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State of the UK roofing industry

SUMMER 2025

Key findings:

- Workload increased but the pipeline of work remains subdued.
- Commercial new build contractors had a positive summer.
- Roofing contractors operating within the domestic RM&I sector are pessimistic about the year ahead.
- Recruitment challenges remain, hindered by cost of employment and poor understanding of opportunities.

Prepared by Barbour ABI, on behalf of NFRC

BarbourABI

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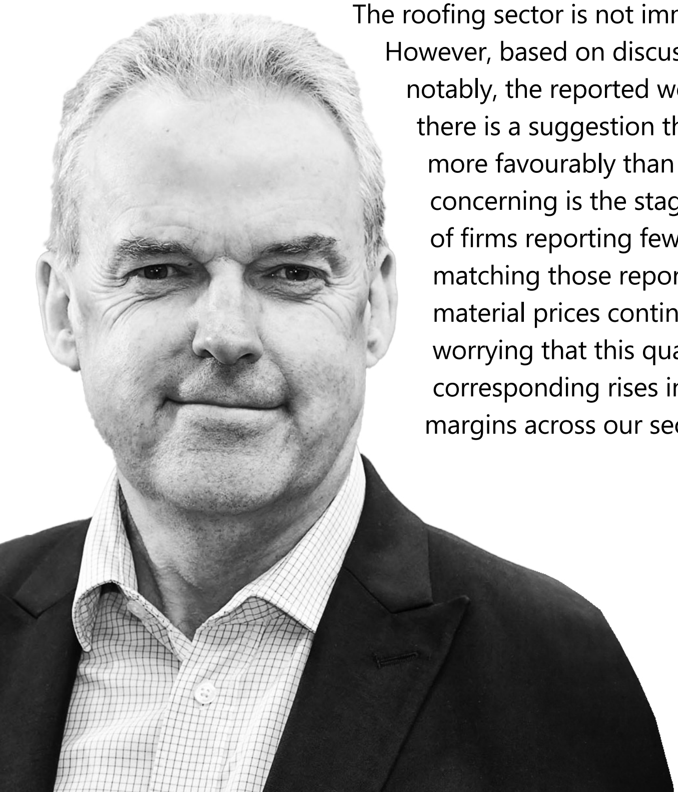
An introduction by James Talman, NFRC CEO

Our State of the Roofing Industry survey returned this summer, with a number of our Members taking the opportunity to share their experiences and outlook on the sector. Over the research period, we enjoyed a particularly warm summer and were delighted to see the Lionesses retain the trophy at the Euros, allowing us to spend more time both on site and in our local pubs and sports clubs. Despite these favourable conditions, sentiment across the UK was muted, held back by weak economic growth, a slowdown in construction, and continuing global uncertainty.



The roofing sector is not immune to these challenges. However, based on discussions with Members and, more notably, the reported workload levels within this report, there is a suggestion that our Members may be faring more favourably than other parts of the industry. More concerning is the stagnation of enquiries with the number of firms reporting fewer enquiries year-on-year, now matching those reporting an increase. Rising labour and material prices continue to pose a challenge, and it's worrying that this quarter saw fewer Members reporting corresponding rises in tender prices, suggesting that margins across our sector are being squeezed.

James Talman
NFRC CEO

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Recruitment remains challenging within roofing and the construction industry as a whole. This was an area we explored further within the summer survey, particularly in relation to the recruitment and retention of new entrants into the sector – often the people taking their first steps into the world of work. It is apparent that work is needed to ensure young people are given the opportunity to learn about careers in construction before making these important choices to ensure they can make informed decisions about whether or not to pursue a career within the industry.

Although ongoing challenges are evident, sentiment data suggests cautious optimism. The next few months, especially announcements in the Autumn budget, will be critical for determining the industry's future prospects.

We hope you enjoy reading this report and we thank the Members who contributed their valuable input to our survey, making everything possible.

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 summer 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 conducted between 9th July and 4th August 2025. 120 NFRC members responded to the survey.

About the author

Jenny Archer is an experienced researcher with 20 years' experience in the field, including 12 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

Key indicators for the UK roofing sector present a mixed picture. Positively, in summer 2025, 43% of roofing contractors reported an increase in their workload compared to the same time last year; an improvement from 36% in spring 2025. Additionally, fewer respondents reported a decrease in workload (23% in summer vs. 27% in spring 2025). However, looking ahead, the pipeline for new work appears subdued: 32% of contractors reported an increase in the level of new enquiries in the summer, similar to the levels seen in spring 2025 (33%). Concerningly, the proportion of respondents reporting a decrease in the level of new enquiries rose by 4%, with 31% reporting a decrease (compared to 27% in spring 2025).

The construction industry in general is continuing to face a challenging period with a high degree of uncertainty often caused by:

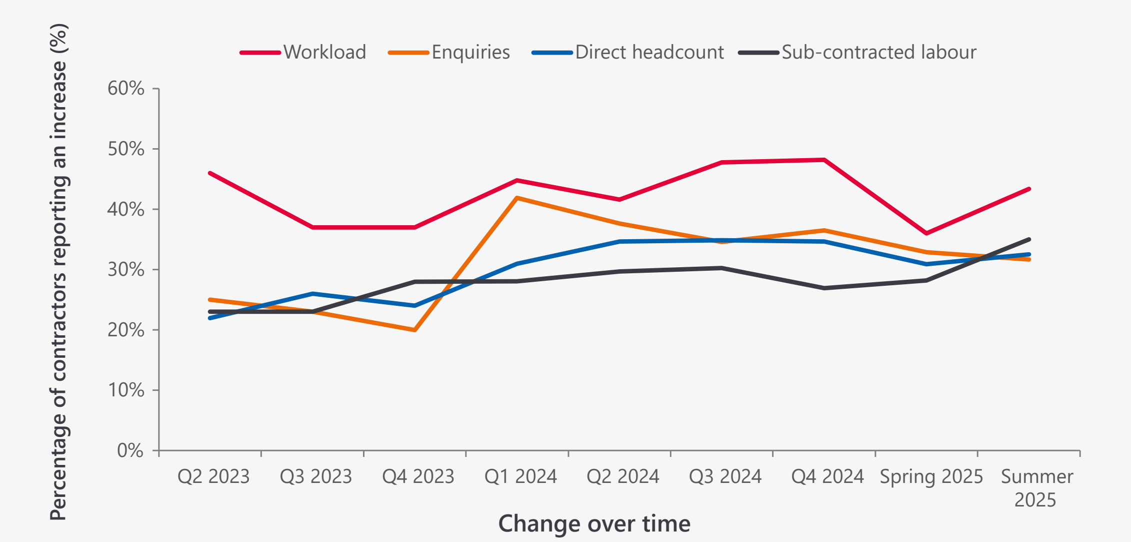
- Continuing delays in the planning system as a bottleneck of planning decisions are held up in Gateway 2 sign-off (where the BSR provides pre-construction approval).
- Cost pressures as companies see the full impact of National Insurance and minimum wage increases.

One respondent commented:

"Customers are not wanting to spend any money. Numbers of orders are decreasing, and the Labour government is not inspiring confidence in consumers."

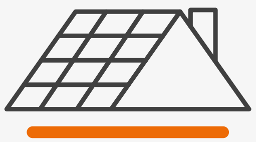
Whilst the proportion of contractors reporting increases in their direct headcount continues to remain fairly static at 33%, use of sub-contracted labour has increased. In summer 2025, 35% reported the use of subcontracted labour had increased, compared to 28% in spring.

Chart 1: Key indicators



Key indicators - change on previous year

Change in workload



Returned to **Q2 2024 levels**

Shift in enquiry levels

-6% vs Q2 2024

Direct headcount changes

Minor fluctuations

Sub-contracted labour levels

+5% vs Q2 2024

Workload by sector and region

Overall, 43% of respondents reported increases in their workload compared to the same time last year – an increase of 7% on spring 2025. Respondents working within both the commercial new build and repair, maintenance and improvement (RM&I) sectors are particularly optimistic with 41% and 42%, respectively, reporting increases during the summer. Weakest growth was reported by those in the domestic RM&I sector; 29% of contractors operating in this sector reported their workload had increased compared to 26% in spring 2025.

From a regional perspective, those operating throughout the UK reported the largest increase in workload: 63% reported an increase and only one in ten (11%) reported a decrease. This is an increase of 15% on spring 2025, when 43% reported an increase in workload. Roofing contractors primarily operating within the South West, and Yorkshire & North East also reported increases in their workload (50% and 38% respectively reported an increase in their workload vs. 30% and 23% in spring 2025).

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

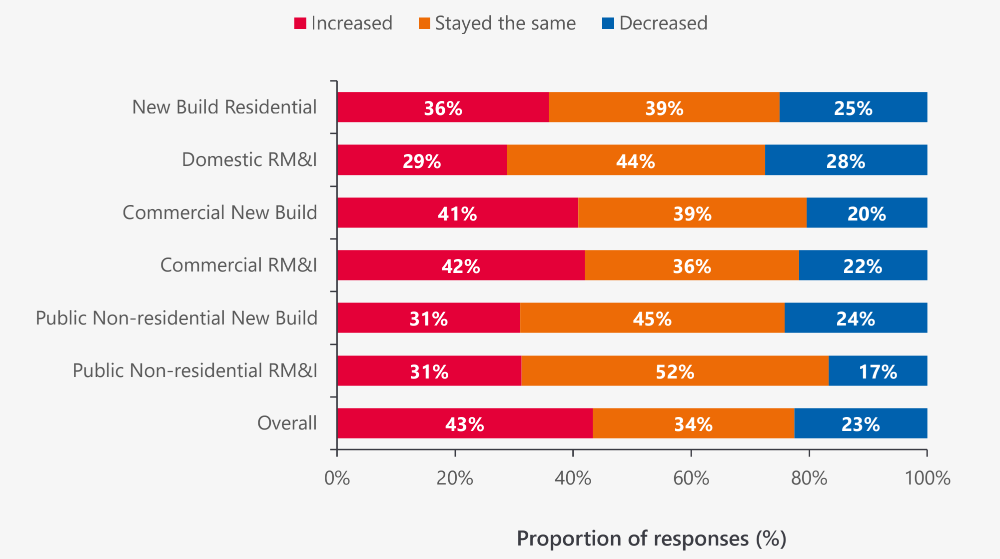
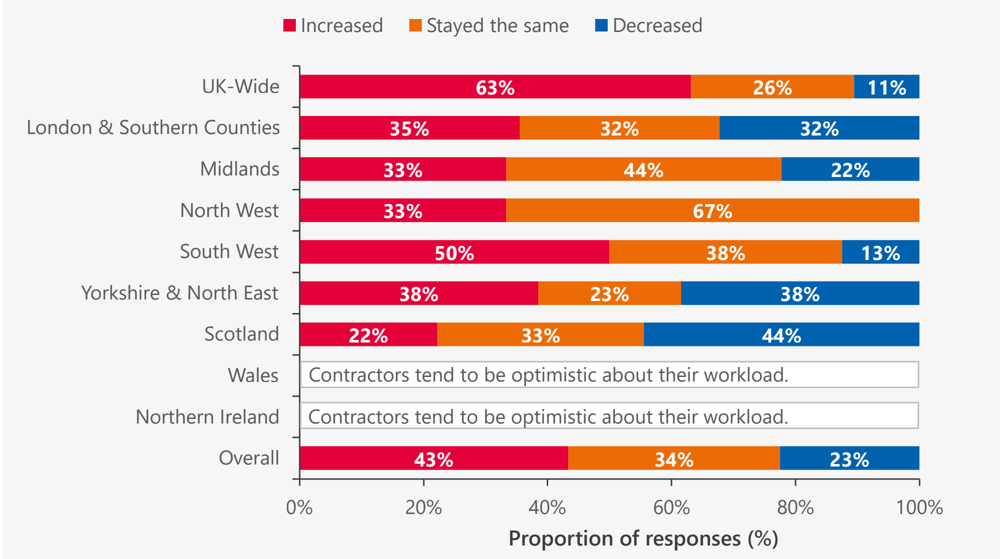
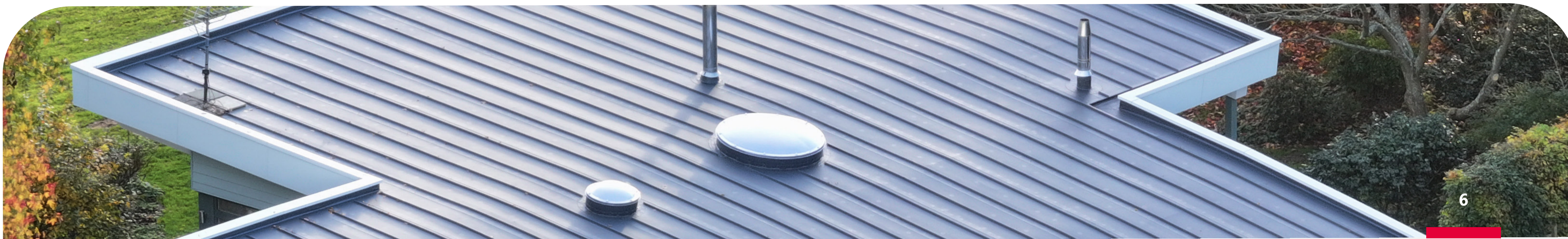


Chart 3: Workload by region – change on previous year



*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. This is something that we observed within the summer report.



Enquiries by sector and region

Overall, during the summer 32% of roofing contractors reported an increase in the level of new enquiries, compared to 33% in spring 2025. The level of new enquiries was highest within the commercial new build sector with 39% of contractors in this sector reporting an increase (vs. 33% in spring 2025). Those operating within the public non-residential new build sector also reported strong growth: 31% indicated the level of new enquiries had increased – an increase of 9% on the previous quarter.

Conversely, those operating in the residential sectors reported the smallest growth in new enquiries. 21% of contractors within the domestic RM&I sector reported an increase (a reduction from 24% in spring). Similarly, 28% of respondents in the new build residential sector reported an increase, compared to 35% last quarter.

Regionally, respondents operating within the North West experienced the highest levels of new enquiries followed by those in the South West: 44% and 38%, respectively, reported an increase (vs. 10% and 25%, respectively).

It is clear from the results that the slow growth in the level of new enquiries is not limited to one region. Fewer contractors operating UK-wide reported an increase in the level of new enquiries: in the summer 26% reported an increase in new enquiries compared to 44% in spring. The Midlands also experienced slower growth with a smaller proportion of respondents reporting an increase in the level of new enquiries in the summer (22% vs. 33% in the spring).

Chart 4: Enquiries by sector – change on previous year

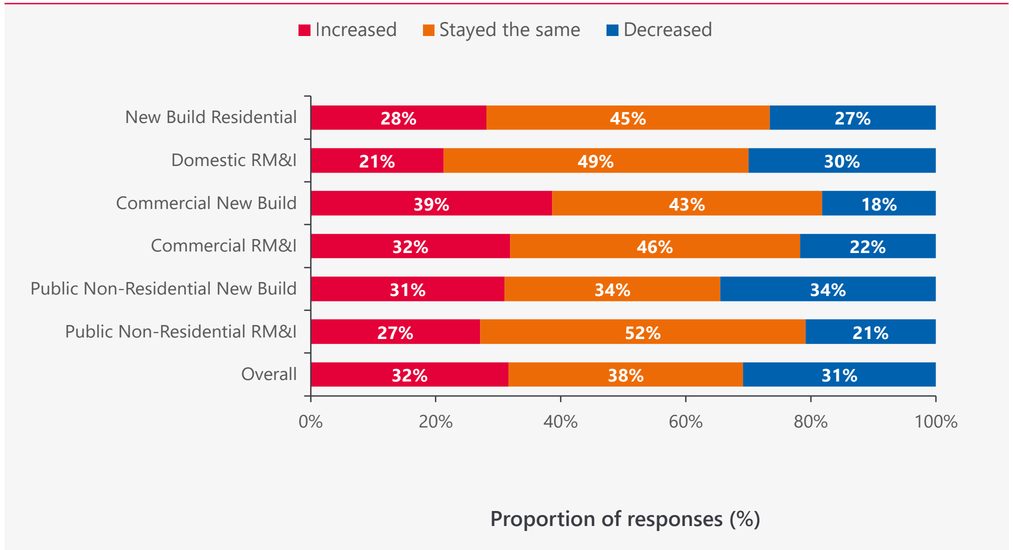
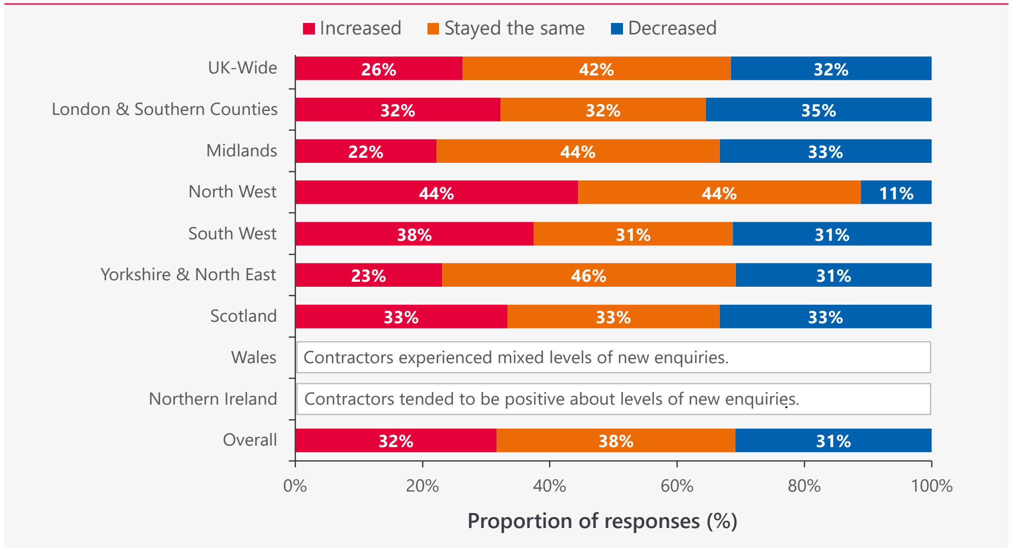


Chart 5: New enquiries by region – change on previous year



Employment skills and shortages

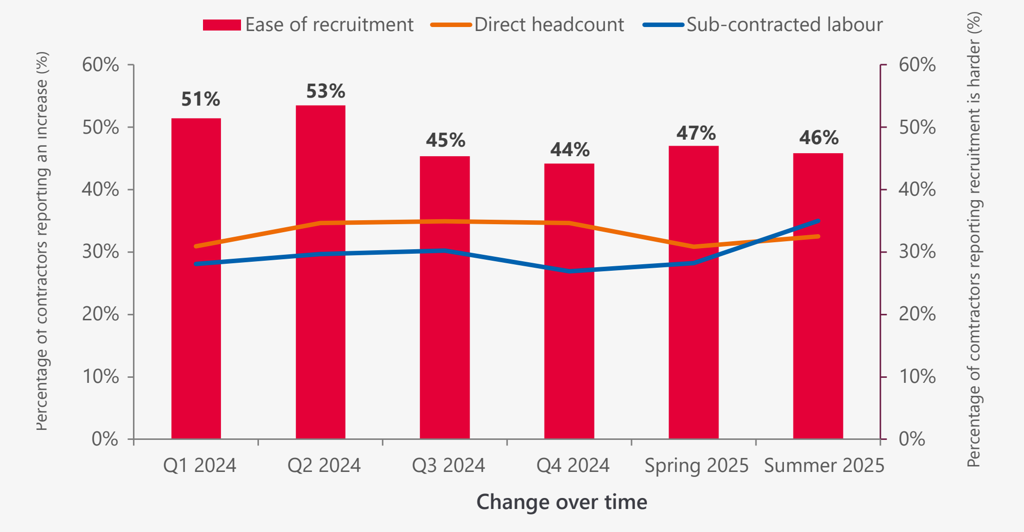
Levels of direct headcount continue to remain fairly static, with 33% of companies reporting an increase compared to 31% in spring 2025. In contrast, during the summer the use of sub-contracted labour increased. The survey found that 35% of companies increased their use of sub-contracted labour – a 7% increase from 28% in the spring.

The recruitment of skilled labour continues to present a challenge for the roofing sector. During the summer nearly half of respondents (46%) indicated that recruitment was harder than it was the same time last year. This is similar to levels seen in spring when 47% reported recruitment was harder. A respondent commented:

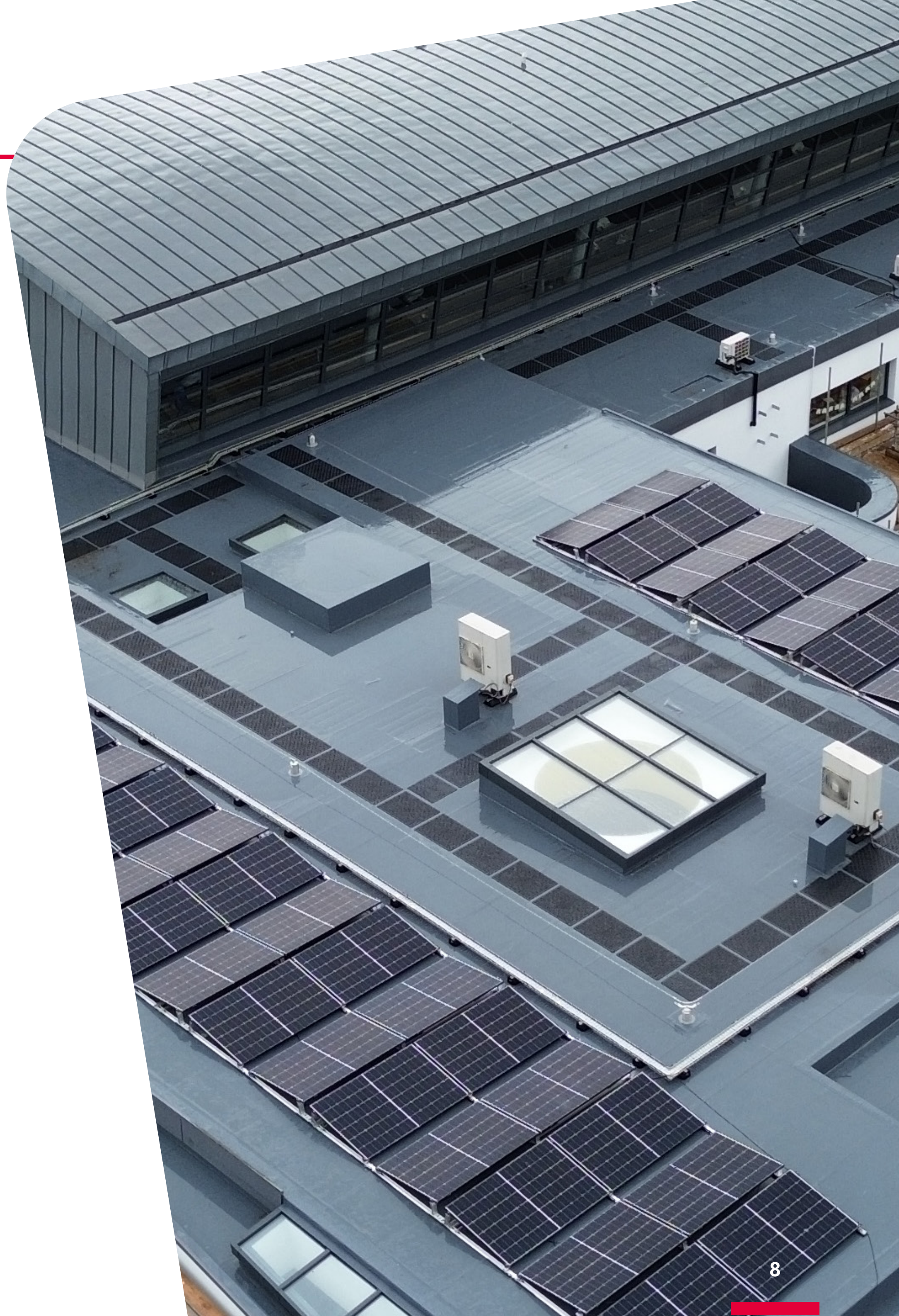
"I worry for the future of the roofing industry with no one interested in joining the trade."

Recruitment challenges are one of the biggest issues currently facing the construction industry in general and is a topic we explore further later in the report.

Chart 6: Labour indicators*



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



Costs, prices and materials availability

Logic dictates that tender prices and costs should be intrinsically linked. However, responses in this latest research suggest that a diversion between the trends is eroding profit margins.

In terms of costs, during the summer, a higher proportion of roofing contractors reported an increase in labour costs: 85% reported an increase compared to 79% in spring. This is likely a reflection of the changes to both minimum wage and employers' national insurance contributions, which increased in April. Positively, for the second consecutive quarter, fewer respondents reported an increase in materials costs (78% vs. 86% in spring 2025 and 90% in Q4 2024).

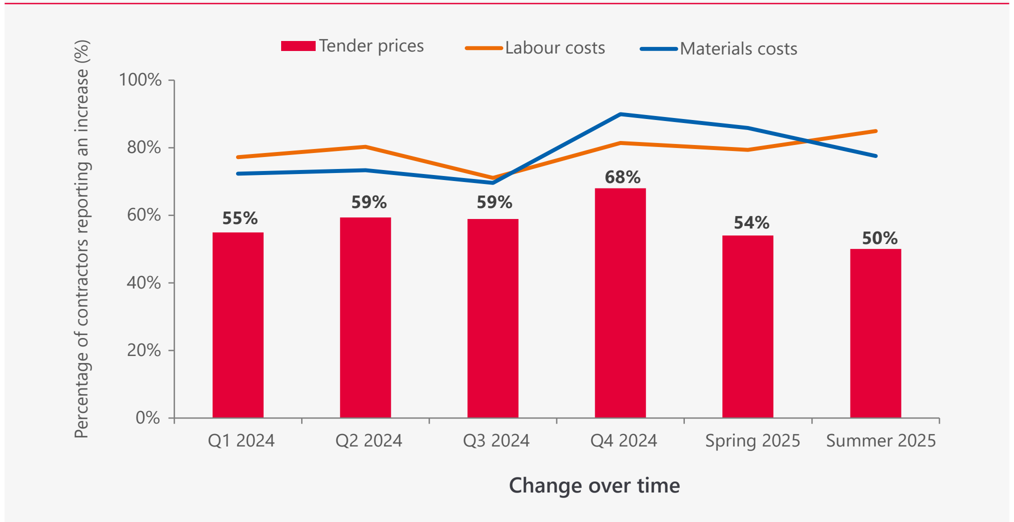
Whilst 50% are reporting an increase in tender prices, this proportion has dropped since spring (vs. 54 %), and we have seen a marked increase in the number reporting tender prices have stayed the same (39% compared to 31% in spring 2025). In the face of subdued demand, respondents' comments raise concerns about some companies' competitive tendering and the effect this has on profit margins:

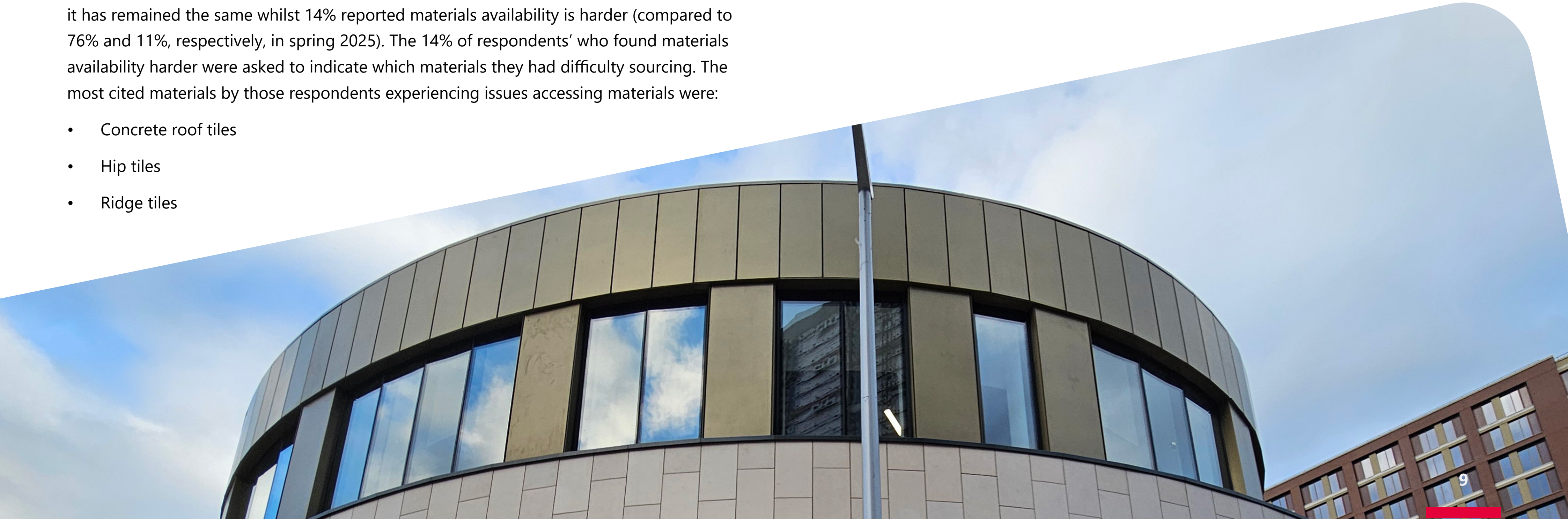
"Many contractors pricing at unsustainable levels, therefore debasing the market."

The availability of materials remains similar to previous quarters: 74% of respondents indicate it has remained the same whilst 14% reported materials availability is harder (compared to 76% and 11%, respectively, in spring 2025). The 14% of respondents' who found materials availability harder were asked to indicate which materials they had difficulty sourcing. The most cited materials by those respondents experiencing issues accessing materials were:

- Concrete roof tiles
- Hip tiles
- Ridge tiles

Chart 7: Cost pressures





Payment terms

During summer 2025, 64% of respondents reported being paid on time, similar to the proportion of respondents (66%) who reported this in spring 2025. Positively, fewer respondent reported being paid late (26% vs. 32% in spring 2025). Whilst this improvement, is welcome, it is apparent that payment terms are not being met in all cases. In particular, there appears to be an issue in meeting agreed payment terms of 30 days or less. In the summer, 48% reported payment terms of 30 days or less but only 31% reported being paid within this time.

Chart 8: Payment terms and periods

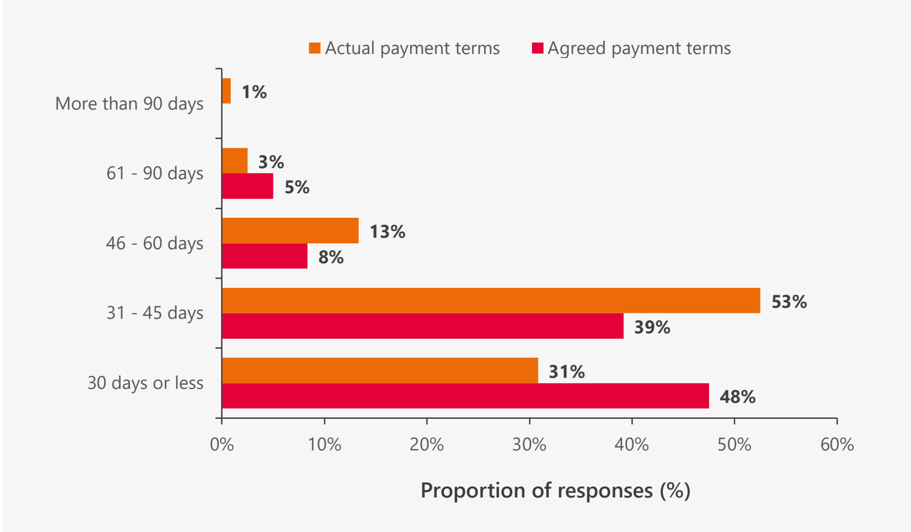
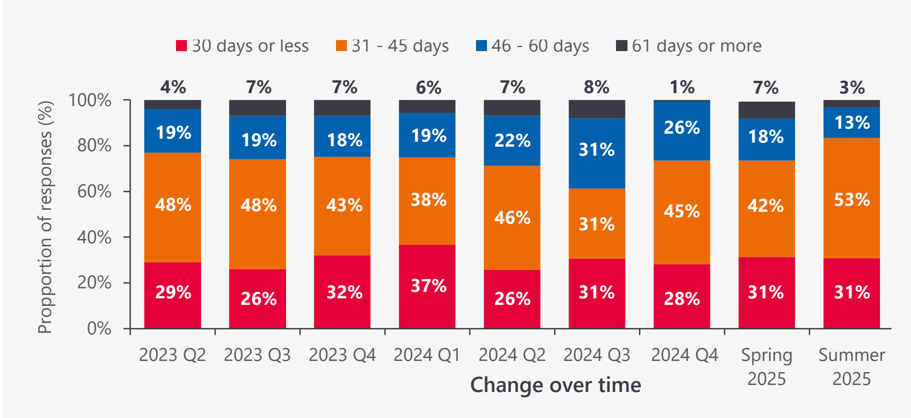


Chart 9: Actual payment period



Sentiment from the roofing sector

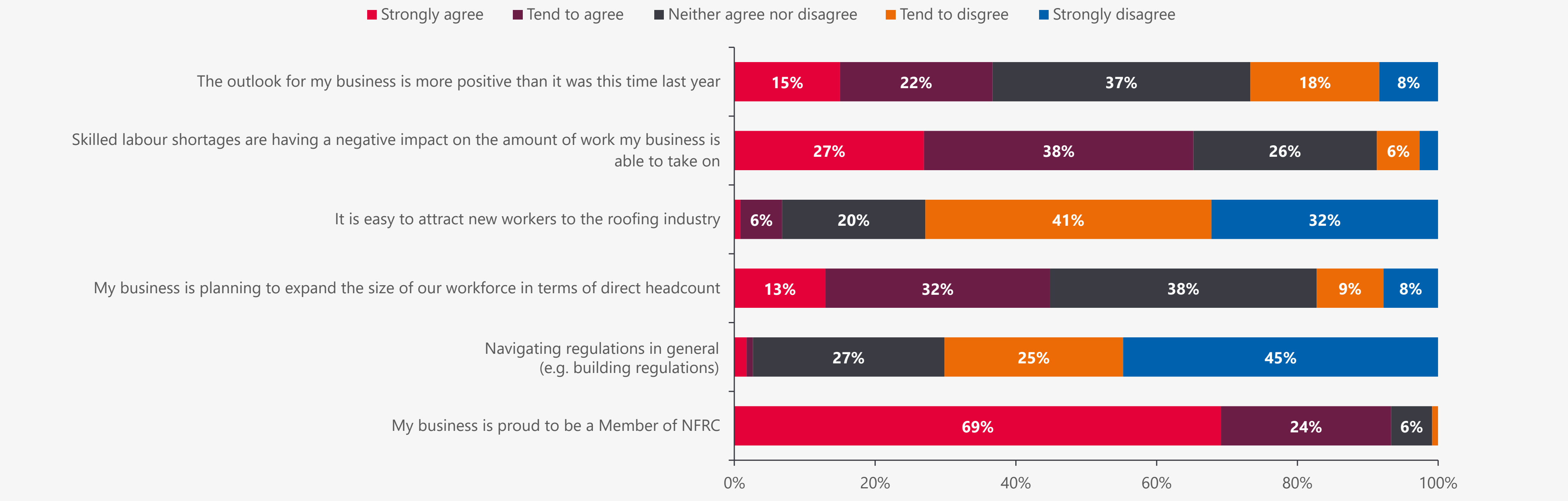
In this section of the report, we explore respondents' perceptions of the roofing sector. Within the survey we presented respondents with a series of statements, both positive and negative, about the roofing industry and working within the sector. We asked respondents to indicate how strongly they agree or disagree with each of the statements. Respondents were able to select an appropriate answer on a 5-point scale ranging from strongly agree through to strongly disagree, with a middle option for those wishing to state they neither agree nor disagree with the statement.

Roofing contractors continue to have mixed opinions regarding the outlook for their business. In summer, a total of 37% agreed (15% strongly agreed and 22% tended to agree) with the statement 'the outlook for my business is more positive than it was this time last year'. This is similar to spring 2025 when 38% agreed with this statement. Despite this mixed outlook a higher proportion of companies agreed that 'my business is planning to expand the size of our workforce in terms of direct headcount': 45% either strongly or tended to agree with this statement in the summer compared to 35% in spring.

Businesses looking to expand their direct headcount continue to face recruitment challenges. Only 1% of respondents strongly agreed and 6% tended to agree that 'it is easy to attract new workers to the roofing industry' (vs. 2% and 3%, respectively, in spring). Furthermore, this quarter around 2 out of 3 respondents (65%) agreed that 'skilled labour shortages are having a negative impact on the amount of work my business can take on'. This is similar to results from spring when 67% agreed with this statement.

In terms of the support which respondents receive, over summer only 3% agreed that 'the UK government provides the support my business needs to succeed' compared to 4% in spring. Positively for NFRC, in the summer, 93% reported their 'business is proud to be a Member of NFRC (vs. 90% who agreed with the statement in spring).

Chart 10: Sentiment from the roofing sector



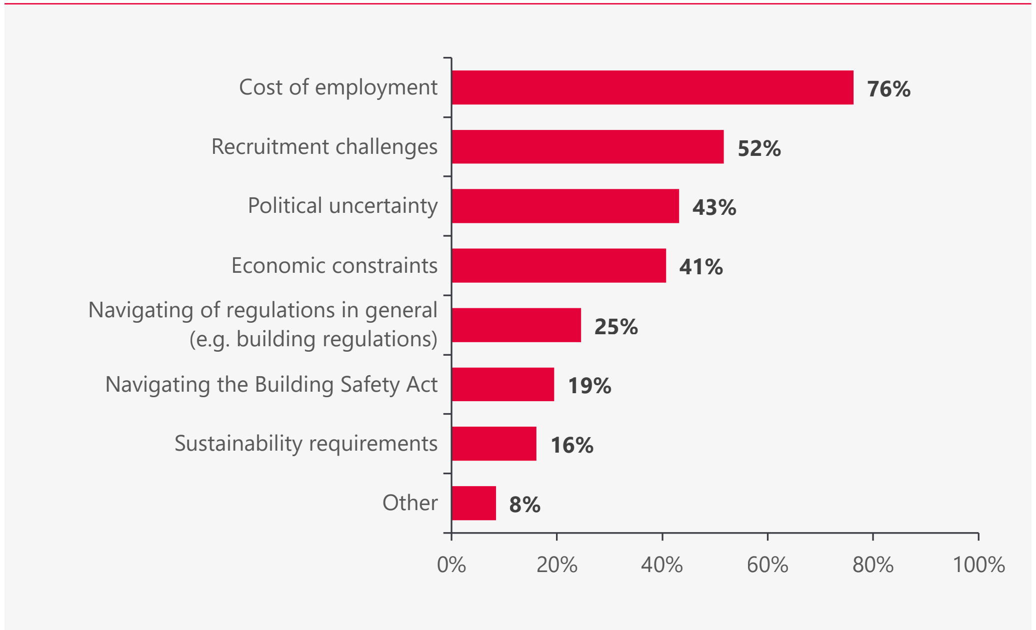
Industry challenges

NFRC was keen to understand the challenges Members are currently facing. The top 3 most cited issues remain unchanged from spring 2025; these were:

- Cost of employment (76% vs. 77% in spring)
- Recruitment challenges (52% vs. 60% in spring)
- Political uncertainty (43% vs. 37% in spring).

During the summer, a higher proportion of respondents cited both economic constraints (41% compared to 34% in spring) and navigating regulations in general (25% compared to 14% in spring 2025).

Chart 11: Industry challenges



Challenges recruiting and retaining new talent

Recruitment is a key challenge for the sector, and as such, NFRC wanted to understand more about the issues companies face when trying to recruit and retain new talent. The survey revealed the main issues are:

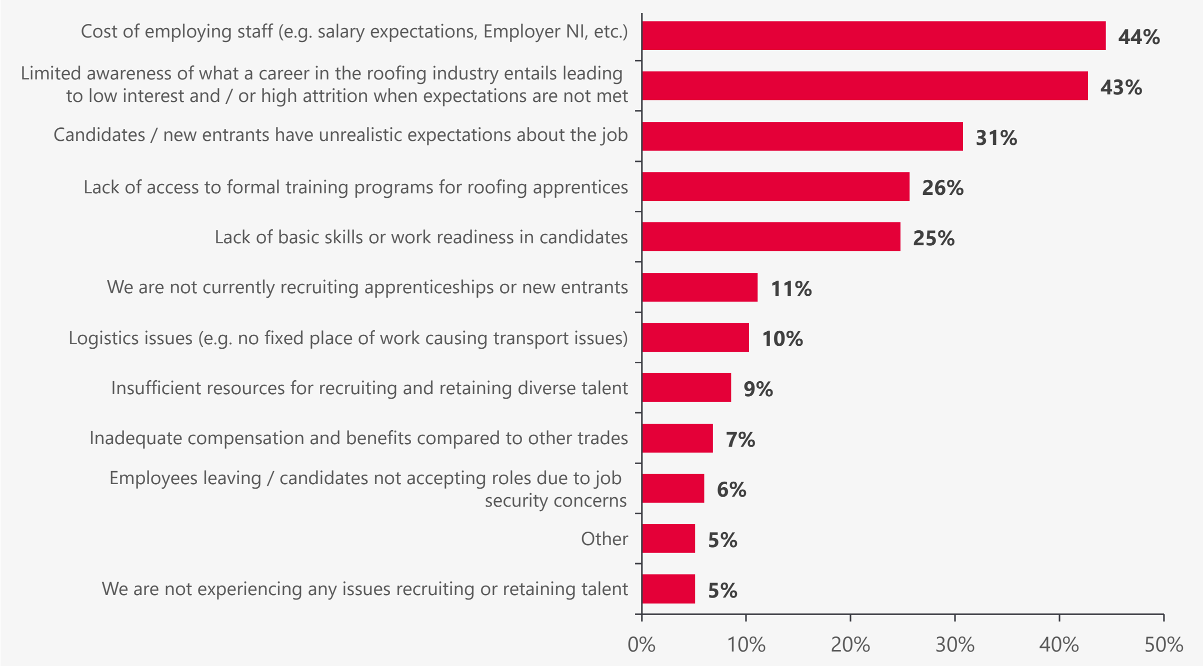
- Cost of employing staff (44%)
- Limited awareness of what a career in the roofing industry entails, leading to low interest and / or high attrition when expectations are not met (43%)
- Candidates / new entrants have unrealistic expectations about the job (31%).

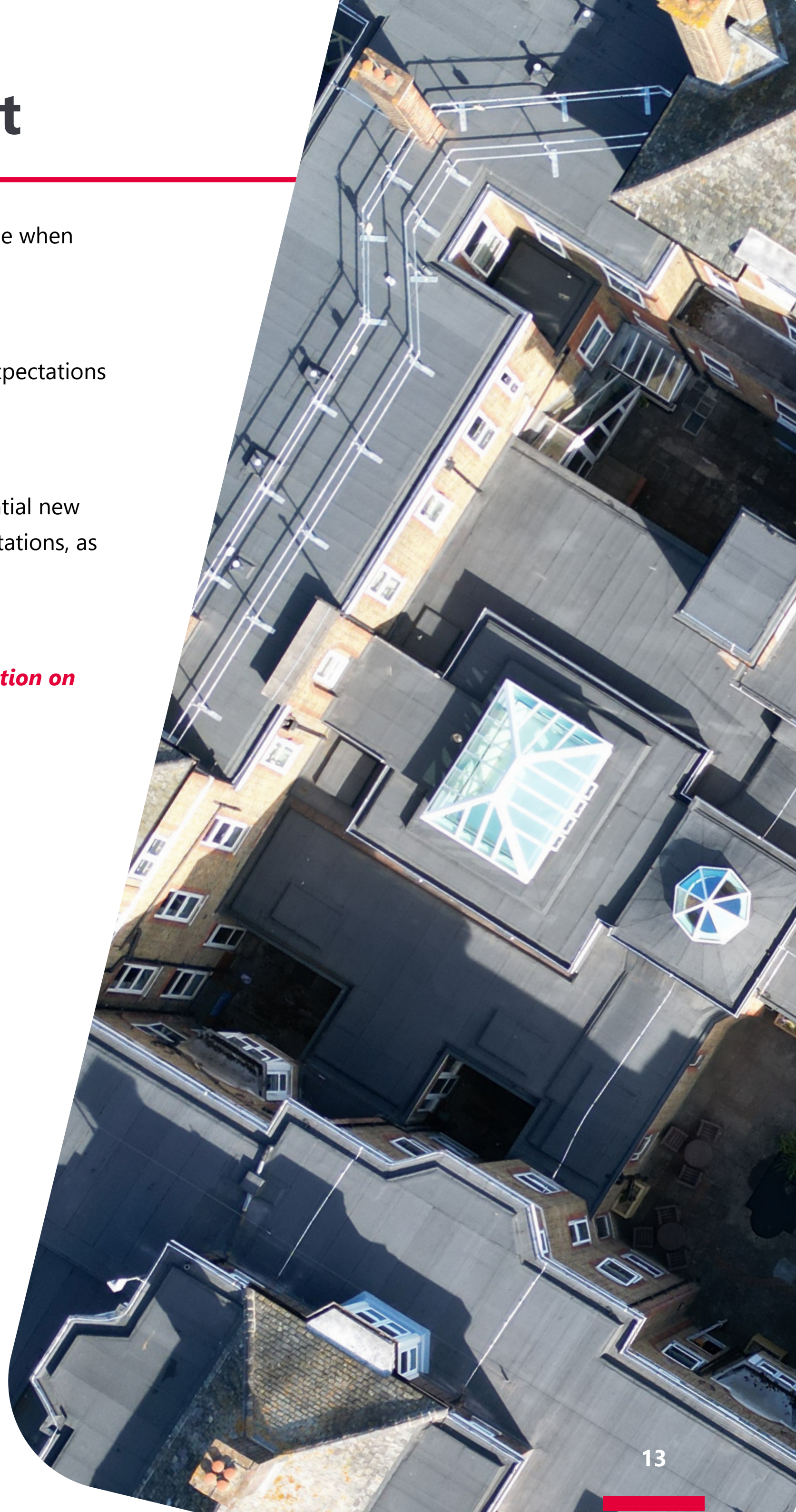
Results indicate that there are gaps that need to be addressed. In particular, there is an education piece to ensure that potential new entrants to the industry understand what a career in the sector actually entails and provide them with a set of realistic expectations, as illustrated by respondents' comments:

"Kids... see roofing as a low skilled trade and is associated with... scams."

"This is mainly because they are not taught any vocational skills at pre-16 level in schools or even given any information on what a career or an apprenticeship is like within construction."

Chart 12: Main challenges recruiting and retaining new talent





Market expectations

Looking forward to the next 12 months, 43% of contractors expect their workload to increase, similar to spring when 41% expected it to increase. Those operating within commercial RM&I are most optimistic with 40% anticipating an increase in their workload (vs. 42% in spring). The commercial new build sector remains one of the more optimistic sectors with 37% of respondents operating within the sector expecting their workload to increase over the next 12 months. However, the sector is significantly less optimistic than they were in spring, when 49% reported they were expecting their workload to increase. Those operating within the domestic RM&I sector are the least optimistic with fewer than 1 in 3 respondents (29%) expecting an increase in workload (compared to 30% in spring).

Regional expectations of workload over the next 12 months are mixed. Those operating within the Midlands (61%) and North West (56%) are most optimistic about their workload (compared to 47% and 30%, respectively, in spring).

In contrast to other regions, the proportion of contractors primarily operating within Yorkshire and North East expecting an increase in workload declined for the second consecutive quarter. During summer 31% indicated they expect their workload to increase over the next 12 months compared to 46% in spring and 79% in Q4 2024. Contractors within the South West also have low expectations with a higher proportion of contractors expecting their workload to decrease over the next 12 months (31% vs. 15% in spring).

Chart 13: Market expectations by sector – 12 months

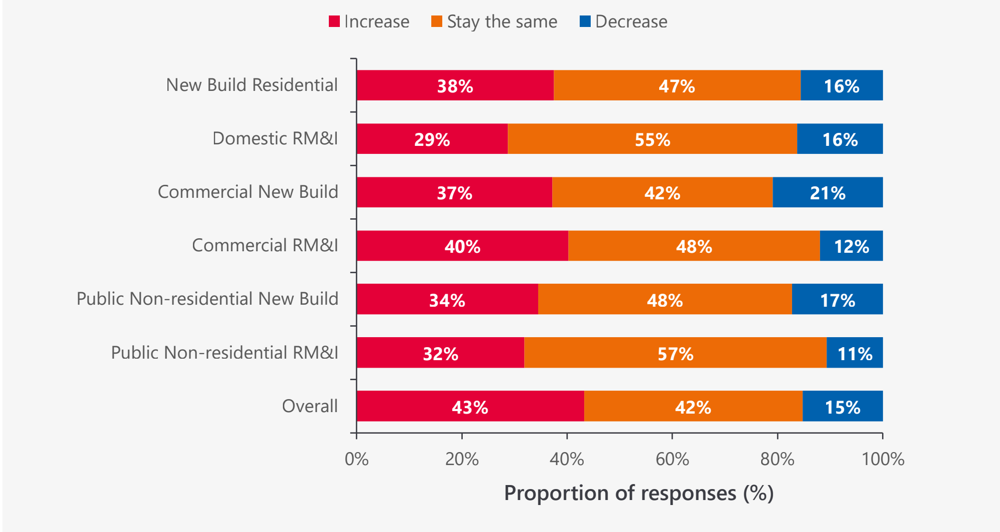
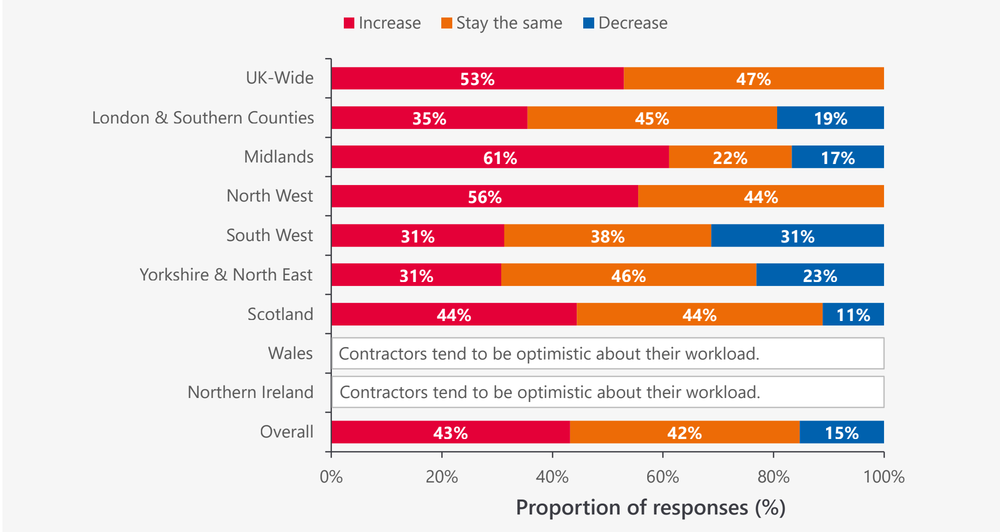


Chart 14: Market expectations by region – 12 months



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