



INCA Market Data 2015

INCA

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Context

The Insulated Render and Cladding Association (INCA) is the recognised trade association for the external wall insulation (EWI) industry, representing the major system designers, a nationwide network of specialist installers and the key component suppliers. With this combination of representation, INCA provides EWI technical advice and installation best practice to Government, clients and other key stakeholders.

INCA collates information from its members each year to provide an overview of the EWI market in UK, including size, turnover and workforce, and this report summarises the results for 2015.

2015 was a challenging year for the industry with the withdrawal of key government energy efficiency schemes. As a result a number of external wall insulation companies entered administration or left the industry. Subsequently, a number of companies also left INCA membership due to financial constraints.

INCA continues to represent the EWI industry and submitted a comprehensive response to the ECO2 consultation with the support of AglityEco. The response called on Government to double the target for SWI measures in the 2017 transition period. The response also highlights that the low target is likely to be achieved even before the new scheme begins and the resulting hiatus could reduce industry capacity for future years even further. INCA continues to support its members to ensure that they are uniquely placed to deliver the highest quality standards for their clients.

INCA Membership

As of 1 October 2016, INCA had 82 members and they have all submitted information for 2015 as part of the Annual Return process.

Category	No. of Members
System Designer	15
Contractor	53
Associate	14
Total	82

With almost all the System Designers and the majority of the large Contractors within membership, it is estimated that INCA represents at least 70% of the EWI industry by volume. INCA members have a collective turnover in EWI of **£365 million** and directly employ **14,393 operatives** and **4,012 Labour Only Sub-Contractors**.

EWI Volumes

INCA System Designer Members supplied **3 million m²** of EWI in 2015.

EWI Type	No. of m ² Supplied	% of Total Supplied
EPS	2,368,205	76
Mineral Fibre	326,050	12
Phenolic	319,950	11
Other	1,000	1
Total	3,015,205	100%

INCA Contractor Members installed **1.48 million m²** of EWI in 2015. The market share of EPS has increased from 71% to 75% and Phenolic has increased from 11% to 13% whilst Mineral Fibre has decreased from 13% to 12% (compared to 2014).

EWI Type	No. of m ² Supplied	% of Total Supplied
EPS	1,111,362	75
Mineral Fibre	177,682	12
Phenolic	185,948	13
Other	8,405	1
Total	1,483,397	100

Training

An average of **94%** of the site-based workforce employed by INCA members hold CSCS cards, an increase from 93% in 2014. This demonstrates that INCA members promote and support a qualified workforce for the EWI industry, which enables them to deliver better quality projects for their clients.

INCA members collectively hold **1,507** CSCS Experienced Worker cards in EWI, up 71% from **880** held in 2014, and INCA continues to provide support to members to convert these into the appropriate Skilled Worker cards.

INCA members collectively paid **£2,336,367** in CITB Levy and received **£2,595,996** in CITB Grants. This means that INCA members now claim back **110%** of Grant from their Levy.

The following table sets out the number of qualifications collectively achieved by INCA members in 2015 and the number of qualifications planned for 2016:

	2015 Actual	2016 Planned
Apprenticeships	477	310
NVQ Level 2	819	541
NVQ Level 3	327	283
SMSTS	249	596
SSSTS	154	397

The following table sets out the number of people collectively trained by INCA members in 2015 and the number of people they are planning to train in 2016.

	2015 Actual	2016 Planned
Business Skills	338	418
Health & Safety	5,320	6,883
Personal Development	1,043	1,390
Technical	1,466	1,587
Other Professional	148	192