

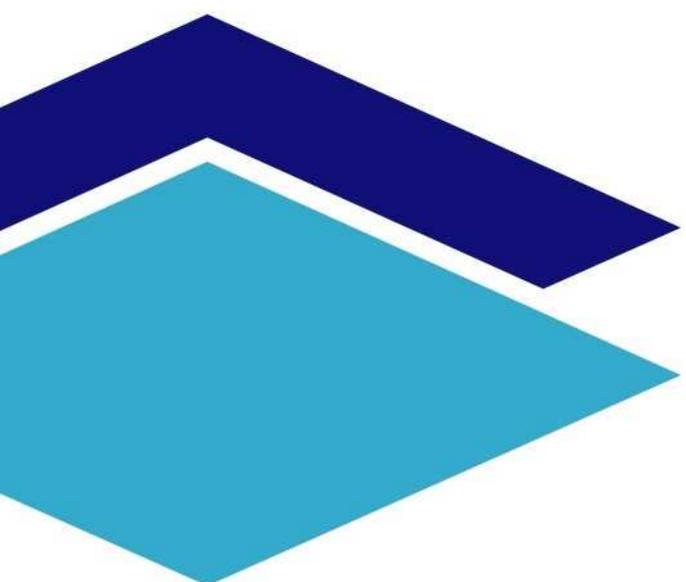


Proposal On:

The Market for Flat Roofs

Great Britain 2015

A Multi-Client Report



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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 seeking reliable and detailed intelligence on the market for flat roofing products.

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 2019

Data from the extensive Construction Markets database (including over 450 interviews covering the general roof and wall claddings market) will be used as a platform. A further 200 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 2014:

- ***The Market for Roofs Claddings***
- ***The Market for Roof Tiles***
- ***The Market for Wall Claddings***
- ***The Market for Rainscreen Claddings***
- ***The Market for Bricks***
- ***The Market for Building Insulation***

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 flat roofs in Great Britain in 2014 and 2015:

1 - Market Size

The estimated market of flat roofs in Great Britain in 2014 and 2015 in terms of installed area (in m²) 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 terms of installed area in m²) in 2014 and 2015 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 terms of installed area in m²) in 2014 and 2015 will be segmented by the following types of products:

- Single Ply
- Standard Bitumen
- Modified Bitumen
- Torched On
- Mastic Asphalt
- Liquid Plastics
- 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 terms of installed area in m²) in 2014 and 2015 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 2014 and 2015 will be further subdivided within each of the following building sector, sub sectors and types of work:

- **Private housing:**

The private housing market will be subdivided as follows:

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

- **Public housing:**

The public housing 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 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 housing
- Public housing
- 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 housing:
 - New houses
 - New flats
 - Extensions
 - Refurbishment
- Public housing:
 - New houses
 - New flats
 - Extensions
 - Refurbishment
- Non domestic buildings:
 - New
 - Extensions
 - Refurbishment
- Industrial buildings:
 - New
 - Extensions
 - Refurbishment



9 - Forecast to 2019

A forecast of the likely development of the market will be made for the period up to 2019 and this will cover the following:

- The likely changes in building sector activity levels by the main sectors:
 - Private housing
 - Public housing
 - 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 items 2, 3 and 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 600 interviews have been conducted with these types of respondents during the whole of 2015.

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:

- £3,850 +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 - PDF format
- Final Tables & Dataset - MS Excel format

Note: The fee will be invoiced in full if the order is received once the draft data has been published in early 2016.

Timing

The delivery dates for flat roof report are as follows:

- Draft Dataset - End February 2016
- Final Dataset & Report - End March / early April 2016



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.



Market research
to the construction industry

Order Form

To:

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I would like to subscribe to **The Market for Flat Roofs Report 2015** 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 ²)				
		Steel	Precast Concrete	Insitu Concrete	Timber / Plywood	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					



Waterproof Membrane Summary Table:

Building Sector / Type of Work		Area of Waterproof Membrane (000 m ²)						Total
		Single Ply	Standard Bitumen	Modified Bitumen	Torched Ons	Mastic Asphalt	Others	
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 Roof Insulation:

Building Sector / Type of Work		Area of Flat Roof Insulation (000 m ²)								
		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			
	Total			
Public Residential	New Houses			
	New Flats			
	Extensions			
	Refurbishment			
	Total			
Non Domestic Buildings	New			
	Extensions			
	Refurbishment			
	Total			
Industrial Buildings	New			
	Extensions			
	Refurbishment			
	Total			
Total Market	New			
	Extensions			
	Refurbishment			
	Total			