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Green Deal & ECO Products Market *Research & Analysis UK 2014*

REPORT SAMPLE

Green Deal & Energy Company Obligations Statistics & Product Sales, Energy Efficient Building Products Market Size & Trends 2008-2018; Product Mix 2008-2018; Forecast Product Sales, Green Deal Financing & Processes

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Estimates Provided

In order to enable benchmarking, marketing analysis and strategic decision making, this report provides our estimates of the market size by value for key product sectors influenced by Government energy efficiency schemes as well as total Eco building products market sizes Whilst we endeavour to attain high levels of accuracy with these estimates and ensure our methodology is as robust as possible in terms of both qualitative and quantitative information, they should nevertheless be treated with a degree of caution.

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1. Introduction & Overview of ECO & Green Deal Market

1.1 Summary of Green Deal & ECO Measures Market 2014-2018

1.1.1 Green Deal Explanation, Definition & Background

The Green Deal was introduced by the current coalition Government as a means of reducing UK carbon emissions in domestic environments in order to meet international carbon reduction obligations. The measure was given a 'soft' launch in October 2012 and officially launched in January 2013 with loans becoming available on the 28th January 2013.

The Green Deal enables homeowners to benefit from energy efficient improvements to their homes through the use of a loan which is repaid through energy bills and is transferred to the property, rather than the homeowner. The 'Golden Rule' aspired to by the Department of Energy and Climate Change (DECC) of the Green Deal is that savings on energy bills must outweigh the cost of repayments.

A full description of the Green Deal process is discussed later in this report, though principally it involves xxxxxx xxx x xxxxx; a x xxxxx plan proposing x xxxxx measures (identified in section 3.3) and x xxxxx; a **'xxxxx** x xxxxx plan which is x xxxxx signed by the x xxxxx; and finally x xxxxx plan whereby the x xxxxx are x xxxxx and x xxxxx of x xxxxx via x xxxxx x xxxxx is enacted.

x xxxxx for the Green Deal x xxxxx than was x xxxxx x xxxxx, x xxxxx assessments x xxxxx launch x xxxxx of the scheme. Reasons for this vary, though sources indicate that x xxxxx x xxxxx x xxxxx x xxxxx x xxxxx, coupled with a x xxxxx x xxxxx x xxxxx of around 7% currently represent the most x xxxxx x xxxxx x xxxxx growth, alongside some x xxxxx x xxxxx x xxxxx of a property x xxxxx x xxxxx x xxxxx. In addition, public x xxxxx x xxxxx x xxxxx Green Deal is x xxxxx x xxxxx x xxxxx very x xxxxx x xxxxx at the x xxxxx of the scheme, x xxxxx x xxxxx x xxxxx x xxxxx x xxxxx through increasing levels of x xxxxx x xxxxx x xxxxx Green Deal plan providers and x xxxxx as well as some x xxxxx x xxxxx increasing marketing x xxxxx x xxxxx in this x xxxxx.

Since January 2013, assessments have x xxxxx x xxxxx x xxxxx actual measures implemented have exhibited x xxxxx x xxxxx performance. During 2013, around x,000 Green Deal assessments were undertaken. In February 2014, current levels x xxxxx around x xxxxx assessments per month, with this likely to x xxxxx by x xxxxx % per month. To the end of 2014, our forecasts suggest that around x xxxxx Green Deal assessments will be undertaken each month.

The Government has x xxxxx x xxxxx x xxxxx will be x xxxxx from stamp duty for those purchasing a x xxxxx x xxxxx energy efficiency improvements and £4,000 will be made available x xxxxx x xxxxx particularly expensive energy x xxxxx, which may provide some future stimulus for Green Deals.

In terms of actual Green Deal plans implemented x xxxxx x xxxxx x xxxxx x xxxxx 2013, underlining x xxxxx x xxxxx x xxxxx x xxxxx scheme. In June

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2013, x xxxxx x xxxxx x xxxxx measures were installed x xxxxx x xxxxx x xxxxx installed in July. Following an increasing x xxxxx x xxxxx x xxxxx activity and rising x xxxxx x xxxxx, x xxxxx x xxxxx x xxxxx x xxxxx in August, x xxxxx in September and x xxxxx x xxxxx in October – representing almost a xxx% increase in 1 month. Our estimates are that to year end December 2013, a total of x xxxxx Green Deal measures were installed, reflecting a rapidly increasing market – x xxxxx x xxxxx x xxxxx x xxxxx x xxxxx.

1.1.2 Energy Companies Obligation Explanation (ECO), Definition & Background

The Energy Companies Obligation (ECO) supersedes the Community Energy Savings Programme (CESP) and Carbon Emission Reductions Target (CERT) which were implemented in 2008 and 2009 and ran until the end of 2012.

The CESP, CERT and ECO schemes all have a fundamental principle in that larger providers of energy have an obligation to assist in improving the energy efficiency of UK homes in order to reduce carbon emissions to meet international obligations in order to address climate change.

ECO was introduced in January 2013 and is more focused on targeting harder to treat homes and more vulnerable householders or lower income households. There are three primary obligations in the ECO, specifically these are:-

- **x xxxxx x xxxxx x xxxxx x xxxxx** – focus on x xxxxx x xxxxx x xxxxx
- **x xxxxx x xxxxx** – focus on x xxxxx x xxxxx x xxxxx x xxxxx, 15% of which must be for x xxxxx x xxxxx x xxxxx x xxxxx areas.
- **x xxxxx x xxxxx Obligation** – improve ability of x xxxxx (The "x xxxxx Group") to heat their homes by x xxxxx x xxxxx x xxxxx.

The ECO scheme has a notional target of reducing household's lifetime space and water heating costs by x xxxxx. The targets are to reduce CO2 emissions by x xxxxx through the x xxxxx obligation and a further x xxxxx through the x xxxxx. The cost to energy providers of meeting these targets is estimated at £x billion per annum to 2022. In the near term, spending of £x billion for the x xxxxx and a further £x million for the x xxxxx obligations to March 2015 is required.

The ECO scheme provides x xxxxx, x xxxxx and a number of other measures (identified in section 4.3 of this report) to consumers living in x xxxxx x xxxxx covers a x xxxxx x xxxxx x xxxxx and x xxxxx households such as the x xxxxx, x xxxxx and l x xxxxx x xxxxx. The amount of subsidy provided to each consumer is x xxxxx x xxxxx x xxxxx x xxxxx x xxxxx, depending x xxxxx and x xxxxx x xxxxx Green Deal plans x xxxxx.

The following chart illustrates how the energy providers' expenditure on the 3 key ECO schemes are split:-

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Figure 1: ECO Scheme Expenditure Share by Key Obligation to 2015

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3. Green Deal Market Statistics & Product Sales

3.1 The Green Deal Process

The Green Deal was introduced to support the xxx xxxxxx x 2008 which reduces xxx xxxxxx x xxx xxxxxx x by x% by 2020 and x0% by 2050. With xxx xxxxxx x xxx xxxxxx x producing almost x% of greenhouse gases, the Green Deal and ECO schemes represent key tools to achieve these targets.

There are principally xxxx elements of the Green Deal process, ranging from xxx xxxxxx x xxx xxxxxx x, drawing up xxx xxxxxx x xxx xxxxxx x and establishing a feasible xxx xxxxxx x xxx xxxxxx x; the xxx xxxxxx x and finally the xxx xxxxxx x process.

The following illustrates in more detail the Green Deal Process:-

1. xxx xxxxxx x **Stage**

- xxx xxxxxx x requests a xxx xxxxxx x from an xxx xxxxxx x xxx xxxxxx x, xxx xxxxxx x or xxx xxxxxx x.

xxx xxxxxx x xxx xxxxxx

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3.2 Key Products Included in Green Deal 2014

There are a wide range of product sectors which are or may be potentially influenced by the continued growth in Green Deals in 2014 and beyond. The following is a list of current product sectors which are or may exhibit sales growth as a result of the Green Deal:-

3.4 Green Deal & ECO Market Size by Value Current Prices 2008-2018 £M

Whilst there are a wide range of qualifying measures for Green Deal and ECO, there are several sectors which account for the majority of the market value in 2014. For the purposes of this report, the "Green Deal & ECO Products Market" is defined as consisting of the following key product sectors:-

- **Insulation** – cavity wall, loft / rafter, solid wall, flat roof
- **Glazing** – replacement entrance doors, windows, patio doors
- **Space & Water Heating** – boilers, controls, ground/air source heat pumps, solar water heaters, small scale CHP,
- **Microgeneration** – Solar Photovoltaic Panels, Inverters, cabling etc
- **Lighting** – LEDs, CFLs, other lighting

The market is also defined as being driven by one of the following four schemes between 2008-2014:-

- **Energy Companies Obligation** (ECO) 2013 - present
- **The Green Deal**– 2013 onwards - present
- **Community Energy Saving Programme** (CESP) 2009-2012
- **Carbon Emissions Reduction Target** (CERT) 2008-2012

This report provides a market value estimate for each of the products within the above key sectors between 2008 and 2014, with forecasts of market size to 2018. All market values are expressed at manufacturers selling prices and exclude any administration / labour / installation costs, delivery costs, VAT and other applicable import taxes or other charges.

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The following chart illustrates the total Green Deal and ECO products market value since 2008, with forecasts to 2018:-

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4. Energy Companies Obligation Market (ECO) & Products

4.1 Definition of Energy Companies Obligation (ECO) & Background Information

The Energy Companies Obligation (ECO) was introduced in Great Britain in January 2013 and replaces the two earlier scheme of CERT (Carbon Emissions Reduction Target) and CESP (Community Energy Savings Programme).

Similar in nature to the scheme's forerunners, ECO places a legal obligation on

4.2 Key Product Sectors & Qualifying Measures Included in ECO

There are a wide range of key product sectors and measures which are included in ECO, as follows:-

- xxx xxxxxx x
- xxx xxxxxx x
- xxx xxxxxx x
- xxx xxxxxx x
- xxx xxxxxx x

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4.4 ECO Products Market Size by Value 2008-2018 £M

The following chart illustrates the total ECO products market value since 2008, with forecasts to 2018:-

Figure 15: UK ECO Product Sales 2008-2018 by Value £M

Sample

Source: MTW Research / HM Government

Sales of products stimulated by the Green Deal are currently valued at x% of the market value so xxx xxxxxx x xxx xxxxxx x xxx xxxxxx x overall market in 2014. xxx xxxxxx x

The changeover from CERT/CESP to ECO has inevitably had

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4.5 ECO Measures Installed by Product Type

The following chart illustrates the share by product type for all ECO measures installed in 2013:-

Figure 16: Green Deal Measures Installed Share by Product Type 2013

Sample

Source: MTW Research / Government Statistics

As illustrated, xxxx continues to dominate the market in terms of ECO measures accounting with x and x xxxx xxxxxxx accounting for x% of the sector in 2013 reflecting more than xxx,000 measures installed. xxxxxxxx accounted for around xxx measures in 2013.

Boiler repairs and replacements are

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5. UK Building Products Market Sales 2014-2018

The following section provides our estimates of the **total market** sizes 2008-2018 and shares for a range of key building products which are also influenced by the Energy Companies Obligation or Green Deal to some extent.

Market size by value between 2008 and 2014 with forecasts to 2018 are provided in this section for:-

UK Building Insulation Market

- UK Market size for **building insulation** 2008-2018
- UK Market Size for **OEM/industrial insulation** Market 2008-2018

UK Lighting Market

- UK **lighting** market size 2008-2014
- Market size for **lamps** 2014 – domestic & non-domestic
- Market size for **luminaires** 2014 – domestic & non-domestic

UK Domestic Space & Water Heating Market

- UK Market size for **boilers** 2008-2018
- UK Market size for **ground source heat pumps** 2008-2018
- UK Market size for **air source heat pumps** 2008-2018
- UK Market size for **heating controls** 2008-2018
- UK Market size for **radiators** 2008-2018
- UK Market size for **underfloor heating** (wet & electric) 2008-2018
- UK Market size for **water heaters** 2008-2018
- UK Market size for **space heaters** 2008-2018

UK Domestic Microgeneration Market

- UK Market size for domestic **photovoltaic** market 2008-2018
- Market size for all other domestic **microgeneration** market 2008-2018

UK Doors & Windows Market

- Market size for domestic **entrance doors** (new & replacement) 2008-18
- Market size for domestic **windows** (new & replacement) 2008-2018
- UK Market size for **patio doors** 2008-2018

Methodology employed to quantify the above market sizes included input from a wide range of sources and research including primary data from manufacturers; distributors & other sources; other MTW research reports; MTW's robust forecast models; analysis of key player's financials / balance sheets; Government statistics; HMRC; credit reference agencies; trade magazines; company websites and industry commentators; as well as our extensive knowledge in these sectors from more than 14 years of researching these markets.

Unless otherwise stated, market sizes are provided at manufacturer's selling prices at current price terms and exclude any labour / installation, delivery costs, import costs and VAT or any other applicable tax or charges.

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6.1 UK Insulation Market Sales 2008-2018

6.1.1 Insulation Statistics - Market Sales Value 2008-2018

The following chart illustrates our estimates of the market size for insulation between 2008 and 2014, with forecasts to 2018:-