Every year, NRCA conducts a market survey to compile and examine important roofing industry data and trends from member roofing contractors throughout the U.S. The 2014-15 NRCA Market Survey gives contractors an opportunity to provide feedback about the percentage of low- and steep-slope roofing work performed during the previous year in new construction, reroofing, and repair and maintenance. It includes the latest information about overall sales volume trends, roofing experiences, material usage and regional breakdowns.

Whether contractors want to evaluate their businesses and current services or consider large capital investments, the survey data allows roofing contractors to compare their materials usage with contractors in other regions, which can affect future business decisions. By analyzing the survey, contractors will be able to notice trends in the industry, including which roof systems are being installed more frequently. NRCA's market survey also provides manufacturers and distributors with data to analyze, and these figures can be compared with those of previous years, as well as future projections.

**Background**

To gather data for the market survey, NRCA mailed survey questionnaires to 2,500 NRCA member roofing contractors at the end of 2014 to obtain data and compare experiences during 2014 and expectations for 2015. NRCA received 190 responses for a response rate of 7.6 percent, slightly higher than previous years.

However, because not all the same companies respond every year, the survey is not a definitive representation of the entire roofing industry and should not be considered a statistically valid analysis of the entire U.S. roofing industry—it is a summary of feedback from member roofing contractors. And because of respondent error and rounding, not all charts add up to 100 percent.

However, one can assume a high degree of confidence in the results because of the response patterns and diversity of the survey respondents. Survey respondents varied in company size and volume, and representative samples were collected from 10 U.S. regions: New England; Mid-Atlantic; South Atlantic; East North Central; East South Central; West North Central; West South Central; Mountain; Pacific; and Alaska, Hawaii and Puerto Rico.

**Market sales and forecasts**

This year's survey reports respondents' sales volumes for 2014 actuals and 2015 projections averaged $7,154,953 and $8,154,334, respectively, compared with NRCA's 2013-14 survey, which was $7,793,835 and $8,479,612, respectively.

Once again, the survey revealed a near-steady ratio of low- to steep-slope sales of 72 percent to 28 percent, respectively (see Figure 1).

The sales breakdown for low-slope new construction, reroofing, and repair and maintenance work were consistent for 2014 and 2015 projections. On average, respondents reported 21 percent of their low-slope roofing work included new construction projects, 66 percent included reroofing jobs, and 13 percent was devoted to repair and maintenance work (see Figure 2).

For steep-slope roofing work, new construction comprised 22 percent; reroofing comprised 66 percent; and repair and maintenance work comprised 12 percent (see Figure 3). For 2015, survey respondents indicated new construction work is projected to be 23 percent; reroofing is projected to be 64 percent; and repair and maintenance work is projected to be 13 percent.

**Materials and insulation**

For low-slope roofing work, the survey results show TPO is the market leader for new construction and reroofing, garnering about
a 31 percent share of the new construction market and 26 percent of the reroofing market for 2014 with similar numbers projected for 2015. EPDM systems followed TPO, capturing 26 percent of the new construction market share and 24 percent for reroofing. PVC systems also continued to gain ground. The low-slope market share for built-up roofing (BUR) and polymer-modified bitumen roof systems continued to decline to less than 4 percent and 10 percent of the market, respectively, compared with 15 years ago when BUR and polymer-modified bitumen each accounted for almost 20 percent of the market.

For steep-slope roofing work, asphalt shingles continued to dominate the market with a 44 percent market share for new construction and 58 percent share for reroofing with similar numbers projected for 2015. Architectural metal followed with a 27 percent market share for new construction work during 2014 and a 24 percent share for reroofing with slight increases projected for 2015.

For insulation materials, polyisocyanurate insulation still leads this sector in market share at 75 percent of new construction and 70 percent of reroofing work, and it has grown by 15 percent since 2000 market share data was reported. Expanded polystyrene is a distant second capturing just 7 percent and 9 percent of the new construction and reroofing markets, respectively.

Steel decks continued to dominate the new construction and reroofing markets at 68 percent and 53 percent, respectively. These figures basically have been unchanged during the past 10 years, and they are predicted to hold on to more than two-thirds of the market share in 2015.

Roof cover board installation for 2014 was reported as 24 percent in new construction, 46 percent in reroofing tear-offs and 30 percent in reroofing re-cover projects (see Figure 4). The projected numbers for 2015 are relatively consistent with 2014.

For rooftop photovoltaic (PV) system installations on low-slope rooftops, rack-mounted PV systems held a majority of the market with 84 percent in new construction and 80 percent in reroofing. The other option in the survey was building-integrated PV systems at 16 percent in new construction and 20 percent in reroofing. For steep-slope rooftop PV system installations, rack-mounted PV systems accounted for 74 percent of the new construction market and 73 percent for reroofing.

Regional business differences
Although the data presented in the market survey represents average market sales, regional variations exist.

In the Northeast and particularly New England area, respondents report using EPDM on more than half of their low-slope roofing jobs compared with the national average reported in the survey.

According to Rob Therrien, president of The Melanson Co. Inc., Keene, N.H., this is because of material durability.

“The single-ply market has been strong in the Northeast since the 1970s, and EPDM and PVC were the cornerstones of that movement,” he says. “Both systems have proven track records in New Hampshire with decades of installations in place. Single-ply roof systems are not affected as badly by our extreme temperatures and humidity as bituminous systems.”

In the Mid-Atlantic region, architectural metal use surpasses asphalt shingles on steep-slope jobs by almost 10 percent. In the South Atlantic region, TPO accounts for almost two-fifths of all low-slope work, and EPDM use is 12 percent below the reported national average. And in the East South Central region, PVC is used more than any other region and is 20 percent higher than the overall response rate.

Historical data
The NRCA market survey is an important tool to help measure the scope of the U.S. roofing industry, and the data provides a glimpse into which roof systems are trending in the low- and steep-slope roofing markets. NRCA’s historical data (see Figure 5) provide comparative sales volume data for the past 10 years and yield many interesting and invaluable insights about how roofing material usage within the industry has changed during the past two decades.

To learn more
For more information about NRCA’s market surveys, please contact Alison L. LaValley, NRCA’s associate executive director of member services, at alavalley@nrca.net or (847) 493-7573. To obtain a hard copy, contact NRCA’s Customer Service Department at (866) ASK-NRCA (275-6722). Participating contractors will receive a copy free of charge. All NRCA members, regardless of their participation, can view or download an electronic copy of the survey for free at shop.nrca.net or via NRCA’s app, which is available from the Apple App Store, Google Play or Windows Store.

Alison L. LaValley, CAE, is NRCA’s associate executive director of member services.