

# State of the UK roofing industry

Q4 2024

## Key findings:

- Roofing contractors are less positive than they were in Quarter 3.
- Both workload and level of new enquiries remain positive, but levels have declined from the previous quarter.
- Roofing contractors working in RM&I, especially those in commercial RM&I, are particularly positive about their expected workload in the year ahead.
- Recruiting skilled labour continues to be challenging.

Prepared by AMA Research, on behalf of NFRC



# Contents

---

An introduction by James Talman, NFRC CEO.....	3
Welcome to the State of The Roofing Industry Survey Report.....	4
Key indicators.....	5
Workload and enquiries by sector.....	6
Workload and enquiries by region.....	7
Employment skills and shortages.....	8
Costs, prices and materials availability.....	9
Market expectations.....	10
Payment terms.....	11
The Building Safety Act.....	12

# Charts

---

Chart 1: Key indicators.....	5
Chart 2: Workload by sector – change on previous quarter.....	6
Chart 3: New enquiries by sector – change on previous quarter.....	6
Chart 4: Workload by region – change on previous quarter.....	7
Chart 5: New enquiries by region – change on previous quarter.....	7
Chart 6: Labour indicators.....	8
Chart 7: Areas of skills shortage.....	8
Chart 8: Cost pressures.....	9
Chart 9: Materials shortages.....	9
Chart 10: Market expectations – 12 months.....	10
Chart 11: Market expectations by region – 12 months.....	10
Chart 12: Payment terms and periods.....	11
Chart 13: Actual payment period.....	11
Chart 14: Extent to which roofing contractors’ organisations are clear of their new responsibilities under the BSA.....	12



# An introduction by James Talman, NFRC CEO

I was encouraged that, after a challenging quarter, members remained positive about their current and future workload expectations, albeit less optimistic than we saw in Quarter 3. We inevitably expect a slight decline in winter as bad weather and fewer hours of daylight affect work on site, often holding up construction; however, this quarter also saw impacts of the autumn budget. One where the chancellor unveiled a series of tax rises, modifications to fiscal rules as well as withdrawing funding from some construction projects.

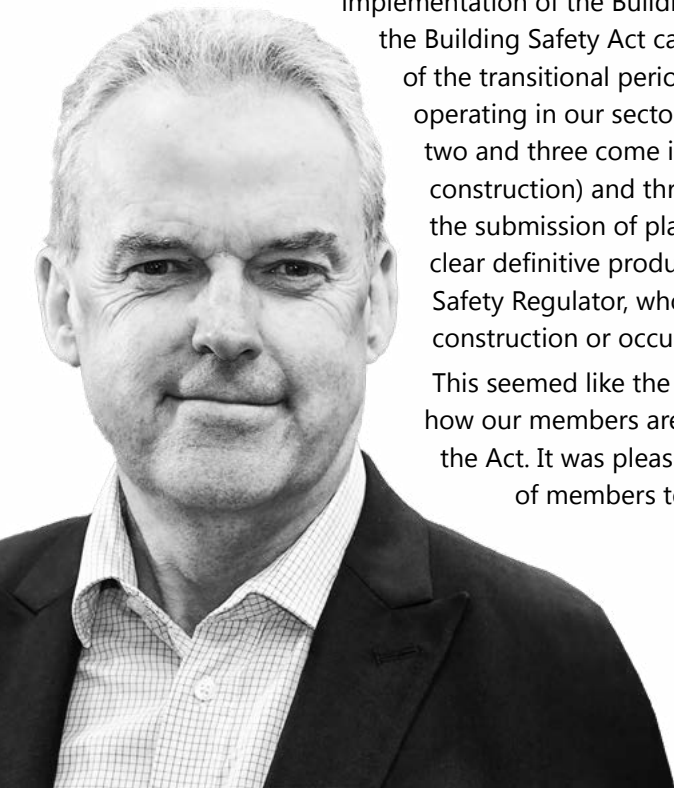
The past year has also marked several significant dates in the transition to and implementation of the Building Safety Act 2022. In April 2024, the Building Safety Act came into force following the closure of the transitional period. Perhaps more notably for those operating in our sector, October 2023 saw gateways two and three come into effect. Gateways two (before construction) and three (before occupation) require the submission of plans, fire safety information and clear definitive product information to the Building Safety Regulator, who then must give approval before construction or occupation occurs.

This seemed like the ideal opportunity to understand how our members are responding to the introduction of the Act. It was pleasing to see a significant proportion of members telling us that they are clear about

their responsibilities, but there are still a number for whom responsibilities could be clearer, and who would value more support to help in this area.

Uncertainties around the Building Safety Act and the responsibilities it brings are not unique to the roofing sector. In fact, in recent months, there have been several articles from elsewhere in the built environment sector expressing concern about potential delays to construction starts, many of which have been caused by a backlog in approvals that are sitting with the Building Safety Regulator. Due to the emphasis in the Act to special measures on Higher Risk Buildings (HRBs), there is a misnomer that a key part of this legislation doesn't affect other construction activity, whether for example a new factory or a domestic refurbishment. The act applies to all those involved in property commissioning, development and management. Responsible parties must be able to evidence organisational and individual competencies.

The need for greater scrutiny is not in doubt. But more support is required to help ensure that the correct information is provided so that applications can be approved as quickly as possible. Whilst not all our members will be working on higher risk buildings, the lack of clarity and support, along with the delays in planning approval is having an impact on our members. NFRC is working to address the concerns raised by our members in relation to the Building Safety Act and will communicate with you to ensure we support you through this biggest change to regulation in decades. The Government's acceptance of all the recommendations from the Grenfell Phase 2 enquiry reinforces the importance of professional membership such as NFRC.



**James Talman**

NFRC CEO

**NFRC**  
LEADING ROOFING EXCELLENCE



# Welcome to the state of the roofing industry survey report



## 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 December 2024. This survey of NFRC members was conducted between 14 January 2025 and 4 February 2025. Over 135 NFRC members responded to the survey.\*



## About the author

Jenny Archer is an experienced researcher with 19 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 AMA research in 2024 as Consultancy Research Manager, delivering bespoke consultancy projects for clients. Jenny is a certified member of the Market Research Society.

\*Please note that this quarter we made some changes to the way we present some of the data at a regional level. Where there are a low number of 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.

In some cases, the 'balanced' percentage may not equal the 'increase' minus 'decrease' percentages due to rounding. Similarly, percentages may not add up to 100 per cent due to rounding or respondents selecting multiple responses.

## Contact us



020 7638 7663

helpdesk@nfrco.co.uk

www.nfrco.co.uk



+44 (0)1242 235724

consultancy@amaresearch.co.uk

www.amaresearch.co.uk

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.”**

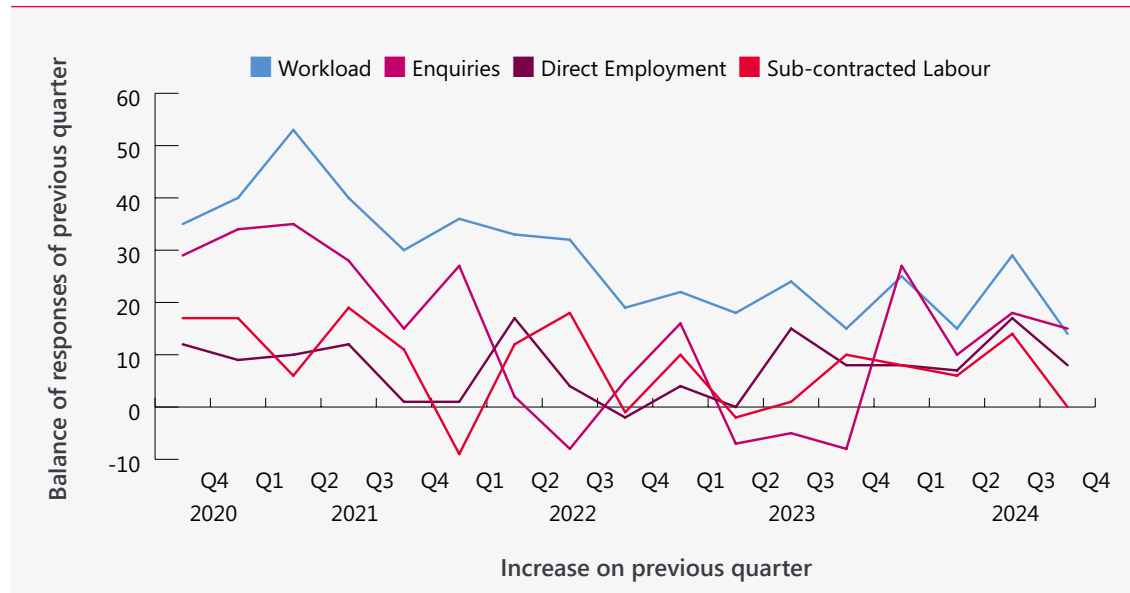
# Key indicators

Key indicators for the roofing sector remain positive; however, perceptions across the four areas of workload, enquiries, direct employment and sub-contracted labour have all reduced compared to the last quarter. This is likely to have been influenced by seasonal variation which we tend to see during Quarter 4 as winter begins, as well as uncertainty caused by the October budget. Within the October budget the chancellor, Rachel Reeves unveiled a series of tax rises, aimed at raising approximately £40bn to support government programmes, alongside modifications to fiscal rules that will permit additional government borrowing.

A balance of 14 per cent of respondents<sup>2</sup> reported overall growth in workload in the fourth quarter of this year, a reduction from 29 per cent in Quarter 3. In Quarter 4, a lower proportion of roofing contractors reported an increase in workload (35 per cent compared to 43 per cent in Quarter 3) with a higher proportion reporting a decline (21 vs. 13 per cent in the last quarter). The level of new enquiries also witnessed a marginal decline this quarter, with a balance of 15 per cent reporting an increase – a reduction from 18 per cent in Quarter 3.

In the roofing sector, the balance of both direct employment and sub-contracted labour levels decreased during Quarter 4 – a balance of 8 per cent reported an increase in direct headcount and a balance of 0 per cent reported an increase in sub-contracted labour levels (compared to 17 and 14 per cent, respectively, in the previous quarter). In the case of both direct employment and subcontracted labour, the proportion reporting an increase in employment levels has fallen. Conversely, the proportion reporting a decrease or no change in employment levels, has risen in Quarter 4.

Chart 1: Key indicators



2. Balance of respondents refers to the percentage reporting an increase minus the percentage reporting a decline.



# Workload and enquiries by sector

Overall, the roofing sector continues to report growth in workload during Quarter 4, but at a slower rate than in the previous quarter, although this differs by sector of operation. In Quarter 4, those operating in the commercial new build sector report the strongest growth compared to Quarter 3 (48 vs. 40 per cent, respectively). Similarly, a higher proportion of respondents working on public non-residential new build projects in Quarter 4 report an increase in workload compared to the previous quarter (42 vs. 37 per cent, respectively). A smaller proportion of respondents working in this sector (15 vs. 20 per cent in Quarter 3) report a decrease in workload.

Those operating in the three repair, maintenance and improvement (RM&I) sectors report a slowdown in workload increases this quarter, compared with Quarter 3. 33 per cent of respondents working in domestic RM&I and 39 per cent in each of the commercial and public non-residential RM&I sectors reported an increase this quarter falling from 41, 46 and 46 per cent respectively in the last quarter. Despite the government’s commitment to the new build residential sector with 1.5 million new homes promised over the next parliament, during Quarter 4, growth in the sector slowed with 28 per cent of roofing contractors reporting an increase in workload, a decrease from 36 per cent in Quarter 3.

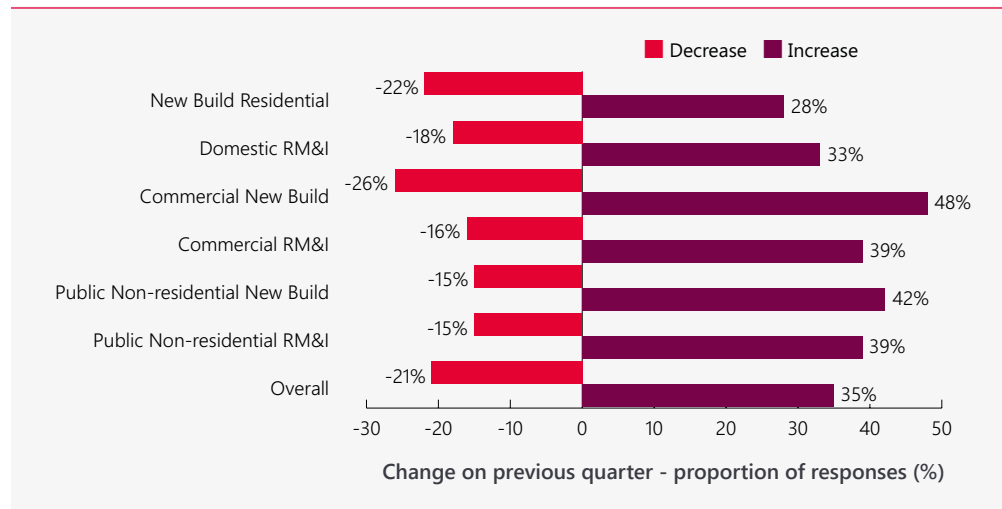
When comparing current workload with the same period in 2023, the domestic RM&I sector has experienced a significant reduction in respondents reporting an increase in workload: in

Quarter 4, a balance of 12 per cent of roofing contractors reported an increase in workload in this sector – a decrease of 21 per cent on the previous quarter.

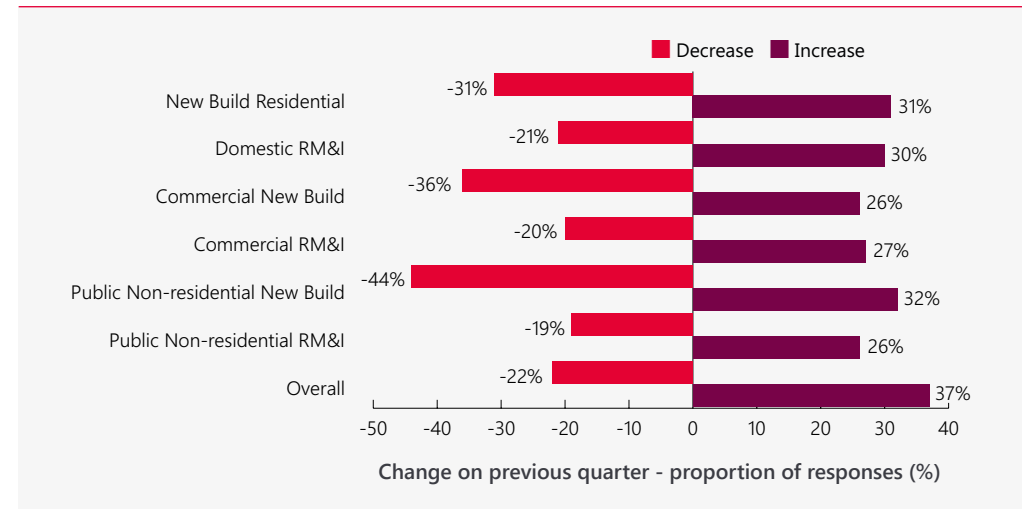
Our survey found that firms saw an overall balanced increase in enquiries of 15 per cent in Quarter 4, a small decrease from 18 per cent in the last quarter. A smaller proportion of respondents operating in the commercial new build (26 vs. 39 per cent) and public non-residential RM&I sectors (26 vs. 40 per cent) report an increase in the level of new enquiries this quarter compared to Quarter 3. Additionally, during Quarter 4, a higher proportion of respondents report a decrease in the level of new enquiries in the public non-residential new build sector (44 per cent compared to 25 per cent in Quarter 3). This suggests that the current growth in workload in the commercial and public non-residential new build sectors may be short-lived.

Overall, in comparison with new enquiries in the same quarter 2023, the balance of roofing contractors reporting growth in the level of new enquiries remains positive. However, the views of those working in the new build residential and commercial sectors are more pessimistic, with a balanced figure of -5 per cent and -2 per cent reporting an increase in the level of new enquiries, a reduction from 5 and 11 per cent, respectively, in the previous quarter.

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



**Chart 3: New enquiries by sector - change on previous quarter**

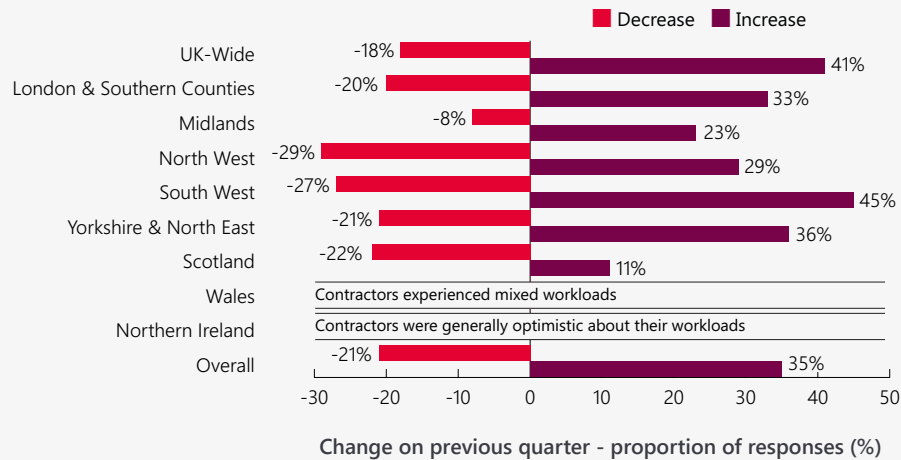




# Workload and enquiries by region

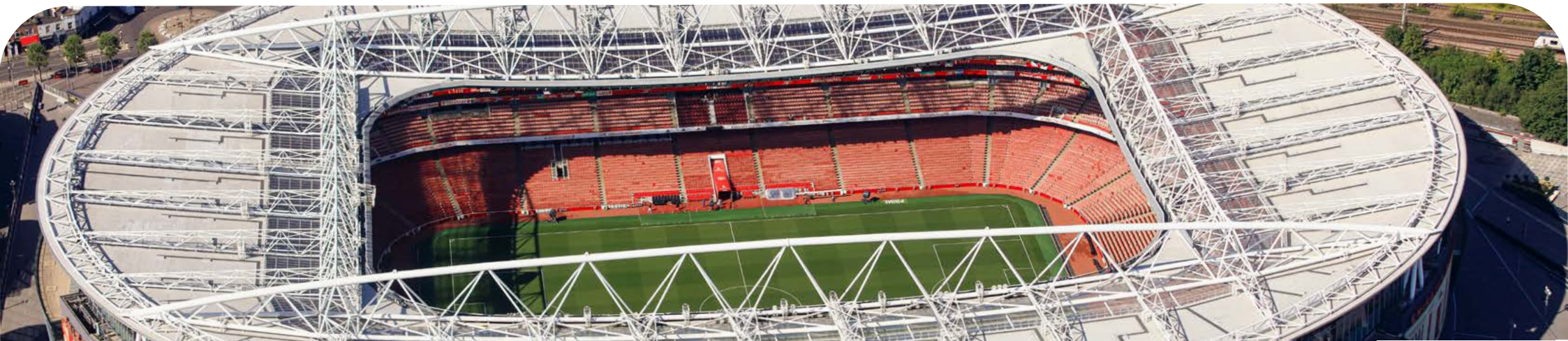
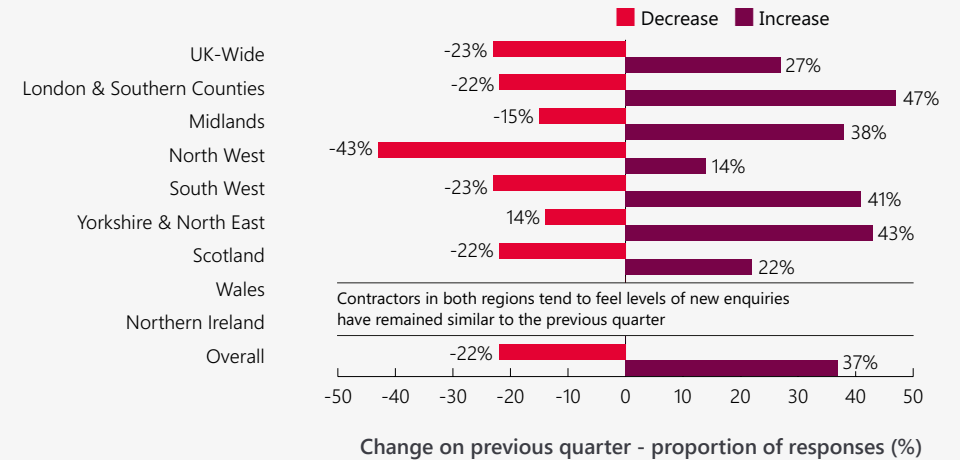
In Quarter 4, respondents primarily operating across the South West and UK-Wide reported the strongest increase in workload (45 and 41 per cent, respectively). However, the balance of roofing contractors reporting an increase in those areas still represents a decline, reducing from 37 per cent in both regions to 18 per cent in the South West and 23 per cent UK-Wide. Firms operating in the Midlands are more likely than those operating elsewhere to indicate that their workloads have remained the same this quarter: 69 per cent report that this is the case during Quarter 4 compared to 33 per cent in the previous quarter.

**Chart 4: Workload by region – change on previous quarter**



This quarter saw an overall balanced increase in new enquiries of 15 per cent. During Quarter 4, those primarily operating in London and Southern Counties indicate increased levels of new enquiries compared to the previous quarter (47 vs. 29 per cent). Conversely, respondents operating primarily in the North West are less likely to report an increase in new enquiries in Quarter 4 compared with the previous quarter, resulting in a decline in the balanced figure (-29 vs. +25 per cent, respectively).

**Chart 5: New enquiries by region – change on previous quarter**

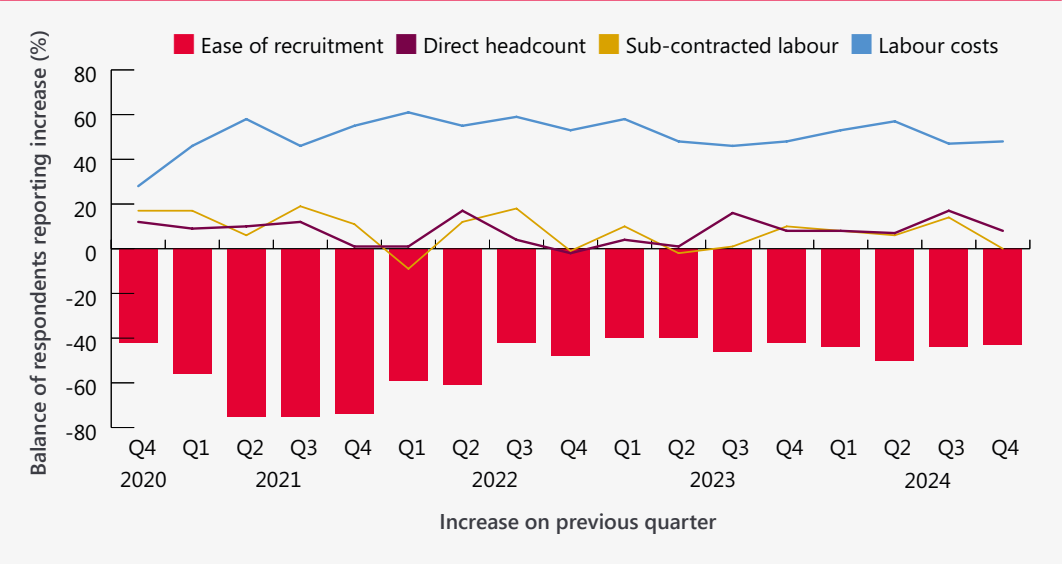


# Employment skills and shortages

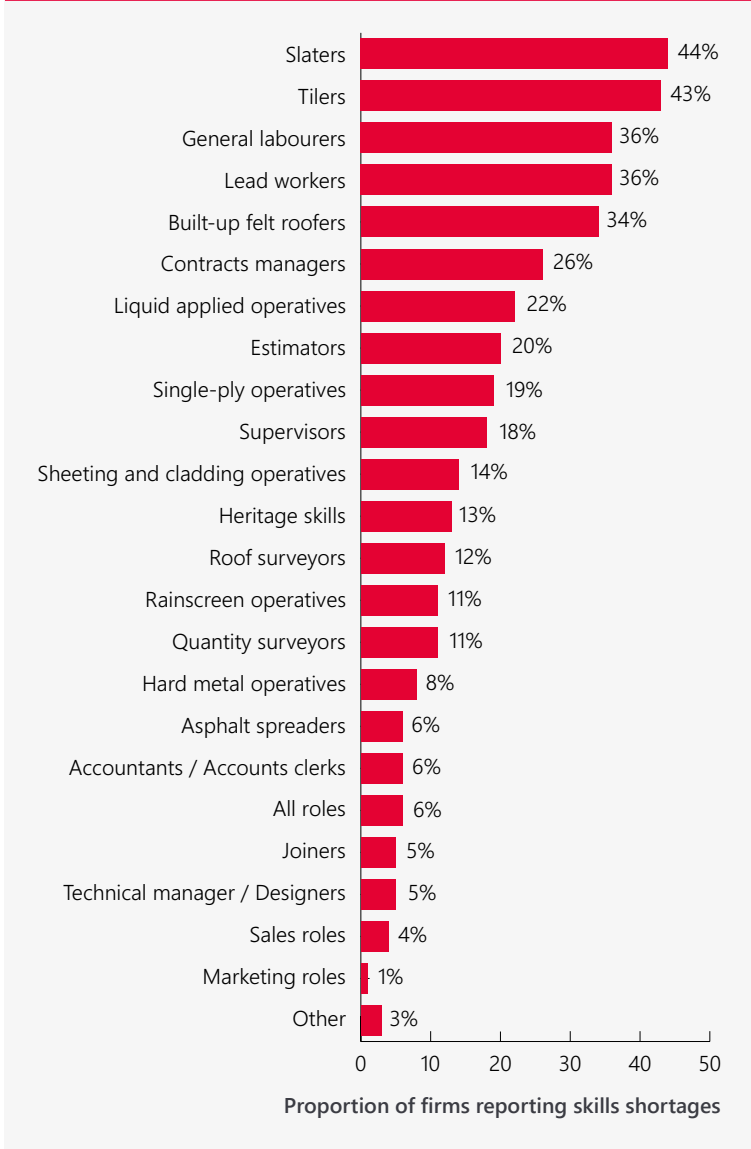
According to the findings of our survey, skilled labour recruitment challenges continue to be an issue for a significant proportion of roofing contractors. The balance of companies reporting an increase in difficulty of recruiting skilled labour is 43 per cent in Quarter 4, similar to levels seen in the previous quarter.

In Quarter 4, respondents report a decline in both the direct headcount and sub-contracted labour at their firms to 8 per cent and 0 per cent respectively. We continue to see a persistent trend in challenges around the recruitment of slaters and tilers. In the fourth quarter of this year, around two-fifths (44 and 43 per cent, respectively) report these as the main areas of skills shortages, followed by 36 per cent reporting issues recruiting general labours and lead workers.

**Chart 6: Labour indicators**



**Chart 7: Areas of skills shortage**





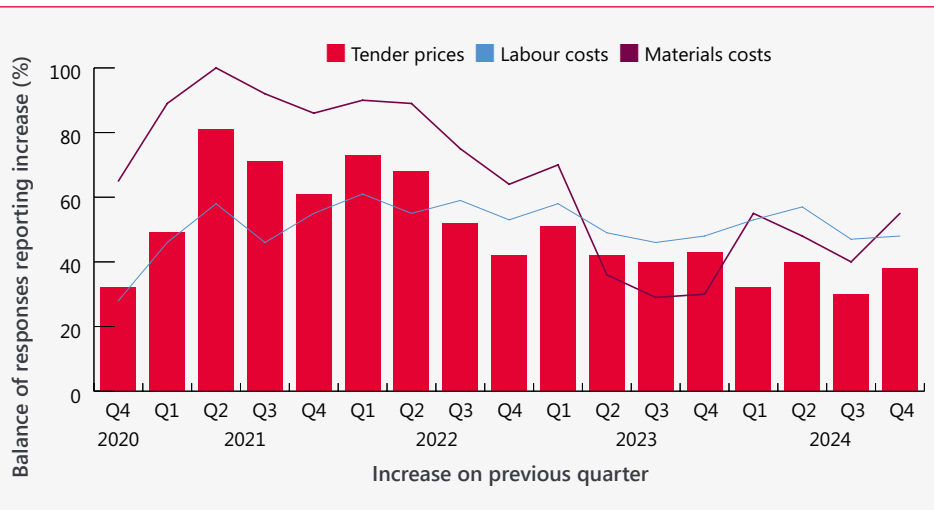
# Costs, prices and materials availability

The proportion of roofing contractors reporting a balanced increase in labour costs remained stable this quarter (48 per cent vs. 47 per cent in Quarter 3).

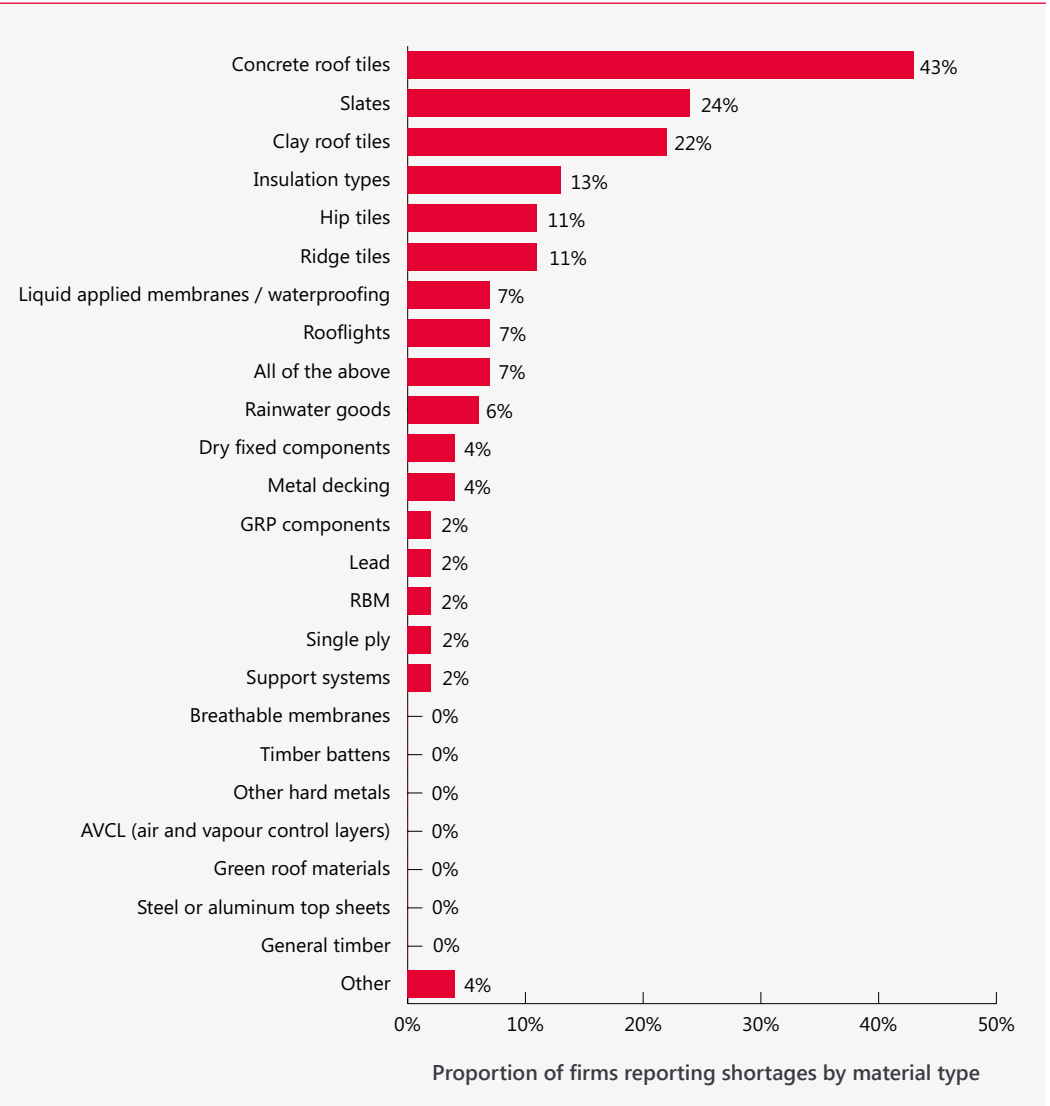
A balance of 55 per cent report higher materials costs during Quarter 4, similar to levels observed in the first quarter of 2024. This is perhaps a reflection of several manufacturers announcing price increases towards the end of the year. As materials costs have increased, tender prices have also risen for a significant proportion of respondents, with 38 per cent reporting that, on balance, their tender prices have increased in Quarter 4. This has risen from 30 per cent reporting a balanced increase in tender prices during the third quarter of this year.

The availability of materials remains similar to the previous quarter. During Quarter 4, 11 per cent of roofing contractors rate the general availability of materials as easier than in the previous quarter, 12 per cent more difficult, and the remaining 77 per cent the same, giving a balanced figure of -1 per cent. This compares to a balanced figure of 2 per cent in the previous quarter. Where the availability of materials is an issue, two-fifths report difficulty sourcing concrete roof tiles, and a quarter report issues sourcing slates.

**Chart 8: Cost pressures**



**Chart 9: Materials shortages**



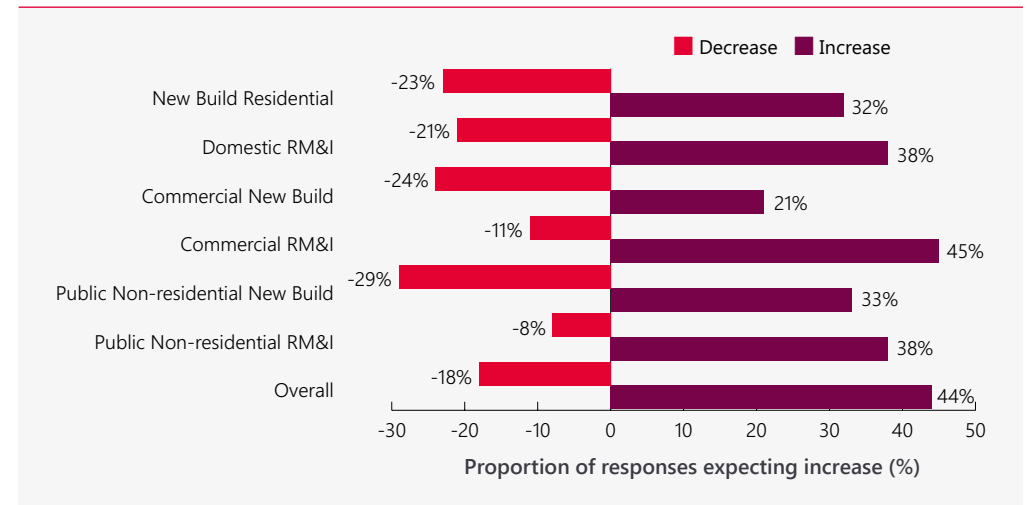
# Market expectations

Overall, two-fifths of respondents (39 per cent) anticipate that their workload will increase in the first quarter of 2025 compared to Quarter 4 2024, similar to Quarter 3 results. However, a higher proportion (20 per cent compared to 11 per cent in the previous quarter) expects workload levels to decrease, resulting in a reduced balanced figure compared to Quarter 3 (20 vs. 28 per cent, respectively).

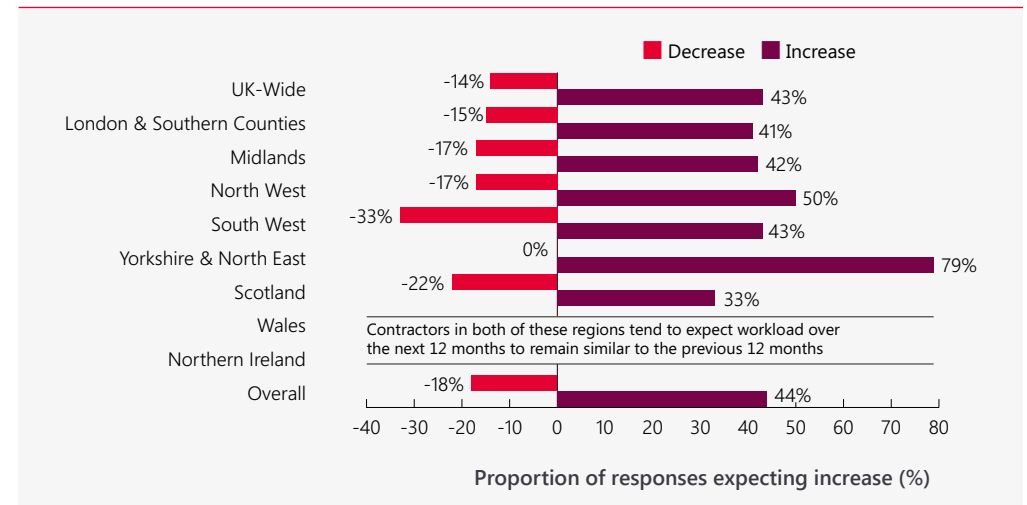
When considering the 12 months ahead, the picture continues to be mixed. Overall, 44 per cent of respondents anticipate their workload will increase in the next 12 months and 18 per cent that it will decrease resulting in a balanced figure of 26 per cent. This differs by sector, with more optimism amongst those involved in RM&I, compared with those operating in new build sectors. In Quarter 4, roofing contractors operating within the commercial RM&I sector are particularly optimistic, reporting a balanced figure of 34 per cent compared to 28 per cent in the previous quarter. Conversely the three new build categories all experienced large reductions in the balanced figure. The public non-residential new build sector experienced the largest reduction compared to Quarter 3 (4 vs. 37 per cent, respectively). This is perhaps a reflection of the governments October budget and the withdrawal of funding for some construction projects. Workload in the commercial new build sector is anticipated to shrink marginally over the next 12 months: a balance of -2 per cent of respondents expect an increase in workload in this area.

Regional expectations of workload over the next 12 months are varied. In each of the regions, more roofing contractors tend to report an anticipated increase in workload over than the next 12 months than predict a decrease; however, the scale of this does vary. On balance, those operating UK-wide are less optimistic about their future workload expectations (29 vs. 48 per cent) in the previous quarter. Similarly, those operating in the Midlands (25 vs. 50 per cent), South West (10 vs. 40 per cent) and Scotland (11 vs. 23 per cent) are less optimistic about their future workload expectations this quarter compared to the previous quarter. Those operating in Yorkshire and the North East are more likely to be optimistic about the outlook for workload over the next 12 months this quarter, with 79 per cent expecting an increase compared to 38 per cent in the previous quarter.

**Chart 10: Market expectations – 12 months**



**Chart 11: Market expectations by region – 12 months**



# Payment terms

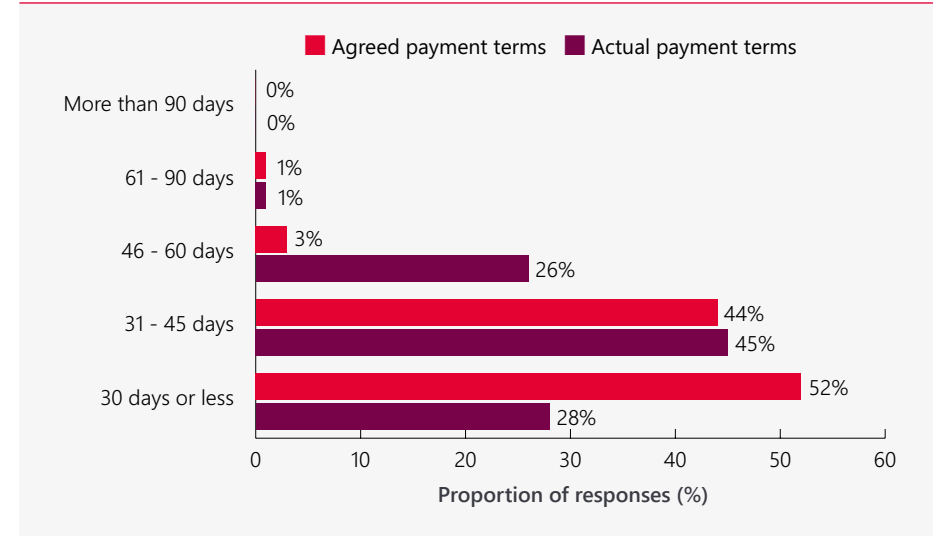
Late payment of due accounts continues to be an issue: 45 per cent of respondents continue to report receipt of late payment for work completed. Nearly all survey participants (96 per cent) report requests for payment within 45 days: half (52 per cent) within 30 days and 44 per cent within 31 – 45 days. However, 27 per cent of companies are waiting more than 46 days for payment with some waiting up to 90 days.

Although the majority (96 per cent) claim that payment is requested within 45 days, over one-quarter of respondents report a wait of 46 or more days for payment, with a small proportion waiting for over 90 days.

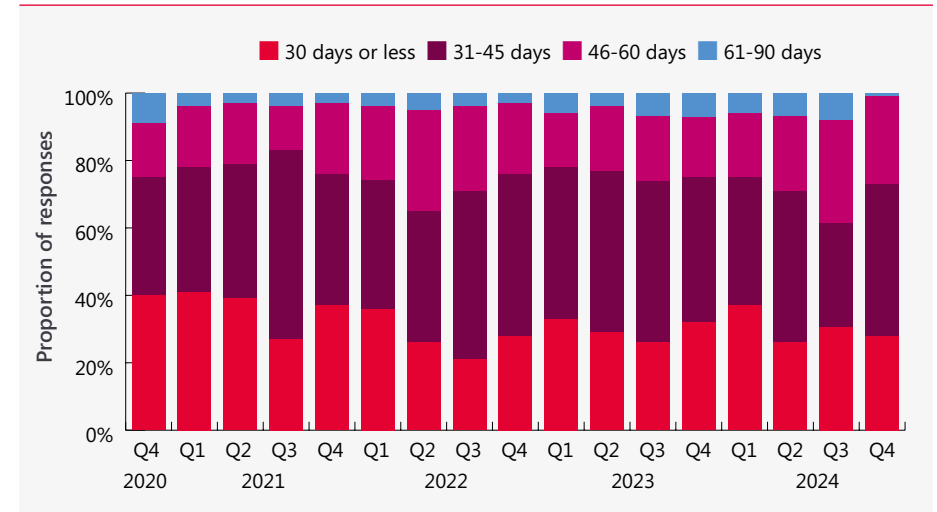
Despite 45 per cent of respondents claiming to receive late payment, there is some improvement in this area. Compared to the previous quarter, a higher proportion in Quarter 4 reports being paid within 45 days (61 vs. 73 per cent, respectively). Only 1 per cent of roofing contractors report waiting between 61 and 90 days for payment during Quarter 4, a reduction from 8 per cent in the previous quarter.



**Chart 12: Payment terms and periods**



**Chart 13: Actual payment period**

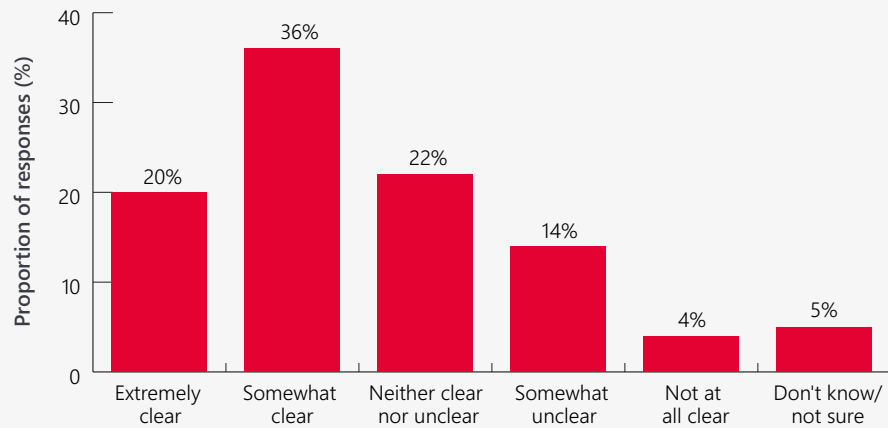




# The Building Safety Act (BSA)

Within the Quarter 4 survey, NFRC were keen to understand the extent to which members are aware of their responsibilities under the Building Safety Act (BSA) 2022 and the support that members need to update their business practices in line with the Act. Positively, more than half (56 per cent) of NFRC's members report that they are extremely or somewhat clear about their new responsibilities under the BSA with few saying they are unclear. However, only 20 per cent of them report that they are extremely clear. More support is required to assist roofing contractors in understanding and ensuring they are compliant with the act. NFRC is working on a response to our survey findings, and we will communicate our plans to members over the next few months.

**Chart 14: Extent to which roofing contractors' organisations are clear about their new responsibilities under the BSA**





LEADING ROOFING EXCELLENCE

020 7638 7663

helpdesk@nfrf.co.uk

www.nfrf.co.uk



AMA Research

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

+44 (0)1242 235724

consultancy@amaresearch.co.uk

www.amaresearch.co.uk

**Download the previous report**

