



**Rainwater Harvesting  
Market  
*Research & Analysis*  
*UK 2010***

**Rainwater Harvesting Market Size & Review 2004-2014; SWOT & PEST Analysis,  
Product Mix 2004-2014; End User Mix 2004-2014; Market Leaders Profiles & Key  
Financials; Market Forecasts to 2014**

**May 2010**

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Whilst we endeavour to attain high levels of accuracy, it should be borne in mind that the rankings and other information provided within this report contain an element of estimation, should be regarded as such and treated with a degree of caution.

#### **Estimates Provided**

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# 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, end use mix, SWOT, key trends and influences and industry structure trends. 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, Ansoff Matrix & 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.

- **End Use Sector Mix**

The report identifies the key channels that drive demand for this market and provide a current, historical & future market share estimate for each. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key channels also provided, 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 profile for each company including full contact details for developing fast sales leads; 3 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, enabling the reader to quickly gauge the current financial health of a company.

- **Relevant Companies, 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 RAINWATER HARVESTING MARKET

### 2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Rainwater Harvesting Market comprises of a range of products suitable for use within domestic and non-domestic applications. Specifically, this report reviews the UK rainwater harvesting market between 2004 and 2010 with forecasts to 2014 for:-

- **Rainwater Tanks** – below & above ground tanks (all materials), header tanks, excluding 'water butts'.
- **Filters** – downpipe, leaf separators & catchers, garden filters, tank filters (suction filters), industrial filters, calmed inlet etc.
- **Pumps & Controls** - Flow controllers, 'rain management systems' submersible pressure pumps etc.
- **Accessories** – Pipes, trapped overflow, tank level gauges, hose, UV sterilisation, solar panels etc.

Water butts are excluded from analysis in this report as per the standard industry approach.

The market is valued at 'Distributor Selling Prices' and we have sought to exclude any labour or ancillary costs as well as VAT and other applicable taxes, rebates, grants or other income not relating specifically to the sale of RWH products.

The report also provides market size by volume, roof area and value as well as illustrating key trends for domestic and non-domestic applications, defined as:-

- **Domestic Applications** – Self build; Domestic New Build (e.g by housebuilders), Installation in Existing Domestic Dwellings.
- **Non-Domestic Applications** – Education, Leisure, Retail, Public Sector, Warehouses / Industrial, Commercial etc.

Typical applications for rainwater harvesting (RWH) systems include toilet and urinal flushing, laundry, irrigation, vehicle washing and some process applications in the non-domestic sector. Domestic systems can be shared between 2 households and are typically used over 1-4 storeys.

This second edition report replaces our first review of the market, published in 2008, and remains the only 'off the shelf' report specifically reviewing the UK rainwater harvesting market. The methodology for this report included analysis of sales data from the industry coupled with primary research information from Government sources, manufacturers, contractors, and other trade sources. This was supported by secondary research from trade journals, company reports, Companies House, Government statistics, trade associations, company websites and existing knowledge in this sector.

## **2.2 RAINWATER HARVESTING MARKET SIZE & TRENDS 2004-2014**

### **2.2.1 Rainwater Harvesting Market Size 2004-2014 – Current Prices**

The UK rainwater harvesting market is estimated to be worth just over £xx million in 2010 as illustrated in the following chart:-

### **2.2.2 Rainwater Harvesting Market Size 2004-2014 – Constant Prices**

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2004, with forecasts to 2014:-

**Figure 2: Rainwater Harvesting Market – UK 2004 – 2014 Constant Prices £M**

**Source: MTW Research / Trade Estimates**

The above chart more clearly highlights the

### **2.2.3 Rainwater Harvesting Market by Volume 2004-2014**

The following chart illustrates our estimates of the performance of the rainwater harvesting market by number of installations between 2004 and 2009 and forecasts to 2014:-



#### **2.2.4 Rainwater Harvesting Market by Roof Area (M2) 2004-2014**

The following chart illustrates our estimates of the performance of the rainwater harvesting market by roof area between 2004 and 2009 and forecasts to 2014:-

## **2.2.5 Rainwater Harvesting Penetration Scenarios 2010-2020**

### 3. PRODUCT TRENDS & SHARES

#### 3.1 Share by Key Product Sector – 2010, 2004 & 2013

The share accounted for by each of the key sectors within the UK rainwater harvesting market in 2010 is illustrated in the following chart:-

**Figure 29: Key Product Shares in Rainwater Harvesting Market 2010**

**Source: MTW Research / Trade Estimates**

As the above chart illustrates, the UK rainwater harvesting market comprises of a range of product sectors with a variety of uses, including:-

- **Tanks** – Above & below ground tanks & water storage solutions
- **Accessories** – e.g. gutter mesh, gutter diverters, tank gauges, overflow outlets, tank vacuum system etc, connectors etc
- **Pumps & Controls** – single pump panels, dual pump panels, RWH management systems, submersible pumps, solar pumps, centrifugal / impeller, float switches, pressure pumps etc
- **Filters** – tank filters, in-line filters, downpipe filters & collectors, insect / pest screens & flaps / mesh, UV Filters, self cleaning filters etc.

In 2010, the largest segment of the market is

In order to illustrate historical trends, the following chart illustrates our estimates of the share by key product sector in 2004:-

**Figure 30: Rainwater Harvesting Product Mix by Value 2004**

**Source: MTW Research / Trade Sources**

As the chart illustrates, there has been

The following chart illustrates the forecast share for each key product sector within the rainwater harvesting market in 2014:-

**Figure 31: Forecast Share by Product in Rainwater Harvesting Market 2014**

**Source: MTW Research / Trade Sources**

Our forecasts suggest that

## 4. RAINWATER HARVESTING MANUFACTURER PROFILES

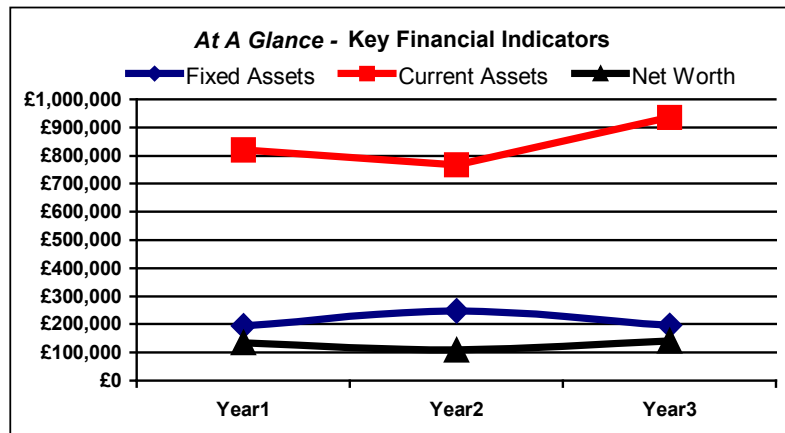
The following section identifies some of the key UK manufacturers & suppliers and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players in the market, inclusion or otherwise in the following section does not necessarily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

### 4.1 Rainwater Harvesting Manufacturers Profiles & KPIs

#### Sample Ltd - Company Overview & 'At a Glance'

Sample Address  
Sample  
Sample Postcode  
Tel: Sample

Sample Ltd is a private limited with share capital company, incorporated on June 23, 1999. The company's main activities are recorded by Companies House as "The manufacture and supply of waste and surface water treatment products.". In early 2010, the company has an estimated 20-30 employees.



To year end December 2009, Sample Ltd is estimated to have achieved a turnover of around £3 million. Pre-tax profit for the same period is estimated at around £0.12 million. The following table briefly provides a top line overview on Sample Ltd:-

<b>Company Name</b>	Sample Ltd
<b>Brief Description of Activities</b>	The manufacture and supply of waste and surface water treatment products.
<b>Parent Company</b>	Sample LIMITED
<b>Ultimate Holding Company</b>	Sample PLC
<b>Estimated Number of Employees</b>	20-30
<b>Senior Decision Maker / Director</b>	Sample

The following table illustrates the company's key performance indicators for the last 3 years:-

**Sample Ltd - 3 Year KPIs to Year End 25/03/2009**

Key Indicator £	Year End 31/03/2007 (Year1)	Year End 26/03/2008 (Year2)	Year End 25/03/2009 (Year3)
<b>Fixed Assets</b>	£195,000	£248,000	£196,000
<b>Current Assets</b>	£820,000	£767,000	£936,000
<b>Current Liabilities</b>	£866,000	£867,000	£976,000
<b>Long Term Liabilities</b>	£2,000	£28,000	£14,000
<b>Net Worth</b>	£134,000	£109,000	£142,000
<b>Working Capital</b>	£-46,000	£-100,000	£-40,000
<b>Profit per Employee</b>	£-3,091	£-1,080	£759
<b>Sales per Employee</b>	£119,182	£113,480	£111,586



## 5. END USE APPLICATION SHARE & TRENDS

### 5.1 Share by Domestic & Non-Domestic Applications in 2010

The UK rainwater harvesting market is comprised of systems designed for use within a wide range of buildings, both within the domestic and non-domestic sector. At present, the xxxxxxxx sector represents the majority share of sales, although sources indicate that given the size of the xxxxxxxx market, this could easily change in the future.

The share by value accounted for by the domestic and non-domestic end use markets in 2010 is illustrated in the following chart:-

**Figure 85: Share by Distribution Channel for Rainwater Harvesting Market 2010**

**Source: MTW Research / Trade Sources**

There are

### 5.2 Non-Domestic Rainwater Harvesting Market 2004-2014

The non-domestic rainwater harvesting market includes a wide range of key end use sectors with both the public and private sectors, including:-

- Infrastructure
- Factories
- Warehouses
- Coal / Oil / Steel
- Schools & Colleges
- Universities
- Health
- Offices
- Entertainment
- Garages
- Shops
- Agriculture

Whilst there is some growing activity in terms of installation of RWH systems in xxxxxxx, the majority of the market (estimated at around 90%) is reliant on xxxxxxxxxxx. To year end 2009, the total value of new orders for non-domestic construction activity stood at £x, as illustrated in the following chart:-

**Figure 86: Non-Domestic Construction Market - New Orders by Value 2004-2014**

**Source: ONS / MTW Research**

### **5.2.1 Non-Domestic Rainwater Harvesting Market by Value 2004-2014**

The following chart illustrates our estimates of the performance of the non-domestic rainwater harvesting market by value since 2004, with forecasts to 2014:-

**Figure 87: Non-Domestic Rainwater Harvesting Market by Value 2004-2014**

**Source: MTW Research / Trade Sources**

The chart illustrates the relatively

### **5.2.2 Non-Domestic Rainwater Harvesting Market by Volume 2004-2014**

In terms of volume, growth has also been rapid and substantial, as illustrated in the following chart:-

**Figure 88: Non-Domestic Rainwater Harvesting Market by Volume 2004-2014**



**Source: MTW Research / Trade Sources**

From a

### **5.2.3 Non-Domestic Market 2010 - Share by End Use Sector**

The following chart illustrates our estimates of how sales of non-domestic rainwater harvesting systems are segmented by the key end use sectors in 2010:-

**Figure 89: Share by Key End Use Sector in Non-Domestic RWH Market 2010**

**Source: MTW Research / Trade Estimates**

There are a number of

### **5.3 Domestic Rainwater Harvesting Market 2004-2014**

The domestic rainwater harvesting market includes new build and installations in existing houses sectors within both the public and private sectors, including:-

- Private Housebuilding Market
- Public Sector Housebuilding Market
- private Sector RMI (existing dwellings)
- Public Sector RMI (existing dwellings)

Similar to the non-domestic market, there have been some advances in product development in relation to products which are

In order to identify the market potential for domestic RWH systems, the following chart illustrates the typical mix in terms of applications for water per person, per day:-

**Figure 90: Typical Domestic Water Usage Per Person by Application 2010**

**Source: MTW Research / Trade Estimates / DEFRA**

As illustrated,

The performance of the new build sector also has a substantial impact on the domestic RWH market. The following chart illustrates how the private UK housebuilding market has performed since 2004, with forecasts to 2014:-

**Figure 91: UK Private Housebuilding Market by Volume 2004-2014**

**Source: MTW Research / Trade Estimates**

As illustrated, the private housebuilding sector

### **5.3.1 Domestic Rainwater Harvesting Market by Value 2004-2014**

The following chart illustrates our estimates of the performance of the domestic rainwater harvesting market by value since 2004, with forecasts to 2014:-

**Figure 93: Domestic Rainwater Harvesting Market by Value 2004-2014**

**Source: MTW Research / Trade Sources**

The market has

### **5.3.2 Domestic Rainwater Harvesting Market by Volume 2004-2014**

In terms of volume, growth has also been rapid and substantial, as illustrated in the following chart:-

**Figure 94: Domestic Rainwater Harvesting Market by Volume 2004-2014**

**Source: MTW Research / Trade Sources**

From a

**5.3.3 Domestic Market - Share by Private & Public New Build**

The following chart illustrates our estimates of how sales of domestic rainwater harvesting systems are segmented by the private and public sectors in 2010:-

**Figure 95: Share by Key End Use Sector in Domestic RWH Market 2010**

**Source: MTW Research / Trade Estimates**

As illustrated, private

## **5.2 Rainwater Harvesting Suppliers Market – Industry Structure**

The following section reviews the UK rainwater harvesting market in 2010 in terms of industry structure and provides key performance indicators for some of the key UK suppliers within the rainwater harvesting industry.

### **5.2.1 Market Mix by 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 96: Market Share by Rainwater Harvesting Supplier Sales Growth / Decline 2010**

**Source: MTW Research / Company Accounts**

For the preceding 12 months to April 2010, our estimates suggest that around

### **5.2.2 Industry Share by Credit Rating in 2010**

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 by rainwater harvesting suppliers in terms of credit rating in April 2010:-

**Figure 97: Market Share by Credit Rating in the Rainwater Harvesting Industry 2010**

**Source: MTW Research / Company Accounts**

Credit ratings are a crucial indicator of the financial health of a company and when combined, as in the above chart, provide a graphic illustration of the current financial health of the overall rainwater harvesting market at present.

As illustrated, just over