NFRC
LEADING ROOFING EXCELLENCE

State of the UK roofing industry

AUTUMN 2025

Key findings:

- Subdued period of workload and new enquiries.
- Commercial RM&I sector is the most positive.
- North of England pessimistic for 2026.
- The Autumn budget provided little confidence.

Prepared by Barbour ABI, on behalf of NFRC

BarbourABI

Contents

Charts

An introduction by James Talman, NFRC CEO

Looking back at 2025, the findings in this report will not surprise many. They reflect the challenges our Members faced and the opportunities that began to emerge during the year. That's to say a sector navigating a period of transition, shaped by workforce constraints, ongoing cost pressures, challenging market conditions, and the continued need for clear policy support.

Throughout Autumn 2025, considerable attention focused on the Government's budget announcement. While expectations had grown following the delayed release, the final package focused on stability rather than growth and avoided major surprises.

The budget introduced fully subsidised under-25 apprenticeships for SMEs, a positive development reflected in this report. We estimate this measure could deliver savings of approximately £550 per apprentice. However, for many businesses these savings are likely to be offset by increases to the National Minimum Wage and National Living Wage. As highlighted in the following report, rising employment costs continue to squeeze margins.

Other key themes in this report are familiar but urgent, especially the continued shortage of skilled workers. Recruitment continues to get harder for many Members and is impacting their ability to carry out the work in their order books.

Together, these factors are influencing business capacity, investment decisions, and confidence across the industry. The Budget failed to provide the certainty many businesses were seeking. Combined with wider political uncertainty, this has further weakened business confidence.

While this uncertainty presents challenges, it also reinforces the importance of coordinated action between industry and government to deliver policy, sustain resilience and enable the growth opportunities anticipated in the years ahead. This is all reflected in NFRC's focus for 2026. These issues are at the heart of our strategy as we see the UK construction industry move from the low point in output of 2025 to expected moderate growth in 2026 and beyond.

We hope you enjoy reading this report and would like to thank all those Members who contributed towards it. Without your valuable support, it would not be possible to provide you with this up-to-date snapshot of the market.

James Talman
NFRC CEO

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Welcome to the state of the roofing industry survey report

About the survey

This report is prepared by the Consultancy Research Team at Barbour ABI on behalf of NFRC (National Federation of Roofing Contractors). This report predominantly looks at activity in autumn 2025 compared to the same time last year. A small number of questions focus on events over the three months prior to the survey. This survey of NFRC members was deliberately delayed to capture reactions to the Autumn 2025 budget; as a result, it was conducted between 4th December and 12th January 2026. 128 NFRC members responded to the survey.

About the author

Jenny Archer is an experienced researcher with over 20 years' experience in the field, including 13 years delivering research for the built environment sector. During that time, she has designed, managed and presented many quantitative and qualitative projects, sharing results with the industry through written reports and presentations. She has also been heavily involved in competitor analysis to inform strategic decision making. Jenny joined the Consultancy Research Team at Barbour ABI in 2024 as Consultancy Research Manager, delivering bespoke consultancy projects for clients. Jenny is a certified member of the Market Research Society.

NB: The survey and report have been updated for 2025. This resulted in a shorter, easier to complete and more effective survey, and a report which we hope is both more interesting and easier to read and understand. In particular, the report moves away from reporting on balanced figures to discuss the proportion of roofing contractors indicating workload, for example, has increased, decreased or stayed the same.

In some cases, percentages may not add up to 100 per cent due to rounding or respondents selecting multiple responses. When presenting the data at a regional level, if there are less than five responses from a region, the data is omitted from the charts and instead a sentiment from Members in those regions is shown. This is to avoid any ambiguity in the data due to the low number of responses within some regions. Data labels are omitted from the chart for all percentages that are less than 5%.

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NFRC is the largest and most influential roofing trade association in the UK, promoting quality contractors and quality products, ensuring that its Members are at the forefront of all roofing developments.

NFRC actively ensures that all Members offer high standards of workmanship and sound business practice through a strict code of practice and vetting procedure, including site inspections and adhering to the Government endorsed standards. NFRC also provides Members with technical advice and guidance to help ensure compliance, while representing their interests across the wider construction industry and to government.

"Our mission is to provide standards and guidance to our Members, which raises confidence among businesses and householders, and promotes roofing as a skilled, professional sector within the wider construction industry."

Key indicators

During autumn, the UK roofing sector was subdued: 37% of roofing contractors reported an increase in workload compared to 43% in summer 2025. Concerningly, this is an 11-percentage point decrease on the workload levels seen in Q3 2024 (37% in autumn 2025 vs. 48% in Q3 2024). Alongside a subdued workload, the level of new enquiries remains flat: 34% of contractors reported an increase in the level of new enquiries, similar to levels seen in summer 2025 (32%).

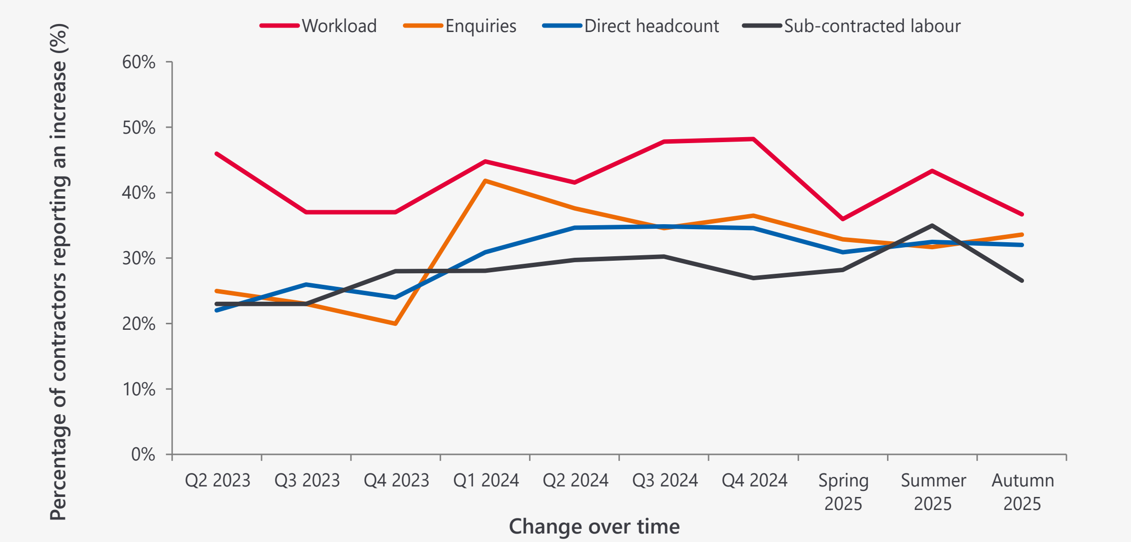
The roofing sector is not alone in experiencing subdued activity. The Barbour ABI Construction Forecast Bulletin GB 2026 – 2030 Edition[1] describes the broader construction industry as showing modest growth in 2025 with total output estimated to have increased by just 1.3% over the year. Traditionally strong sectors for roofing, such as the residential sector, have remained stagnant. This is due to a variety of economic challenges and ongoing issues which are hindering recovery, including stifled demand, elevated build costs and affordability issues, planning delays and regulatory hurdles (such as gaining approval from the Building Safety Regulator), and skills shortages.

During autumn 2025, reported levels of direct headcount remained stable with 32% reporting an increase compared to 33% in summer 2025. In contrast, levels of subcontracted labour reduced as workload levels fell (27% reported an increase in the use of sub-contracted labour vs. 35% in summer 2025). This reduction partly reflects the seasonal workforce fluctuations typically observed in Q3 or Q4 each year. Compared to Q3 2024, both levels of direct headcount and sub-contracted labour fell by 3 and 4-percentage points, respectively.

During autumn, the UK roofing sector was subdued: 37% of roofing contractors reported an increase in workload compared to 43% in summer 2025.

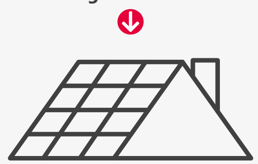
[1]https://store.barbour-abi.com/report/construction-forecast-bulletin-2026-editions/

Chart 1: Key indicators



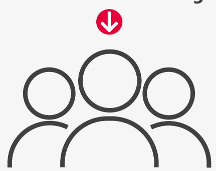
Key indicator changes over the last year

Change in workload



-11% vs Q3 2024

Direct headcount changes



-3% vs Q3 2024

Shift in enquiry levels

Minor fluctuations

Sub-contracted labour levels

-4% vs Q3 2024

Workload by sector and region

Overall, 37% of roofing contractors reported an increase in workload during autumn 2025 compared to 43% in summer 2025. During the autumn, the three repair, maintenance and improvement (RM&I) sectors showed the strongest growth. 37% of contractors working within the public non-residential RM&I sector and 32% of those working within the domestic RM&I sector reported an increase in workload (compared to 31% and 29%, respectively, in the summer). Weakest growth was reported by the commercial new build sector: 20% of contractors working in this sector reported an increase in workload compared to 41% in the summer – a decrease of 21 percentage points.

Regionally, there are disparities in reported workloads. Strongest growth is found among contractors working within the South West: 56% of whom reported growth in workload (vs. 50% in summer 2025). Those operating UK-wide are also more positive about their workload: 53% of respondents reported an increase. However, this is a decrease from 63% in the summer.

Those primarily operating within the North West and Yorkshire & North East reported the lowest increase in workload (14% and 18%, respectively, vs. 33% and 38% in summer 2025).

Chart 2: Workload by sector – change on previous year

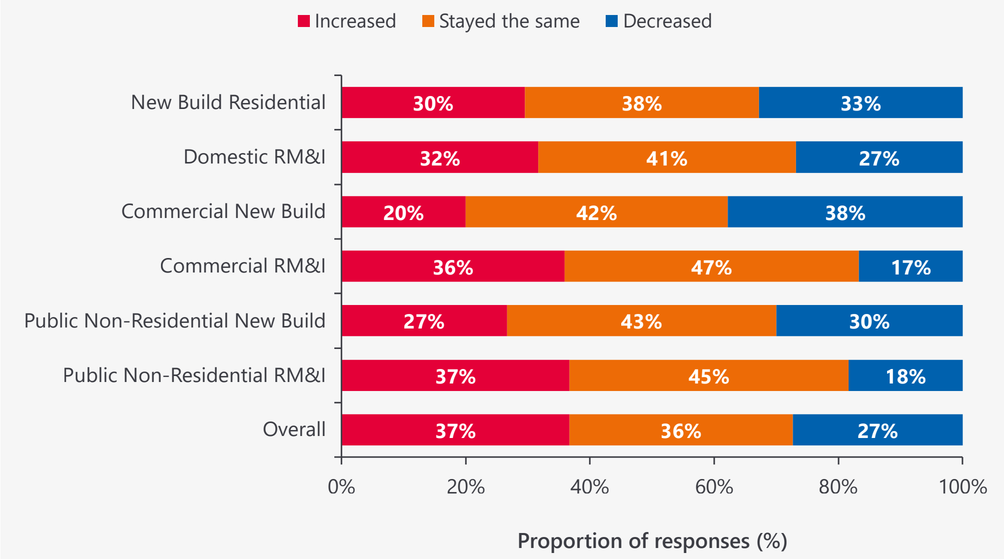
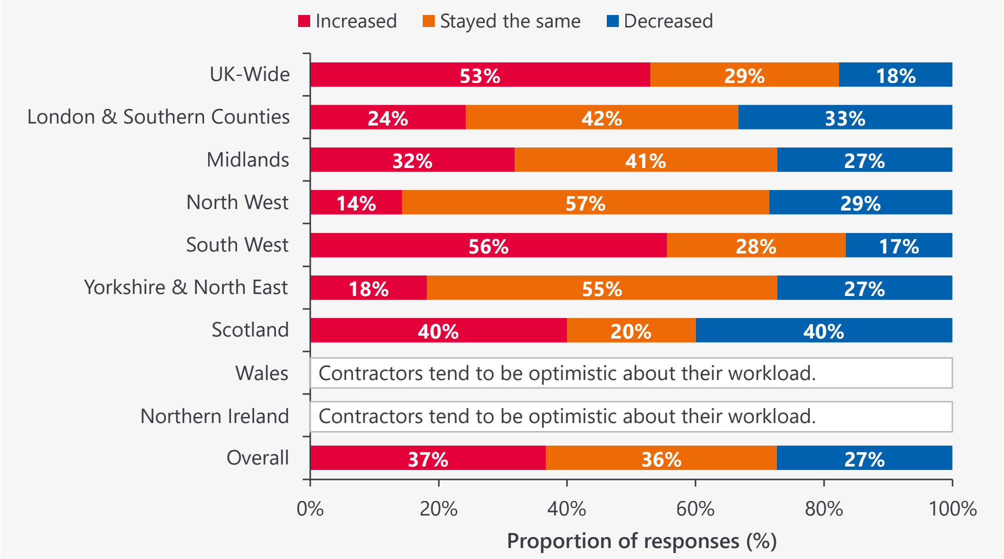


Chart 3: Workload by region – change on previous year



Enquiries by sector and region

During the autumn, 34% of roofing contractors reported an increase in the level of new enquiries compared to 32% in summer 2025. The level of new enquiries was highest within the commercial RM&I sector where 37% reported an increase (compared to 32% in the summer). In contrast, this quarter only 16% of roofing contractors in the commercial new build sector reported an increase in the level of new enquiries, a significant decline from 39% in the summer. The commercial sector is likely being influenced by investors reluctance to invest in new offices due to weak business confidence, high borrowing costs and economic uncertainty. Similarly, the retail, and entertainment and leisure sectors are, as a whole, impacted by this uncertainty with the focus shifting instead to repurposing and refurbishment.

From a regional perspective, those operating across the UK reported the strongest increase in the level of new enquiries (53% compared to 26% in summer 2025). This suggests their broad portfolio is protecting them from areas that are struggling with a poor pipeline of work. Those operating primarily in the South West have also seen an increase in the level of new enquiries (50% reported an increase vs. 38% in the summer).

The weakest pipelines of activity are in the North West and Midlands, where only 14% and 18%, respectively, reported an increase in the level of new enquiries. In the North West this is down sharply from summer 2025, when 44% reported an increase.

Chart 4: Enquiries by sector – change on previous year

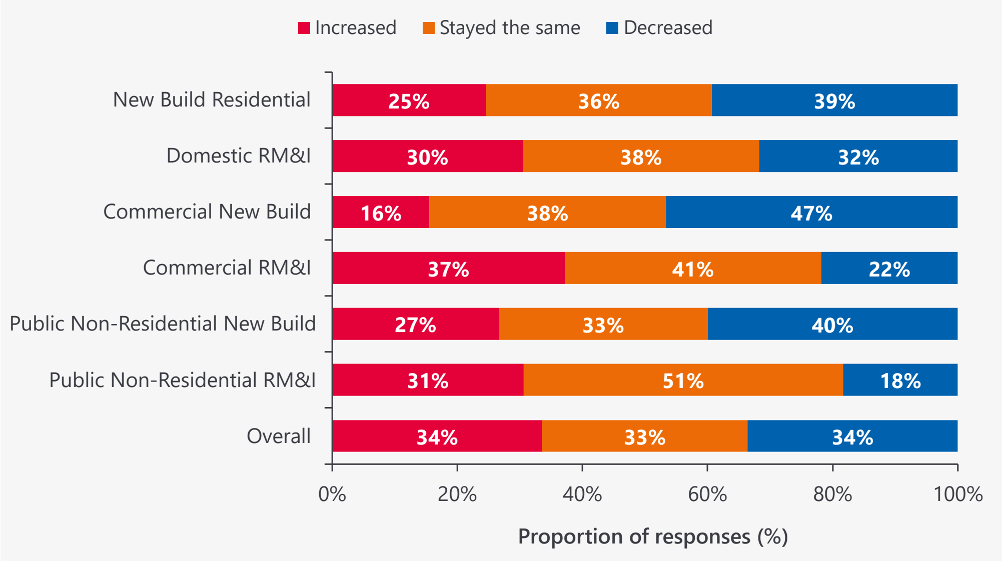
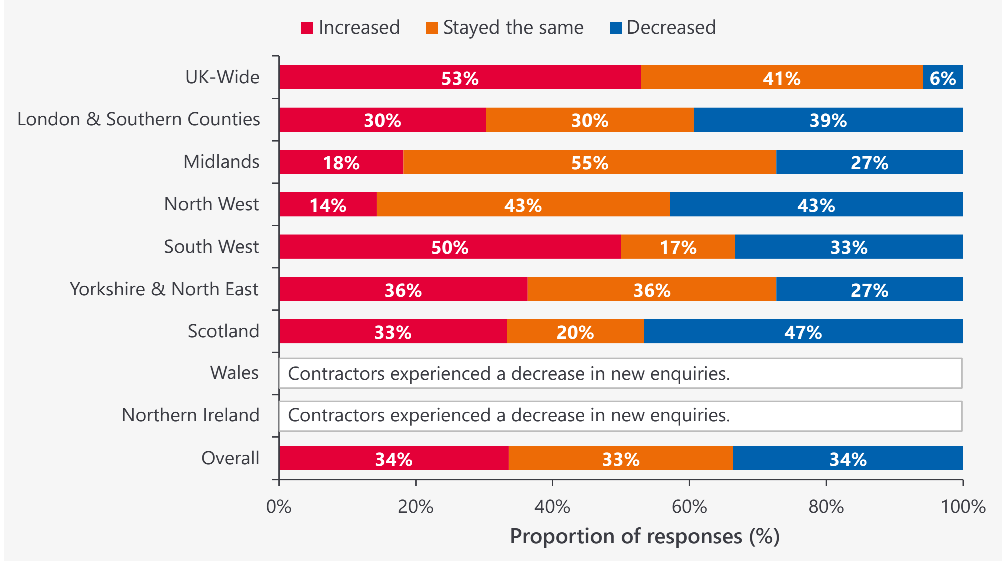


Chart 5: New enquiries by region – change on previous year



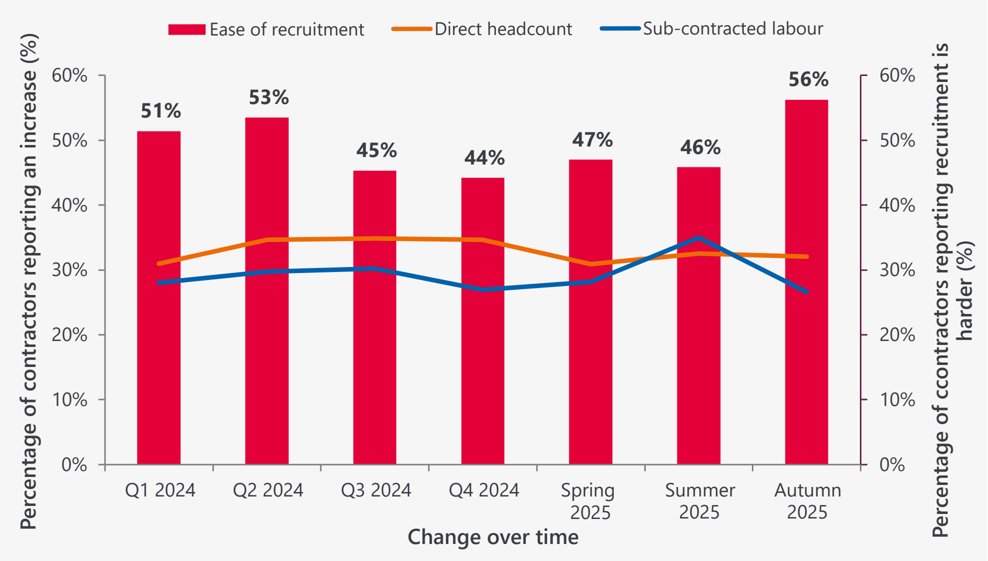
Employment skills and shortages

Levels of direct headcount remained stable during autumn with 32% of contractors reporting an increase in direct headcount and half (52%) reporting their direct headcount has remained the same. This is similar to summer 2025 when 33% reported an increase with 50% reporting direct headcount had remained the same. In contrast to this, use of sub-contracted labour declined in autumn, with 27% reporting an increase compared with 35% in summer 2025. This decline likely reflects the seasonal workforce fluctuations typically observed in Q3 or Q4 each year and mirrors the use of sub-contracted labour in Q4 2024.

Recruitment continues to be an issue for the built environment, including the roofing sector. During autumn, more than half of contractors reported recruitment was harder: an increase from 46% in summer 2025. There is significant concern about the lack of skilled workers entering the roofing industry: *"I worry for the future of the roofing industry with no one interested in joining the trade".*

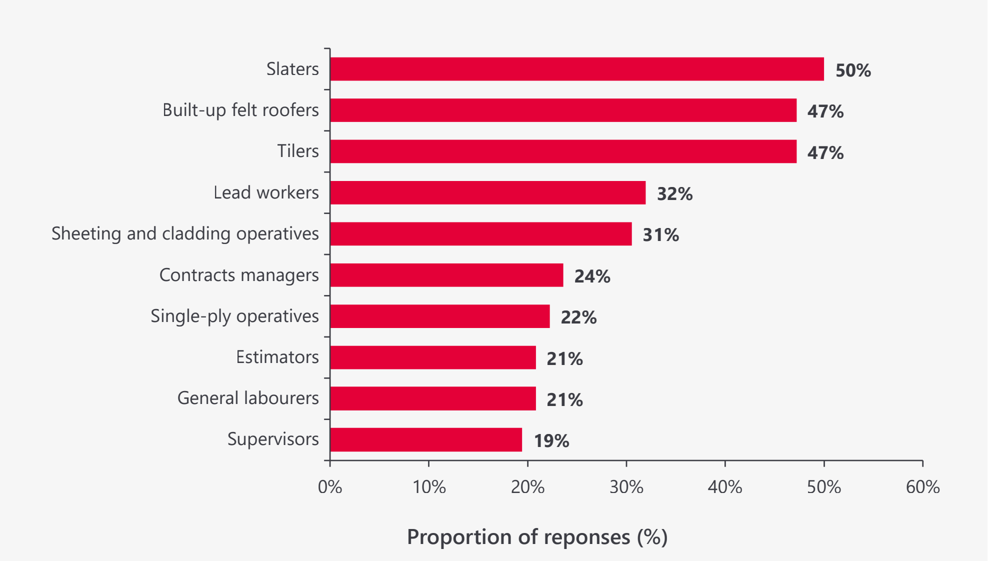
Those rating recruitment harder were asked to indicate which roles they have difficulty recruiting for. The top 10 difficult to recruit roles remained the same with some slight variation in order. The three most cited hard to recruit roles remain: slaters (50% vs. 47% in spring), built-up felt roofers (47% vs. 37% in spring), and tilers (47% vs. 50% in spring).

Chart 6: Labour indicators*



* 2024 results are based on respondents comparing the current situation to the previous quarter; 2025 results makes a comparison to the same time last year.

Chart 7: Top 10 areas of skills shortage^



^Please note, only respondents who reported recruitment 'was harder' than this time last year were asked this question.

Costs, prices and materials availability

Balancing tender prices with costs remained challenging for many roofing contractors. During autumn, 83% reported an increase in labour costs compared to the same time last year, similar to the proportion who reported this (85%) in summer 2025. Meanwhile, 87% of contractors reported an increase in materials costs during autumn (compared to 78% in summer 2025). One contractor commented:

"The price of materials has rocketed".

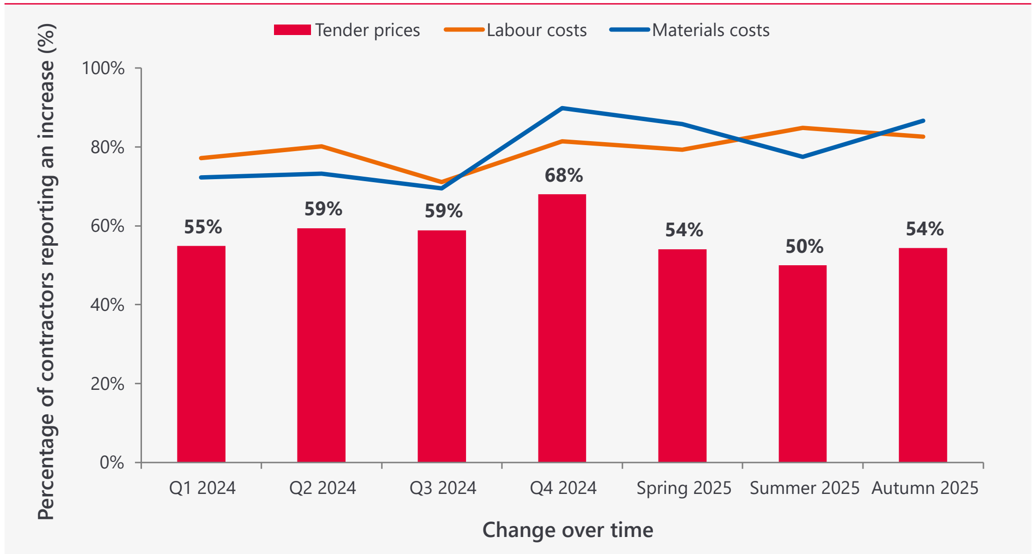
It is common for the industry to see increases in materials costs around December (which coincided with the launch of the autumn survey) as providers either implement cost increases or announce planned increases for the start of the new year.

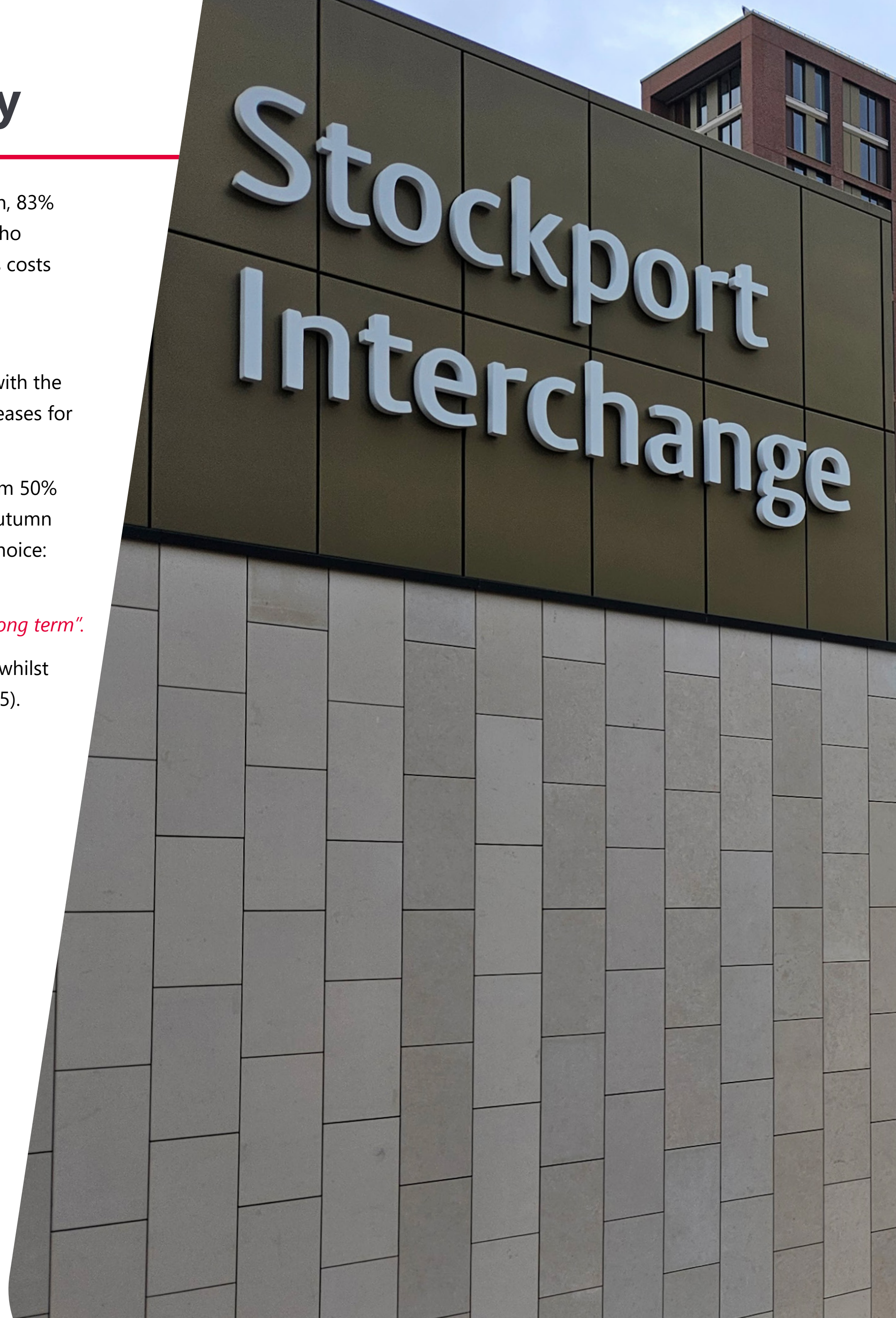
In terms of tender prices, 54% of contractors reported an increase in these during the autumn, up from 50% in the summer. At the same time, more contractors reported a decrease in tender prices during the autumn compared to summer 2025 (20% and 11%, respectively). This suggests that contractors are facing a choice: increase tender prices to ensure their costs are covered or compete on price.

"Competitors are submitting tenders at unsustainable levels, this will result in companies failing in the long term".

The availability of materials remains similar to previous quarters: 72% indicate it has stayed the same whilst 14% reported materials availability is harder (compared to 74% and 14%, respectively, in summer 2025).

Chart 8: Cost pressures





Payment terms

During autumn 2025, 67% of respondents reported being paid on time; a small increase on the 64% who reported being paid on time over the summer. Despite this small improvement in the proportion reporting being paid on time, 29% reported they continue to receive late payment (vs. 26% in summer 2025). There continues to be a gap between the proportion of contractors requesting payment within 30 days and those indicating payment was received within this timeframe: 44% requested payment within 30 days but only 29% reported being paid within this time frame.

Chart 9: Payment terms and periods

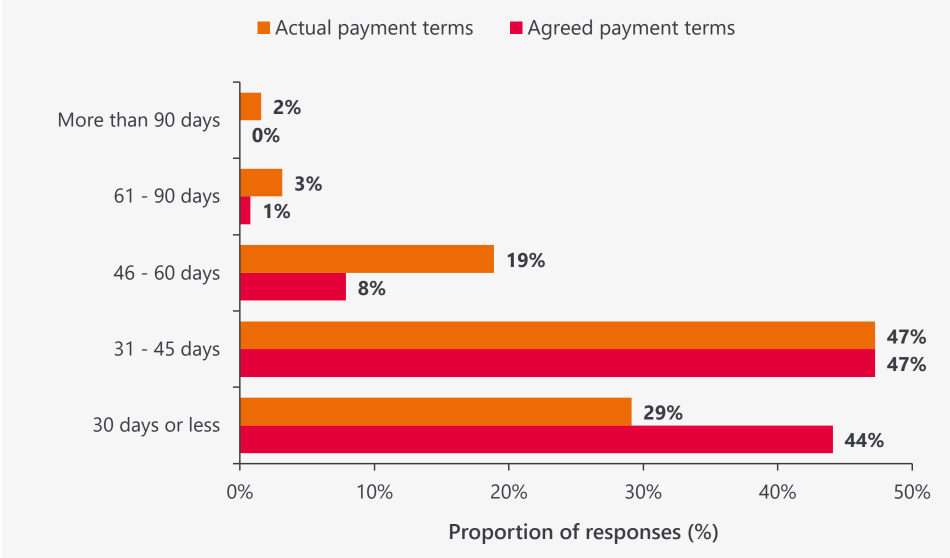
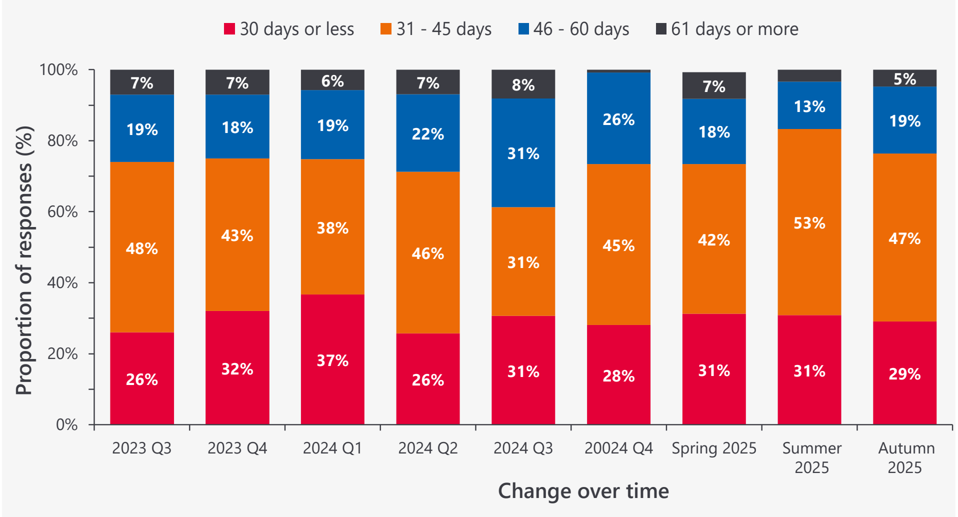


Chart 10: Actual payment period



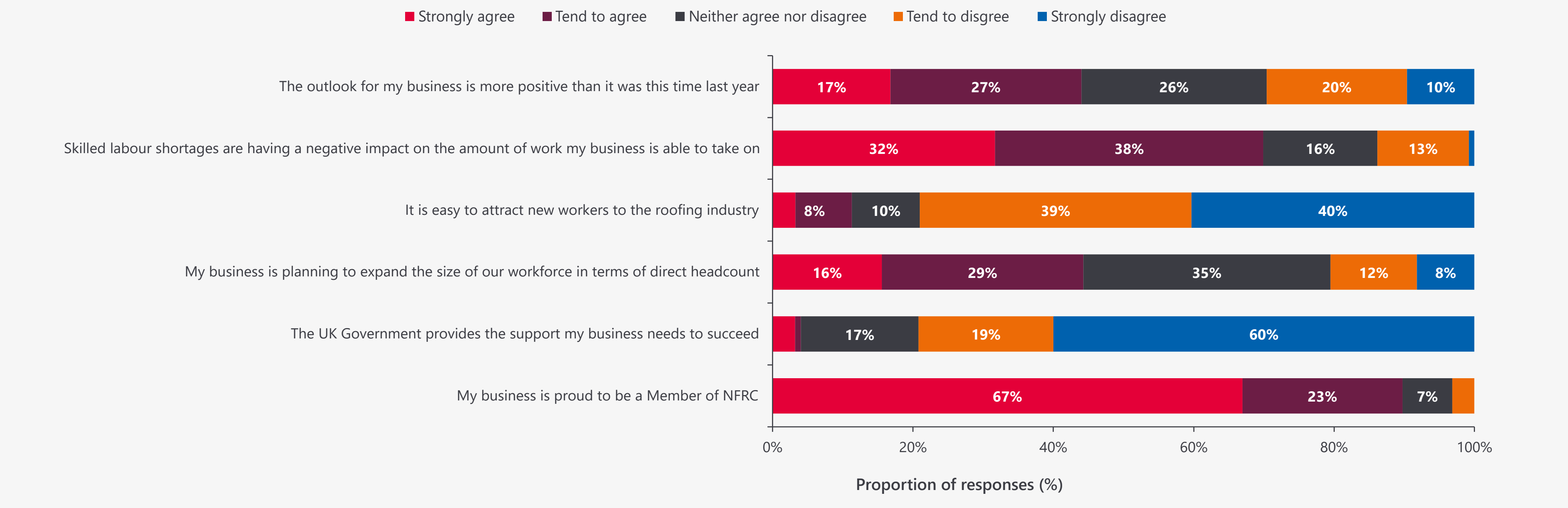
Sentiment from the roofing sector

In this section of the report, we explore respondents' perceptions of the roofing sector. We presented respondents with a series of statements, both positive and negative, and asked respondents to indicate their level of agreement or disagreement with each statement. During autumn, roofing contractors expressed more definitive views about the outlook for their business. Specifically, 44% of respondents agreed with the statement, *'the outlook for my business is more positive than it was this time last year'*, while only 26% neither agreed nor disagreed. This is a notable shift from summer 2025 where both figures stood at 37%. Meanwhile, 44% of respondents indicated their businesses intention to *'expand the size of our workforce in terms of direct headcount'*, consistent with the percentage of contractors who reported this in the summer.

Despite this optimism, the roofing sector continues to confront significant challenges. In total, seven out of ten respondents agreed that *'skilled labour shortages are having a negative impact on the amount of work my business is able to take on'*. This concern has intensified since summer 2025, when 65% indicated it was an issue. Furthermore, only 3% strongly agreed that attracting new workers to the roofing industry is easy, highlighting a broader issue affecting not just roofing but the entire built environment. NFRC has been actively supporting skills development across the UK — contributing to refreshed Local Skills Improvement Plans in England, helping secure dedicated roofing apprenticeship provision in Wales, delivering school Skills Demonstrations in Scotland, and strengthening our relationship with CITB Northern Ireland — alongside a range of other initiatives aimed at tackling the industry's skills crisis.

Participants' responses clearly indicate a desire for more government support. Just 3% strongly agreed and 1% tended to agree that *'the UK government provides the support my business needs to succeed'*, mirroring low figures from summer 2025 (2% and 1%, respectively). One respondent commented: *"We have lost faith in our industry [and this is] 100% down to the UK government - no support at all. We feel they are working against us".*

Chart 11: Sentiment from the roofing sector



Challenges facing the roofing sector

The most commonly cited challenges facing NFRC Members remain relatively consistent across quarters:

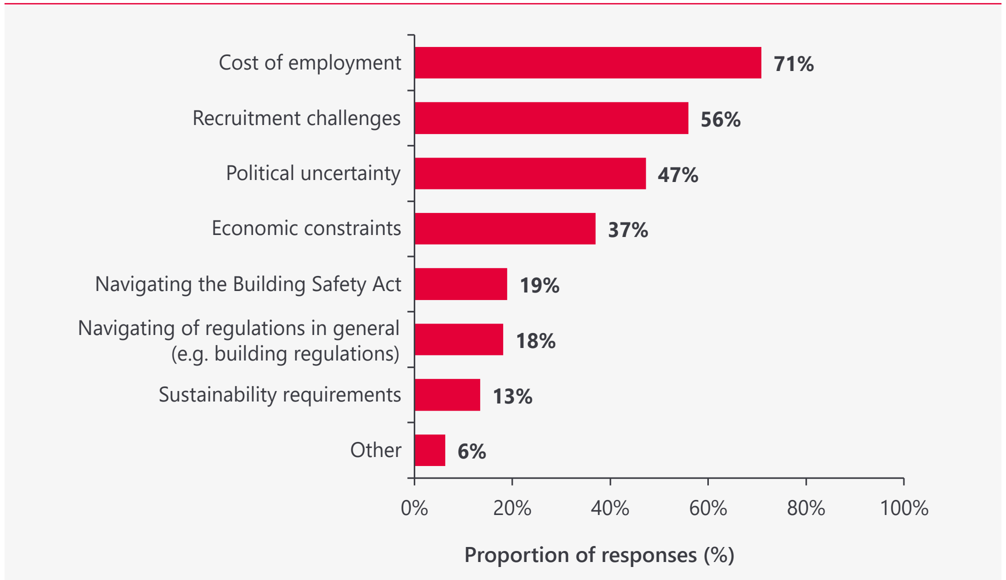
- The cost of employment (71% down from 76% in summer).
- Recruitment challenges (56% up from 52% in summer).
- Political uncertainty (47% up from 43% in summer).

While the most frequently cited challenges remain consistent, it is noteworthy that a smaller number of respondents now indicate the cost of employment as one of the top three challenges impacting their business. In contrast, a growing proportion of Members indicated recruitment challenges and political uncertainty as critical issues. As one Member noted:

"Our organisation is currently facing a significant challenge: despite a robust workload and increasing demand for our services, we are struggling to find skilled workers to meet these needs".

We have observed a steady increase in the percentage of Members recognising political uncertainty as a key challenge in 2025, with figures rising from 37% in spring to 47% in autumn.

Chart 12: Industry challenges



Market expectations

Looking ahead to the next 12 months, 40% of roofing contractors expect an increase in their overall workload (vs. 43% in summer 2025). Contractors operating in the public non-residential RM&I sector are the most optimistic, with 38% expecting their workload to grow (vs. 32% in summer 2025). In contrast, fewer contractors in the residential and commercial new build sectors feel positive, following a tough quarter. Only 30% of these contractors expect an increase in workload (compared to 38% for new build residential and 37% for commercial new build in summer 2025). These results are not surprising given the difficult trading conditions. Barbour ABI's Forecast Bulletin indicates that 2025 was the weakest year for growth since COVID-19. However, modest growth is predicted for 2026. By 2027, residential output is likely to exceed 2022 levels for the first time in five years, while the industrial, health and education sectors (public non-residential work) show a stronger pipeline.

Regionally, those operating UK-Wide are most optimistic about their future workload, with 88% reporting they expect their workload to increase in the next 12 months; this is a significant increase from 53% in summer 2025. The geographical area covered by these contractors shields them from challenges faced in specific regions.

In contrast, contractors primarily operating in the North of England exhibit a more pessimistic outlook. In Yorkshire & North East, only 9% of contractors anticipate an increase in workload (vs. 31% in summer 2025), Similarly, just 14% of contractors in the North West expect their workload to grow, down from 56% last quarter – a reduction of 41 percentage points.

*Please note respondents are asked about the individual sectors and overall workload separately. Occasionally, this can lead to discrepancies where overall perceptions appear more positive than sector or regional breakdowns. This is something we observed within the market expectations in the autumn report.

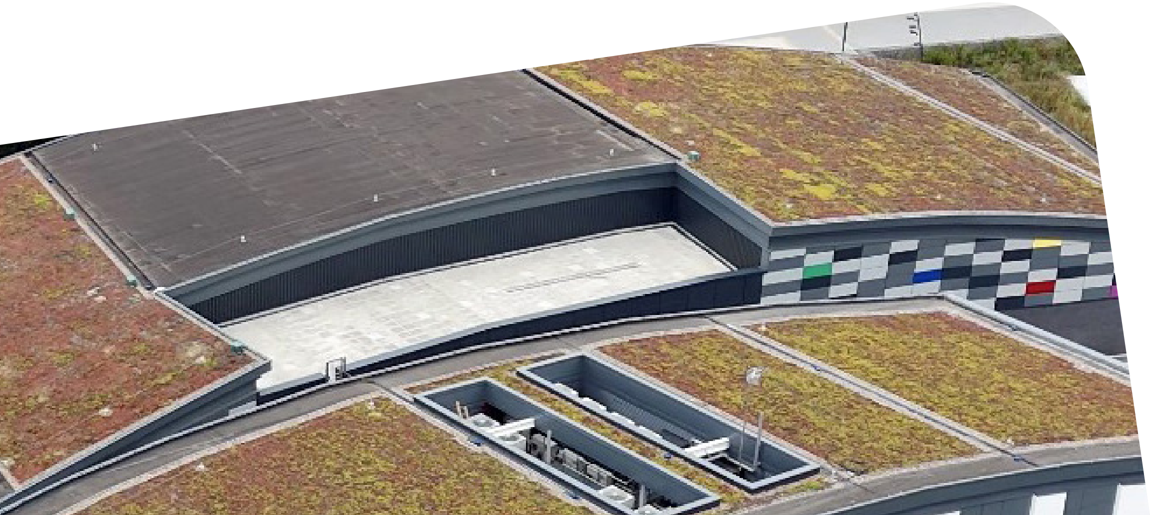


Chart 13: Market expectations by sector – 12 months*

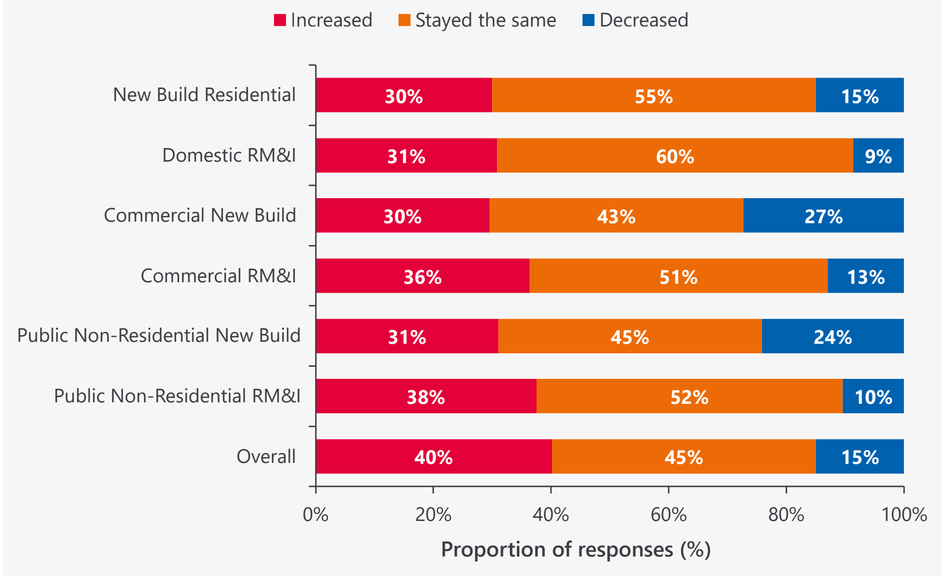
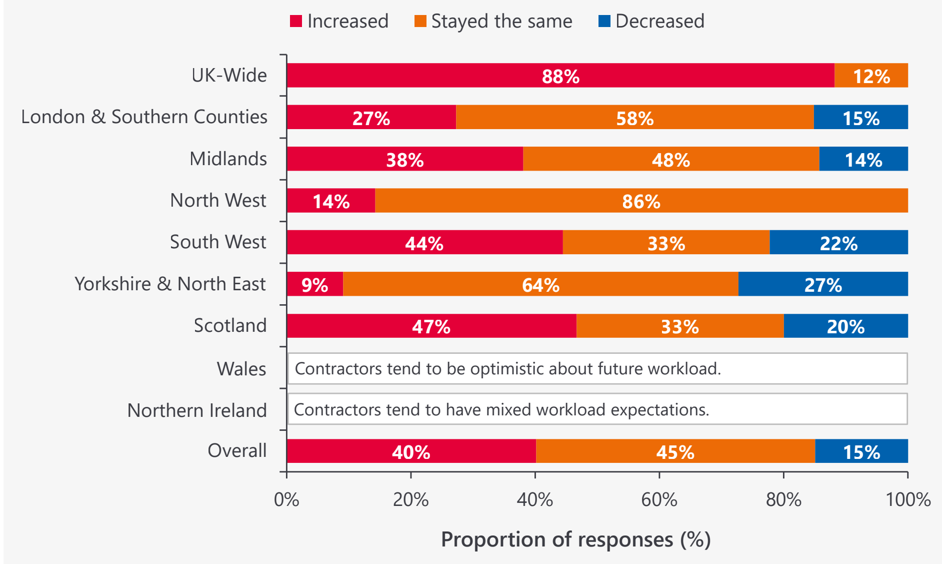


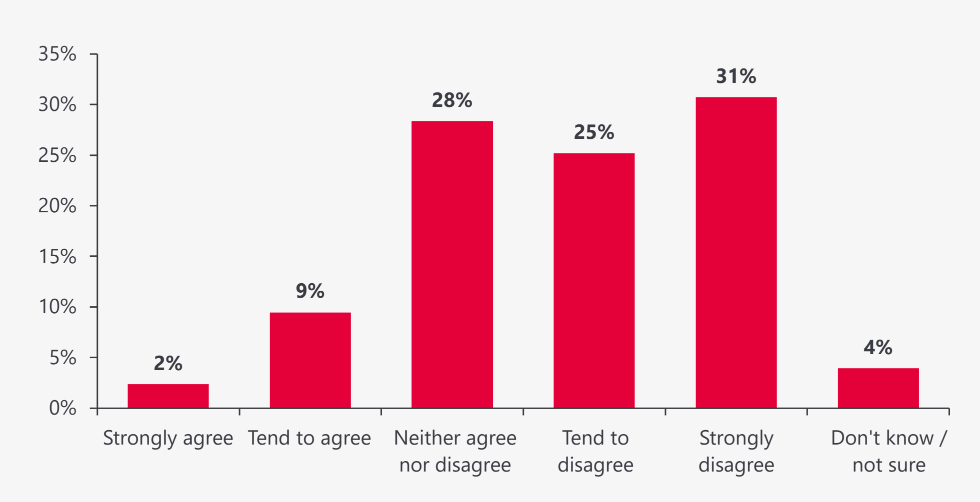
Chart 14: Market expectations by region – 12 months



Impact of the Autumn Budget

NFRC sought to gauge Members' immediate reaction to the Autumn budget, which was announced on 26 November 2025. Leading up to the announcement, the budget faced increasing scrutiny, with many anticipating significant measures due to its delay. Through the survey we aimed to understand whether the budget provided Members with the certainty required to confidently make plans for their business's future. Only 2% of respondents strongly agreed that the budget provided this certainty, with just 9% more tending to agree. In contrast, almost a third of respondents (31%) strongly disagreed with this statement.

Chart 15: Agreement that the budget provides certainty for future planning



Key Autumn Budget 2025 announcements for roofing

National Living Wage and apprentice wages (from April 2026): These wages will increase to:

- Over 21 years old = £12.71/hour.
- 18 – 20-year-olds = £10.85/hour.
- 16 – 17-year-olds and apprentices = £8.00/hour.

Apprenticeships: Introduction of free apprenticeship training for under-25s at SMEs, along with an £820m Youth Guarantee for paid placements for those who have been on universal credit for an extended period.

Fuel duty: Frozen until September 2026, then increased in stages before rising with inflation.

Business rates: From April 2026, there will be a new "revaluation" of business properties in England and an adjustment to the calculation of business-rates bills. For smaller properties with a rateable value under £500,000, business-rates bills will go down, but for everyone else they will go up.

Mileage-based electric car tax: Drivers of electric and plug-in hybrid cars will be subject to a mileage-based charge (dubbed 'eVED') from April 2028.

Tax thresholds: Income tax and National Insurance thresholds frozen until 2030–31.

Impact of the Autumn Budget

In the survey, we also asked Members to evaluate specific budget announcements that were most relevant to the roofing sector. We wanted to understand the extent to which respondents believed these measures would positively or negatively impact their businesses. Members expressed the most optimism regarding the free apprenticeship training for under 25s in SME businesses, with 13% believing it will have a very positive impact and 36% a positive impact. Announcements around continued freezes to Fuel Duty and National Insurance thresholds were also broadly seen as positives by Members. It is notable that these announcements are freezes on current costs, rather than net savings for business owners or measures to stimulate demand, and in the case of fuel duty, is a temporary measure until September 2026.

Conversely, respondents were most pessimistic about the effects of increases to the national living wage and apprentice wages, with 42% and 49%, respectively, indicating that these changes would have a negative or very negative impact on their businesses. As one Member noted:

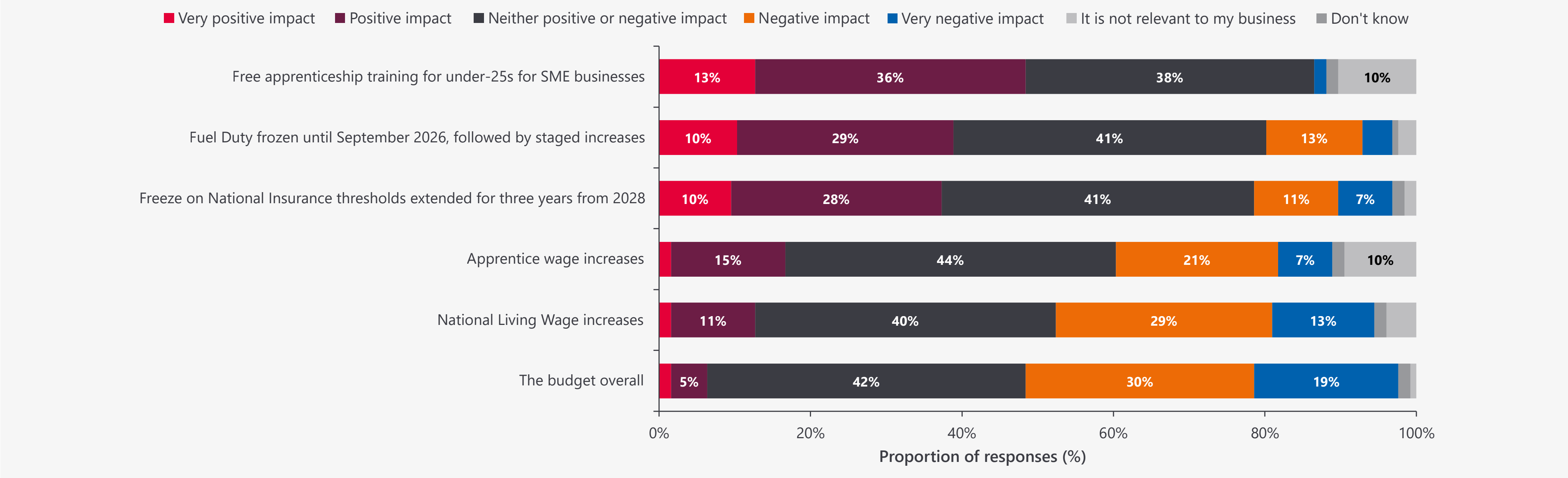
"Labour's latest budget has now made it even harder to bring on trainees at the new rates for payment, and the extra 2% on dividends will make it harder to want to get more work for nothing in return".

These wage increases are beneficial for the individuals earning them and may help to attract new workers to the industry. However, they can pose a significant affordability challenge to businesses considering taking on new entrants or apprentices.

Despite some positives within the budget, it is clear that many roofing contractors would have liked it to go further with measures designed to stimulate growth for the sector:

"[the roofing sector is] in the doldrums at present with the lack of Gov stimulus to help first time buyers and improve prosperity / confidence of the public to spend / invest in their home or business".

Chart 16: Impact of budget announcements on sector



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

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