



**Electric Underfloor
Heating Market
Research & Analysis
*UK 2011***

REPORT SAMPLE

**UK Electric Underfloor Heating Market Size & Industry Review 2005-2011; SWOT
& PEST Analysis, Product Mix & Key Trends 2005-2015; Manufacturer &
Distributor Profiles & Key Financials; Market Forecasts to 2015**

3rd Edition

December 2011

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This report reflects MTW Research's independent view of the market which may differ from other third party views. Whilst we try to ensure that our reports are an accurate depiction of their respective markets, it must be emphasised that the figures and comment contained therein are estimates based on a mix of primary and secondary research, and should therefore be treated as such.

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In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

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 and influences and future prospects for the market. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns 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 used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients 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 over a ten-year period. As they are based on quantitative data as well as 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 Mix – Current & Future**

This report identifies the key product sectors 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.

- **Industry Structure Analysis**

The report identifies the key characteristics of the structure of the industry, analysed by turnover bands, credit rating, and performance over the last 12 months, age of companies, employee bands and geographical share by UK region. This analysis enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. 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.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page company profile including contact details for developing fast sales leads; 4 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, enabling the reader to quickly gauge the current and historical financial health of a competitor or potential client.

- **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. UK ELECTRIC UNDERFLOOR HEATING MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK electric underfloor heating market is currently valued at just over £xx million in 2011 at manufacturers selling prices, xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx in terms of overall sales performance in 2011 following a xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx 2010 as some xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx growth was evidenced in the xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx sector. More recently, xxxxxxxx xxxxxxxx activity has xxxxxxxx xxxxxxxx and the xxx of xxxxxxxx xxxxxxxx activity is increasingly representing a key xxxxxxxx to the overall electric underfloor heating market. This trend is likely to continue for the xxxxxxxx of xxxxxxxx , prompting some xxxxxxxx term xxxxxxxx in the market overall.

During 2010, indications are that xxxxxxxx xxxxxxxx xxxxxxxx some extent, though this trend is indicated to have reversed to some extent in 2011 as xxxxxxxx xxxxxxxx xxxxxxxx . As such, xxxxxxxx xxxxxxxx is likely to remain a key xxxxxxxx xxxxxxxx of market growth in the low-mid market value sectors. In general terms, however, indications are that xxxxxxxx xxxxxxxx are slowly xxxxxxxx toward a xxxxxxxx xxxxxxxx product which offers xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx end user as well as providing xxxxxxxx xxxxxxxx xxxxxxxx . The growing ability for manufacturers to xxxxxxxx xxxxxxxx product portfolio should offer xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx for both volume & value xxxxxxxx xxxxxxxx and xxxxxxxx the market in the medium term.

Given a xxxxxxxx xxxxxxxx of xxxxxxxx for the UK economy and construction industry, our forecasts are for xxxxxxxx xxxxxxxx in 2012, followed by a xxxxxxxx xxxxxxxx from 2013 onwards. The xxxxxxxx of the economy and xxxxxxxx xxxxxxxx xxxxxxxx in the near term is likely to be

2.2 ELECTRIC UNDERFLOOR HEATING MARKET SIZE & TRENDS 2005-2015

2.2.1 Electric Underfloor Heating Market Size 2005-2015 – Current Prices

The UK electric underfloor heating market encompasses a relatively wide range of products and is estimated to be worth just over £xx million in 2011 as illustrated in the following chart:-

Figure 1: Electric Underfloor Heating Market – UK 2005 - 2015 By Value £m

REPORT SAMPLE

Source: MTW Research / Trade Estimates

The UK electric underfloor heating market is currently

2.2.2 Electric Underfloor Heating Market Size 2005-2015 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2005, with forecasts to 2015:-

Figure 2: Electric Underfloor Heating Market – UK 2005 - 2015 Constant Prices £M

REPORT SAMPLE

Source: MTW Research / Trade Estimates

As illustrated, based on constant prices, the electric underfloor heating market has

2.2.3 Electric Underfloor Heating Market Size by Volume 2005-2015

The following chart illustrates the number of installations of electric underfloor heating in the UK from 2005 – 2010 with estimates to 2015.

Figure 3: Electric Underfloor Heating Market – No. of installations 2005 - 2015

REPORT SAMPLE

Source: MTW Research / Trade Estimates

As the above chart illustrates, based on average size installations, it is estimated that there are currently around xxxx installations of electric underfloor heating in the UK in 2011, with the market having xxxxxxxx in size by volume since 2005.

Current estimates are that there are approximately xxxxx electric UFH installations undertaken in the UK, with this having

2.3 KEY MARKET TRENDS IN THE ELECTRIC UNDERFLOOR HEATING MARKET

2.3.1 PEST Analysis – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence the UK electric underfloor heating market. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

2.4 SWOT ANALYSIS – Strengths, Weaknesses, Opportunities, Threats

Following a strategic review of the UK electric underfloor heating market, the following table identifies some of the key strengths & weaknesses evident in the market at present:-

Figure 10: Key Strengths & Weaknesses in the Electric Underfloor Heating Market 2011-2015

STRENGTHS	WEAKNESSES
REPORT SAMPLE	REPORT SAMPLE

Source: MTW Research Strategic Review 2011

Key opportunities and threats evident in the market at present include:-

Figure 11: Key Opportunitites & Threats in the electric underfloor heating Market 2011-2015

OPPORTUNITIES	THREATS

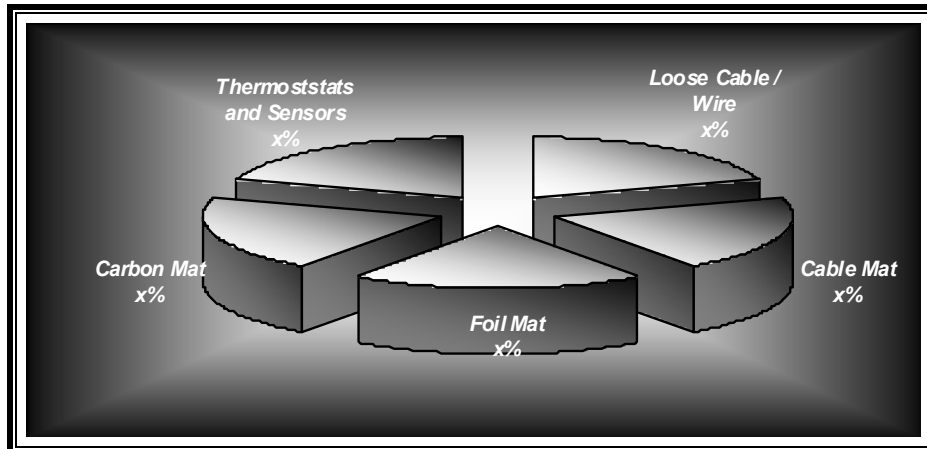
Source: MTW Research Strategic Review 2011

3. PRODUCT TRENDS & SHARES

3.1 Share by Key Product Sector – 2011, 2005 & 2015

The share accounted for by each of the key product sectors within the UK electric underfloor heating market in 2011 is illustrated in the following chart:-

Figure 12: Share by Product in Electric Underfloor Heating Market 2011



Source: MTW Research / Trade Sources

As the above chart illustrates, the UK electric underfloor heating market comprises a range of product sectors with a variety of uses. The largest sector of the market is accounted for by

In order to illustrate historical trends, the following chart illustrates the share by key product sector in 2005:-

Figure 13: Share by Product in Electric Underfloor Heating Market 2005

4. ELECTRIC UNDERFLOOR HEATING DISTRIBUTION

4.1 UK Electric Underfloor Heating Distribution Structure

There are a wide number of routes to market employed by the electric UFH industry, with the levels of activity depending on the application, specifier and installer. The following chart illustrates the key channels active in the electric underfloor heating market in 2011.

4.2 UK Electric Underfloor Heating Distribution Channel Share

The following chart illustrates our estimates of the mix by key distribution channels within the UK electric underfloor heating market in 2011:-

Figure 20: Electric Underfloor Heating Market Share by Key Distribution Channels 2011

Source: MTW Research / Trade Sources

As illustrated DIY and Hardware Stores are currently estimated to account for x% of the total UK electric underfloor heating market in 2011, This channel experienced

In order to provide a historical context, the 2005 share for each of the key channels is illustrated in the following chart:-

Figure 21: Electric Underfloor Heating Market 2005 Share by Key Distribution Channels

Source: MTW Research / Trade Sources

5. ELECTRIC UNDERFLOOR HEATING SUPPLIER PROFILES

The following section identifies some of the key UK electric underfloor heating suppliers and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

5.1 Electric Underfloor Heating Supplier Profiles and KPIs

Sample Limited - Company Overview & 'At a Glance'

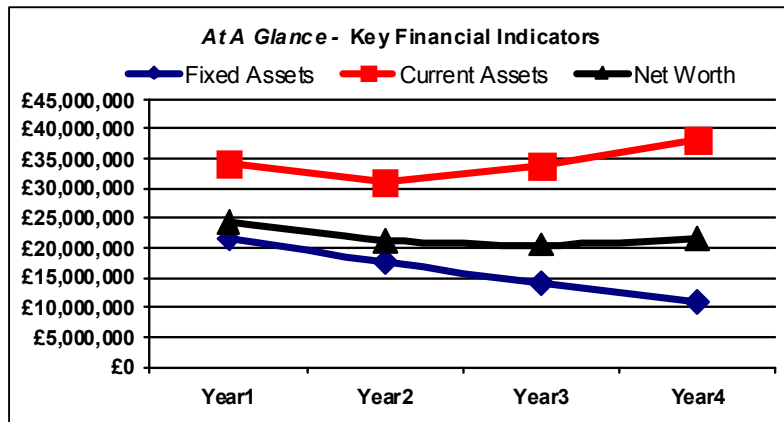
Sample Industrial Estate

Sample

Sample

Tel: Sample

Sample Limited is a private limited with share capital company, incorporated on March 23, 1960. The company's main activities are recorded by Companies House as "Manufacture and marketing of heating appliances." In 2011, the company has an estimated 300-320 employees.



To year end December 2010, Sample Limited is estimated to have achieved a turnover of around £72 million. Pre-tax profit for the same period is estimated at around £2.20 million. The following table briefly provides a top line overview on Sample Limited:-

Company Name	Sample Limited
Brief Description of Activities	Manufacture and marketing of heating appliances.
Parent Company	
Ultimate Holding Company	
Estimated Number of Employees	300-320
Senior Decision Maker / Director	Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Limited - 4 Year KPIs to Year End 31-Dec-10

Key Indicator £	Year End 31-Dec-07 (Year1)	Year End 31-Dec-08 (Year2)	Year End 31-Dec-09 (Year3)	Year End 31-Dec-10 (Year4)
Fixed Assets	£21,483,000	£17,631,000	£14,230,000	£10,935,000
Current Assets	£34,238,000	£31,149,000	£33,900,000	£38,309,000
Current Liabilities	£27,398,000	£24,029,000	£23,244,000	£25,148,000
Long Term Liabilities	£1,656,000	£2,126,000	£3,871,000	£2,379,000
Net Worth	£24,495,000	£21,317,000	£20,574,000	£21,709,000
Working Capital	£6,840,000	£7,120,000	£10,656,000	£13,161,000
Profit per Employee				
Sales per Employee	£8,138.11	-£7,484.85	£3,972.56	£7,015.92

6.ELECTRIC UFH INDUSTRY TRENDS 2005-2015

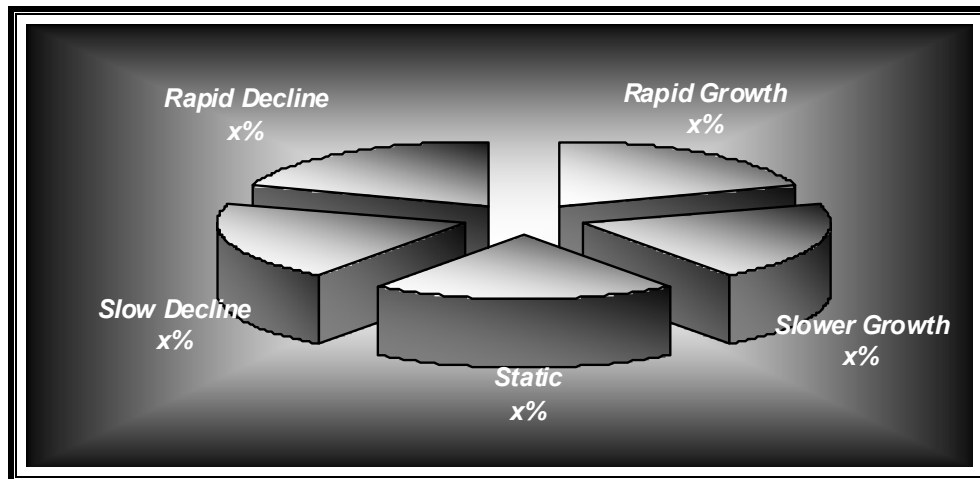
6.1 Electric Underfloor Heating Suppliers Market – Industry Structure

The following section reviews the UK electric underfloor heating industry in 2011 in terms of industry structure based on industry financial sales data and provides key performance indicators for the UK electric underfloor heating market.

6.1.1 Growth/Decline Over Last 12 Months

The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last 12 months:-

Figure 71: Share by Electric UFH Suppliers Sales Growth / Decline 2010-2011



Source: MTW Research / Company Accounts

Indications are that whilst the market returned to

6.1.2 Industry Share by Credit Rating in 2011

Credit ratings also provide a crucial indicator as to an organisation's performance and underlying health. When combined with other companies and viewed on an industry wide basis, credit ratings also offer an effective insight into the fundamentals of a market. The following chart illustrates the share accounted for electric underfloor heating suppliers in terms of credit rating in December 2011:-

6.2 Key Market Trends in the Electric Underfloor Heating Industry 2005-2015

The following section reviews some of the key trends in terms of financial performance of the UK electric underfloor heating market since 2005, and forecasts to 2015.

6.2.1 Electric UFH Suppliers Profitability 2005-2015

The following table illustrates the performance of the electric underfloor heating market in terms of profitability between 2005 and 2011 and provides forecasts to 2015:-

Figure 77: Electric UFH Market Profitability 2005 – 2015 £M

Source: MTW Research / Trade Estimates

Profitability levels in the electric underfloor heating market peaked in

6.2.2 Electric UFH Industry Assets 2005-2015

The following table illustrates the electric underfloor heating market in terms of current and fixed assets between 2005 and 2011 and forecasts to 2015:-

Figure 78: Electric UFH Industry Assets 2005 – 2015 £M

Source: MTW Research / Trade Estimates

The above chart illustrates that the combined levels of assets owned by the electric underfloor heating industry has

6.3 Electric Underfloor Heating Suppliers Ranking & Turnover Estimates

6.3.1 Electric Underfloor Heating Suppliers Listing

The following identifies key market players active at present: -

Figure 85: Electric Underfloor Heating Suppliers Company Listing

Allbrite (UK) Limited	Ipecc Systems Limited
Ambient Electrical Limited	Living Heat Limited
Birbek Floors Limited	Living Heat Limited
C.J. Electrical (Ipswich) Limited	Marmox (UK) Ltd
Chromalox (UK) Limited	OJ Electronics Limited
Continental UFH Ltd	Pederson Limited
Cozyheat Ltd	Rayotec Limited
D.K. Heating Limited	Rettig (UK) Limited
Danfoss Limited	Speedheat U.K. Limited
Discount Floor Heating Limited	Step Warmfloor UK Limited
Discount Floor Heating Limited	The Floor Warming Company Limited
Eswa Limited	The Underfloor Heating Company
Flexel International Limited	Thermal Reflections Limited
Flexelec (UK) Limited	Timeguard Limited
Floor Heating Limited	Timoleon Limited
Floor Heating Systems Limited	UFH Services Limited
Glen Dimplex Home Appliances Limited	UK Underfloor Heating Ltd
Global Trace Heating Limited	Underfloor Heating Controls Limited
Heatmat Limited	Underfloor Heating Merchants Limited
Heatmiser UK Limited	Underfloor Heating Now Limited
Honeywell Limited	Underfloor Heating Systems Limited
Hot Floors UK Limited	Warmafloor (GB) Limited
Hypocaust Limited	Warmfloor Solutions Ltd
Invisible Heating Systems Limited	Warmup Plc

Source: MTW Research / Trade Sources

The following section ranks the companies identified above by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio as well as being active in sectors outside of the scope of definition for this report.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose

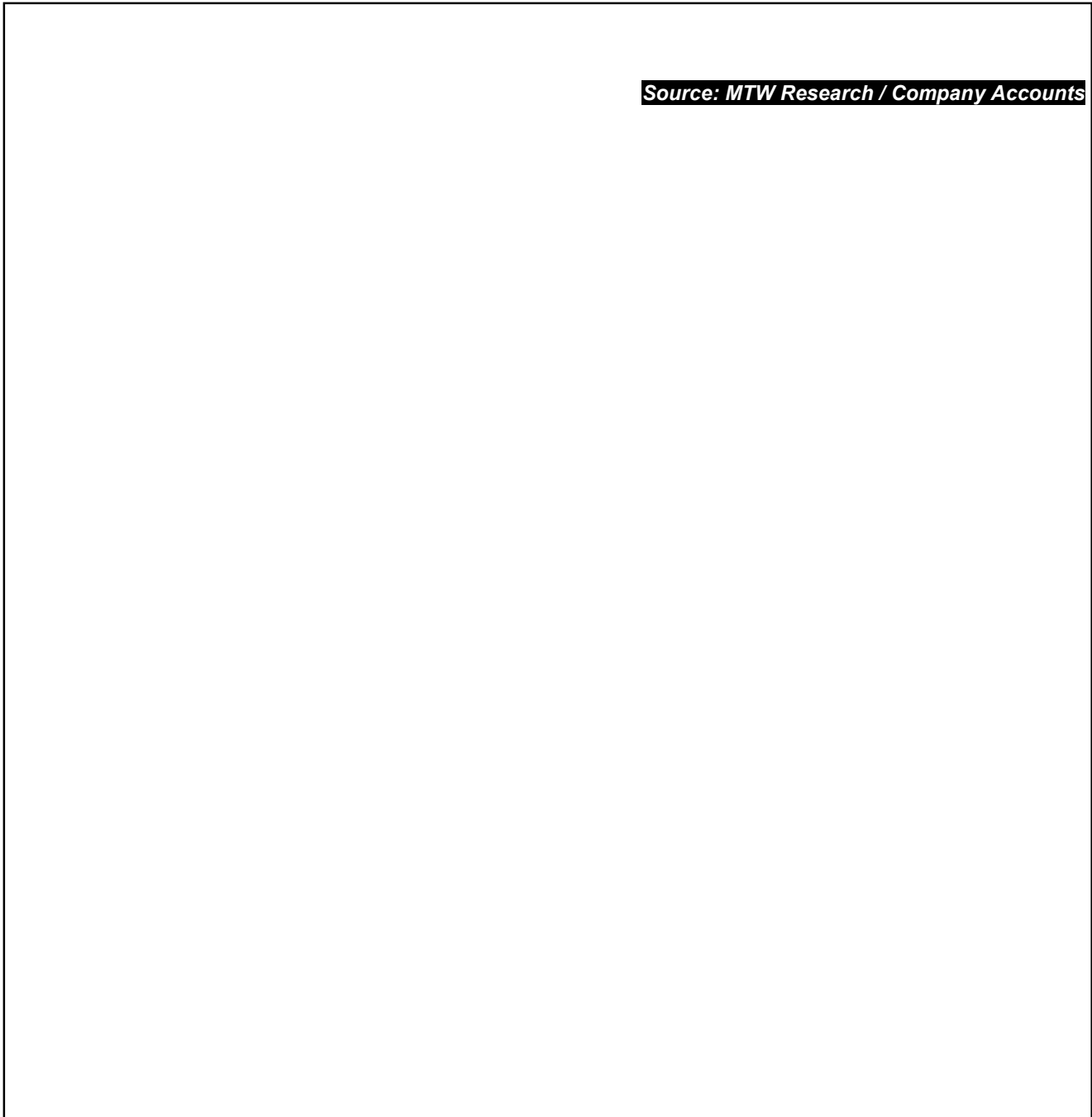
turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we seek to attain high levels of accuracy, it should be borne in mind that the rankings and other information provided within this report may contain an element of estimation. In addition, whilst we endeavour to ensure that the majority of the major companies active in the market with which this report is concerned are included, it should be noted that the list of companies included in this report is not exhaustive and the inclusion or otherwise of a company does not necessarily indicate, nor should be interpreted as, a company's relevance or otherwise in the market.

6.3.2 Electric Underfloor Heating Suppliers Ranking By Turnover

The table illustrates our estimates of the turnover rank for each company:-

Figure 86: Electric Underfloor Heating Suppliers Ranked By Turnover 2010



6.3.3 Electric Underfloor Heating Suppliers Turnover Estimates 2010

The following table illustrates the estimated turnover for each company for 2010:-

Figure 87: Electric Underfloor Heating Suppliers Sales Estimates 2010 £M

Trading Name	2010 turnover (£M)	Trading Name	2010 turnover (£M)
Source: MTW Research / Company Accounts			

6.3.4 Electric Underfloor Heating Suppliers Ranking by Profitability

The following table illustrates the profit ranking for each supplier in 2010: -