NFRC

LEADING ROOFING EXCELLENCE

State of the UK roofing industry

WINTER 2026

Key findings:

- Sector experienced a challenging winter.
- Winter performance impacted by conflict in the Middle East.
- Sector facing economic constraints and uncertainty.

Prepared by Barbour ABI, on behalf of NFRC

BarbourABI

Contents

Charts

An introduction by James Talman, NFRC CEO

As we reflect on the last three months, the concerning results in this report make clear that the roofing sector faces significant challenges. The year began with prolonged periods of poor weather across much of the UK, disrupting planned works, affecting productivity and placing additional strain on businesses already operating in difficult market conditions. This was followed in late February with a significant escalation in US-Iran tensions, raising concerns about inflationary pressures, energy costs and supply chain stability, as well as impacting investor confidence. This has all been exacerbated by government instability.

Against this backdrop of economic uncertainty, it is unsurprising that confidence has weakened and that many firms are apprehensive about the future. Only 28% of roofing contractors anticipate an increase in work over the next 12 months compared to 40% in Autumn 2025. While the full implications of the conflict remain unclear, businesses are struggling, and growth projections for construction are being revised down in line with the wider UK economy. NFRC is working to support Members through this time with advice on managing inflation, reviewing contract terms, engaging with suppliers, and consulting available helplines when necessary. NFRC is also representing the difficulties of specialist contractors in national supply chain forums.

James Talman
NFRC CEO
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With an ageing workforce and growing concerns about succession, the need to invest in training, apprenticeships and career pathways has never been more important, but companies are understandably constrained by economic conditions and pressures on wages. Barbour ABI estimates that over 500,000 construction workers are set to retire over the next ten years, posing a severe risk of lost experience that we will not get back. Unless conditions improve and businesses are adequately supported to attract, train and retain the next generation of roofing professionals, we risk losing a vast amount of knowledge, expertise and capability that will not easily be replaced.

Over the past year, NFRC has continued to prioritise skilled employment by connecting people to local roofing careers through the likes of the Ambition Roofing programme, local engagement leading to the launch of roofing programmes at two new colleges, employer recruitment support and work to strengthen training and competence pathways across the sector. We have worked with Members, training providers and industry partners to raise awareness of roofing as a skilled and rewarding career, while helping businesses develop the workforce they need for the future. This work is ongoing, and the findings of this report demonstrate that much more remains to be done.

NFRC will continue to champion the interests of our members and work with government, industry partners and training providers to address the challenges highlighted in this report. The near future will continue to be challenging, and it is essential that the government, regardless of the leader, urgently introduce measures to boost construction demand.

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 winter 2026 compared to the same time last year. A small number of questions focus on events over the three months prior to the survey. The previous wave of research with NFRC members was postponed until after the Autumn Budget, as a result the winter survey was also delayed to avoid the two waves falling too close together; it was conducted from 19th March to 20th April 2026. 140 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. The Federation also offers technical advice, guidance to facilitate training requirements and represents Member interests to the wider construction industry and 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

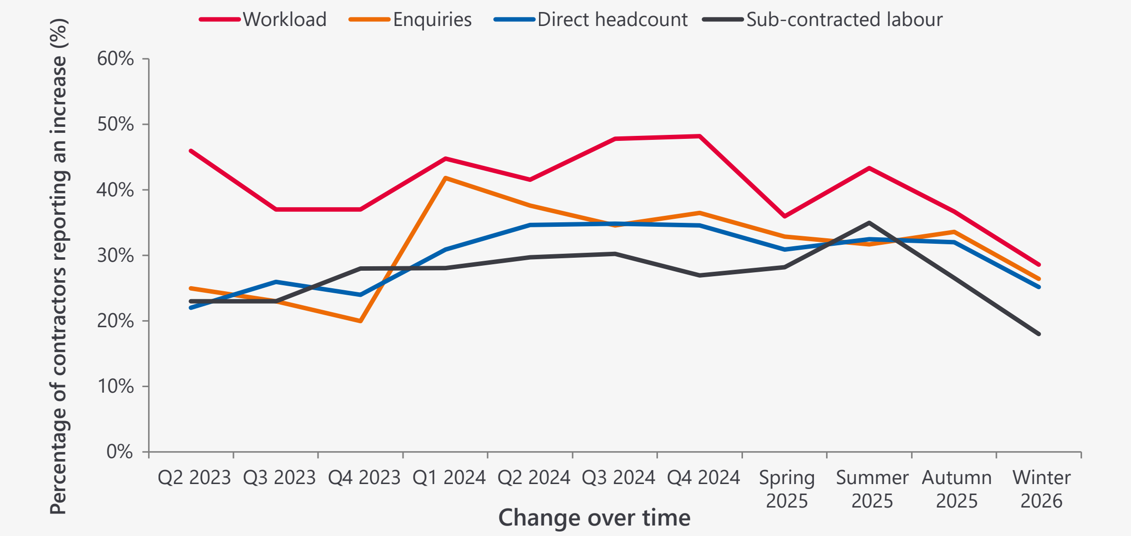
Results show the UK roofing sector experienced a challenging winter. Fewer than a third (29%) reported an increase in workload, down from 37% in autumn 2025 and notably lower than 48% in Q4 2024 – a 20-percentage point reduction year-on-year. New enquiries fell as well: 26% reported an increase in the level of new enquiries during winter 2026 compared to 34% in autumn 2025.

Although disappointing, the results are not unsurprising. The winter (January – March 2026) brought continued uncertainty for the entire construction industry and the wider economy. Wet weather conditions in January disrupted construction activity, and the Iran war, which began on 28th February 2026, generated global economic disruption and a fuel crisis. In April, the International Monetary Fund (IMF) lowered its UK growth forecast from 1.3% (estimated in January) to 0.8%[1]. At Barbour ABI, we are also revising our growth projections downward, with investor and buyer confidence particularly affected. We expect the residential sector to be particularly hard hit, forecasting total residential growth for 2026 of -4%. This is driven by weaker demand as the cost of living rises and inflation increases.

Labour indicators are also down on previous quarters. During winter 2026, a quarter of respondents (25%) reported an increase in their organisation's direct headcount, down from 32% in Autumn 2025. Compared to Q4 2024, this is a 9-percentage point decrease (25% in winter 2026 vs 35% in Q4 2024). Similarly, just 18% reported an increase in their use of sub-contracted labour during winter (vs. 27% in autumn 2025) – a 9-percentage point reduction year-on-year (27% in Q4 2024).

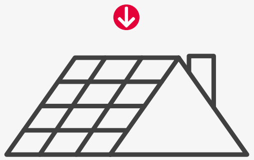
> **"We are trying all ways to increase business but it's extremely hard out there especially on the domestic side".**

Chart 1: Key indicators



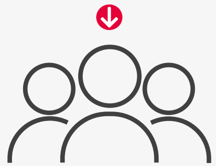
Key indicators - change on previous year

Change in workload



-20% vs Q4 2024

Direct headcount changes

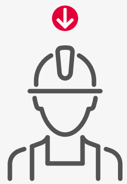


-9% vs Q4 2024

Shift in enquiry levels

-10% vs Q4 2024

Sub-contracted labour levels



-9% vs Q4 2024

[1]UK parliament, Economic update: How resilient are current supply chains?, https://commonslibrary.parliament.uk/research-briefings/cbp-10650/

Workload by sector and region

Overall, 29% reported an increase in workload in winter 2026 compared to 37% in autumn 2025. Roofing contractors working within the commercial repair, maintenance and improvement (RM&I) sector reported the strongest increase in workload at 30%, although this was lower than the 36% recorded in autumn 2025.

Weakest growth was reported in the public non-residential RM&I sector where 25% of contractors recorded an increase in workload – a 12-percentage point reduction from 37% in autumn 2025.

Regionally, contractors primarily working within the Midlands reported the strongest growth: 42% of respondents working in this area reported an increase compared to 32% in autumn 2025. Those primarily operating within the North West and Yorkshire & North East also reported an improvement in workload (rising from 14% and 18% respectively in autumn 2025 to 25% in winter 2026). Contractors operating within the South West reported the largest fall: 29% reported increased workload in winter 2026, down from 56% in autumn 2025 – a 27-percentage point decline.

Chart 2: Workload by sector – change on previous year*

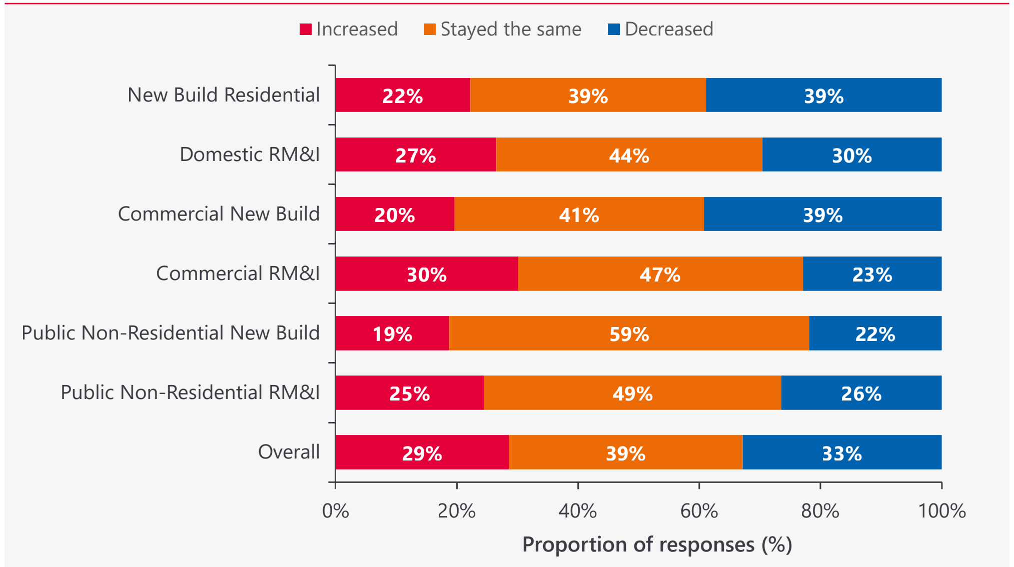
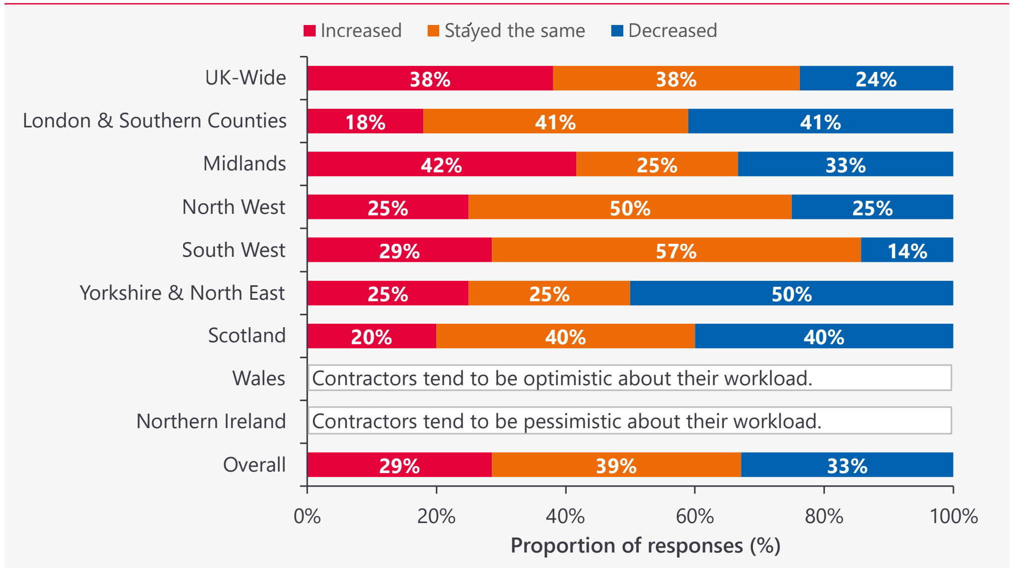


Chart 3: Workload by region – change on previous year



*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.

Enquiries by sector and region

During winter 2026, 26% of roofing contractors reported an increase in the level of new enquiries – a reduction from 34% in autumn 2025. Those contractors working within the commercial RM&I sector reported the highest level of new enquiries (31%); however, this represents a reduction from 37% in autumn 2025. Weakest growth in the level of new enquiries was reported in the new build residential and public non-residential RM&I sectors, where 20% and 21%, respectively, reported an increase (compared to 25% and 31%, respectively, in autumn 2025).

Contractors operating across the UK remain protected by their broad portfolio: 48% reported an increase in the level of new enquiries in winter 2026 (vs. 53% in autumn 2025). The North West and the Midlands also reported notable gains. In the North West, 38% reported an increase in the level of new enquiries during winter 2026 – a 23-percentage point rise on autumn 2025. Similarly, in the Midlands, 33% reported an increase in the level of new enquiries (vs. 18% in autumn 2025). The weakest pipeline of activity is found in London & Southern Counties and Yorkshire & North East where 15% and 17%, respectively, reported an increase in the level of new enquiries.

Chart 4: Enquiries by sector – change on previous year

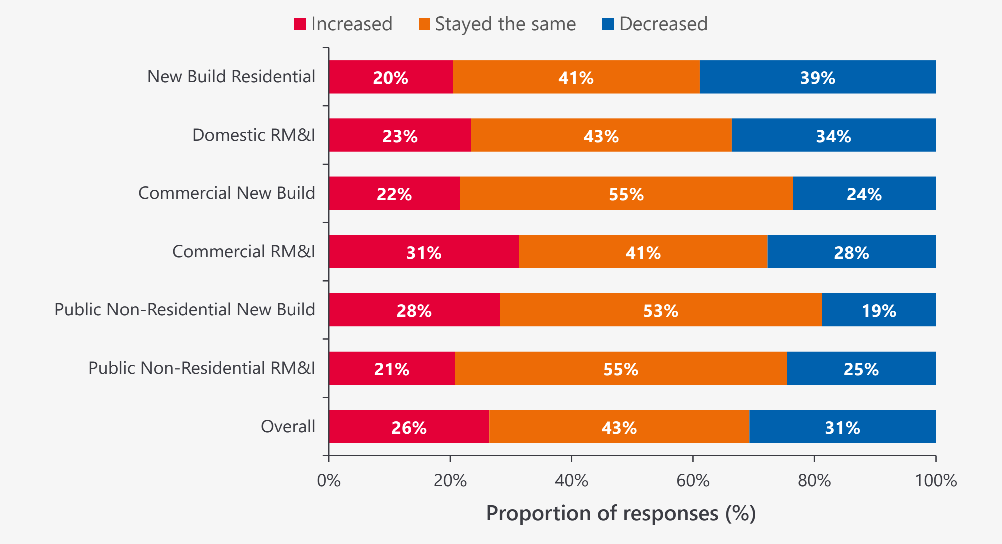
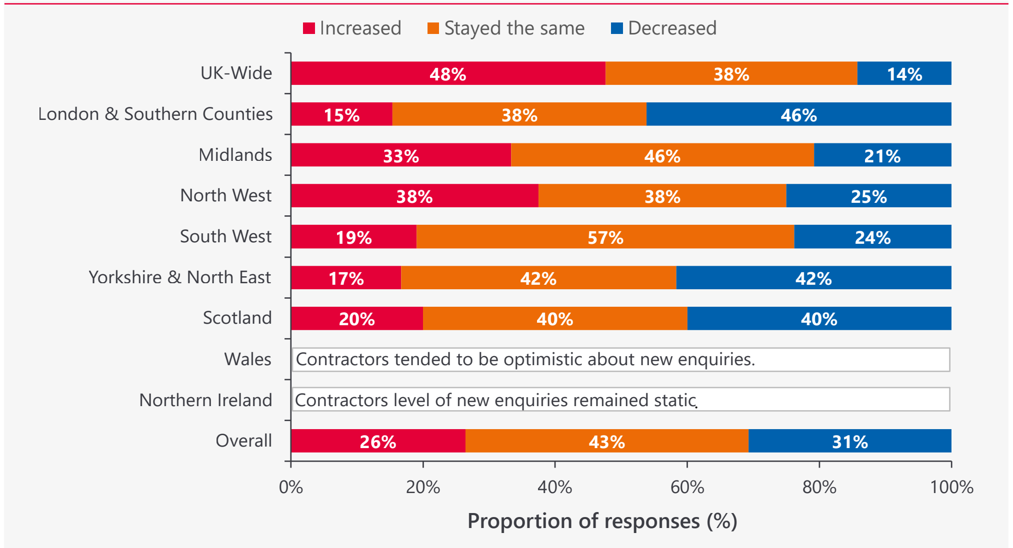


Chart 5: Enquiries by region – change on previous year



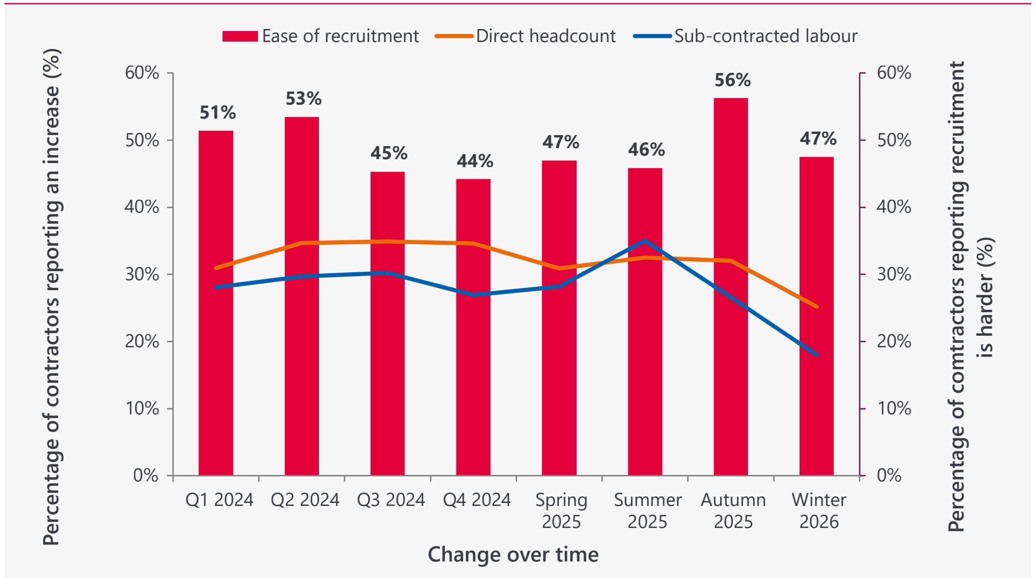
Employment skills and shortages

Reported increases in both direct headcount and use of sub-contracted labour declined in winter 2026. One in four contractors (25%) increased their direct headcount in winter compared to 32% in autumn 2025 – a 7-percentage point reduction. Similarly, 18% reported increased use of sub-contracted labour – a 9-percentage point fall from 28% in autumn 2025.

Recruitment of skilled labour remains challenging for the sector: 47% indicated recruitment was harder than the same time last year. This is an improvement from autumn 2025 when 56% reported recruitment was harder; however, the improvement largely reflects a greater proportion of respondents indicating that they were not recruiting during that period.

Recruitment difficulties are compounded by both the number of workers leaving the construction industry and an ageing workforce. Government figures show the construction industry lost around 15% of its workforce between Q1 2019 (just before COVID) and Q3 2025[2].

Chart 6: Labour indicators*



*Q1 – Q4 2024 results are based on respondents comparing the current situation to the previous quarter; 2025 results make a comparison to the same time last year.

The Construction Industry Training Board's (CITB) UK Construction Industry Picture 2026 estimates that, as of 2023, roughly 24% of construction workers were over 55 years old[3]. Using this data, Barbour ABI calculate that over the next 10 years some 500,000 construction workers are expected to retire, taking c. 27.5 years' experience out of the industry.

This represents a major challenge for, not just the roofing sector, but the entire construction industry. Attracting and retaining new talent will be critical to the future of the sector:

"The government does not do enough or offer enough incentives to bring the next generation workforce into this industry".

[2]Construction Enquirer, https://www.constructionenquirer.com/2025/11/12/construction-employment-sinks-to-24-year-low/

[3]CITB, https://www.citb.co.uk/media/3ptadq4y/final-industry-picture-full-report.pdf

Costs, prices and materials availability

The results suggest the roofing sector remains under pressure from rising costs and competitive tendering. Labour costs remained broadly stable over winter: 80% reported an increase compared to 83% in autumn 2025. In contrast to this, materials costs increased for the second consecutive quarter – 93% of contractors reported an increase in materials costs during winter 2026, up from 87% in autumn 2025 and 78% in summer 2025. These rises partly reflect normal winter price adjustments by manufacturers but have been exacerbated by the conflict in the Middle East. Respondents noted:

"Currently, [there is] a lot of uncertainty regarding materials prices due to increased production and transport costs because of the war".

"The war in Iran is having a negative effect on us, as we are working on fixed prices, and suppliers... are putting 'fuel surcharges' on and increasing these virtually on a weekly basis".

These reported increases are likely to have intensified further since the winter survey and are expected to continue rising if current market conditions persist.

Meanwhile, tender prices dipped during the winter: 50% reported an increase in tender prices compared to 54% in autumn. This suggests that some contractors are accepting tighter profit margins and making difficult trade-offs to secure work:

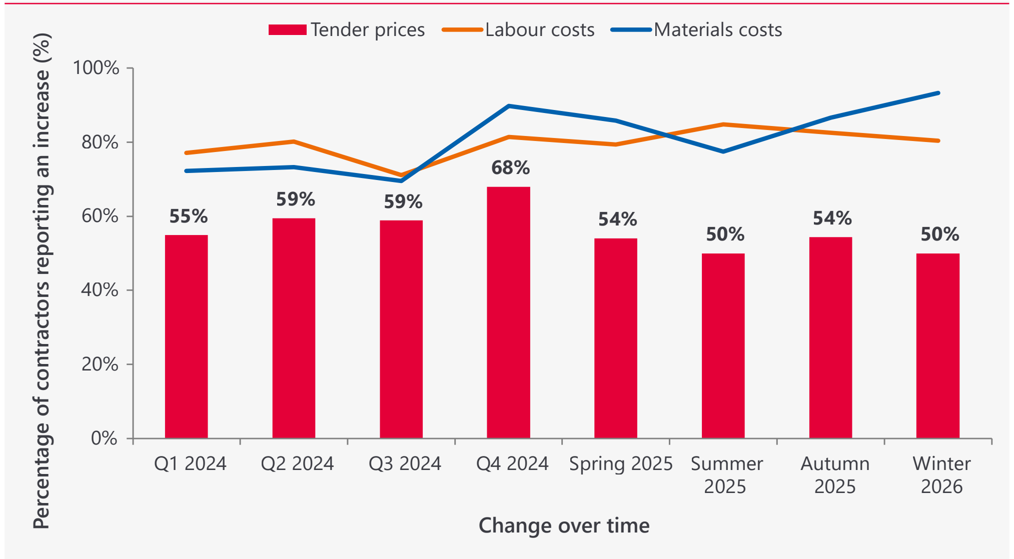
"Main contractors still expect cheap prices even though costs have increased and new regulations make the job harder and longer to complete".

Three-quarters of roofing contractors (75%) indicated that material availability remained the same in winter 2026, compared to 72% in autumn 2025. However, a slightly higher proportion of respondents (19% in winter 2026 vs. 14% in autumn 2025) reported that material availability was harder, though this is still a relatively small proportion.

Among those who experienced difficulty sourcing materials, the most commonly cited difficult to source materials were:

- Insulation types
- Clay roof tiles
- Concrete roof tiles
- Slates

Chart 7: Cost pressures



Payment terms

During winter, 74% of respondents reported being paid on time, an increase from 67% in autumn 2025. This is a welcome improvement; however, 24% of respondents still report late payment. A gap persists in those reporting agreed payment terms of 30 days or less and the proportion reporting payment within that time frame: 48% reported agreed payment terms of 30 days or less but only 37% reported being paid within that time (vs. 44% and 39%, respectively, in autumn 2025).

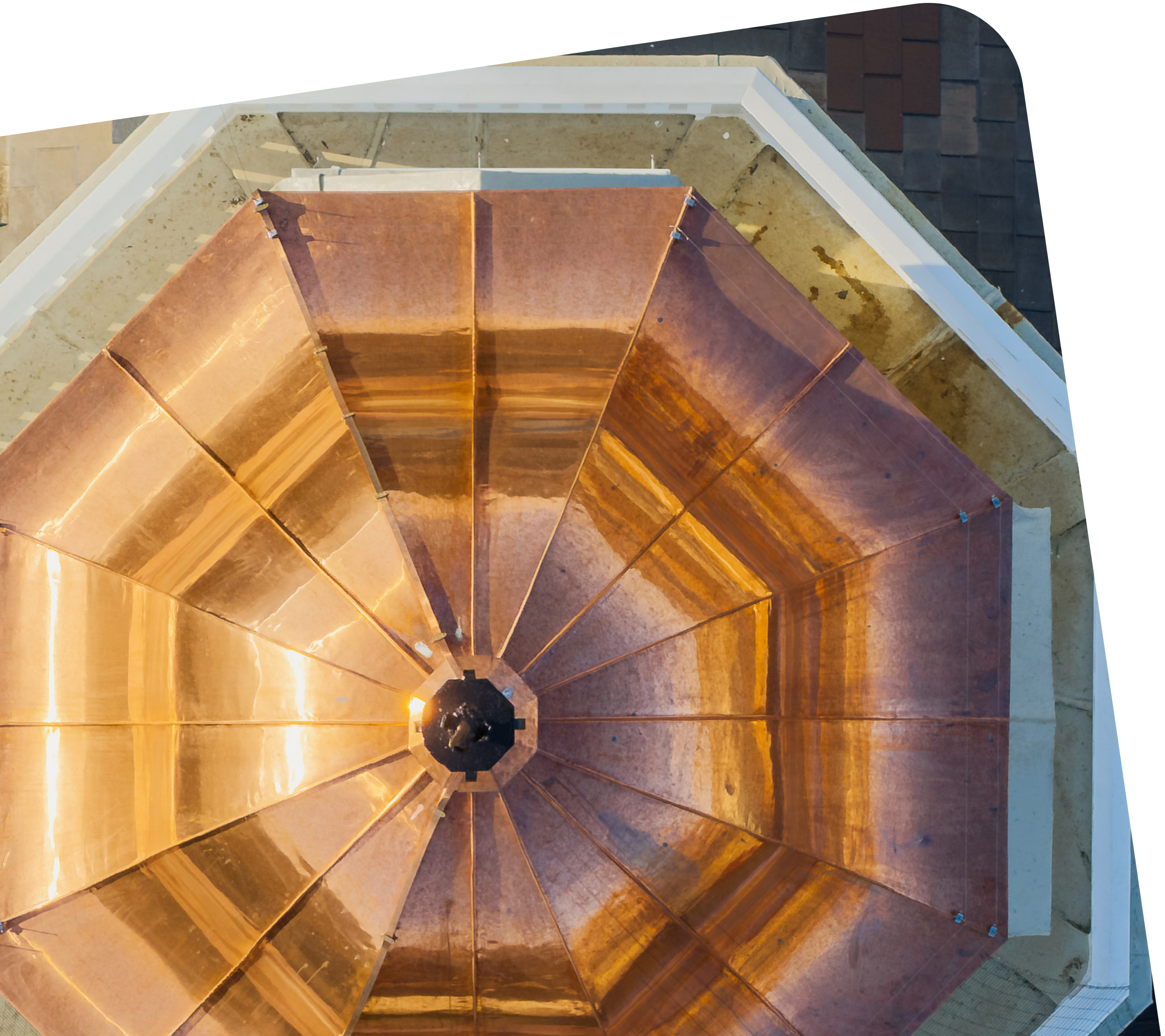


Chart 8: Payment terms and periods

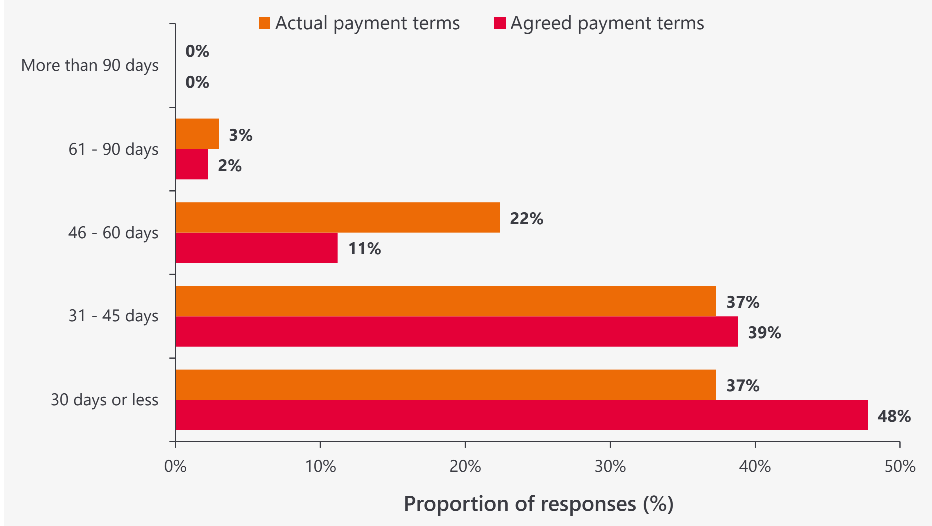
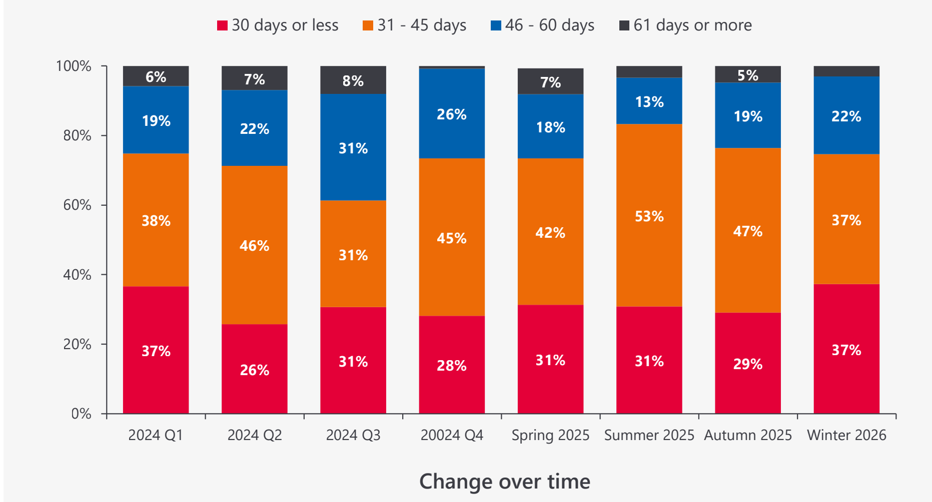


Chart 9: Actual payment period



Sentiment from the roofing sector

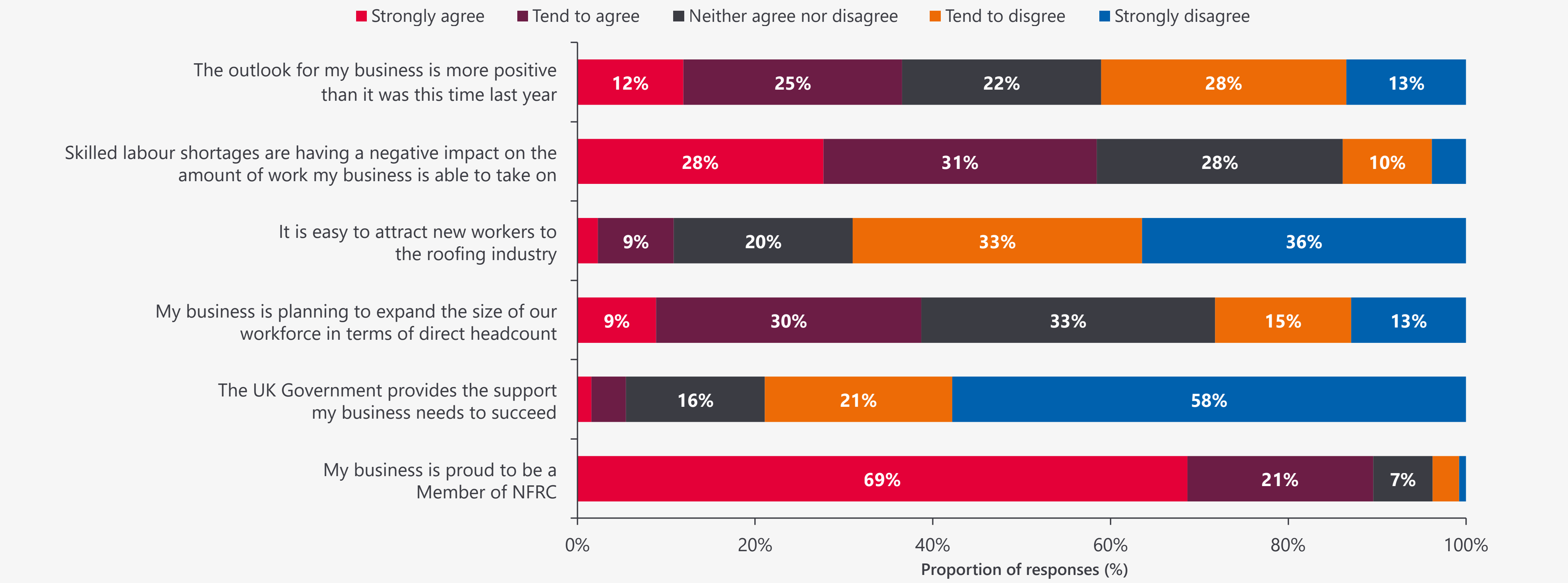
This section examines respondents' perceptions of the roofing sector. The winter 2026 survey shows a shift in perceptions towards a more negative outlook: 41% of respondents disagreed that *'the outlook for their business is more positive than it was this time last year'*, compared to 30% in autumn 2025. Similarly, fewer respondents indicated their business's intention *'to expand the size of our workforce in terms of direct headcount'*: 39% reported plans to increase employee numbers, down from 44% in autumn 2025.

Attracting new workers to the sector remains a problem: just 2% agreed that it is *'easy to attract new workers to the roofing industry'*, similar to the proportion who agreed with this statement in autumn 2025 (3%). For 58% of respondents, *'skilled labour shortages are having a negative impact on the amount of work their business is able to take on'*. Although this is lower than the 70% who agreed with the statement in autumn 2025, the change likely reflects reduced recruitment activity and lower workloads over the winter. When we consider the aging construction workforce discussed earlier in the report, the impact of skilled labour shortages and the challenges roofing contractors have in attracting new workers to the sector are likely to intensify.

It is evident from the results that respondents would like more government support. During the winter, just 5% agreed that *'the UK Government provides the support my business needs to succeed'* (vs. 4% in autumn 2025). Respondents' comments suggest firms are facing pressure from tax increases, increasing regulations and delays in building safety regulation approval. One respondent commented:

"The government need to stop stealth taxing SME companies. it is strangling us to the point of going bust".

Chart 10: Sentiment from the roofing sector



Industry challenges

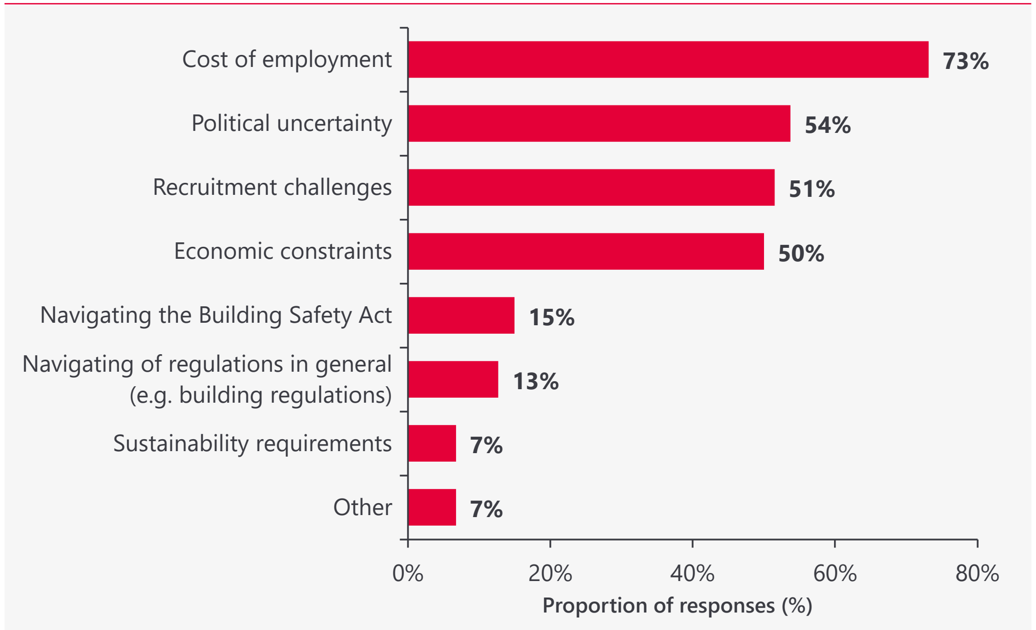
The most commonly cited challenges facing NFRC Members remain relatively consistent across quarters:

- The cost of employment (73% vs. 71% in autumn).
- Political uncertainty (54% vs. 47% in autumn).
- Recruitment challenges (51% vs. 56% in autumn).

Although there is consistency in the most frequently cited challenges, it is noteworthy that economic constraints are increasingly cited as a critical issue by NFRC Members. During winter, half of respondents cited economic constraints as one of the top three challenges impacting their business compared to 37% in autumn. One Member noted:

"A likely recession will make tendering very competitive, and I suspect many projects will likely get mothballed, particularly in the residential sector".

Chart 11: Industry challenges



Market expectations

Looking ahead to the next 12 months, optimism is muted. Overall, 28% of roofing contractors anticipate an increase in their workload, compared to 40% in autumn 2025 – a 12-percentage point reduction. The worst hit sectors are expected to be the two public non-residential sectors. In the public non-residential new build sector just 16% expect their workload to increase in the next 12 months (vs. 31% in autumn 2025) – a reduction of 15 percentage points. Similarly, 19% of contractors in the public non-residential RM&I sector expect an increase, down from 38% in autumn 2025.

Regionally, respondents in the South West and North West are most optimistic about their future workload. In the South West, 42% expect their workload to increase over the next 12 months compared to 44% in autumn 2025. Whilst in the North West, 38%, expect their workload to increase – an improvement from 14% in autumn 2025.

The challenges of future workload are not just isolated to one region. Thirty-two percent of respondents operating UK-Wide expect an increase in workload with 58% anticipating this will stay the same. This is a significant reduction from autumn 2025 when 88% anticipated that their workload would increase in the next 12 months.

Chart 12: Market expectations by sector - 12 months

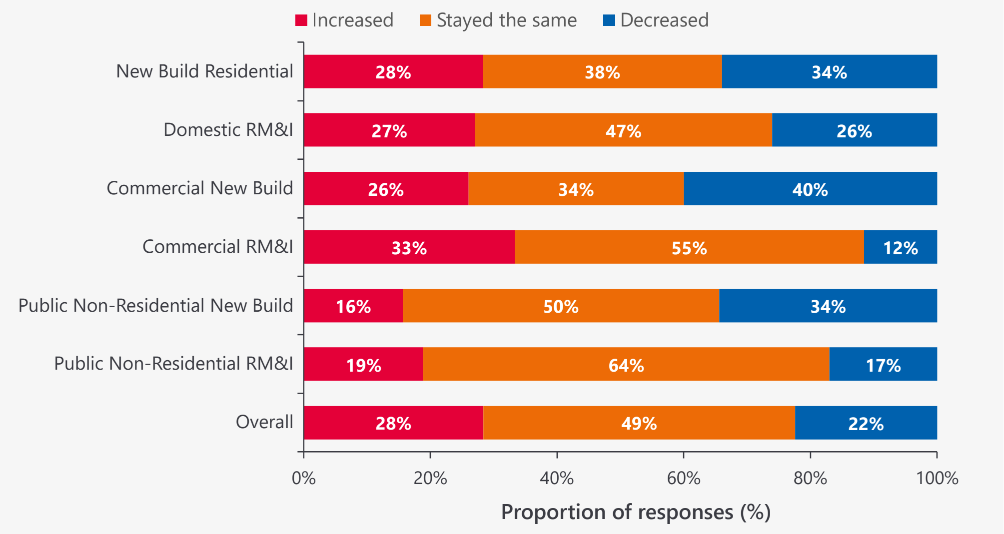
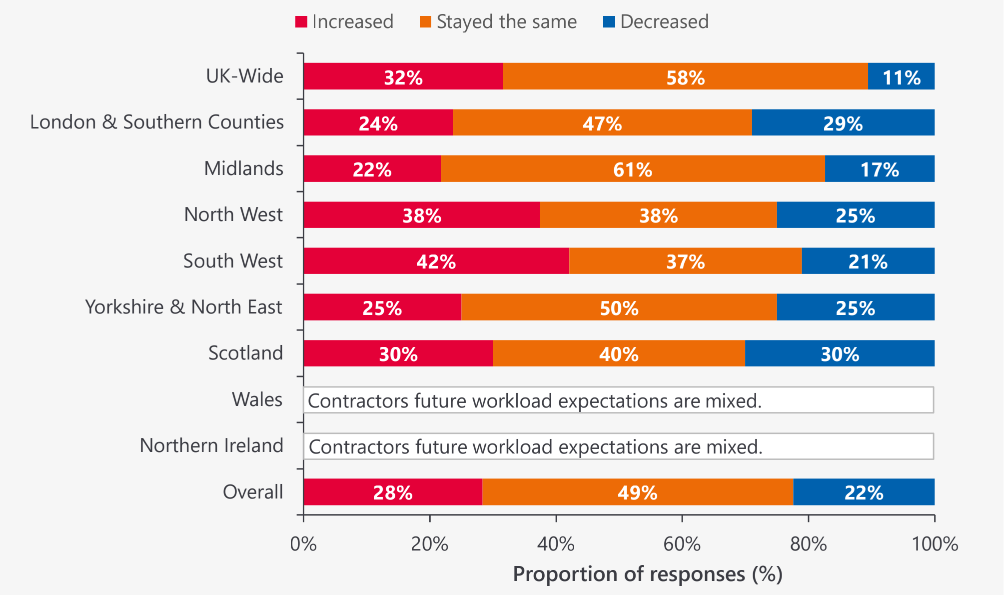


Chart 13: Market expectations by region - 12 months



Recruitment channels

Given the recruitment challenges facing the roofing sector and the wider built environment, NFRC were keen to understand more about the recruitment channels Members use when recruiting experienced or skilled staff and new entrants into the industry. Over the past 3 years or so, the most commonly used methods for recruiting both experienced or skilled staff and new entrants have tended to be informal methods, such as word of mouth and recommendations from existing employees.

Chart 14: Recruitment channels for experienced or skilled staff

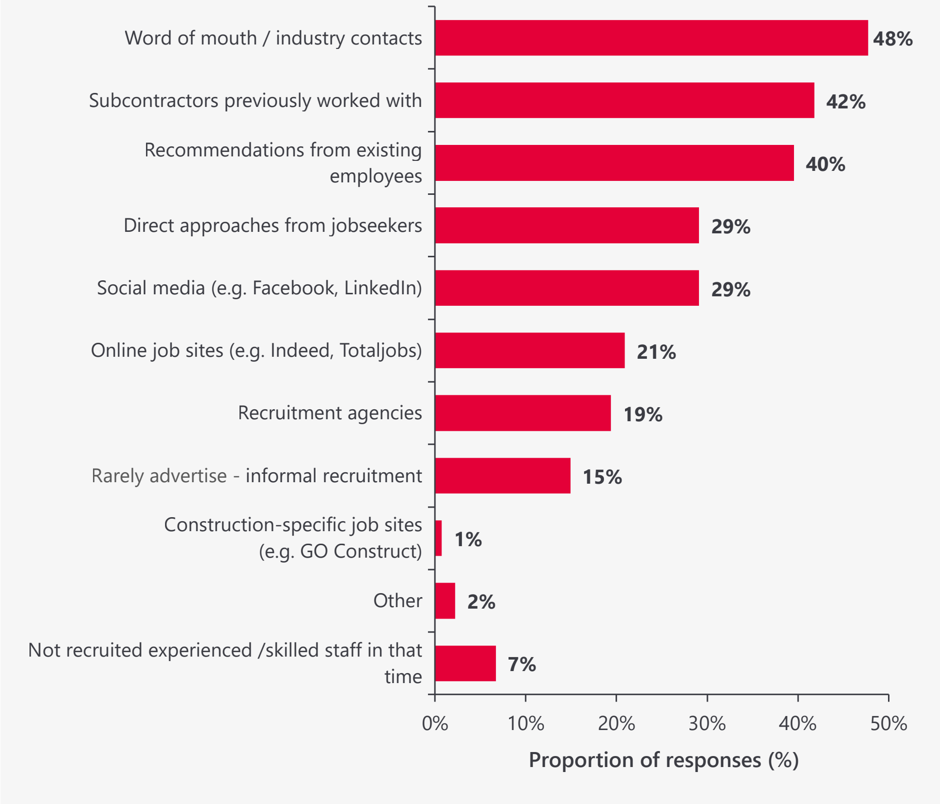
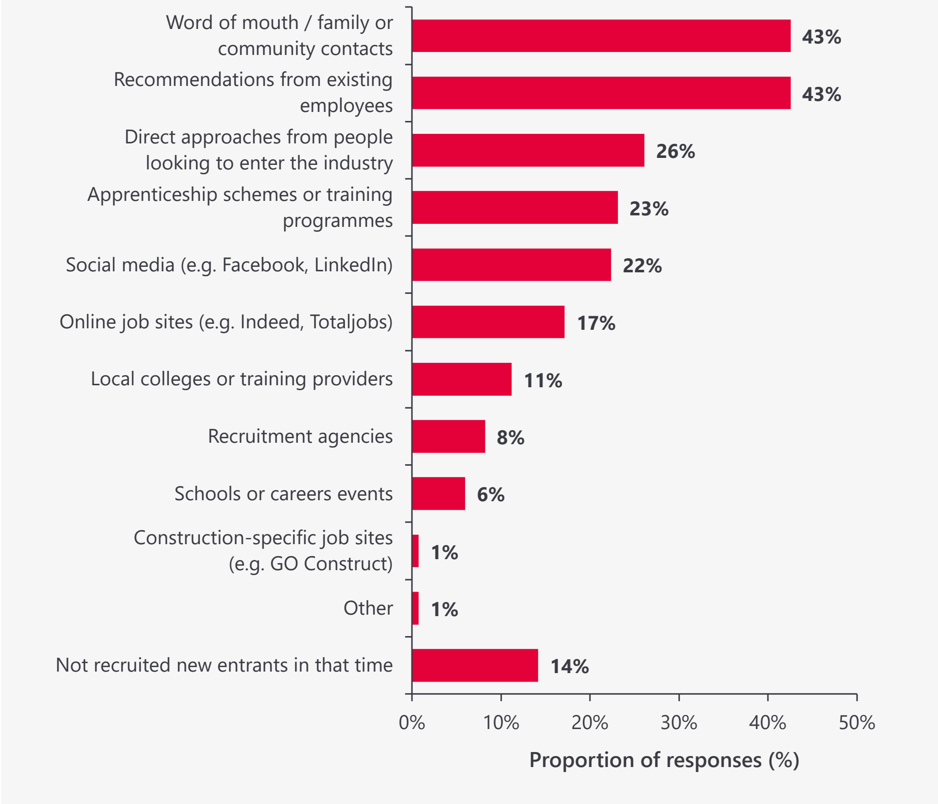
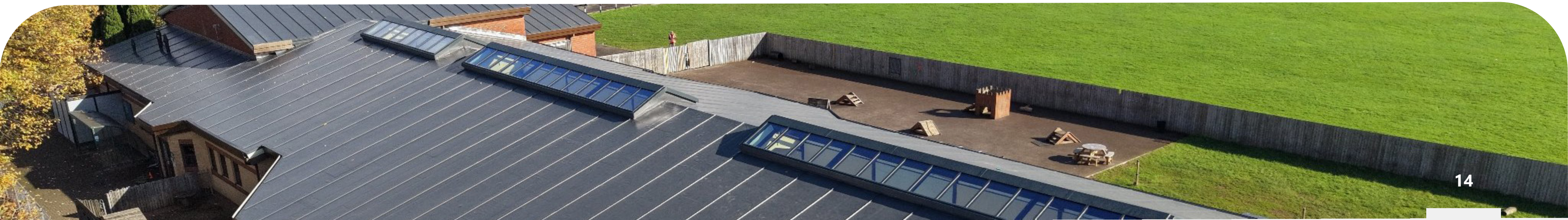


Chart 15: Recruitment channels for new entrants





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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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