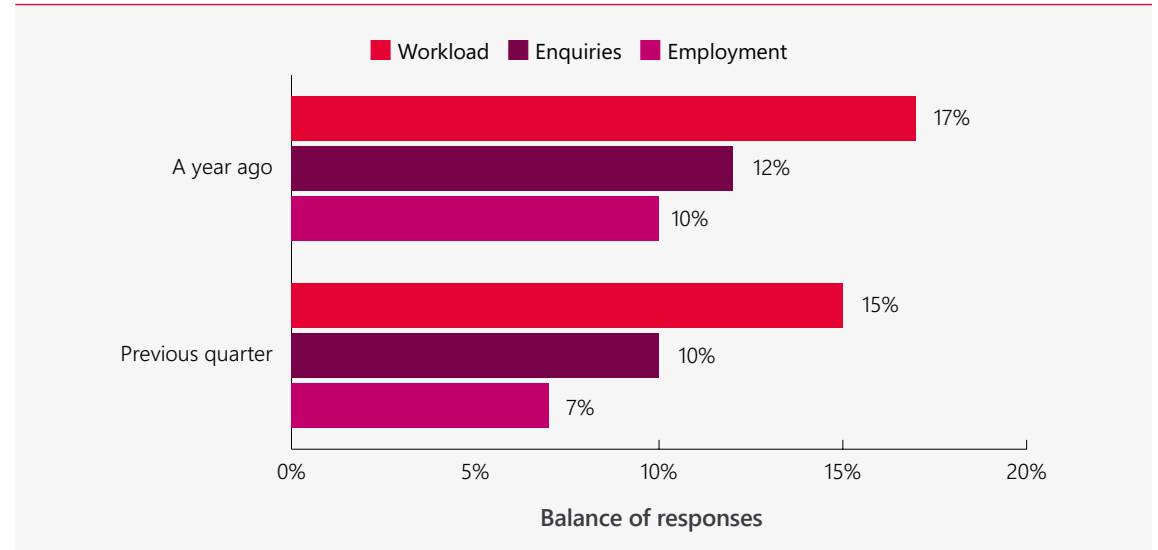


# Key Indicators

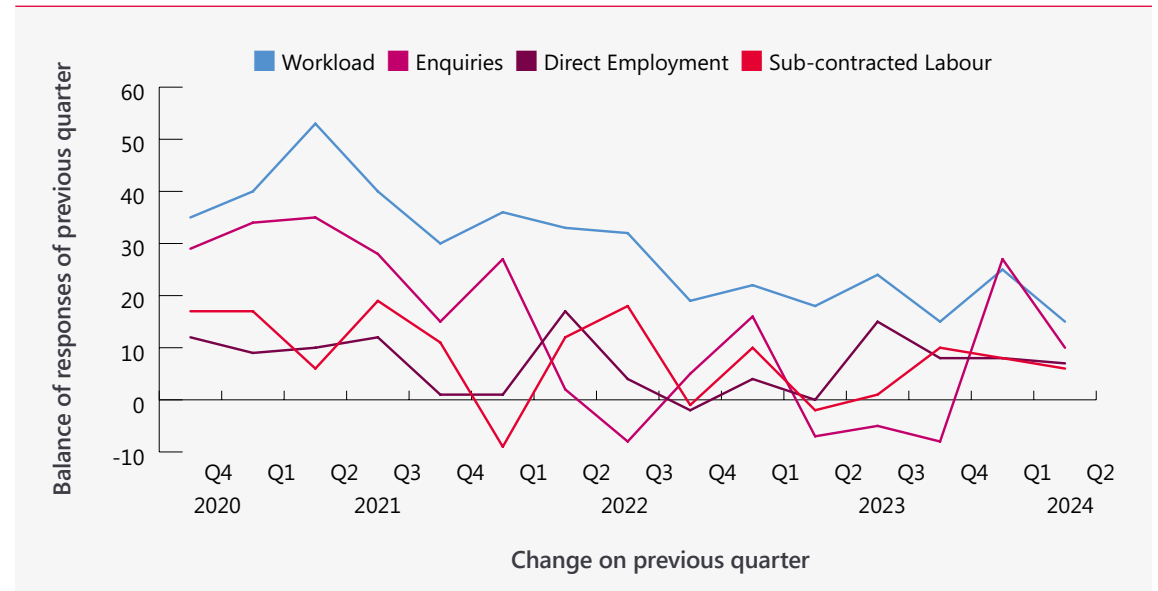
Key indicators for the roofing sector remain positive in Quarter 2 of this year, although there are signs of a slight slowdown in growth and new enquiries. During this period, the country was awaiting the result of the General Election, economic growth remained relatively stagnant, and the Bank of England maintained interest rates at 5.25 per cent. A balance of 15 per cent of respondents reported overall growth in workload in the second quarter of this year, compared with 25 per cent in the previous quarter. 38 per cent of roofing contractors reported an increase in workload compared with the previous quarter this year, although the proportion of those seeing a decline in workload increased from 16 per cent to 23 per cent in the second quarter of 2024.

39 per cent of firms also reported growth in new enquiries for work in Quarter 2, although 29 per cent saw a fall, equating to a balance of 10 per cent growth during this period and lower than the balance in the first quarter of this year. Both direct headcount and subcontracted labour levels increased in Quarter 2 this year, with growth levels remaining similar to those reported in the first quarter, at 7 and 6 per cent, respectively.

## Key Indicators



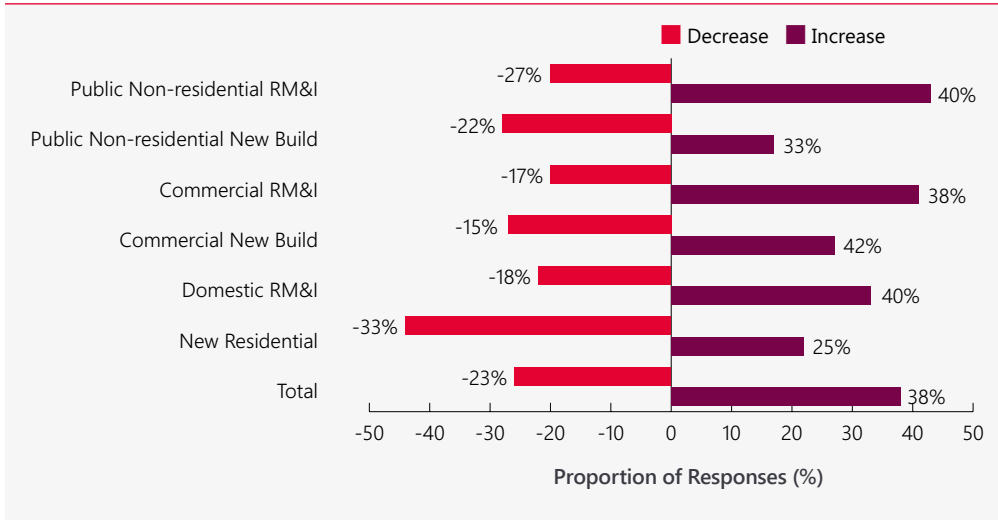
## Key Indicators



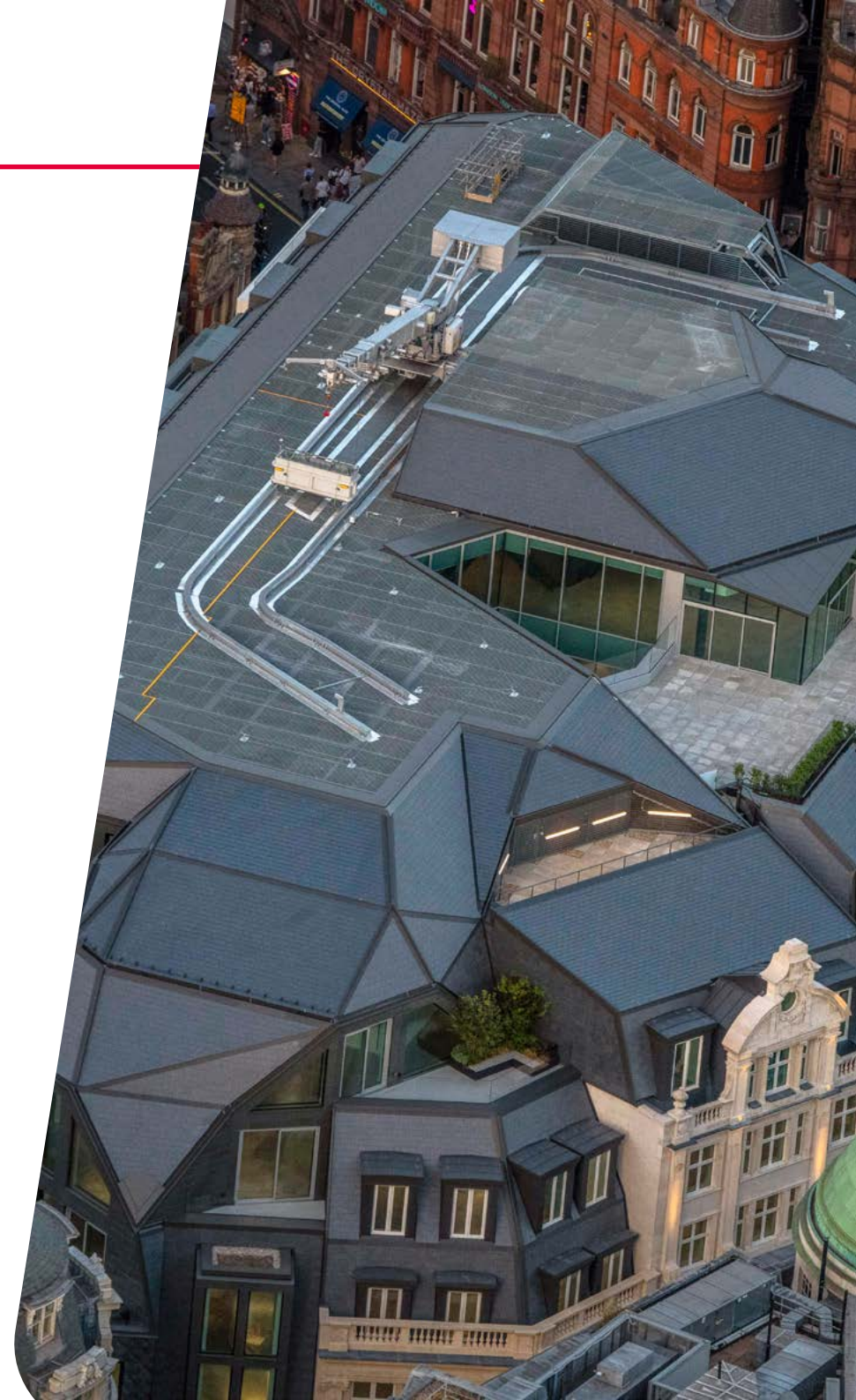
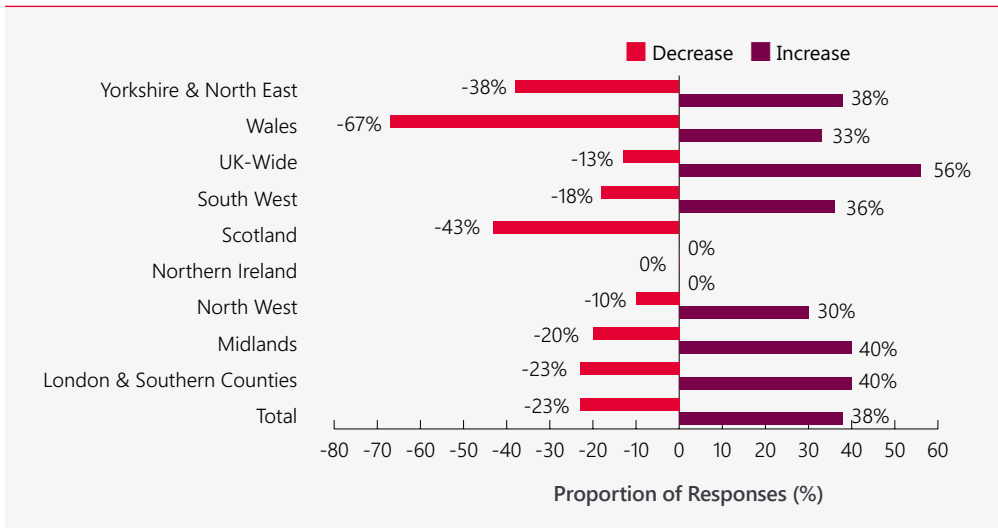
\*N.B. Balance of respondents refers to the percentage reporting an increase less the percentage reporting a decline. In some cases, the 'balance' percentage may not equal the 'increase' minus 'decrease' percentages due to rounding.

# Workload – Change on Previous Quarter

Workload **against** previous quarter split by sector



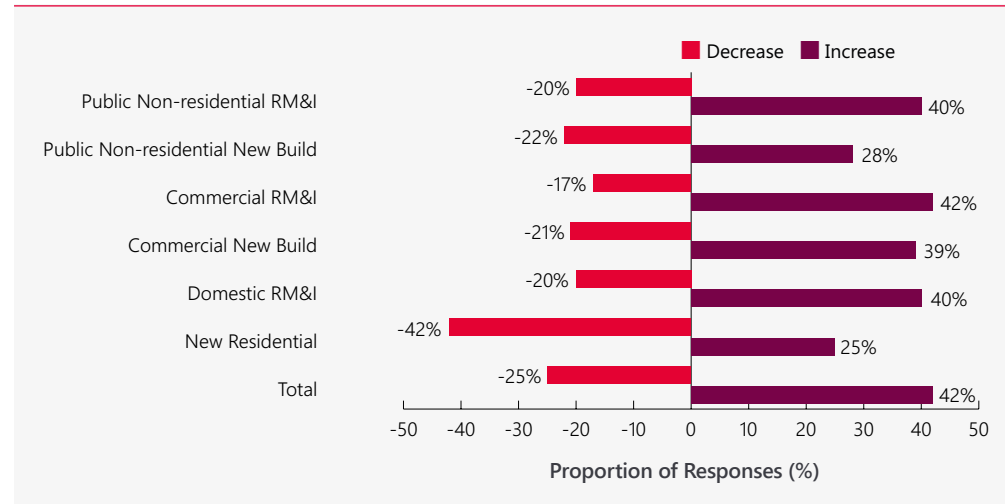
Workload **against** previous quarter split by region



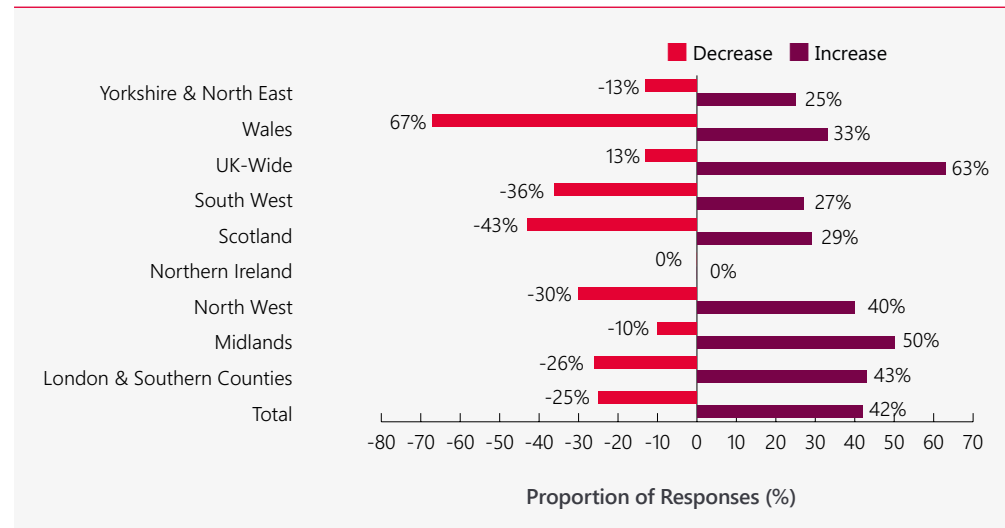


# Workload – Change on Year Earlier

Workload **against a year ago** split by sector

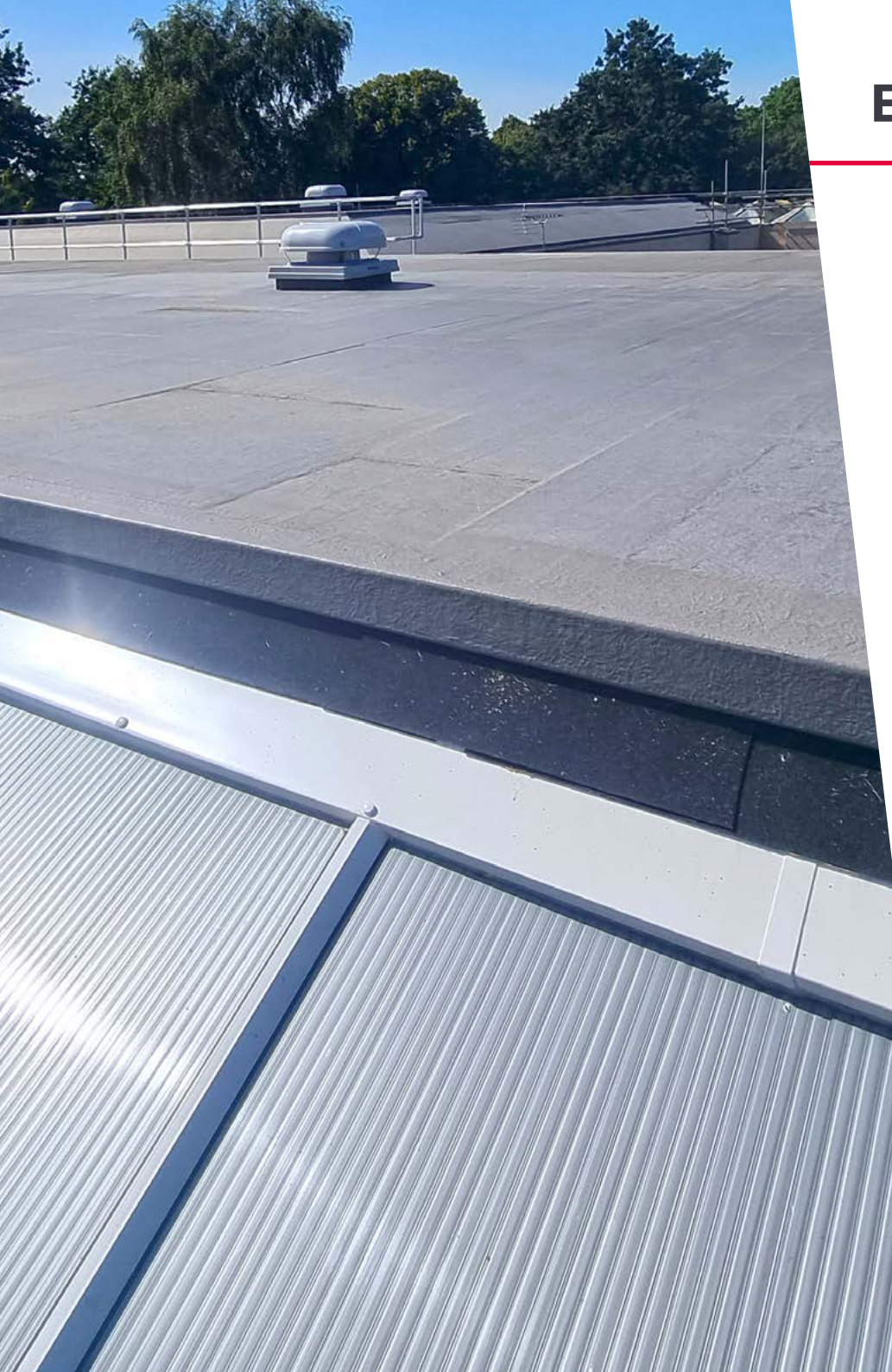


Workload **against a year ago** split by region

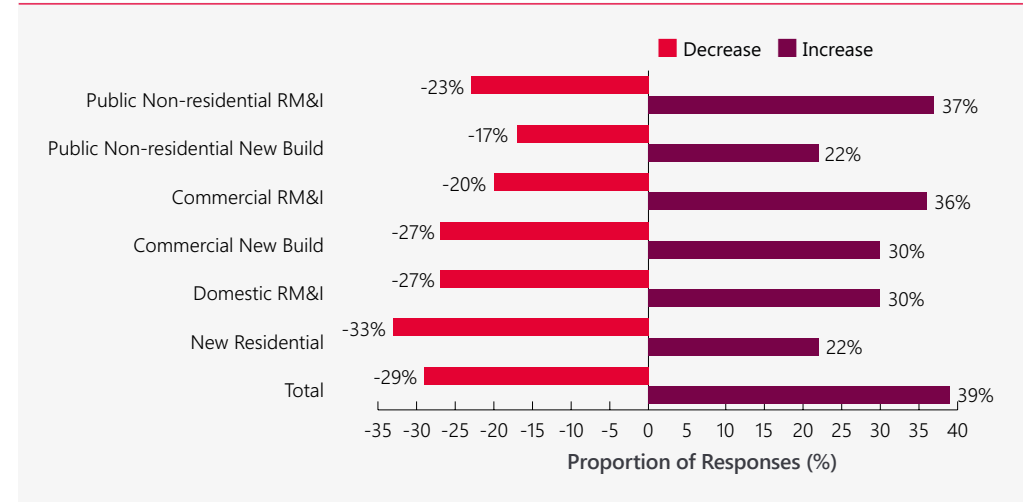




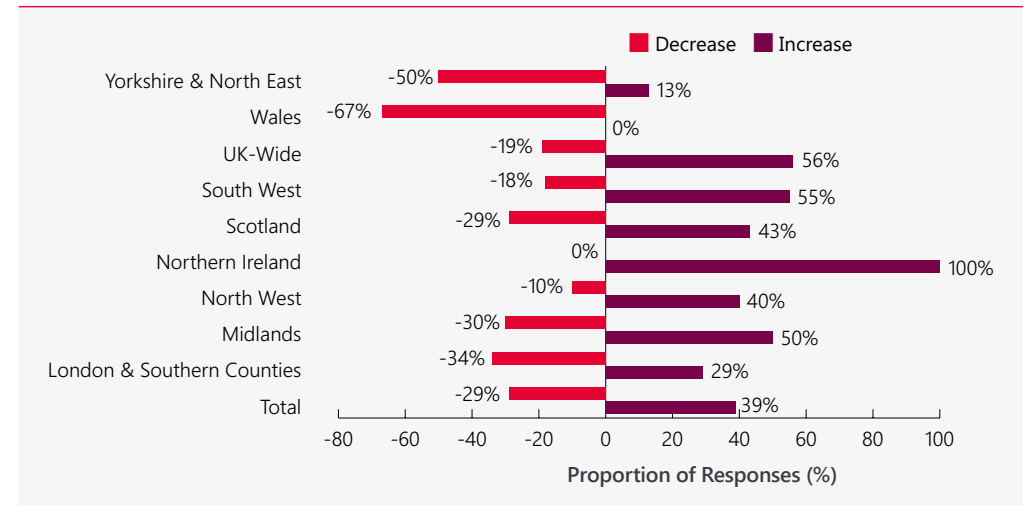
# Enquiries – Change on Previous Quarter



Enquiries **against previous quarter** split by sector

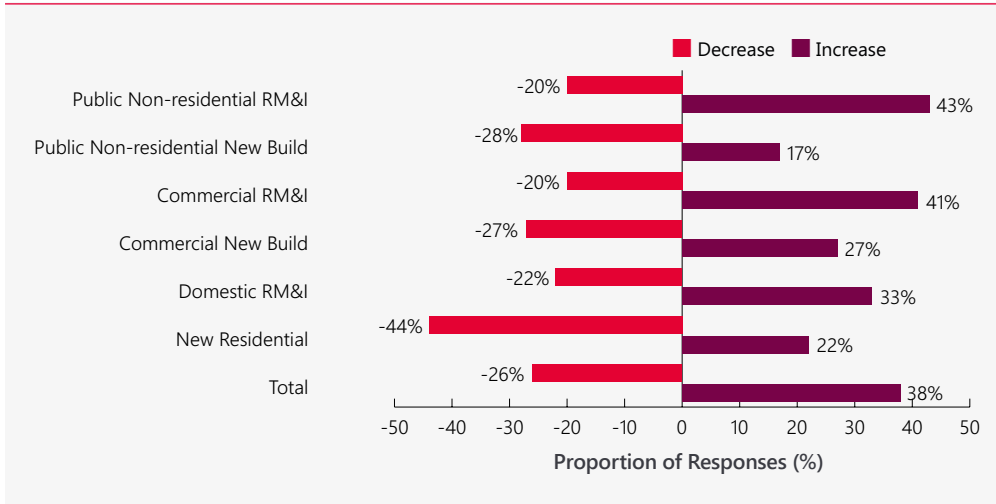


Enquiries **against previous quarter** split by region

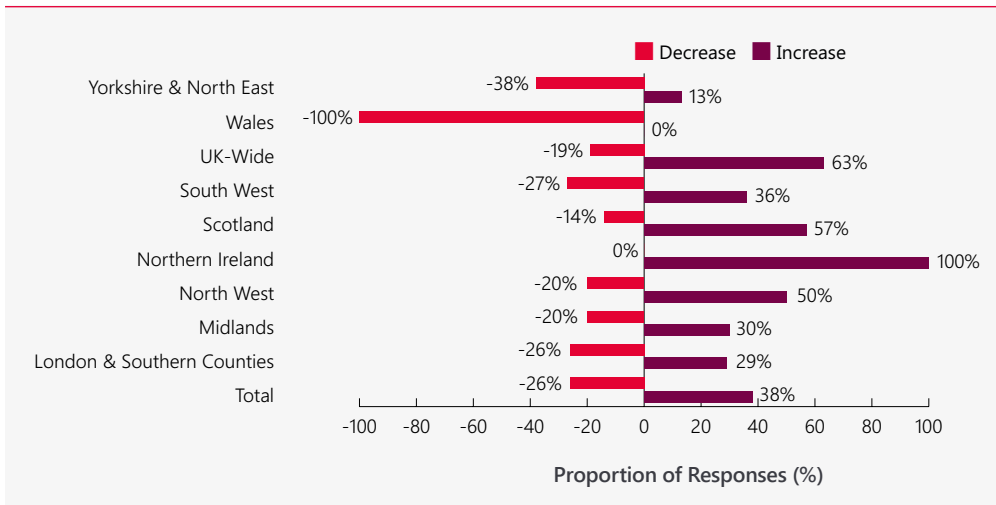


# Enquiries – Change on Year Earlier

Enquiries **against a year ago** split by sector



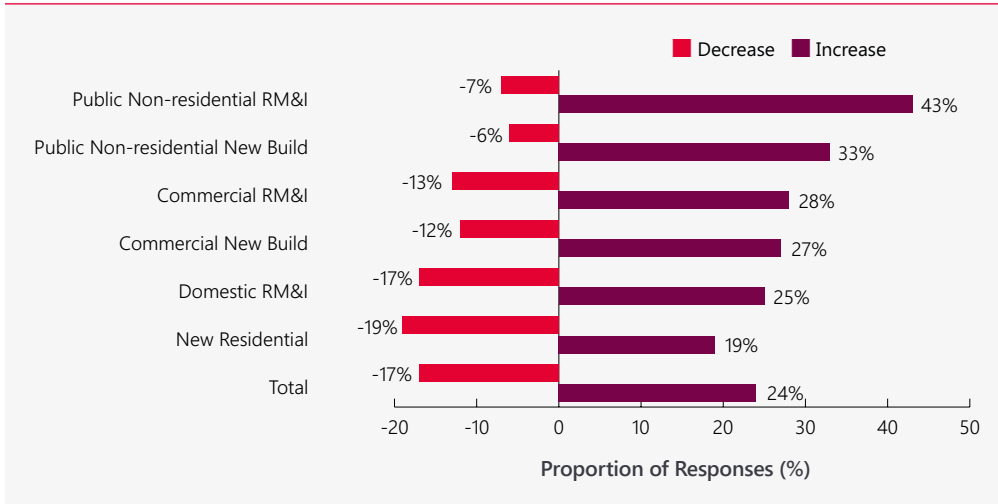
Enquiries **against a year ago** split by region



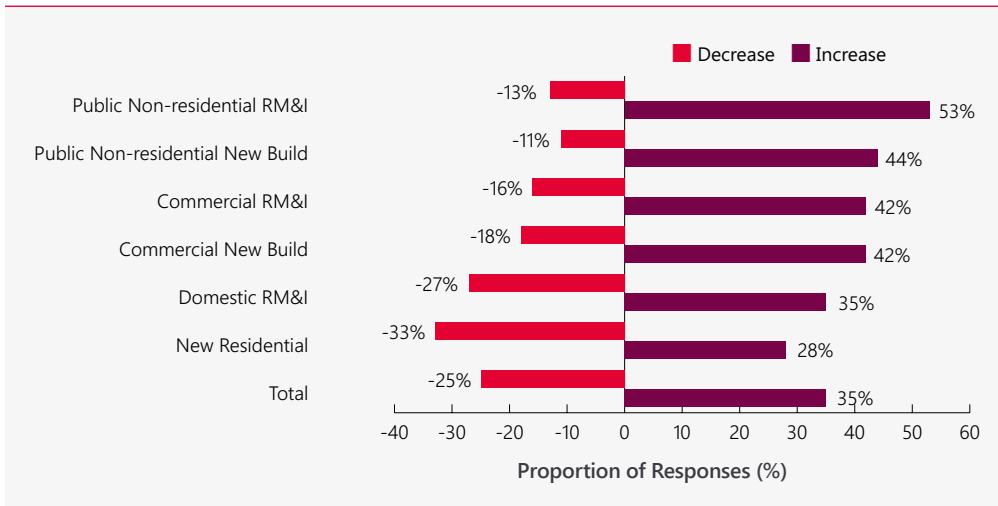


# Direct Headcount

## Change on previous quarter



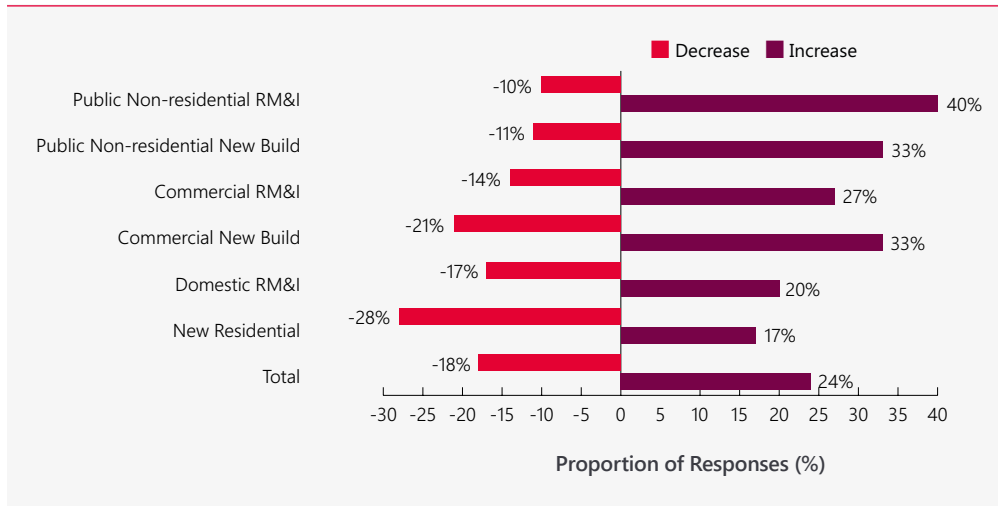
## Change on a year ago



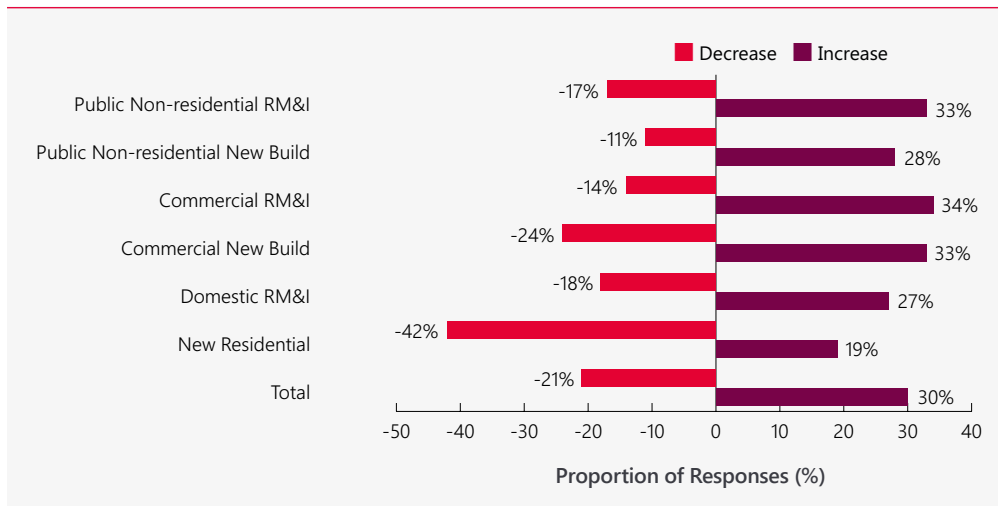


# Sub-Contracted Labour

## Change on previous quarter



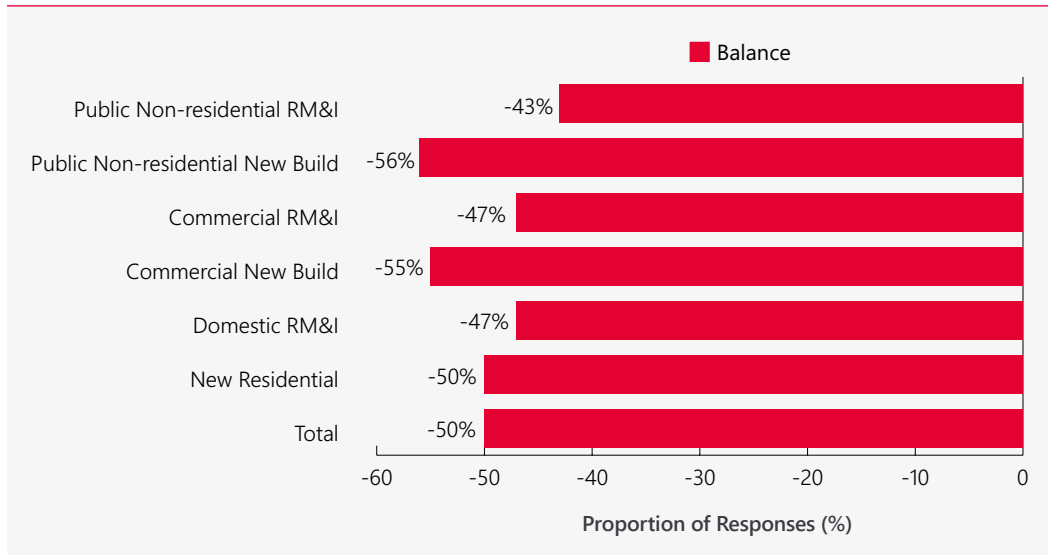
## Change on a year ago



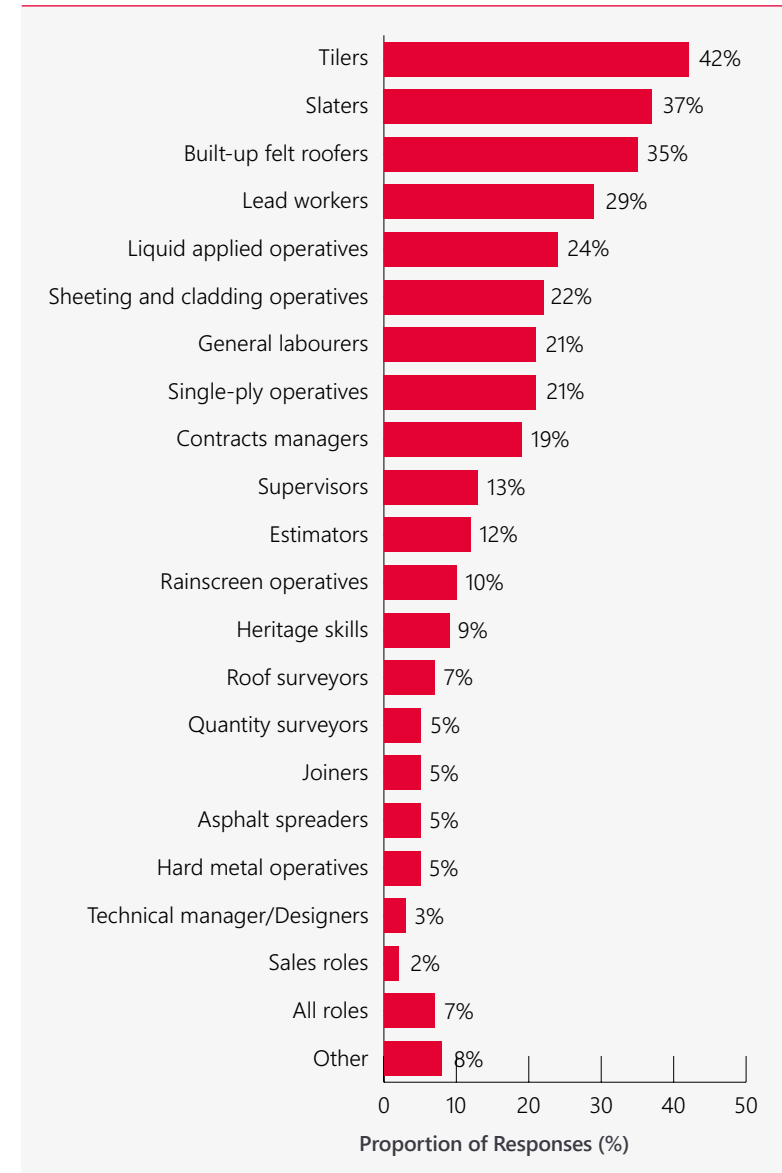


# Recruitment Difficulties

Change on **previous quarter**



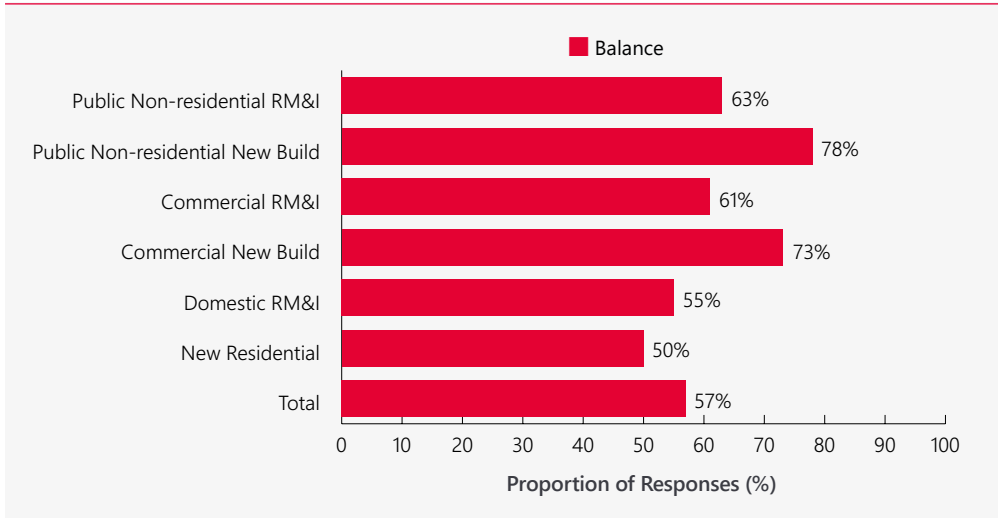
Areas of **Skills Shortages**



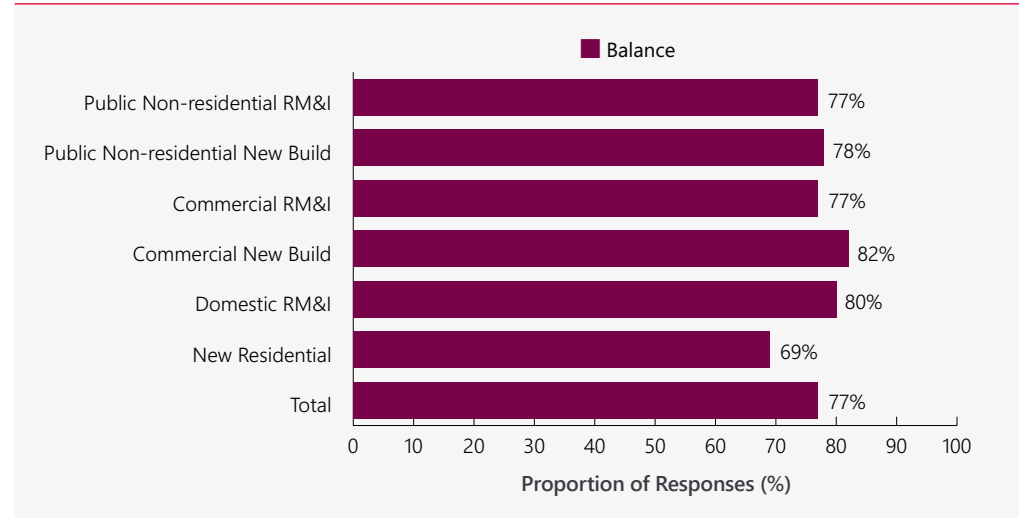


# Labour Cost

Labour Cost **against previous quarter** split by sector



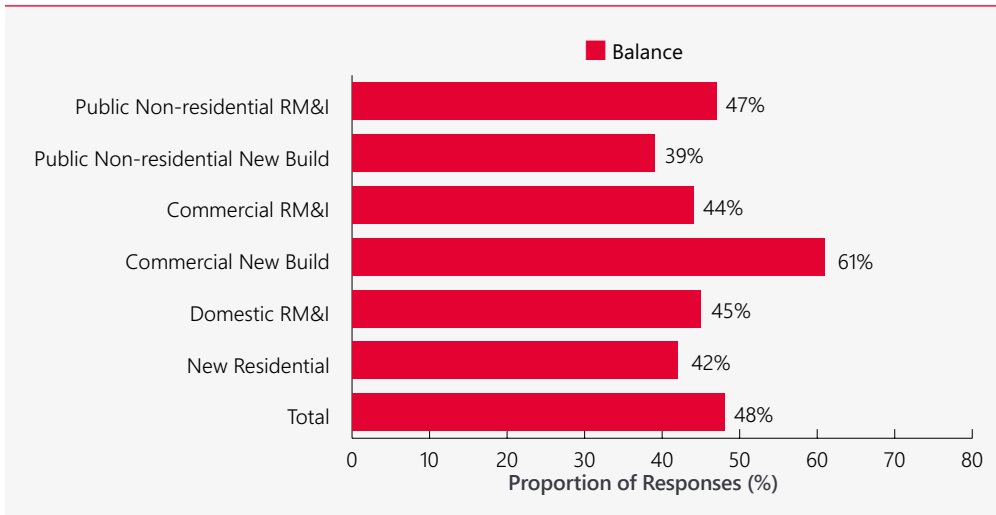
Labour Cost **against a year ago** split by sector



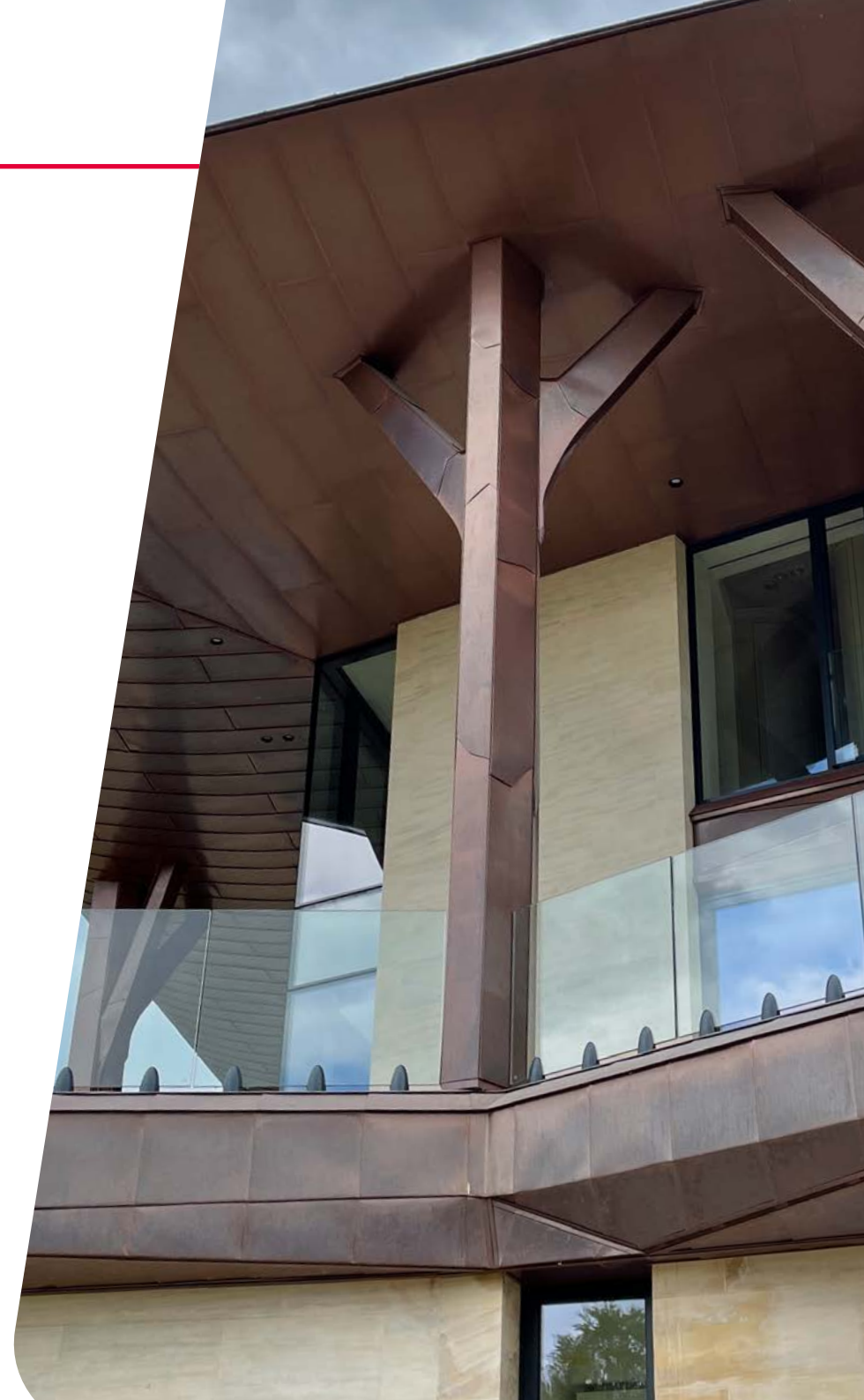
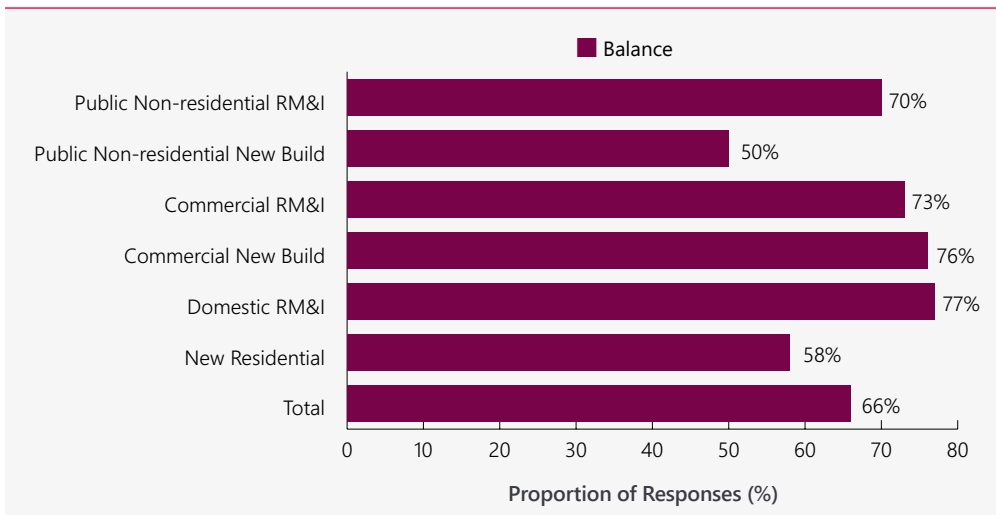


# Material Costs

Material Cost **against previous quarter** split by sector



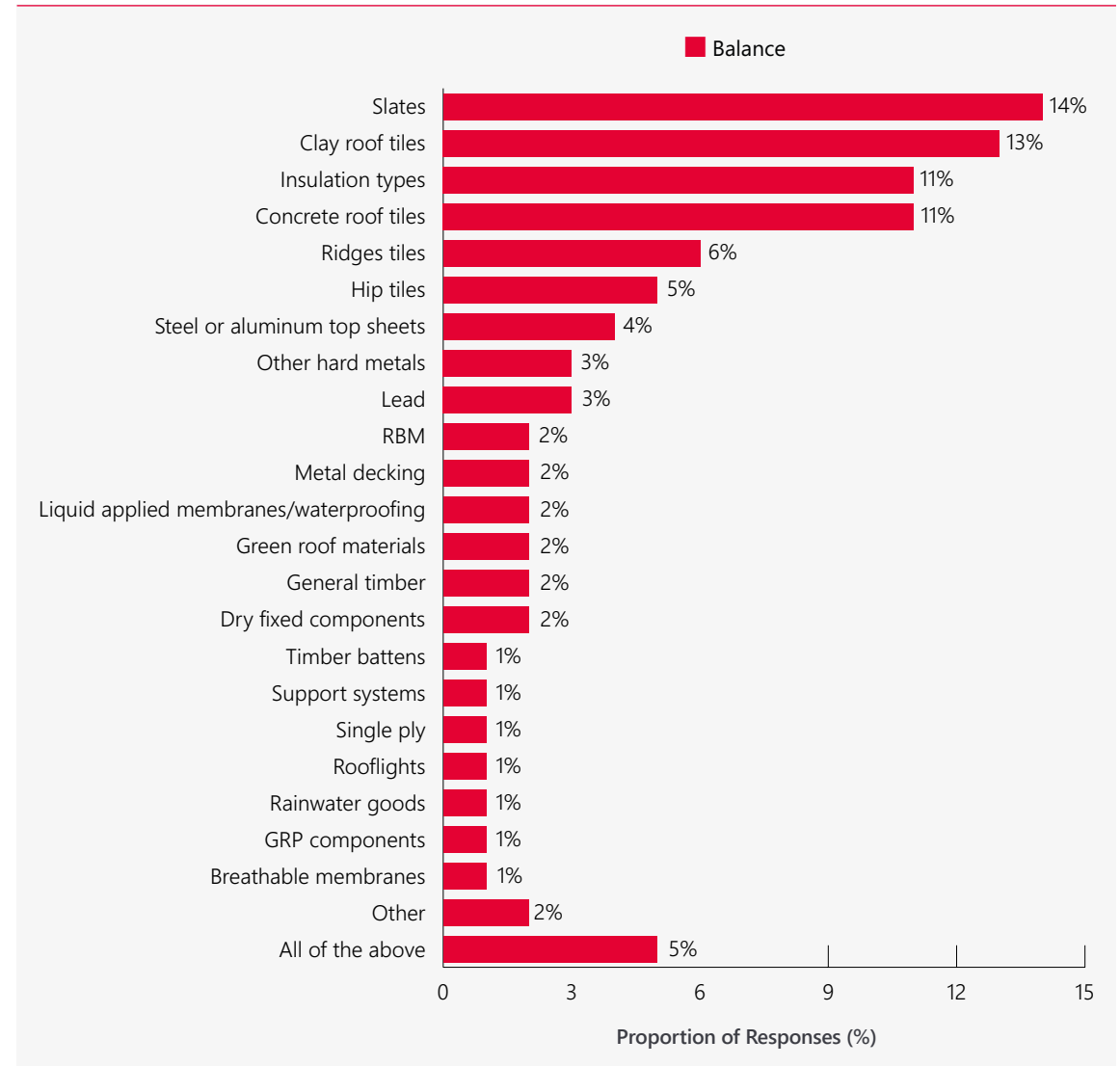
Material Cost **against a year ago** split by sector



# Material Costs

- Materials availability has continued to improve in the second quarter of 2024, albeit at a slower rate than in the first quarter of this year. 16 per cent reported greater ease of securing materials, although 10 per cent reported greater difficulty resulting in a lower balance of 6 per cent finding this easier.
- As seen in the first quarter of this year, shortages of slate were most widespread, with 14 percent of firms reporting difficulty sourcing it. Clay roof tiles and insulation types were also reported as being in short supply by 13 per cent and 11 per cent, respectively. 5 per cent, a small increase on the previous quarter of this year, reported difficulty in obtaining all types of materials.
- A balance of 48 per cent report higher materials prices in quarter 2 this year, compared to 55 per cent in the first quarter, perhaps indicating the price inflation pressures are beginning to subside, albeit marginally.
- Labour costs continue to rise in this quarter, a trend that has been evident in recent quarters. As skills shortages continue to challenge our sector, this trend is expected to continue. 60 per cent of firms reported an increase in wage costs with only 3 per cent reporting a decline.

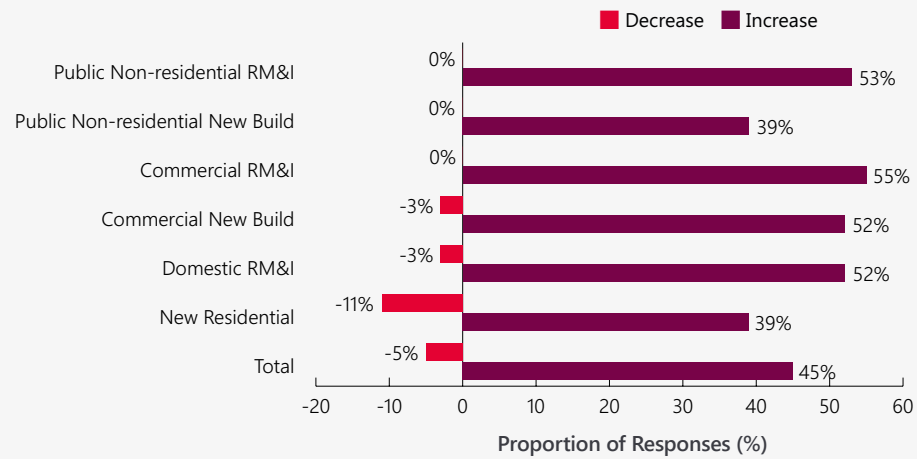
Material Cost **against previous quarter** split by sector



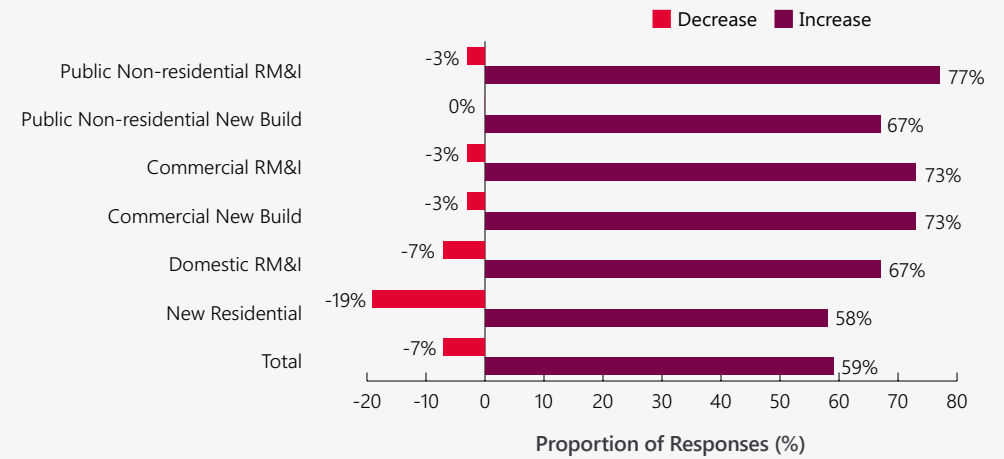


# Tender Prices

Tender Prices **against previous quarter** split by sector

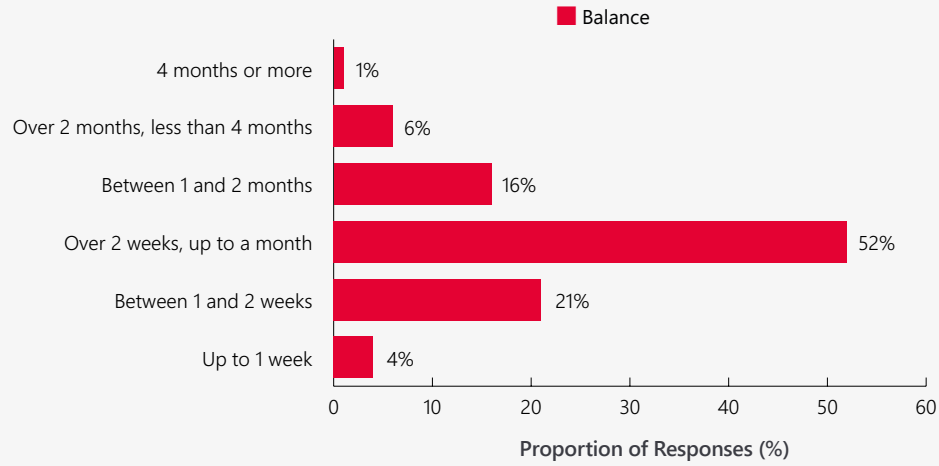


Tender Prices **against a year ago** split by sector

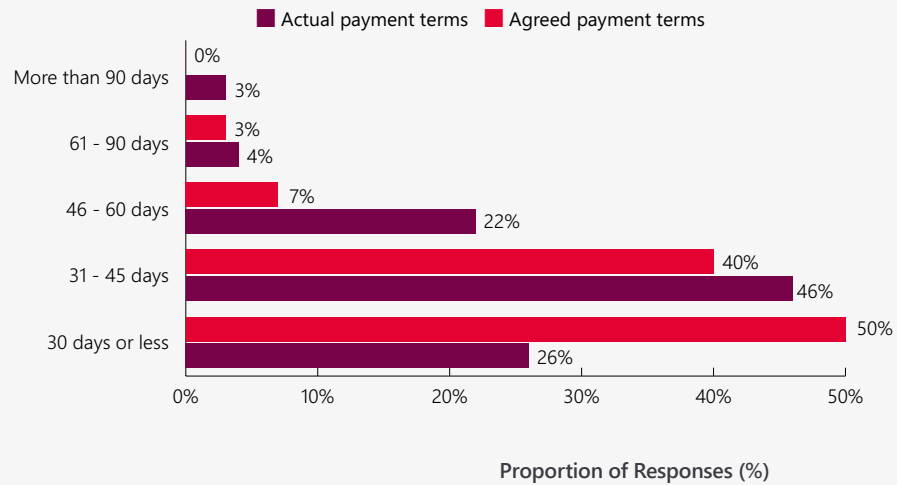


# Lead Times and Payment Terms

## Lead Times



## Payment terms and periods

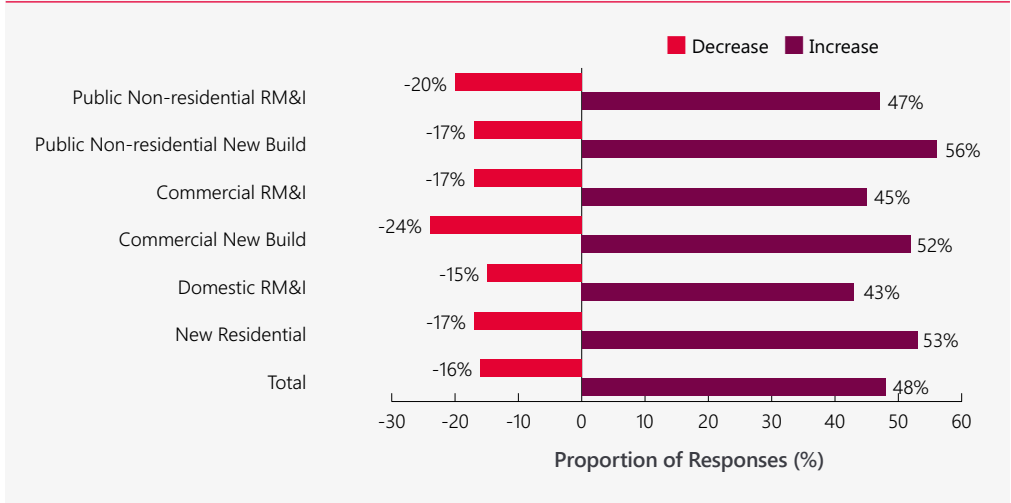




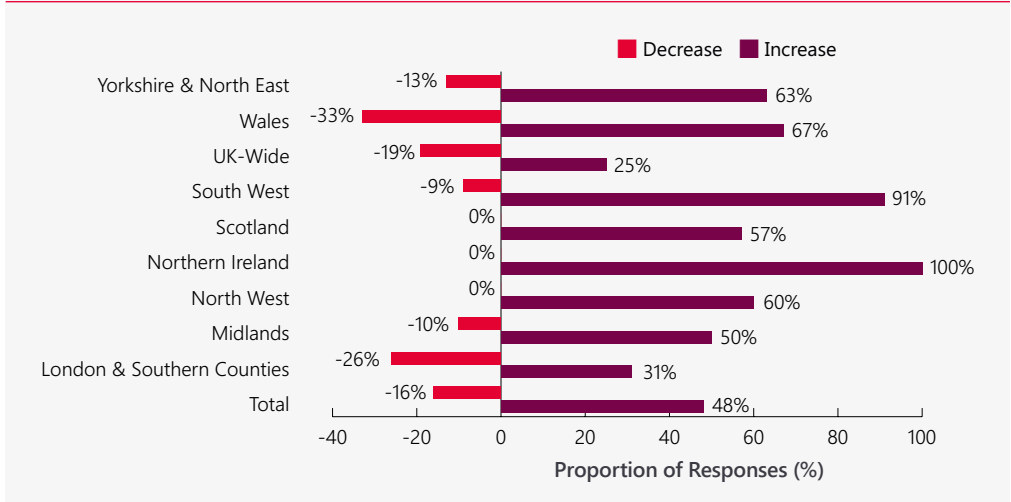


# Market Expectations – Next Quarter

Market Expectations **over the next quarter** split by sector



Market Expectations **over the next quarter** split by region

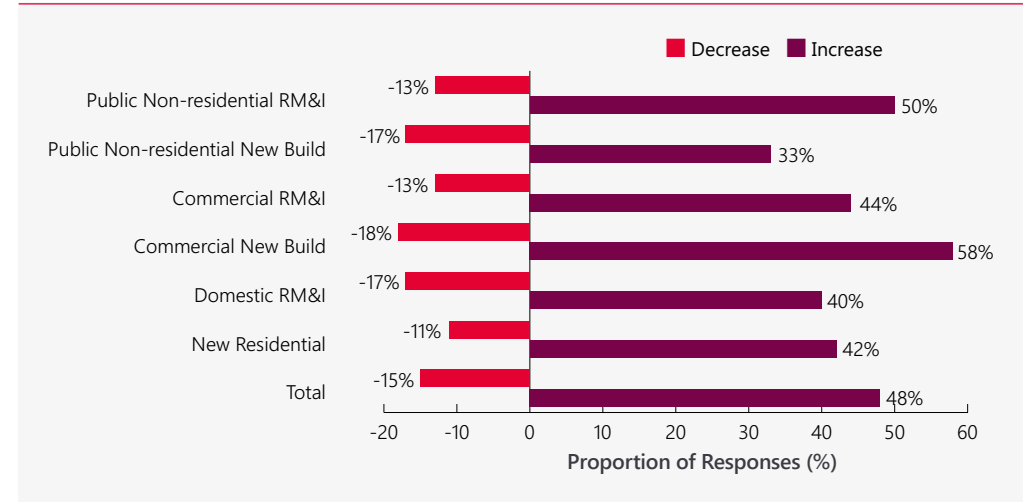




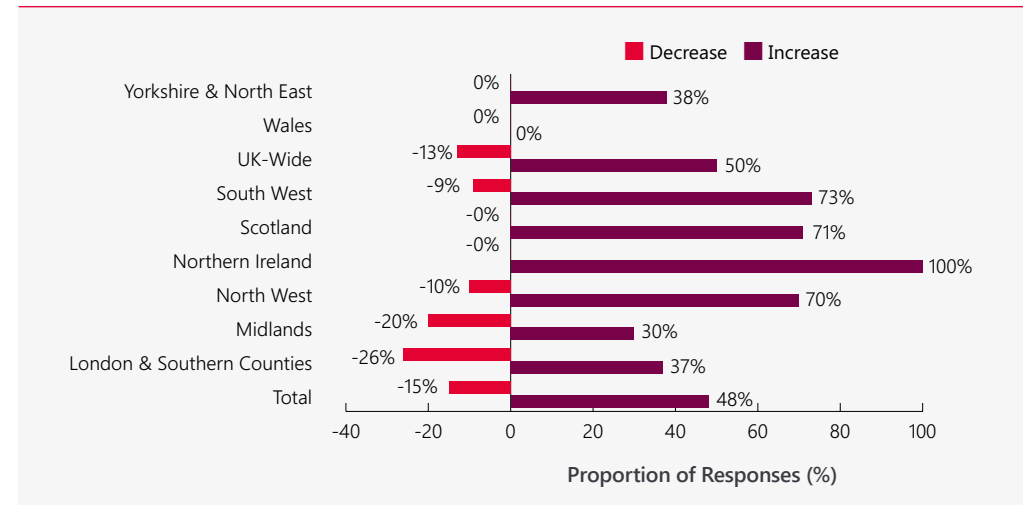
# Market Expectations – Next 12 Months



Market Expectations **over the next 12 months** split by sector



Market Expectations **over the next 12 months** split by region







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AMA Research is proud to have partnered with NFRC to produce this State of the UK Roofing Industry report.

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