

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.



"Just as the M&E sector was recovering from the prolonged difficulties of the recession and starting to see price pressure ease, uncertainties over the construction market resurfaced following the Brexit decision. This is encouraging companies to increasingly concentrate on maintenance contracts, the more stable aspect of the market."

- Terry Leggett, Senior Analyst

This report looks at the following areas:

- What is the likely impact of Brexit?
- How does M&E relate to the facilities management sector?
- What about M&E prices?

The M&E sector now faces a new challenge: the impact of Brexit. Having started to enjoy growing demand as construction activity and consumer/business confidence was restored following a prolonged recession, the sector now faces economic uncertainty and delayed investment decisions. There remain, however, opportunities to drive the sector forward, including renewed government commitment to infrastructure projects, and the potential for maintenance contracts in uncertain conditions.

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



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, 2011-15 actual and 2016-2020 forecast

Figure 2: Segmentation of M&E market in Great Britain, 2015

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: UK new construction output, 2011-2015 actual and 2016-2020 forecast

Figure 6: UK R&M construction output, 2011-2015 actual and 2016-2020 forecast

Companies

What we think

Key Issues

What is the likely impact of Brexit?

How does M&E relate to the facilities management sector?

What about M&E prices?

Introduction

Definitions

Methodology

Abbreviations

Issues in the market

Market factors

Construction industry

Legislation

Government initiatives

UK Economy

Overview

Figure 7: UK GDP quarterly development, 2003-16

Figure 8: UK GDP in economic downturns and recoveries since 1979

Inflation

Interest rates

House prices

Figure 9: UK House price changes, 2006-2016

Consumer spending

Manufacturing

Figure 10: UK manufacturing, 2014-16

Business investment



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



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 11: UK GFCF 2003-16

Imports

Exports

Market Size and Trends

Chapter summary

Market size

Figure 12: M&E contracting output in Great Britain, 2011-15

Market segmentation and trends

Figure 13: Segmentation of M&E contracting in Great Britain, by type, 2011-15

Mechanical contracting

Overview

Figure 14: Mechanical contracting output in Great Britain, 2011-15

Figure 15: Analysis of mechanical contracting output in Great Britain, by type of work, 2011-15

New construction work

Figure 16: Segmentation of mechanical contracting output for new construction projects in Great Britain, by type, 2011-15

Repair & maintenance work

Figure 17: Segmentation of mechanical contracting output for repair & maintenance projects in Great Britain, by type, 2011-15

Electrical contracting

Overview

Figure 18: Electrical contracting output in Great Britain, 2011-15

Figure 19: Analysis of electrical contracting output in Great Britain, by type of work, 2011-15

New construction work

Figure 20: Segmentation of electrical contracting output for new construction projects in Great Britain, by type, 2011-15

Repair & maintenance work

Figure 21: Segmentation of electrical contracting output for repair & maintenance projects in Great Britain, by type, 2011-15

Seasonality of output

Figure 22: Seasonality of private housing output, 2011-15

Figure 23: Seasonality of public housing output, 2011-15

Figure 24: Seasonality of public non-residential construction output, 2011-15

Figure 25: Seasonality of private industrial construction output, 201115

Figure 26: Seasonality of private commercial construction output, 201115

Figure 27: Seasonality of public housing repair & maintenance output, 2011-15

Figure 28: Seasonality of private housing repair & maintenance output, 2011-15

Figure 29: Seasonality of public non-residential repair & maintenance output, 2011-15

Figure 30: Seasonality of private non-residential repair & maintenance output, 201115

Regional sales

Figure 31: Regional public housing construction output, 2011-15

Figure 32: Regional private housing construction output, 2011-15

Figure 33: Regional public non-residential construction output, 2011-15



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



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 industrial construction output, 2011-15
- Figure 35: Regional private commercial construction output, 2011-15
- Figure 36: Regional housing repair & maintenance output, 2011-15
- Figure 37: Regional public non-residential repair & maintenance output, 2011-15
- Figure 38: Regional private non-residential repair & maintenance output, 2011-15

Construction Market Background

Chapter summary

Housing

- Figure 39: Housing completions in the UK, 1970-2015
- Figure 40: Analysis of private housing construction output in Great Britain, 2011-15
- Figure 41: Private new housing starts and completions in England, 2011-16
- Figure 42: Analysis of new public housing construction output in Great Britain, 2011-15
- Figure 43: Public housing starts and completions in England, 2011-16
- Figure 44: Trends in the gross supply of affordable housing in England, by tenure 2010-15
- Figure 45: Forecast private housing output in Great Britain, 2016-20
- Figure 46: Forecast public housing output in Great Britain, 2016-20

Public non-residential construction

- Figure 47: Long term trend in public non-residential construction activity in Great Britain, 1970-2015
- Figure 48: Analysis of public sector non-residential construction output in Great Britain, 2011-15
- Figure 49: Analysis of public sector non-residential construction in Great Britain, by type, 2011-15
- Figure 50: Forecast public non-residential construction output in Great Britain, 2016-20
- Figure 51: Forecast of public non-residential construction in Great Britain, by type, 2016-20

Private industrial construction

- Figure 52: Long term trend in private industrial construction output in Great Britain, 19702015
- Figure 53: Analysis of private industrial new construction work in Great Britain, by sector 2011-15
- Figure 54: Forecast private industrial construction output in Great Britain, 2016-12

Private commercial construction

- Figure 55: Long term trend in private commercial construction output in Great Britain, 19702015
- Figure 56: Analysis of private commercial construction in Great Britain, by type, 201115
- Figure 57: Forecast private commercial construction output in Great Britain, 2016-20
- Figure 58: Forecast of private commercial construction in Great Britain, by sector, 201620

Repair & maintenance

Figure 59: Segmentation of the R&M activity in Great Britain, 2015

Public housing

Figure 60: Analysis of repair & maintenance output in the public housing sector in Great Britain, 201115

Private housing

Figure 61: Analysis of repair & maintenance output in the private housing sector in Great Britain, 2011-15

Public non-residential

Figure 62: Analysis of repair & maintenance output in the public non-residential sector in Great Britain, 2011-15

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



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 63: Analysis of repair & maintenance output in the private nonresidential sector in Great Britain, 2011-15

Figure 64: Forecast repair & maintenance construction output in Great Britain, 2016-20

Figure 65: Forecast repair & maintenance construction output in Great Britain, by type, 201620

Civil engineering

Figure 66: Civil engineering construction output in Great Britain, by sector, 2011-15

Figure 67: Forecast civil engineering construction output in Great Britain, 2016-20

Industry Structure

Chapter summary

Industry development

Figure 68: Analysis of the changes in the structure of the plumbing, heating and air conditioning sector, 2012-16

Figure 69: Analysis of the changes in the structure of the electrical installation sector, 2012-16

Structure by employment

Figure 70: Analysis of the employment structure of the plumbing, heating and air-conditioning installation sector, 2015 and 2016

Figure 71: Analysis of the employment structure of the electrical installation sector, 2015 and 2016

Structure by turnover

Figure 72: Analysis of the financial structure of the plumbing, heating and air conditioning sector, 2015 and 2016

Figure 73: Analysis of the financial structure of the electrical installation sector, 2015 and 2016

Company Profiles

NG Bailey

Figure 74: Financial analysis of NG Bailey, 2012-16

Company strategy

Balfour Beatty Engineering Services

Figure 75: Financial analysis of Balfour Beatty, 2011-15

Figure 76: Turnover analysis of Balfour Beatty by segment, 2013-15

Company strategy

TClarke

Figure 77: Financial analysis of TClarke, 2011-15

Figure 78: Turnover analysis of TClarke, 2015

Company strategy

Crown House Technologies

Figure 79: Financial analysis of Crown House Technologies, 2011-15

Company strategy

Imtech

Company strategy

Michael J Lonsdale

Figure 80: Financial analysis of Michael J Lonsdale, 2011-15

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



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.

Company strategy

Lorne Stewart

Figure 81: Financial analysis of Lorne Stewart, 2011-15

Company strategy

Skanska Rashleigh Weatherfoil

Figure 82: Financial analysis of Skanska Rashleigh Weatherfoil, 2011-15

Company strategy

SPIE (formerly SPIE Matthew Hall)

Figure 83: Financial analysis of SPIE, 201115

Company strategy

SSE Contracting

Figure 84: Financial analysis of SSE Contracting, 201115

Company strategy

Forecast

Chapter summary

Market overview

Figure 85: Forecast M&E contracting output in Great Britain, 2016-20

Market segmentation

Figure 86: Forecast segmentation of M&E contracting in Great Britain, by type, 2016-20

Mechanical contracting

Overview

Figure 87: Forecast mechanical contracting output in Great Britain, 2016-20

Figure 88: Analysis of mechanical contracting output in Great Britain, by type of work, 2016-20

New construction work

Figure 89: Forecast segmentation of mechanical contracting output for new construction projects in Great Britain, by type, 2016-20

Repair & maintenance work

Figure 90: Forecast segmentation of mechanical contracting output for repair & maintenance activity in Great Britain, by type, 2016-20

Electrical contracting

Overview

Figure 91: Forecast electrical contracting output in Great Britain, 2016-20

Figure 92: Forecast analysis of electrical contracting output in Great Britain, by type of work, 2016-20

New construction work

Figure 93: Forecast segmentation of electrical contracting output for new construction projects in Great Britain, by type, 2016-20

Repair & maintenance work

Figure 94: Forecast segmentation of electrical engineering output for repair & maintenance activity in Great Britain, by type, 2016-20

Further Sources and Contacts

Trade associations

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



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.
Trade magazines	
Trade exhibitions	

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