

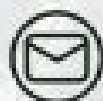


LEADING THE UK EWI INDUSTRY

# EWI Industry Report



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June 2025

## INCA Report

### EWI Market Analysis 2024

30.06.2025

INCA, the recognised trade association for the external wall insulation (EWI) industry in the UK, have published findings of their industry survey which reveals the size and split of the market for the calendar year 2024.

#### Key Findings:

- 4.4 million square metres of EWI was installed onto buildings across the UK in 2024
- 66% of this went into the refurbishment of homes and buildings
- 22% into new build construction
- 12% into the cladding remediation market
- Mineral fibre insulation was, at 52%, the main insulant used with expanded polystyrene (EPS) making up 43% of the market (low rise only) and other insulants accounting for the remaining 5%
- Various types of specialist render proved by far the most popular finish and were incorporated within 81% of systems. Brick slips (and similar) decorative finishes accounted for the remaining 19%

#### Summary By Sector:

External wall insulation systems are widely used throughout the UK construction industry both in the highly effective thermal upgrade of existing buildings (especially solid wall, hard to treat and non-traditional buildings) and as a method of construction thermally efficient new buildings across all sectors of the market.

The industry commissioned survey was undertaken by NEMS Market Research on behalf of INCA and targeted all main system manufacturers with a near 100% participation rate reported. It follows on from a similar survey in 2024, the first for many years, and confirmed the over-all size in monetary terms and corrected a discrepancy in terms of total volume by square metres.

Considering significant variation in the cost of the different systems and finishes along with different types and thicknesses of insulation incorporated within the systems, the findings revealed a total of 4,396,661 square metres of EWI was installed in the UK during 2024 on projects across all sectors of the market.

The refurbishment (retrofit) sector often supported by government funding measures) accounted for 2,912,216 square meters (66.2%) of this total. The forecast sector growth for 2024 didn't materialise with most contributors reporting funding delays and labour capacity being the main causes. However,

88% of participants forecast solid growth in 2025 with the majority expecting this growth to lie within the 10% to 20% range but stress that this is entirely dependent on Government initiatives and funding streams.

New build construction totalled 947,402 square meters (21.5%) of the total which, after the correction, showed a modest growth in 2024 with stronger specifications, a push for student accommodation schemes and quick build housing solutions being the main drivers. Building Safety Regulator (BSR) compliance (high rise) was one of the main challenges in 2024 and is predicted to cause further delays in 2025 which is why contributors only forecast a continued modest growth in the new build sector throughout 2025.

The cladding remediation sector (not reported on previously) accounted for the balance of 537,042 square metres (12.2%). This sector was reported as being significantly impacted by BSR compliance gateway delays. The cladding remediation sector was highlighted as one of the main areas of opportunity for 2025 but, in reverse, it was also singled out as the main areas of challenge with continued BSR gateway delays reported as the main area of concern.

#### **Summary By Insulant:**

Perhaps unsurprisingly mineral fibre remained the most popular choice of insulant in 2024 - regulations mandate its use on high rise buildings and in the installation of fire breaks / fire barriers. Some 2,268,659 square metres was installed in 2024 representing 51.6% of the EWI market.

EPS sales remained extremely strong and proved a popular choice of insulant for low rise being the choice of insulant in 43.6% of all system installs in 2024 and accounting for 1,917,521 square metres.

Contributors are predicting the split to widen significantly in 2025 with mineral fibre becoming the choice of insulant of key industry players and as BSR delayed high rise works (mandating the use of mineral fibre) start to filter through – particularly across the new build and cladding remediation sectors.

Other insulation (extruded polystyrene, PIR, wood fibre etc) lost share marginally and accounted for the remaining 210,481 square metres, 4.8% of the over-all market.

#### **Summary By Finish:**

Specialist renders remain the main decorative finish of choice, being incorporated within 81.2% of systems and representing a total of 3,568,325 square metres in 2024. These come in a wide variety of different materials, thicknesses, colours and textures and the number includes those which incorporate an additional dash aggregate within the overall finish and those projects where render is used to create the effect of stone / brickwork.

Brick slips (clay or lightweight brick effect systems), stonework and tiles accounted for the remaining 18.8% of the market – some 828,336 square metres.

John Sparrow, Executive Director at INCA said:

“Building on the foundations laid following the publication of the first industry report for many years some 12 months ago this report was able to confirm the size of the industry in financial terms, correct a discrepancy in the over-all size in square metre size and drill down slightly more by sector.

Coming at a time when we have such a clear focus on competence, training and the development of a new industry apprenticeship scheme we regard the results to be of particular importance to better evidence the need to attract new blood into the EWI industry and support our efforts to facilitate this.

We would like to thank all our system designer membership and close industry partners for their input, support and contribution.”

Mark Weaver, Chair of INCA said:

“Whilst the numbers demonstrate that the industry is delivering well at current levels, they also highlight the scale of the opportunity on the horizon as the Government looks to ramp up its retrofit program to deliver on net zero targets. The data also highlights the significant potential within the new-build sector and the cladding remediation sector – we have a real opportunity to grow our share of the market through innovation and greater awareness of the commercial and environmental benefits of EWI.

In turn this justifies the efforts INCA are making to address any skills shortage, not just by way of promoting the industry, but directly in relation to training and upskilling. We currently spearhead the steering group tasked with defining and mapping out a route to EWI competence (now at implementation stage), we are also finalising the agreement for a new Specialist Applied Skills Program (SAP) in EWI for Wales, supporting on the employer group commissioned to deliver the EWI pathway of a new apprenticeship by the end of 2025 and collaborating with colleges and training facilities across the UK in support of multiple regional and national training and upskilling initiatives.

These are positive numbers which we hope will drive further investment in the EWI sector, encourage more operatives to join us and to help us to future-proof our industry.”