

Report

www.bsria.co.uk

World Heating 2007

United Kingdom - Radiators and Underfloor Heating

Report 50851/20
March 2008

A multi client study

Compiled by: Andrea Käfer

No. of pages: 32 of text

Quality Approved: *Johannes Fritsch*

This report must not be reproduced except in full without the written approval of an executive director of BSRIA. It is only intended to be used within the context described in the text.

BSRIA Limited

Old Bracknell Lane West, Bracknell, Berkshire RG12 7AH UK

T: +44 (0)1344 465600 **F:** +44 (0)1344 465626

E: bsria@bsria.co.uk **W:** www.bsria.co.uk

CONTENTS

1	MARKET BACKGROUND OVERVIEW	1
1.1	Economy and construction.....	1
1.1.1	Population and climate	2
1.1.2	Economy.....	2
1.1.3	Construction.....	3
1.1.4	New house building.....	3
1.1.5	Energy supply	5
1.2	Heating park.....	5
1.3	Local heating practices	6
2	MARKET SIZE AND SEGMENTATION	7
2.1	Market size.....	7
2.2	Technical segmentation by type of radiator.....	8
2.2.1	Steel radiators	8
2.2.2	Steel panel radiators	8
2.2.3	Towel warmer radiators.....	9
2.2.4	Cast iron radiators	10
2.2.5	Aluminium radiators	10
2.2.6	Low surface radiators.....	10
2.3	Underfloor heating	10
3	MARKET DRIVERS AND TRENDS	14
3.1	Market drivers.....	14
3.1.1	Refurbishment sector.....	14
3.1.2	New housing	15
3.1.3	Building regulations	16
3.1.4	Energy performance of buildings directive	17
3.1.5	Code for sustainable homes	17
3.1.6	Renewable technologies	18
3.2	Market trends	18
3.2.1	Forecast assumptions.....	18
4	RADIATORS STRATEGIC OVERVIEW	22
4.1	Macro-environmental analysis	22
4.2	Market attractiveness.....	23
5	STRUCTURE OF SUPPLY	26
5.1	Radiators.....	26
5.1.1	Steel panel radiators	26
5.1.2	Towel warmer radiators.....	26
5.1.3	Comments on suppliers	27
5.2	Underfloor heating	28
5.2.1	Comments on suppliers	29
6	DOMESTIC VERSUS OVERSEAS TRADE	30
6.1	Imports and exports	30
7	DISTRIBUTION AND END USER SECTOR.....	31
7.1	Distribution of radiators and underfloor heating.....	31
7.2	End user sector	32

TABLES

Table 1.1	Background data economy and construction, 2004-2008	1
Table 1.2	The housing park by type of heating product, 2007.....	5
Table 2.1	Volume and value of the radiators and underfloor heating market, 2006 and 2007	7
Table 2.2	Steel radiator market, volume, 2006 and 2007	8
Table 2.3	Steel panel radiator market by panel type, volume, 2006 and 2007	8
Table 2.4	Steel panel radiator market by type, volume, 2006 and 2007.....	9
Table 2.5	Towel warmer radiator market, volume, 2006 and 2007	9
Table 2.6	Underfloor heating market, volume, 2006 and 2007	11
Table 2.7	Underfloor heating market by type of pipe material, volume, 2006 and 2007	11
Table 2.8	Underfloor heating market by pipe diameter, volume, 2006 and 2007.....	12
Table 2.9	Underfloor heating market by radiator equivalent, volume, 2006.....	12
Table 2.10	Underfloor heating market by radiator equivalent, volume, 2007	13
Table 3.1	Radiator and underfloor heating market historical trends, volume ('000 units), 2002 – 2006	19
Table 3.2	Radiator and underfloor heating market forecast, volume ('000 units), 2005 – 2010	20
Table 4.1	PESTLE analysis of the United Kingdom heating products market.....	22
Table 4.2	Competitive forces analysis.....	24
Table 4.3	Market attractiveness matrix by product type	25
Table 5.1	Market shares for steel panel radiators, 2006 and 2007	26
Table 5.2	Market shares for hydronic towel warmer radiators, 2006 and 2007.....	27
Table 5.3	Market shares for underfloor heating, volume (million metres), 2006 and 2007	28
Table 6.1	Overseas trade, volume ('000 units), 2006.....	30
Table 7.1	First point of distribution for manufacturers/importers, 2007	31
Table 7.2	Distribution pattern for radiators,% by volume, 2006	32
Table 7.3	Radiators and underfloor heating market by end user sector, 2007	32

FIGURES

Figure 1.1	Map of the United Kingdom	1
Figure 2.1	Radiator and underfloor heating sales by type, value € %, 2007	7
Figure 2.2	Underfloor heating market by type of pipe material, volume, 2007.....	11
Figure 3.1	Radiator market forecast, volume ('000 units), 2006-2011	20
Figure 3.2	Underfloor market forecast, volume, 2006-2011	21
Figure 4.1	PESTLE analysis of the United Kingdom heating products market.....	22
Figure 4.2	Competitive forces analysis	23
Figure 5.1	Market shares for steel panel radiators, 2007.....	26
Figure 5.2	Market shares for hydronic towel warmer radiators, 2007	27
Figure 5.3	Market shares for underfloor heating, volume ('000 metres), 2007	29
Figure 7.1	First point of distribution, radiators and underfloor heating, 2005.....	31
Figure 7.2	Sales of radiators and underfloor heating by end user sector, 2007	32