

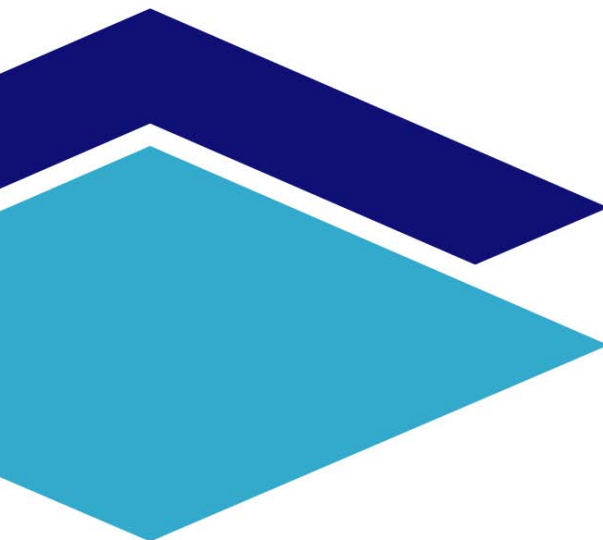


**Proposal on:**

**The Market for Flat Roofs**

**Great Britain 2009**

**A Multi Client Report**



Construction Markets  
PO Box 359  
Lymington SO41 8XD

T 01590 678822

W [www.construction-markets.co.uk](http://www.construction-markets.co.uk)  
E [info@construction-markets.co.uk](mailto:info@construction-markets.co.uk)

## List of Contents

<b>Title</b>	<b>Page Number</b>
<b>Introduction</b>	<b>1</b>
<b>Report Contents</b>	<b>2</b>
<b>Research Programme</b>	<b>8</b>
<b>Fees &amp; Timings</b>	<b>9</b>
<b>Terms and Conditions</b>	<b>10</b>
<b>Order Form</b>	<b>11</b>
<b>Appendix 1 - Example Tables</b>	<b>12</b>

## Introduction

Construction Markets has been researching and reporting on the flat roofs market for over 30 years. The reports, based on hundreds of in-depth interviews with a wide range of key specifiers, contractors, clients, manufacturers and suppliers of flat roof 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 flat roofing products.

The market for flat roofs is both large and diverse. Over the last 10 years there have been significant changes in the market, including the following:

- Types of waterproof membranes
- Thermal insulation standards
- Growth of high rise flats within the private residential market
- Major growth and then unprecedented decline in the offices market
- Two years of major decline in the private residential market

This highly specialised study provides a detailed market assessment which will analyse the subject comprehensively in terms of market size segmented by:

- Products:
  - Flat Roof Deck by type
  - Thermal Insulation by type
  - Waterproof Membranes by type
- Building Sectors
- Type of Work

The report also:

- Analyses the shares taken by flat roofs against pitched roof systems in the various sectors by type of work
- Examines the important single ply market by type of membrane
- Provides a detailed forecast through to 2014

Data from the extensive Construction Markets database (including 1,200 interviews covering the general roof and wall claddings market) will be used as a platform. A further 220 interviews have been conducted specifically to meet the needs of this study in order to provide the in-depth information requirements and to ensure accuracy.

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

- *The Market for Roofs Claddings*
- *The Market for Wall Claddings*
- *The Market for Building Insulation*

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

**Email:** [dominic@construction-markets.co.uk](mailto:dominic@construction-markets.co.uk)

**Tel:** + 44 1590 678 822

## Report Contents

The following data will be provided on the market for flat roofs in Great Britain in 2009:

### 1 - Market Size

The estimated market of flat roofs in Great Britain in 2008 and 2009 in terms of installed area (in m<sup>2</sup>) for each of the following types of products:

- Flat Roof Deck
- Flat Roof Waterproof Membranes
- Thermal Insulation

### 2 - Segmentation by Types of Products – Flat Roof Decks

The total market for flat roof deck (in area terms in m<sup>2</sup>) in 2008 and 2009 will be segmented by the following types of products:

- Steel
- Precast Concrete
- In-situ Concrete
- Timber

This data will be further subdivided by the building sectors detailed in section 5.

### 3 - Segmentation by Types of Products – Flat Roof Waterproof Membranes

The market for flat roof waterproof membranes (in area terms in m<sup>2</sup>) in 2008 and 2009 will be segmented by the following types of products:

- Single Ply
- Standard Bitumen
- Modified Bitumen
- Torched On
- Mastic Asphalt
- Others

This data will be further subdivided by the building sectors detailed in section 5.

#### 4 - Segmentation by Types of Products – Thermal Insulation

The market for the thermal insulation of flat roofs (in area terms in m<sup>2</sup>) in 2008 and 2009 will be segmented by the following types of products:

- Polyurethane
- EPS
- XPS
- Composite Insulants
- Mineral Wool Slab
- Mineral Wool Roll
- Phenolic
- Others

This data will be further subdivided by the building sectors detailed in section 5.

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

The market for the types of products outlined in sections 2, 3 and 4 by types of products in 2008 and 2009 will be further subdivided within each of the following building sector, sub sectors and types of work:

- **Private Residential Buildings:**

The private residential market will be subdivided as follows:

- New Buildings:
  - Houses
  - Low Rise Flats
  - High Rise Flats
- Extensions
- Refurbishment

- **Public Residential Buildings:**

The public residential market will be subdivided as follows:

- New Buildings:
  - Houses
  - Flats
- Extensions
- Refurbishment

- **Non Domestic Buildings:**

The non domestic buildings market will be further subdivided as follows:

- New Non Domestic Buildings:
  - Offices
  - Retail / Shops
  - Leisure / Entertainment
  - Education
  - Health
  - Other Public
  - Other Private
- Extensions
- Refurbishment

- **Industrial Buildings:**

- New Buildings
- Extensions
- Refurbishment

***Please see the example tables provided in Appendix 1 for the full scope of the data coverage.***

## 6 – Market Segmentation – Membrane Usage in Refurbishment Work

The total market for waterproof membranes is further subdivided by the following building sectors:

- Private Residential Buildings
- Public Residential Buildings
- Non Domestic Buildings
- Industrial Buildings

And by the following types of work:

- New Buildings
- Extensions
- Refurbishment:
  - Major Refurbishment:
    - Replacement Deck + Insulation + Membrane
    - Replacement Insulation + Membrane
  - Replacement Membrane Only

## 7 – Single Ply Membranes by Types

The total market for single ply membranes is further subdivided by the following types:

- PVC
- EPDM
- Others

## 8 – Flat Roofs vs. The Remainder of the Market:

The share of the total roof cladding market taken by flat roofs will be provided and subdivided by the following building sectors and types of work:

- Private Residential Buildings:
  - New Houses
  - New Flats
  - Extensions
  - Refurbishment
- Public Residential Buildings:
  - New Houses
  - New Flats
  - Extensions
  - Refurbishment
- Non Domestic Buildings:
  - New
  - Extensions
  - Refurbishment
- Industrial Buildings:
  - New
  - Extensions
  - Refurbishment

## 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 in the report will be collected from the following research programme:

### 1 - Field Research

Telephone interviews have been conducted with the following types of respondents:

- Private house builders
- Developers of high rise private residential apartment blocks
- Specifiers designing public residential buildings
- Local Authorities
- Housing Associations / RSL's (Registered Social Landlords)
- Specifiers designing non domestic buildings
- Flat Roofing Contractors
- Other specialist sub contractors
- Segments of the distribution network
- Manufacturers supplying into the market
- Others as identified as being relevant sources of information

Over 450 interviews have been conducted with these types of respondents during the whole of 2009.

***Please note that all Construction Markets information is based on original field research and our unique research models. This ensures unparalleled detail and accuracy.***

### 2 – Desk Research:

A major programme of desk research has also been 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 40 years ago.
- Data collected from the Internet.

## Fees & Timings

### Fee Structure

The fee for the study on The Market for Flat Roofs 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 roof claddings 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  
Lymington SO41 8XD

Email: [dominic@construction-markets.co.uk](mailto:dominic@construction-markets.co.uk)

I would like to subscribe to **The Market for Flat Roofs 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:

\_\_\_\_\_

## Appendix 1 - Example Tables

Flat Roof Deck Summary Table:

Building Sector / Type of Work		Area of Flat Roof Decking (000 m <sup>2</sup> )				
		Steel	Precast Concrete	Insitu Concrete	Timber / Plywood	Total
Private Residential	New					
	Extensions					
	Refurbishment					
	<b>Total</b>					
Public Residential	New					
	Extensions					
	Refurbishment					
	<b>Total</b>					
Non Domestic Buildings	New					
	Extensions					
	Refurbishment					
	<b>Total</b>					
Industrial Buildings	New					
	Extensions					
	Refurbishment					
	<b>Total</b>					
Total	New					
	Extensions					
	Refurbishment					
	<b>Total</b>					

**Waterproof Membrane Summary Table:**

Building Sector / Type of Work		Area of Waterproof Membrane (000 m <sup>2</sup> )						Total
		Single Ply	Standard Bitumen	Modified Bitumen	Torched Ons	Mastic Asphalt	Others	
Private Residential	New							
	Extensions							
	Refurbishment							
	<b>Total</b>							
Public Residential	New							
	Extensions							
	Refurbishment							
	<b>Total</b>							
Non Domestic Buildings	New							
	Extensions							
	Refurbishment							
	<b>Total</b>							
Industrial Buildings	New							
	Extensions							
	Refurbishment							
	<b>Total</b>							
Total	New							
	Extensions							
	Refurbishment							
	<b>Total</b>							

**Flat Roof Insulation:**

Building Sector / Type of Work		Area of Flat Roof Insulation (000 m <sup>2</sup> )								
		Polyurethane	EPS	XPS	Composite Insulants	Mineral Wool Slabs	Mineral Wool Matt	Phenolic	Others	Total
Private Residential	New									
	Extensions									
	Refurbishment									
	Total									
Public Residential	New									
	Extensions									
	Refurbishment									
	Total									
Non Domestic Buildings	New									
	Extensions									
	Refurbishment									
	Total									
Industrial Buildings	New									
	Extensions									
	Refurbishment									
	Total									
Total	New									
	Extensions									
	Refurbishment									
	Total									

**Flat Roofs vs. Alternatives:**

Building Sector / Type of Work		% Based on Area of Roof Cladding		
		Flat Roofs	Alternatives	Total
Private Residential	New Houses			
	New Flats			
	Extensions			
	Refurbishment			
	<b>Total</b>			
Public Residential	New Houses			
	New Flats			
	Extensions			
	Refurbishment			
	<b>Total</b>			
Non Domestic Buildings	New			
	Extensions			
	Refurbishment			
	<b>Total</b>			
Industrial Buildings	New			
	Extensions			
	Refurbishment			
	<b>Total</b>			
Total Market	New			
	Extensions			
	Refurbishment			
	<b>Total</b>			