

State of the UK roofing industry

SPRING 2025

Key findings:

- Workload and levels of new enquiries have declined.
- Commercial new build contractors are optimistic about the year ahead.
- Recruitment challenges remain.

Prepared by Barbour ABI, on behalf of NFRC



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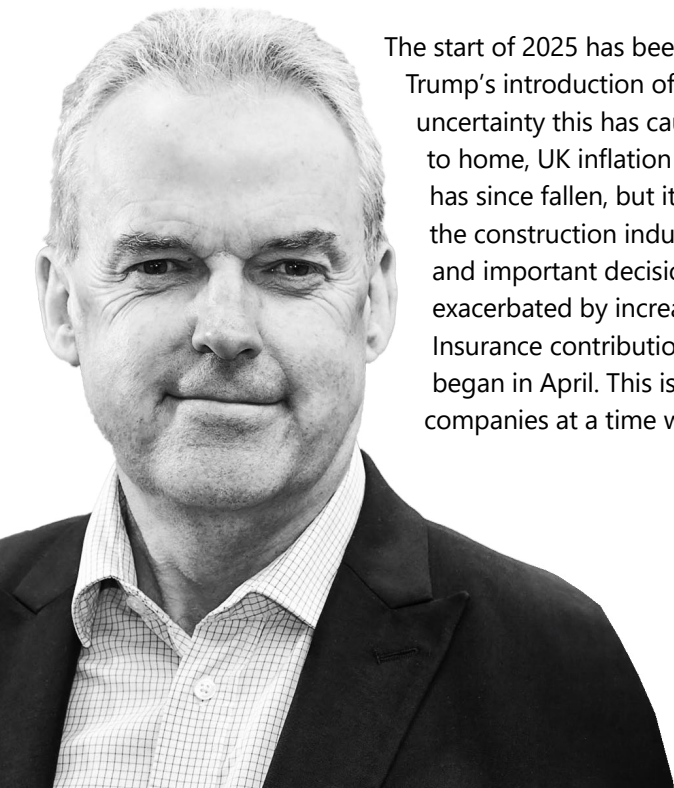
An introduction by James Talman, NFRC CEO

Heading into 2025, we saw an opportunity to rejuvenate and refresh our State of the Roofing Industry survey, with the new updated version launching in spring 2025. It was pleasing to see such a positive response to the survey, with over 150 Members sharing their views and experiences with us. The survey retained many of the key measures with which you will be familiar – workload and levels of new enquiries for example – but now also looks to understand roofing contractors' perceptions of the roofing industry and more about the challenges contractors are facing. The report has also been refreshed, and we hope you find it interesting and easier to read and digest.

The start of 2025 has been turbulent, not least with President Trump's introduction of trade tariffs and the economic uncertainty this has caused around the world. Closer to home, UK inflation unexpectedly rose in January. It has since fallen, but it is perhaps not surprising that the construction industry as a whole has seen projects and important decisions delayed. This has been further exacerbated by increases in both employers' National Insurance contributions and the minimum wage, which began in April. This is placing additional pressure on companies at a time when construction remains the worst

hit sector for insolvencies. It has recently been reported that, in January, 305 firms in the construction industry became insolvent. The roofing sector has not escaped from the uncertainties these events have caused. It is evident from Members' responses that it has been a challenging period with fewer contractors reporting increases to their workload and level of new enquiries.

I was especially pleased to see the level of pride that respondents feel about being a Member of NFRC, particularly given the important work we do to represent Members' interests to the wider construction industry and government. One such example is around retentions and late payment – a subject we covered in this survey. We have been campaigning hard in this area, receiving confirmation this year that retentions will be included in an upcoming consultation. Our goal is to see the abolition of retentions. The results from this survey confirm the need for more action on late payment to be taken. Members responses to the survey, including the detailed comments which many Members provided, will be invaluable to our response to the upcoming consultation. Thanks to those Members who completed the survey and we hope you enjoy reading this new report.



James Talman
NFRC CEO

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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 (the National Federation of Roofing Contractors). This report primarily looks at activity in spring 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 10 April and 1 May 2025. Over 150 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 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.

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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

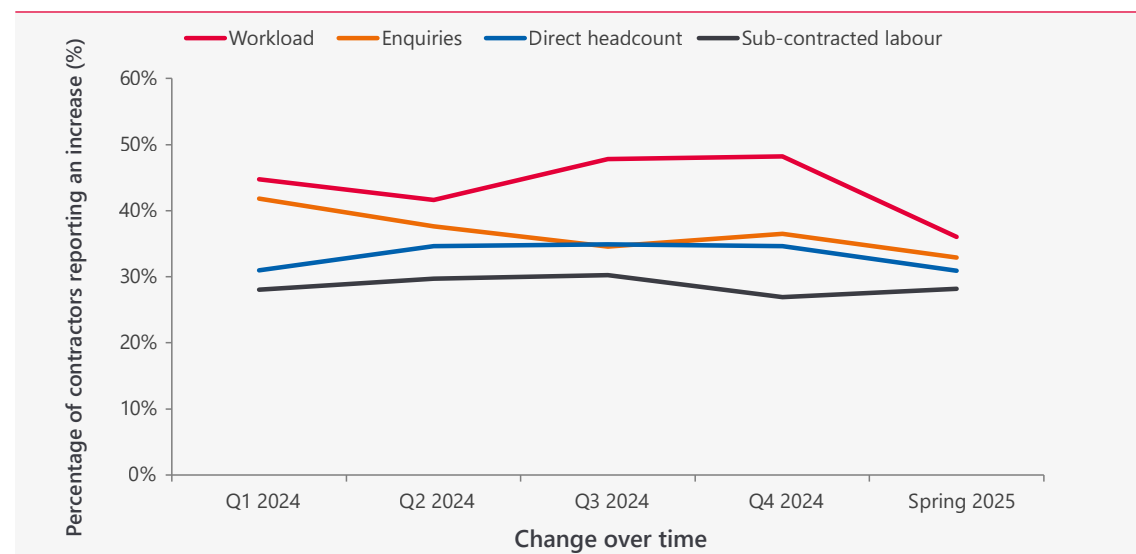
Key indicators suggest that activity in the UK roofing sector is slowing. Overall, in spring 2025, 36% of contractors reported an increase in their workload compared to the same time last year; a reduction from almost one-half (48%) reporting this in Q4 2024. Positively, the proportion reporting a decrease in their workload has remained similar to Q4 2024, with a larger proportion of respondents now reporting their workload has stayed the same (37% in spring vs. 27% in Q4 2024). The level of new enquiries also dropped by 3% with 33% reporting an increase in spring, and 27% a decrease (compared to 36% and 26%, respectively, in Q4 2024).

This slowdown is not unexpected given the economic backdrop:

- In January, UK inflation unexpectedly rose to 3% (though it has since decreased to 2.6% in April).
- Trump announced trade tariffs in early April causing uncertainty around the impact these would have on inflation.
- From April, employers in the UK were subject to increases in their National Insurance contributions.

The proportion of contractors reporting increases in their direct headcount and sub-contracted labour has remained fairly static over the last year, with just minor fluctuations between quarters. During spring, 31% reported an increase in the size of their company's direct headcount and 28% an increase in their company's employment of sub-contracted labour (compared to 35% and 27%, respectively, in Q4 2024).

Chart 1: Key indicators



Key indicator changes over the last year



Workload by sector and region

Overall, 36% of respondents reported increases in their workload compared to the same time last year – a decrease of 11% on Q4 2024. Contractors working in the commercial new build and repair, maintenance and improvement (RM&I) sectors were more positive about their workload, with 31% and 32%, respectively, reporting increases during spring. However, these sectors have experienced the largest decline in contractors reporting an increase in workload compared to Q4 2024 (declining from 45% and 49%, respectively). Similarly, fewer respondents working on public sector non-residential new build and RM&I projects reported increases in workload. In spring, 19% and 25%, respectively, reported increases in workload compared to 46% in each case in Q4 2024.

During spring, respondents working across the UK reported the largest increase in workload (48%), although this was a slight decline on the proportion reporting an increase in Q4 2024 (55%). Contractors primarily operating in London and Southern Counties, and Yorkshire and North East experienced the largest decrease in workload (35% and 38% reported a decline compared to 18% and 29% in Q4 2024). In contrast to other regions, respondents primarily operating in the Midlands reported a small increase in their workload compared to Q4 2024 (40% vs 38% in Q4 2024) and a smaller proportion reported a decrease (13% vs. 23% in Q4 2024).

Chart 2: Workload by sector – change on previous year

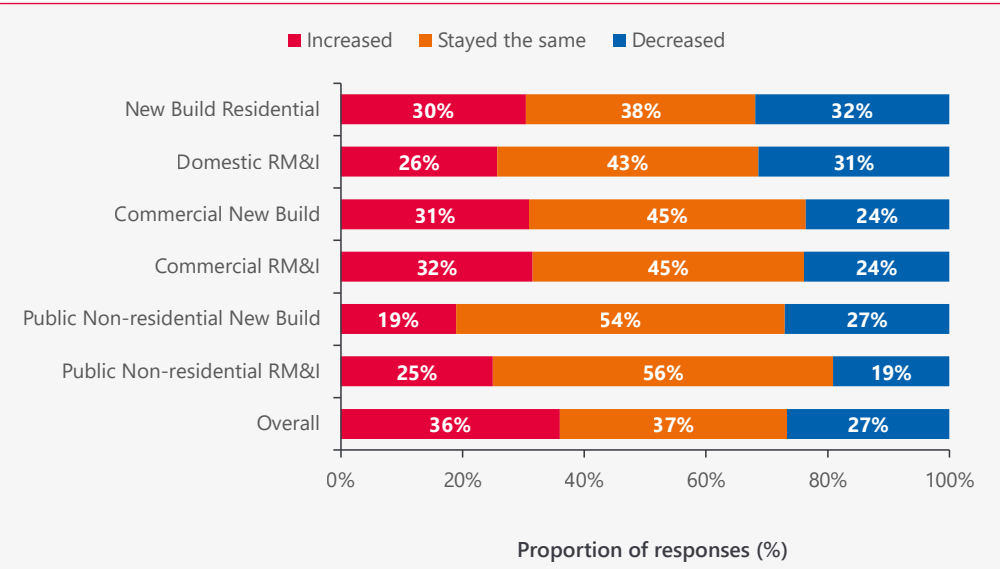
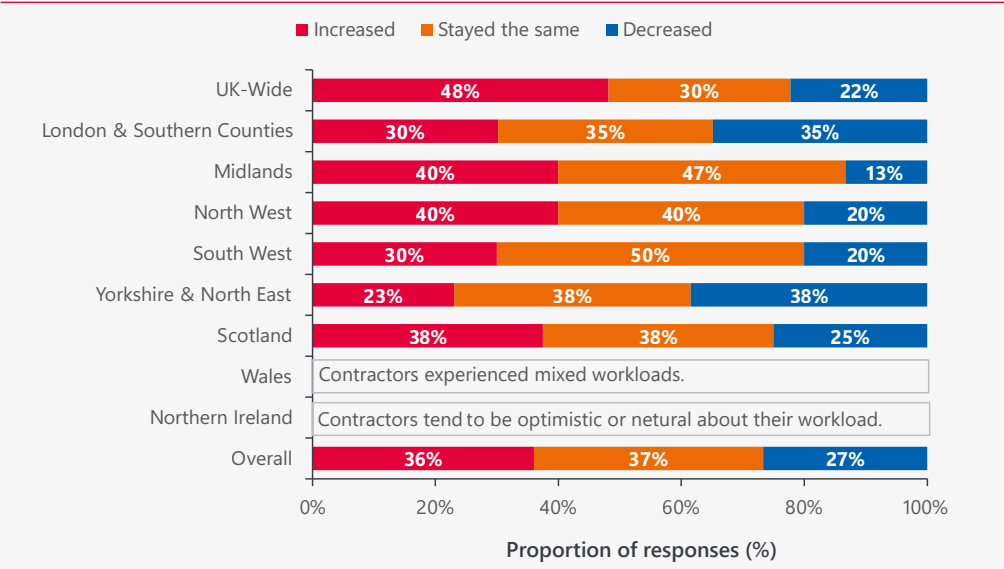


Chart 3: Workload by region – change on previous year

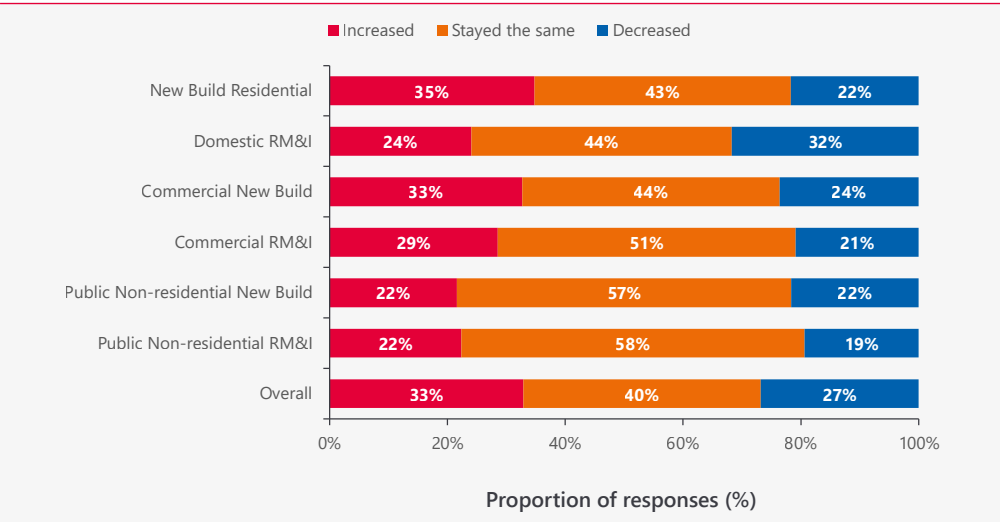


Enquiries by sector and region

During spring, 33% of firms reported an increase in the level of new enquiries, a small decline from 36% in Q4 2024. The level of new enquiries was strongest in the new build residential sector, with a higher proportion of respondents reporting increases compared to Q4 2024 (35% vs. 25%). Meanwhile, a smaller proportion of respondents in the commercial new build sector reported a decrease in new enquiries (24% vs. 36% in Q4 2024).

Conversely, respondents operating in the domestic RM&I sector reported the biggest decline in new enquiries. 32% of contractors in this sector reported a decrease in the level of new enquiries, up from 22% in Q4 2024. Additionally, those working in the public non-residential new build sector were more likely to indicate that the level of new enquiries had remained the same (57% vs. 24% in Q4 2024).

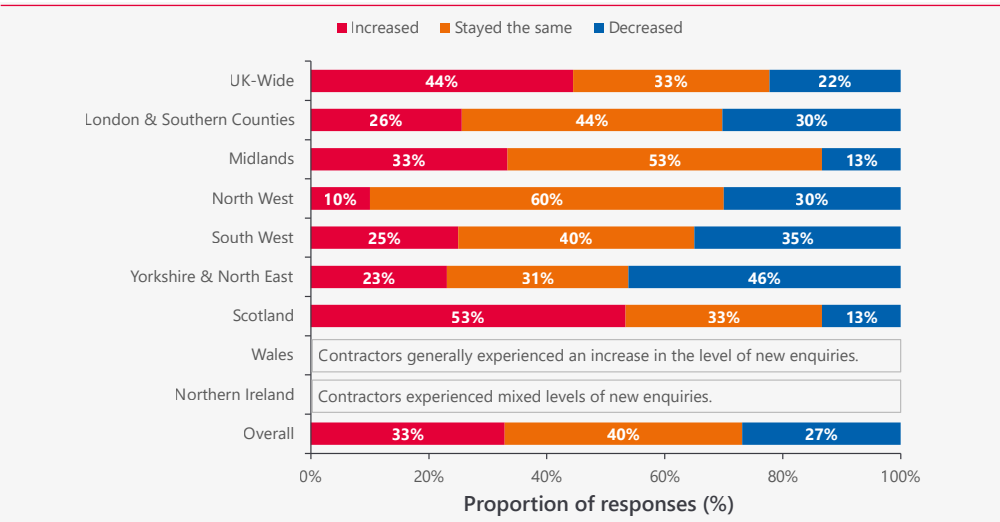
Chart 4: Enquiries by sector – change on previous year



Spring 2025 saw those operating UK-Wide experience good growth in the level of new enquiries, with 44% of respondents reporting an increase compared to 32% in Q4 2024. In contrast, those primarily operating in Yorkshire and North East experienced a decline in new enquiries with a smaller proportion of respondents reporting an increase (23% vs. 43%) and a larger proportion reporting a decrease (46% vs. 29%). Similarly, fewer contractors operating in London and Southern Counties reported an increase in new enquiries (26% compared to 44% in Q4 2024).

Compared to Q4 2024, a larger proportion of respondents operating in the Midlands reported that new enquiries have remained the same (53% vs. 38%) and a smaller portion reported a decrease (13% vs. 31%), reflecting a stabilisation in the level of new enquiries.

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

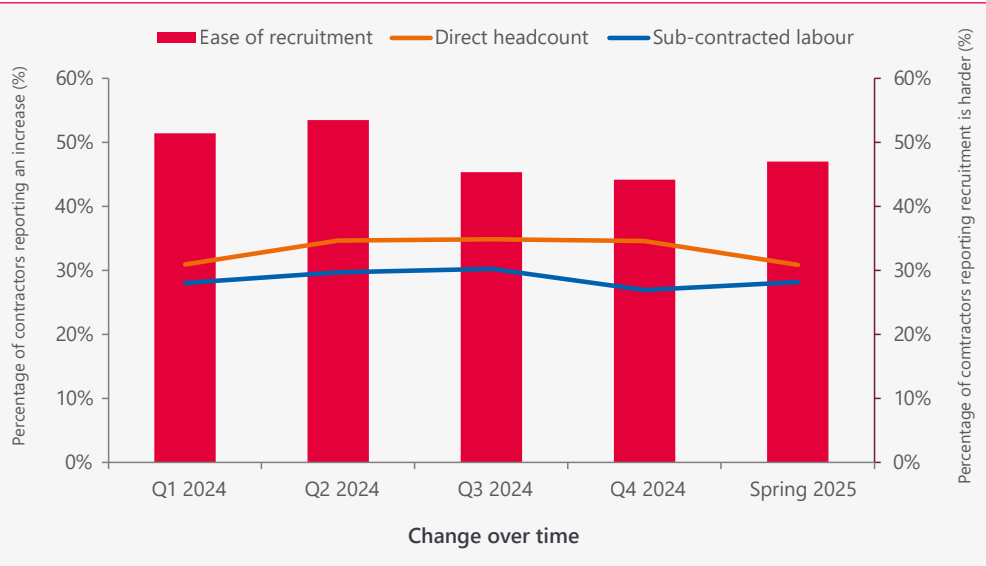


Employment skills and shortages

Levels of both direct headcount and sub-contracted labour have remained fairly static. The survey found that 31% of companies increased their direct headcount with 52% stating it stayed the same (this compares to 35% and 48%, respectively, in Q4 2024). Similarly, 28% of respondents reported their employment of sub-contracted labour increased compared to 27% in Q4 2024.

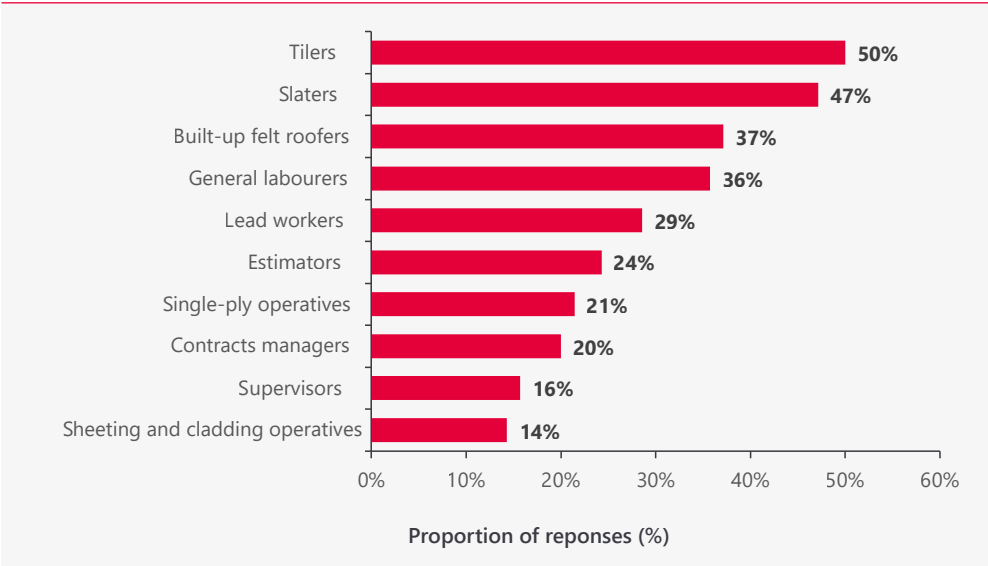
The recruitment of skilled labour remains a challenge for a significant proportion of roofing contractors. Nearly one-half of respondents (47%) reported that recruitment was harder during spring and just 5% indicated it was easier than the same time last year. This is similar to levels seen in Q4 2024 when 44% of respondents found the recruitment of skilled workers harder and 2% easier, compared to Q4 2024. Amongst those reporting it harder to recruit skilled labour, the most challenging roles to recruit remain tilers and slaters, followed by built-up felt roofers and general labourers.

Chart 6: Labour indicators*



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

Chart 7: Top 10 areas of skills shortage†



†Please note, only respondents who reported recruitment 'was harder' than this time last year were asked this question.



Costs, prices and materials availability

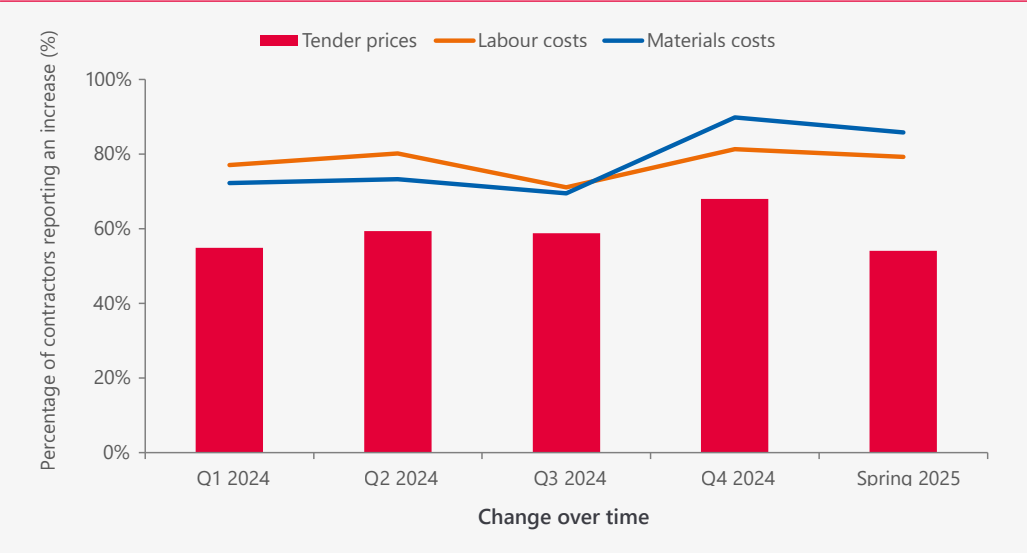
The proportion of roofing contractors reporting an increase in labour costs remained stable, with 79% reporting an increase compared to 81% in Q4 2024.

Following increases during Q4 2024, 86% of contractors reported materials costs have increased during spring, a decline from 90% in Q4 2024. The availability of materials remains similar to Q4 2024: 13% of respondents stated it was easier to get the materials they need, 76% indicated it stayed the same and the remaining 11% reported them harder to source. This compares to 77% stating that the availability of materials remained the same in Q4 2024.

The survey findings suggest that contractors are observing some pressure on their tender prices. Fewer respondents reported that tender prices had increased during spring (54% vs. 68% in Q4 2024). For 31% of respondents, tender prices had remained the same, but for 15%, they had decreased (this compares to 23% and 9%, respectively, in Q4 2024). One respondent suggested a possible reason for this:

“The last 12 months has seen new build work not go ahead as planned and we have struggled to secure work to fill voids... Direct competitors have seen this also which has led to tender pricing lowering significantly”.

Chart 8: Cost pressures



Payment terms

Positively, during spring, 66% of respondents reported being paid on time, an increase from 55% in Q4 2024. However, for 32%, late payment remains an issue. During spring, 88% of companies requested payment within 45 days but only around three-quarters (73%) reported receiving payment within that time.



Chart 9: Payment terms and periods

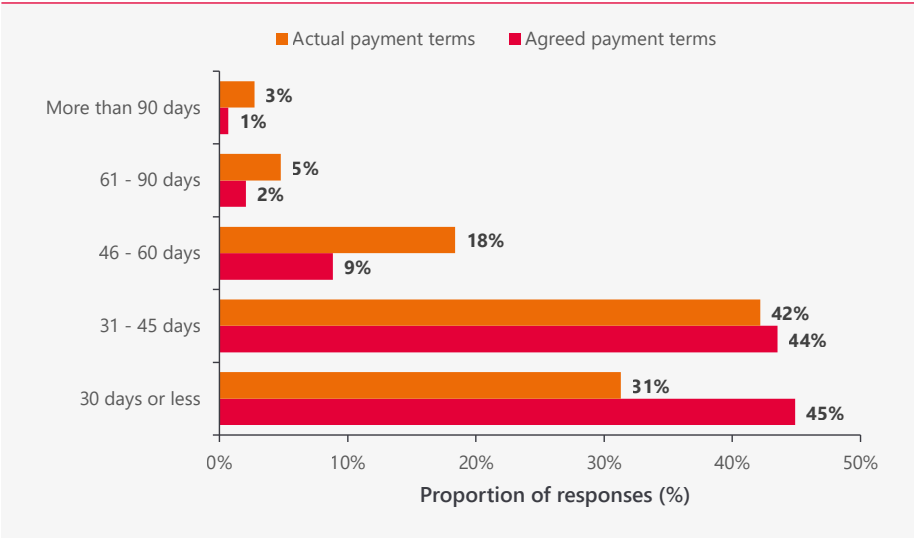
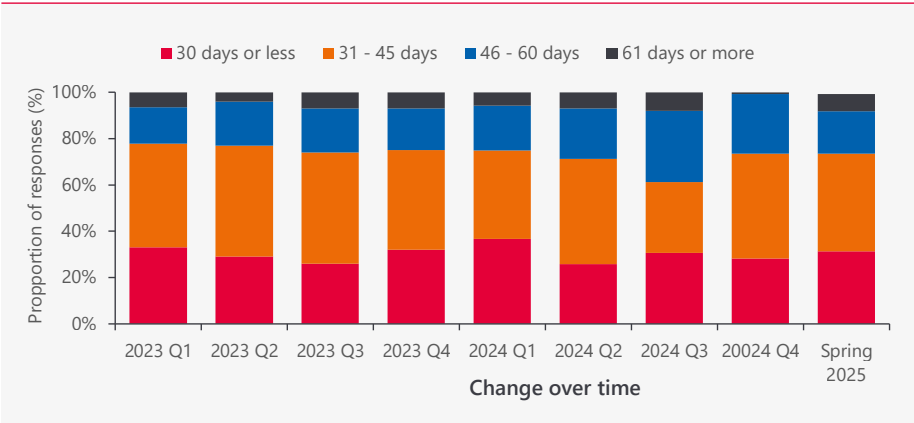


Chart 10: Actual payment period



Sentiment from the roofing sector

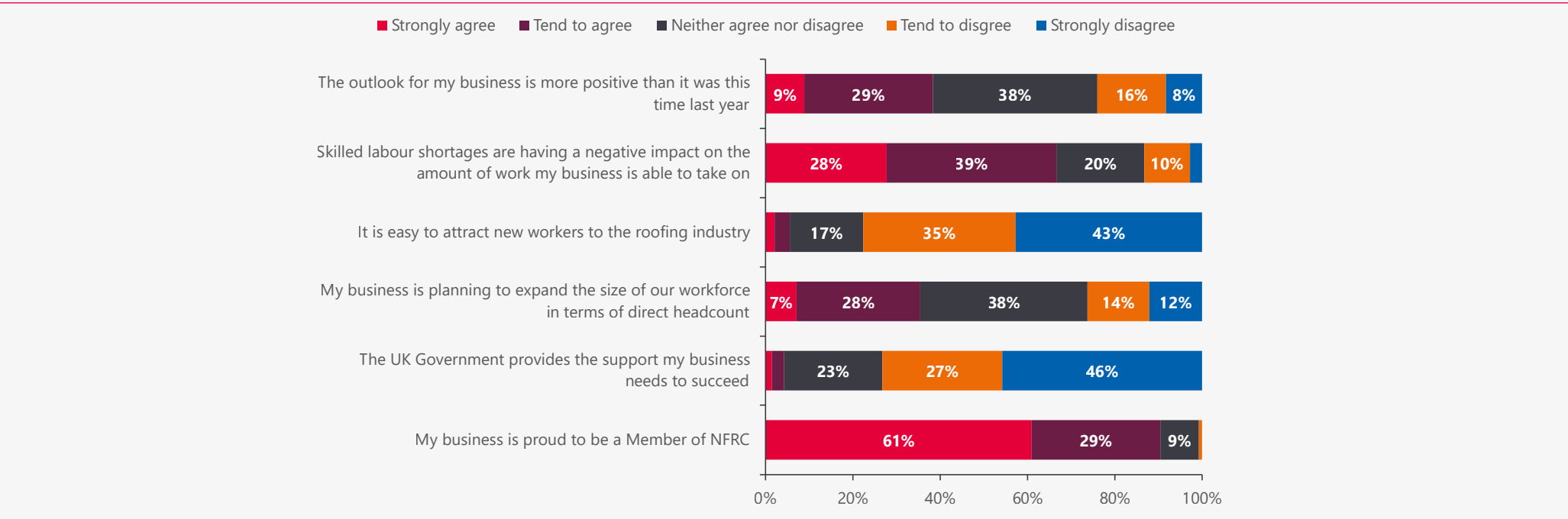
In this new section of the report, we explore respondents' perceptions of the roofing sector. Within the survey we presented respondents with a series of statements, both positive and negative, about the roofing industry and working within the sector. We asked respondents to indicate how strongly they 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.

It is evident that roofing contractors have a mixed opinion regarding the outlook for the sector. 38% agreed that the 'outlook for their business is more positive than it was this time last year', with a further 38% who neither agreed nor disagreed with this statement. Perhaps unsurprisingly, this is impacting on companies' expansion plans with a similar proportion of respondents, 35%, who agreed that their 'business is planning to expand the size of its workforce in terms of direct headcount'.

As we have previously discussed, the recruitment of skilled workers is a challenge for the roofing sector. Two-thirds (67%) of respondents agreed (28% of whom strongly agreed) that 'skilled labour shortages are having a negative impact on the amount of work their business is able to take on'. Linked to this, only a small proportion of respondents agreed (2% strongly agreed and 3% indicated they tend to agree) that 'it is easy to attract new workers to the roofing industry'. In contrast to this, three-quarters of respondents (78%) disagreed that 'it is easy to attract new workers to the roofing industry', with 43% of these indicating they strongly disagreed with this statement.

The survey found that the sector would like to see more support from the government. Only 4% of respondents agreed that 'the UK Government provides the support my business needs to succeed', whilst almost three-quarters (73%) disagreed with the statement. Meanwhile, positively for NFRC, 9 out of 10 respondents agreed that their 'business is proud to be a Member of NFRC': 61% reported that they strongly agree with the statement, with 29% tending to agree.

Chart 11: Sentiment from the roofing sector



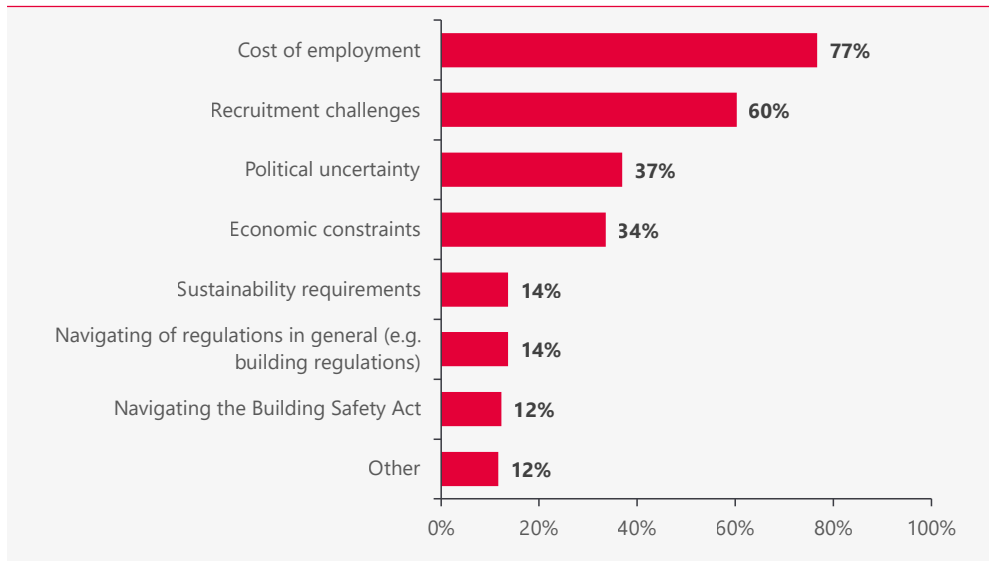
Challenges facing the roofing sector

As well as understanding Members' perceptions of the roofing sector, NFRC was keen to understand some of the challenges they are currently facing. Respondents were asked to select up to three issues that were currently having the most significant impact on their organisation.

The most cited issues were:

- Cost of employment (77%)
- Recruitment (60%)
- Political uncertainty (37%).

Chart 12: Industry challenges



Market expectations

Around two-fifths of respondents (41%) expect their workload to increase over the next 12 months, a slight decline from 44% in Q4 2024. In particular, respondents operating within the commercial new build sector anticipate strong growth. Almost one-half (49%) of those working in this sector anticipate an increase in workload and only 1 in 10 respondents (11%) expect workload to decrease. This compares to 21% and 24%, respectively, in Q4 2024. A higher proportion of contractors operating within the new build residential sector are anticipating an increase in their workload over the next 12 months (42% vs. 32% in Q4 2024), perhaps due to the government reiterating its commitment to building new homes within the March Spring Statement.

Regional expectations of workload over the next 12 months are varied. Those primarily operating in Scotland are the most optimistic about their future workload (60% expect an increase vs. 33% in Q4 2024). Additionally, just under one-half of contractors operating in the Midlands (47%) and Yorkshire and North East (46%) anticipate workload will increase over the next 12 months. However, the proportion expecting an increase in Yorkshire and North East is lower than the 79% that expected an increase in workload over the next 12 months in Q4 2024. A higher proportion of respondents in this region now expect workload to remain the same over the next 12 months (45% vs. 21%).

The lowest increase in workload is anticipated in the North West (30% expect an increase); however, a higher proportion of contractors operating in this region expect their workload to remain the same over the next 12 months (70% vs. 33% in Q4 2024).



Chart 13: Market expectations – 12 months

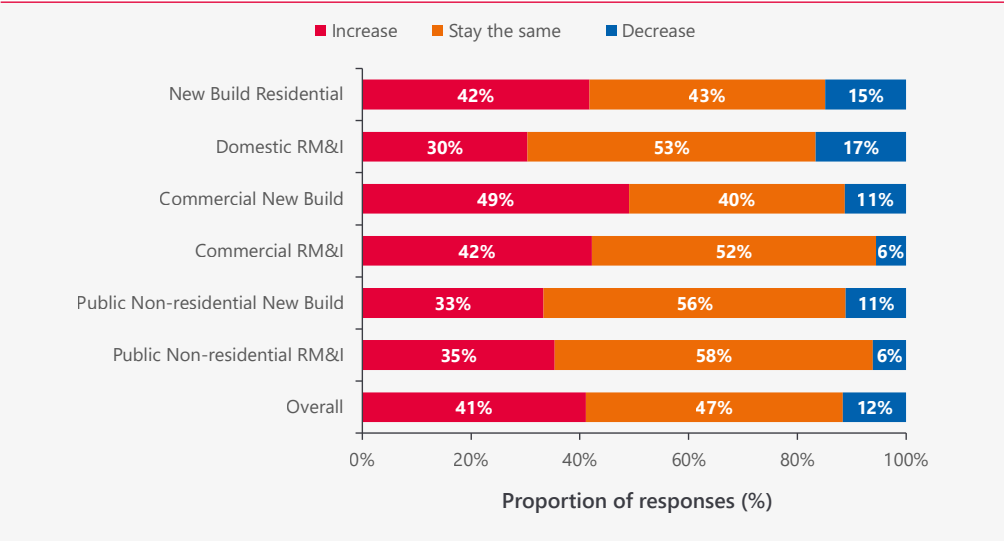
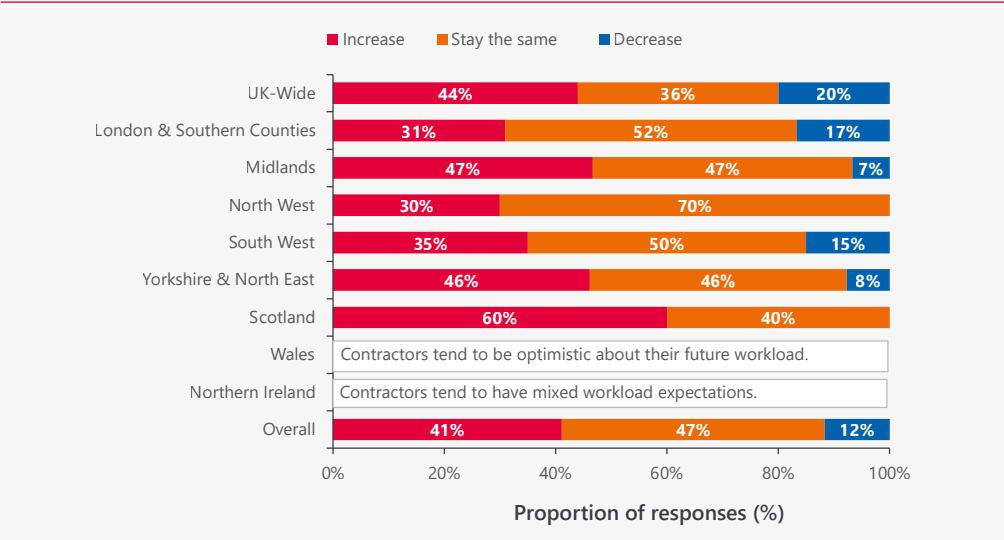


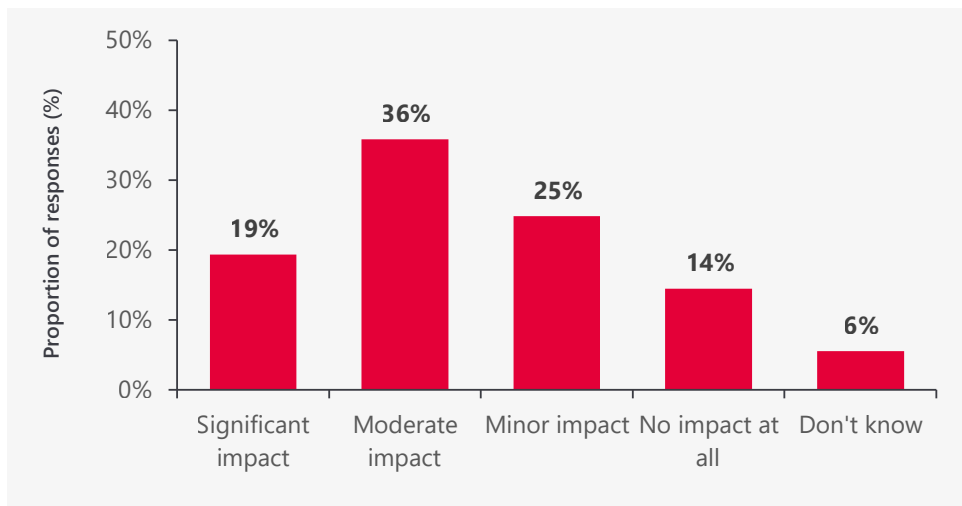
Chart 14: Market expectations by region – 12 months



Retentions payments

NFRC was keen to understand the impact of retentions on its Members to help inform its response to a forthcoming government consultation on retentions and late payment. Retentions have a negative impact on 4 out of 5 of respondents (80%): 19% reported that retentions have a severe impact, 36% a moderate impact and 25% a minor impact.

Chart 15: Extent to which retentions impact respondents' company





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

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