

Mechanical and Electrical Engineering - UK - December 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



MARKET & BUSINESS
DEVELOPMENT

Combining insight with foresight

"The M&E sector has suffered for a prolonged period, with the recession reducing demand significantly, and the subsequent flat economy failing to rectify the situation."
– Terry Leggett, Senior Analyst

This report looks at the following areas:

- Can M&E margins be increased again after the extreme price pressure of the past few years?
- Will the market grow in excess of average UK economic activity?
- Will growth arise from new construction or repair and maintenance?
- Which end use sectors offer the best prospects?
- Will continued public spending restrictions be more than offset by the buoyancy of the private sector?

The M&E sector has suffered an elongated period of difficulties, reflecting the downturn in demand from the new construction sector and consequent over-capacity. Even the less volatile maintenance sector has suffered from price pressure. New construction demand is now growing strongly, with prospects of not only real-term growth in a sector that will expand ahead of the UK economy, but also a correction of prices that is expected to further improve market growth.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Mechanical and Electrical Engineering - UK - December 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Executive Summary

The market

- Figure 1: M&E market in Great Britain, 2010-14 actual and 2015-2019 forecast
- Figure 2: Segmentation of M&E market in Great Britain, 2010-14 actual and 2015-2019 forecast
- Figure 3: Segmentation of mechanical contracting market in Great Britain, 2015
- Figure 4: Segmentation of electrical contracting market in Great Britain, 2015

Market factors

- Figure 5: New construction activity, 2009-14 actual and 2015-19 forecast
- Figure 6: Civil engineering activity, 2009-14 actual and 2015-19 forecast
- Figure 7: Development of Ad hoc and contract work in the R&M M&E market in Great Britain, 2009-13 actual and 2014-2019 forecast

Companies

- Figure 8: Analysis of the changes in the structure of the plumbing, heating and air conditioning sector and the electrical installation sector, 2011-15

What we think

Key Issues

- What is the link between M&E and the facilities management sector?
- Have M&E prices started to rise again?
- So are the prospects now brighter?

Introduction

- Definitions
- Methodology
- Abbreviations
- Issues in the market
- Market factors
- Construction industry
- Legislation
- Government initiatives

UK Economy

Overview

- Figure 9: UK GDP quarterly development, 2003-15
- Figure 10: UK GDP in economic downturns and recoveries since 1979

Inflation

- Interest rates
- House prices
- Consumer spending

Manufacturing

- Figure 11: UK output by industry, 2008-15

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Mechanical and Electrical Engineering - UK - December 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Business investment

Figure 12: UK GFCF 2003-15

Imports

Exports

Market Size and Trends

Chapter summary

Market size

Figure 13: M&E contracting output in Great Britain, 2010-14

Market segmentation and trends

Figure 14: Segmentation of M&E contracting in Great Britain, by type, 2010-14

Mechanical contracting

Overview

Figure 15: Mechanical contracting output in Great Britain, 2010-14

Figure 16: Analysis of mechanical contracting output in Great Britain, by type of work, 2010-14

New construction work

Figure 17: Segmentation of mechanical contracting output for new construction projects in Great Britain, by type, 2010-14

Repair & maintenance work

Figure 18: Segmentation of mechanical contracting output for repair & maintenance projects in Great Britain, by type, 2010-14

Electrical contracting

Overview

Figure 19: Electrical contracting output in Great Britain, 2010-14

Figure 20: Analysis of electrical contracting output in Great Britain, by type of work, 2010-14

New construction work

Figure 21: Segmentation of electrical contracting output for new construction projects in Great Britain, by type, 2010-14

Repair & maintenance work

Figure 22: Segmentation of electrical contracting output for repair & maintenance projects in Great Britain, by type, 2010-14

Seasonality of output

Figure 23: Seasonality of private housing output, 2010-14

Figure 24: Seasonality of public housing output, 2010-14

Figure 25: Seasonality of public non-residential construction output, 2010-14

Figure 26: Seasonality of private industrial construction output, 2010-14

Figure 27: Seasonality of private commercial construction output, 2010-14

Figure 28: Seasonality of public housing repair & maintenance output, 2010-14

Figure 29: Seasonality of private housing repair & maintenance output, 2010-14

Regional sales

Figure 30: Regional private housing construction output, 2010-14

Figure 31: Regional public housing construction output, 2010-14

Figure 32: Regional public non-residential construction output, 2010-14

Figure 33: Regional private industrial construction output, 2010-14

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Mechanical and Electrical Engineering - UK - December 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 34: Regional private commercial construction output, 2010-14

Figure 35: Regional housing repair & maintenance output, 2010-14

Construction Market Background

Chapter summary

Housing

Figure 36: Housing completions in the UK, 1970-2015

Figure 37: Analysis of private housing construction output in Great Britain, 2010-14

Figure 38: Private new housing starts and completions in England, 2010-15

Figure 39: Analysis of new public housing construction output in Great Britain, 2010-14

Figure 40: Public housing starts and completions in England, 2010-15

Figure 41: Trends in the gross supply of affordable housing in England, by tenure 2010-15

Figure 42: Forecast private housing output in Great Britain, 2015-19

Figure 43: Forecast public housing output in Great Britain, 2015-19

Public non-residential construction

Figure 44: Long term trend in public non-residential construction activity in Great Britain, 1970-2014

Figure 45: Analysis of public sector non-residential construction output in Great Britain, 2010-14

Figure 46: Analysis of public sector non-residential construction in Great Britain, by type, 2010-14

Health

Education

"Other" sector

Figure 47: Forecast public non-residential construction output in Great Britain, 2015-19

Figure 48: Forecast of public non-residential construction in Great Britain, by type, 2015-19

Private industrial construction

Figure 49: Long term trend in private industrial construction output in Great Britain, 1970-2014

Figure 50: Analysis of private industrial new construction work in Great Britain, by sector 2010-14

Figure 51: Forecast private industrial construction output in Great Britain, 2015-19

Figure 52: Forecast of private industrial new construction work in Great Britain, by sector 2015-19

Private commercial construction

Figure 53: Long term trend in private commercial construction output in Great Britain, 1970-2014

Figure 54: Analysis of private commercial construction in Great Britain, by type, 2010-14

Figure 55: Forecast private commercial construction output in Great Britain, 2015-19

Figure 56: Forecast of private commercial construction in Great Britain, by sector, 2015-19

Repair & maintenance

Figure 57: Segmentation of the R&M activity in Great Britain, 2014

Private housing

Figure 58: Analysis of repair & maintenance output in the private housing sector in Great Britain, 2010-14

Public housing

Figure 59: Analysis of Decent Homes backlog programme allocations, 2012-15

Figure 60: Analysis of repair & maintenance output in the public housing sector in Great Britain, 2010-14

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Mechanical and Electrical Engineering - UK - December 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Private non-residential

Figure 61: Analysis of repair & maintenance output in the private nonresidential sector in Great Britain, 2010-14

Public non-residential

Figure 62: Analysis of repair & maintenance output in the public non-residential sector in Great Britain, 2010-14

Figure 63: Forecast repair & maintenance construction output in Great Britain, 2015-19

Figure 64: Forecast repair & maintenance construction output in Great Britain, by type, 2015-19

Public housing

Figure 65: Forecast repair & maintenance output in the public housing sector in Great Britain, 2015-19

Private housing

Figure 66: Forecast repair & maintenance output in the private housing sector in Great Britain, 2015-19

Figure 67: Forecast repair & maintenance output in the public nonresidential sector in Great Britain, 2015-19

Figure 68: Forecast repair & maintenance output in the private non-residential sector in Great Britain, 2015-19

Civil engineering

Figure 69: Civil engineering construction output in Great Britain, by sector, 2010-14

Figure 70: Forecast civil engineering construction output in Great Britain, 2015-19

Industry Structure

Chapter summary

Industry development

Figure 71: Analysis of the changes in the structure of the plumbing, heating and air conditioning sector, 2011-15

Figure 72: Analysis of the changes in the structure of the electrical installation sector, 2011-15

Structure by employment

Figure 73: Analysis of the employment structure of the plumbing, heating and air-conditioning installation sector, 2014 and 2015

Figure 74: Analysis of the employment structure of the electrical installation sector, 2014 and 2015

Structure by turnover

Figure 75: Analysis of the financial structure of the plumbing, heating and air conditioning sector, 2014 and 2015

Figure 76: Analysis of the financial structure of the electrical installation sector, 2014 and 2015

Company Profiles

NG Bailey

Figure 77: Financial analysis of NG Bailey, 2011-15

Company strategy

Balfour Beatty Engineering Services

Figure 78: Financial analysis of Balfour Beatty, 2010-14

Figure 79: Turnover analysis of Balfour Beatty by segment, 2013-14

Figure 80: Balfour Beatty investment portfolio, 2014

Company strategy

TClarke

Figure 81: Financial analysis of TClarke, 2010-14

Company strategy

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Mechanical and Electrical Engineering - UK - December 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Crown House Technologies

Figure 82: Financial analysis of Crown House Technologies, 2011-15

Company strategy

Imtech

Figure 83: Financial analysis of Imtech UK, 2009-13

Company strategy

Michael J Lonsdale

Figure 84: Financial analysis of Michael J Lonsdale, 2010-14

Company strategy

Lorne Stewart

Figure 85: Financial analysis of Lorne Stewart, 2010-14

Company strategy

Skanska Rashleigh Weatherfoil

Figure 86: Financial analysis of Skanska Rashleigh Weatherfoil, 201014

Company strategy

SPIE (formerly SPIE Matthew Hall)

Figure 87: Financial analysis of SPIE, 201014

Company strategy

SSE Contracting

Figure 88: Financial analysis of SSE Contracting, 201014

Company strategy

Forecast

Chapter summary

Market overview

Figure 89: Forecast M&E contracting output in Great Britain, 2015-19

Market segmentation

Figure 90: Forecast segmentation of M&E contracting in Great Britain, by type, 2015-19

Mechanical contracting

Overview

Figure 91: Forecast mechanical contracting output in Great Britain, 2015-19

Figure 92: Analysis of mechanical contracting output in Great Britain, by type of work, 2015-19

New construction work

Figure 93: Forecast segmentation of mechanical contracting output for new construction projects in Great Britain, by type, 2015-19

Repair & maintenance work

Figure 94: Forecast segmentation of mechanical contracting output for repair & maintenance activity in Great Britain, by type, 2015-19

Electrical contracting

Overview

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Mechanical and Electrical Engineering - UK - December 2015

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 95: Forecast electrical contracting output in Great Britain, 2015-19

Figure 96: Forecast analysis of electrical contracting output in Great Britain, by type of work, 2015-19

New construction work

Figure 97: Forecast segmentation of electrical contracting output for new construction projects in Great Britain, by type, 2015-19

Repair & maintenance work

Figure 98: Forecast segmentation of electrical engineering output for repair & maintenance activity in Great Britain, by type, 2015-19

Further Sources & Contacts

Trade associations

Trade magazines

Trade exhibitions

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com