



**Proposal on:**

**The Market for Building Insulation**

**Great Britain 2009**

**A Multi Client Report**



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## List of Contents

<b>Title</b>	<b>Page no.</b>
<b>Introduction</b>	<b>1</b>
<b>Report Contents</b>	<b>2</b>
<b>Research Programme</b>	<b>6</b>
<b>Fees &amp; Timings</b>	<b>7</b>
<b>Terms and Conditions</b>	<b>8</b>
<b>Order Form</b>	<b>9</b>

## Introduction

Construction Markets has been researching and reporting on the building insulation market for over 30 years. The reports, based on hundreds of in-depth interviews with a wide range of key specifiers, specialist contractors, manufacturers and suppliers of building insulation products and extensive desk research have gained a reputation for unparalleled detail and accuracy. The report is an essential tool for anyone wishing to identify market dynamics, shares and trends or indeed anyone just wanting reliable and detailed intelligence on the market for building insulation products.

Previously the data was contained as part of two other multi client reports:

- The Total Roof Market
- The Total Wall Market

However, for the past 12 years it has been published as a volume in its own right. This has been an essential development as the market has seen such substantial and rapid developments in terms of both product shares and overall volumes, especially with the numerous changes in Part L of the Building Regulations (covering thermal insulation).

Originally the report was produced bi-annually but, at the request of subscribers, it is now published annually.

In addition to all the other changes that the market has seen, there have been significant shifts in dwelling types away from houses to high rise flats. These developments had a dramatic impact on the building insulation market but the 2009 volume illustrates the impact of the 'credit crunch' and the ensuing recession. This led to a decline of over 30% in the new private dwellings market in 2008 followed by a further impact on the non domestic markets in 2009. The detailed forecast shows the full extent of the decline and the long term impact that it will have on the market.

***Note: We will also publish reports covering the following markets in 2009:***

- ***The Market for Roof Claddings***
- ***The Market for Flat Roofs***
- ***The Market for Wall Claddings***

***Separate proposals are available covering these reports; please contact us for more information:***

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## Report Contents

The following data will be provided on the market for building insulation in Great Britain in 2009:

### 1 - Market Size

The estimated market for building insulation in Great Britain in 2008 and 2009 in terms of installed area (in m<sup>2</sup>).

### 2 - Segmentation by Types of Products

The total market for building insulation in 2008 and 2009 will be segmented by the following types of insulation products:

- Mineral Wool Roll
- Mineral Wool Slab
- Blown Mineral Wool
- Polyurethane
- EPS
- XPS
- Phenolic
- Other Blown
- Aluminium bubble
- Tri Iso
- Composite Insulants (for Flat Roofs)
- Others

### 3 - Segmentation by Building Sectors and Types of Work

The market for building insulation by types of products in 2008 and 2009 will be further subdivided within each of the following building sectors and types of work:

- Private Dwellings
- Public Dwellings
- Non Domestic Buildings\*
- Industrial Buildings

***\*Note: Major end uses within the new non domestic buildings market are further subdivided by sub sectors (offices, retail, leisure, education, health, other public and other private)***

This data will be further subdivided by the types of insulation used in each building sector by the following types of work:

- New buildings
- Extensions
- Reroofing and refurbishment to walls

#### 4 - Segmentation by Applications / End Uses

The market for building insulation by types of insulation and building sectors will be further subdivided by the following application / end uses:

- Roof Insulation:
  - Loft Insulation
  - Warm Roof
  - Industrial Roof Insulation
  - Flat Roof:
    - Under Deck
    - Over Deck
- Wall Insulation:
  - Cavity Infill:
    - Full Fill
    - Partial Fill
    - Blown / Pumped
  - Framed Construction
  - Industrial Wall Insulation
  - Curtain Walling / Rainscreens
  - External Wall Insulation
  - Other Wall Insulation
- Ground Floor Insulation:
  - Between Joists
  - Under Slab

**Note:** *The data stated in items 2, 3 and 4 will be provided in a series of cross related matrices in Excel format. This is due to the complexity of the data and the tables not being legible within a PDF report format. **Dominic – I would still include some examples at the end of the proposal, maybe stating that these are some of the less complex tables***

**Example tables are available upon request.**

## 5 - Trend Data

The changes and developments in the building insulation market in terms of size and segmentation back to 1999 will be examined. This will include data shown graphically and in tabular form with relevant commentary.

Detailed trend data will be provided for each of the following types of products:

- Mineral Wool Mat
- Mineral Wool Slab
- Blown Mineral Wool
- Polyurethane
- EPS
- XPS
- Phenolic
- Other Blown
- Aluminium bubble
- Tri Iso
- Composite Insulants (for Flat Roofs)
- Others

And the following end uses:

- Loft Insulation
- Industrial Roof Insulation
- Flat Roof
- Warm Roof Insulation
- Cavity Infill
- Framed Construction
- Insulated Plasterboard
- Curtain Walling / Rainscreens
- Industrial Wall Insulation
- External Wall Insulation
- Other Wall Insulation
- Ground Floor Insulation

## 5 - Forecast to 2014

A forecast of the likely development of the market will be made for the period up to 2014 and this will cover the following:

- The likely changes in building sector activity levels by the main sectors:
  - Private Residential
  - Public Residential
  - Private Commercial Buildings
  - Public Non Domestic Buildings
  - Industrial Buildings
  
- The projected changes in product usage for all of the main types of products (as listed above under item 4).

The forecast will be based on the following:

- The unique Construction Markets computer based forecasting model
- A full and detailed analysis of all relevant macroeconomic and other available data and statistics
- Information from the comprehensive field research programme

## Research Programme

The data required will be collected from the following research programme:

### 1 - Interviews will be conducted with the following types of respondents:

- House builders
- Specifiers designing non domestic buildings
- Specialist sub contractors supplying into the insulation market
- Segments of the distribution network for insulation
- Manufacturers supplying into the insulation market
- Others as identified as being relevant sources of information

It will be necessary to conduct between 600 and 650 interviews with these types of respondents.

### 2 - A major programme of desk research will also be conducted consisting of the following:

- Collection and analysis of all published and other obtainable statistics from both public and private sources
- Information from the unique database held by Construction Markets which has been updated annually since the consultancy was started over 36 years ago
- Data collected from the Internet

## Fees & Timings

### Fee Structure

The fee for the study on The Market for Building Insulation will be:

- £3,250 +VAT per subscriber

This fee will be invoiced in the following stages

- 60% upon delivery of the draft report and dataset
- 40% on delivery of the final report and dataset

The draft and final reports and datasets will be supplied in electronic format as follows:

- Draft and Final Report - PDF format
- Tables & Dataset - MS Excel format

*Note: The fee will be invoiced in full if the order is received once the final report has been published in early 2010.*

### Timing

The delivery dates for The Market for Building Insulation Report are as follows:

- Draft Report and Dataset - November 2009
- Final Report and Dataset - February 2010

## Terms and Conditions

Our basic terms and conditions are as follows and by placing an order you agree to them:

- Our terms of payment are strictly 30 days from the invoice date.
- The Copyright for any and all information supplied by Construction Markets in any format (contained in a draft report, final report, notes, ad hoc basis or otherwise) is retained by Construction Markets.
- Any and all information supplied by Construction Markets in any format (contained in a draft report, final report, notes, ad hoc basis or otherwise) must not be copied, distributed or in any way disclosed outside of the subscribing company without the prior written consent of Construction Markets.
- Whilst Construction Markets make all reasonable endeavours to ensure the accuracy of all data that is supplied, they cannot be held responsible in any way for any errors or omissions, however caused.

## Order Form

To:

Construction Markets  
PO Box 359  
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Email: [dominic@construction-markets.co.uk](mailto:dominic@construction-markets.co.uk)

I would like to subscribe to **The Market for Building Insulation Report 2009** as described in the proposal and hereby agree to the terms of conditions contained therein.

My details are as follows:

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Position: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Tel: \_\_\_\_\_

Mobile: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Please invoice me for the relevant stage payment(s) as applicable.

Signed:

\_\_\_\_\_