



**Timber Frame
Construction Market
Research & Analysis
UK 2022**

REPORT SAMPLE

**Timber Frame Housebuilding Market & Non-Domestic Timber Frame
Construction Market Size & Industry Review 2016-2022; SWOT & PEST
Analysis, Product Mix & Key Trends 2016-2026; Timber Frame Suppliers
Key Financials; Market Forecasts to 2026**

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1. Introduction to *Research & Analysis* Reports

1.1 Key Features & Benefits of this Research & Analysis Report

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, SWOT, key trends, end use sector mix & trends, key market influences and future prospects for the market. In addition, rankings by turnover and profit for the market leaders are provided.

Based on statistically relevant company financials which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also be used as an operational sales and marketing tool, enabling the reader to quickly grow sales and focus marketing budgets.

This report includes:-

- **Market Size, PEST, SWOT & Trends – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by **value & volume** over a ten-year period. Based on quantitative data as well as the usual qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product & End Use Sector Mix – Current & Future**

This report identifies the key product sectors & end use applications in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **Leading Suppliers Turnover & Profit**

MTW are unique in that we provide a turnover and profit estimate for every company in the report. Based on quantitative, statistically valid research, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Key Players' Ranking**

This report identifies the key players in the market and ranks them by turnover and profit. This enables the reader to identify the most relevant potential key companies in a market, understand their current position in the market and quickly identify new targets and opportunities.

- **Relevant Research, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

2. Timber Frame Market By Volume & Value 2022-2026

2.1 Timber Frame Construction Market Definition

The UK Timber Frame Construction Market is defined as consisting of a range of structural building products manufactured primarily from softwood designed for both the domestic and non-domestic sectors. More specifically, 'timber frame' within the definition of the 'market' includes:-

- **Post & Beam** – The most traditional style of home building, this technology employs vertical and horizontal timber posts, beams or 'lintels' used as primary structural components in buildings, constructed in layers with independent floors.
- **Open Panel** – Prefabricated, structurally load bearing timber frames manufactured 'offsite' in a factory, with the internal face of the wall left unfinished in order for insulation, services and linings to be installed onsite before closing with plasterboard.
- **Closed Panel** – Timber frame load bearing panels manufactured to a much greater level 'offsite', with insulation, windows, doors and service channels pre-installed. Closed panels are extremely air tight and combined with triple glazing and high levels of in-built insulation, very low U-values are achievable.
- **Volumetric** - Three-dimensional units composed primarily of timber, manufactured in factory conditions that enclose usable space and are then delivered and installed within or onto a building or structure. Generally fully finished internally.
- **Hybrid** – Volumetric, semi-volumetric or panellised systems produced offsite and consisting of a combination of timber and other material such as steel, SIPs etc, but manufactured primarily from timber.
- **SIPS** – structural insulated panels – manufactured in factory conditions, a layer of rigid insulating foam is 'sandwiched' between layers of oriented-strand board (OSB), generally with an interior finish, such as gypsum board or tongue-and-groove paneling. Structural integrity of the SIP depends upon the glue bonds between the skins and the core and the durability and structural reliability of the core material.

All prices in this report are measured at manufacturers selling prices (msp) excluding any installation / labour costs, value added, import or other taxes and delivery charges. The market definition specifically excludes sales of additional fittings (e.g. sanitaryware, kitchens etc) included in volumetric / pod units etc., but does include doors and windows, wiring, ducting, pipework etc where these are an integral part of the timber frame system. The report focuses only on new products supplied for use within the United Kingdom for the application within the 'domestic' (i.e. housebuilding) and non-domestic construction sectors.

The methodology for this report is based on the last 3 years of financial data from over 80% of the UK industry by value (100+ companies), coupled with a wide range of additional sources from timber frame manufacturers & contractors, trade associations, company websites, Companies House, various HM Government departments, HM Customs & Excise, trade journals, credit reference agencies, industry commentators and our own experience of researching these markets for more than a decade.

2.2 Timber Frame Construction Market Executive Summary

Timber frame construction encompasses a wide range of products within both the domestic and non-domestic sectors with just over xxx,xxx units likely to be completed in 2022. By December 2022, timber frame construction is estimated to xxxx by just over x% in volume terms in 12 months. This xxxxxx is attributed to xxxxx activity in xxxx and the xxx to xxxx xxxx the Covid-19 pandemic, with non-domestic sector demand xxxxx to xxxxx.

In 2022, the market is estimated at just over £xxxx million at manufacturers selling prices by year end, reflecting xxxxx in market value of just over xx% in current price terms. Since 2016, total sales have xxxx by xxx%, reflecting xxxxx with an average annual xxxx of xxxx%, xxxxxx the challenging xxxxx of xxxx.

Sales of timber frame buildings are likely to xxxxxx xxxxxx xxxxxx % in constant price terms in 2022, xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx housebuilding coupled with xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx in the commercial xxxxxx xxxxxx xxxxxx. Share xxxxxx xxxxxx xxxxxx timber frame buildings xxxxxx xxxxxx xxxxxx by xxxxxx xxxxxx activity xxxxxx xxxxxx xxxxxx, xxxxxx xxxxxx Government xxxxxx xxxxxx xxxxxx sector through xxxxxx xxxxxx xxxxxx xxxxxx.

xxxxxx housebuilding xxxxxx xxxxxx coupled with xxxxxx xxxxxx UK housebuilding is xxxxxx xxxxxx to xxxxxx xxxxxx xxxxxx for timber frame applications in the medium to longer term. By 2026, our forecasts are for the total timber frame construction market to xxxxxx xxxxxx xxxxxx billion in current price terms xxxxxx xxxxxx, reflecting xxxxxx of x% in the next 4 years.

'Domestic' applications account for a xxxxxx xxxxxx and, in the last 4 years, xxxxxx xxxxxx proportion of the timber frame construction market. To year end December 2022, an estimated xxx,000 timber frame homes will be built, accounting for over xx% of timber frame construction.

xxxxxx xxxxxx non domestic timber frame buildings xxxxxx xxxxxx offer a xxxxxx xxxxxx of benefits associated with MMC (Modern Methods of Construction) and Off Site Manufacturing (OSM), this sector has xxxxxx xxxxxx share due to xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx build activity. xxxxxx in larger scale capital investment in xxxxxx, xxxxxx, xxxxxx and xxxxxx sectors have xxxxxx, xxxxxx opportunities in the non-domestic timber frame sector xxxxxx xxxxxx xxxxxx

Our estimates are for non-domestic timber frame completions to reach xxxxxx xxxxxx xx,000 units in 2022. By 2026 our forecasts are for this sector to xxxxxx by around xx% in the next 4 years, rising to around xxxxx units completed and a value of £xxx million.

The open panel timber frame sector accounts for t xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx industry in 2022 accounting for x% and sales of just over £xx million.

The xxxxxx xxxxxx sector is accounted for by the closed panel sector, representing just under x% of all timber frame construction and reflecting a total market value of around £ xxxx million.

Structural insulated panels (SIPs) are also a significant contributor to the UK timber frame construction market in 2022 and xxxxxx xxxxxx xxxxxx xxxxxx share, with sales estimated at more than £xxx million in 2022.

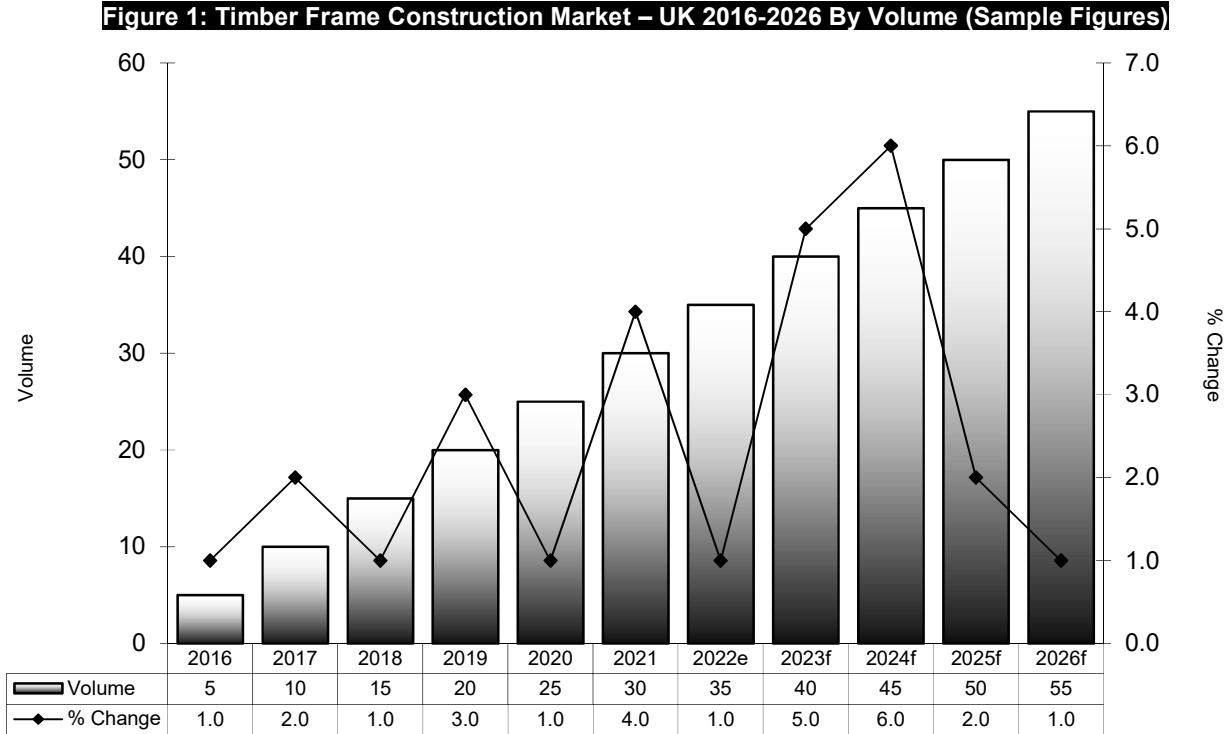
Timber frame housebuilding is forecast to exhibit xxxxxx xxxxxx of x% per annum in the near to medium term in volume terms, reaching just under xxx,000 units by 2026. In value terms, xxxxxx xxxxxx coupled with xxxxxx xxxxxx should also xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx. By 2026 the domestic timber frame market is forecast to be worth some £xxxx million, reflecting xxxxxx xxxxxx of xx% in the next 4 years.

The top 120 leading timber frame suppliers are set to report sales turnover of more than £xx billion in 2022, reflecting a xxxxxx xxxxxx xxxxxx market. Recent M&A activity has been xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx activity by a few market leading timber frame companies in 2021 is likely translate into a xxxxxx xxxxxx xxxxxx xxxxxx industry for 2022 onwards.

Profitability has xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx years, with rising xxxxxx xxxxxx, xxxxxx, xxxxxx and xxxxxx costs and xxxxxx xxxxxx xxxxxx presenting xxxxxx xxxxxx for the industry. xxxxxx xxxxxx, the top 120 leading timber frame suppliers are likely to report total profits of around £xxxx million in 2022, reflecting an industry which xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx.

2.3 Timber Frame Construction Market by Volume 2022-2026

The UK timber frame construction market encompasses a wide range of products within both the domestic and non-domestic sectors with just over xxx,000 forecast completions in 2022 as illustrated in the following chart (Figures changed for sample purposes:-



Source: MTW Research / Trade Estimates

The market experienced particularly xxxx xxx of xxxxx between xxx and xxx, xxxxx by some xxx% with volumes xxxxx at just over xx,000 units in xxx. The market was xxxxx by xxxxx share xxxxx by timber frame in the UK housebuilding market coupled with rapid xxxxx in the xxxxx xxxxx xxxxx market providing xxxxx xxxxx xxxxx xxxxx xxxxx for suppliers in this sector.

The impact of the xxxxx xxxxx xxxxx had an immediate a xxxxx as housebuilding activity rapidly