

## Mechanical and Electrical Engineering - UK - September 2017

Report Price: £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The M&E sector is now facing very different prospects, depending on the customer focus of the contractor. This is a direct consequence of the Brexit decision and the varied impact it has already demonstrated. There remain some very strong areas of demand, while others are faltering amid economic uncertainty”.

– Terry Leggett, Senior Analyst

This report looks at the following areas:

- How are M&E margins likely to change?
- How will Brexit impact the market?
- Are the best prospects in new construction or R&M?
- Which end-use sectors offer the best prospects?
- How will government spending restrictions change, and will these impact the market?

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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

# Mechanical and Electrical Engineering - UK - September 2017

Report Price: £995.00 | \$1288.43 | €1182.46

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, 2012-16 actual and 2017-21 forecast

Figure 2: Segmentation of M&E market in Great Britain, 2016

Figure 3: Segmentation of mechanical contracting market in Great Britain, 2016

Figure 4: Segmentation of electrical contracting market in Great Britain, 2016

#### Market factors

Figure 5: UK new construction output, by type, 2012-16 actual and 2017-21 forecast

Figure 6: UK R&M construction output, by type, 2012-16 actual and 2017-21 forecast

#### Companies

#### What we think

### Key Insights

How important to M&E is Brexit?

Why have M&E contractors diversified?

Are price pressure re-emerging in the M&E sector?

### Introduction

#### Definitions

#### Methodology

#### Abbreviations

#### Issues in the market

#### Market factors

#### Construction Industry

#### Legislation

#### Government initiatives

### UK Economy

#### Overview

Figure 7: Forecast GDP development 2017-21

Figure 8: UK GDP quarterly development, 2004-17

#### Inflation

#### House prices

Figure 9: UK House price changes, 2006-17

#### Interest rates

#### Consumer spending

#### Manufacturing

Figure 10: UK manufacturing, 2014-17

#### Business investment

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Mechanical and Electrical Engineering - UK - September 2017

Report Price: £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: UK GFCF 2003-17

Imports

Exports

## Market Size and Trends

Key points

Market size

Figure 12: M&E contracting output in Great Britain, 2012-16

Market segmentation and trends

Figure 13: Segmentation of M&E contracting in Great Britain, by type, 2012-16

Mechanical contracting

Figure 14: Mechanical contracting output in Great Britain, 2012-16

Figure 15: Analysis of mechanical contracting output in Great Britain, by type of work, 2012-16

Figure 16: Segmentation of mechanical contracting output for new construction projects in Great Britain, by type, 2012-16

Figure 17: Segmentation of mechanical contracting output for repair & maintenance projects in Great Britain, by type, 2012-16

Electrical contracting

Figure 18: Electrical contracting output in Great Britain, 2012-16

Figure 19: Analysis of electrical contracting output in Great Britain, by type of work, 2012-16

Figure 20: Segmentation of electrical contracting output for new construction projects in Great Britain, by type, 2012-16

Figure 21: Segmentation of electrical contracting output for repair & maintenance projects in Great Britain, by type, 2012-16

Seasonality of output

Figure 22: Seasonality of private housing output, 2012-16

Figure 23: Seasonality of public housing output, 2012-16

Figure 24: Seasonality of public non-residential construction output, 2012-16

Figure 25: Seasonality of private industrial construction output, 2012-16

Figure 26: Seasonality of private commercial construction output, 2012-16

Figure 27: Seasonality of public housing repair & maintenance output, 2012-16

Figure 28: Seasonality of private housing repair & maintenance output, 2012-16

Figure 29: Seasonality of public non-residential repair & maintenance output, 2012-16

Figure 30: Seasonality of private non-residential repair & maintenance output, 2012-16

Regional sales

Figure 31: Regional public housing construction output, 2012-16

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

Figure 33: Regional public non-residential construction output, 2012-16

Figure 34: Regional private industrial construction output, 2012-16

Figure 35: Regional private commercial construction output, 2012-16

Figure 36: Regional housing repair & maintenance output, 2012-16

Figure 37: Regional public non-residential repair & maintenance output, 2012-16

Figure 38: Regional private non-residential repair & maintenance output, 2012-16

## Construction Market Background

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Mechanical and Electrical Engineering - UK - September 2017

**Report Price:** £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Key points

### Housing

Figure 39: Housebuilding market in Great Britain, 2012-16

Figure 40: UK housebuilding completions, 1970-2016

### Public housing

Figure 41: Analysis of new public housing construction output in Great Britain, 2012-16

Figure 42: Public housing starts and completions in England, 2011-16

Figure 43: UK public sector housing completions, by sector, 1978-2016

Figure 44: Additional affordable homes provided in England, by tenure 2011-16

Figure 45: Forecast public housing output in Great Britain, 2017-21

### Private housing

Figure 46: Analysis of private housing construction output in Great Britain, 2012-16

Figure 47: Private new housing starts and completions in England, 2011-16

Figure 48: UK private sector housing completions, by sector, 1978-2016

Figure 49: Forecast private housing output in Great Britain, 2017-21

### Public non-residential

Figure 50: Long-term trend in public non-residential construction activity in Great Britain, 1970-2016

Figure 51: Analysis of public sector non-residential construction output in Great Britain, 2012-16

Figure 52: Analysis of public sector non-residential construction in Great Britain, by type, 2012-16

Figure 53: Forecast public non-residential construction output in Great Britain, 2017-21

Figure 54: Forecast of public non-residential construction in Great Britain, by type, 2017-21

### Private industrial

Figure 55: Long term trend in private industrial construction output in Great Britain, 1970-2016

Figure 56: Analysis of private industrial new construction work in Great Britain, by sector 2012-16

Figure 57: Forecast private industrial construction output in Great Britain, 2017-21

Figure 58: Forecast of private industrial new construction work in Great Britain, by sector 2017-21

### Private commercial

Figure 59: Long term trend in private commercial construction output in Great Britain, 1970-2016

Figure 60: Analysis of private commercial construction in Great Britain, by type, 2012-16

### Repair & maintenance

Figure 61: Segmentation of the R&M activity in Great Britain, 2016

### Public housing

Figure 62: Analysis of repair & maintenance output in the public housing sector in Great Britain, 2012-16

### Private housing

Figure 63: Analysis of repair & maintenance output in the private housing sector in Great Britain, 2012-16

### Public non-residential

Figure 64: Analysis of repair & maintenance output in the public non-residential sector in Great Britain, 2012-16

### Private non-residential

Figure 65: Analysis of repair & maintenance output in the private non-residential sector in Great Britain, 2012-16

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Mechanical and Electrical Engineering - UK - September 2017

Report Price: £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 66: Forecast repair & maintenance construction output in Great Britain, 2017-21

Figure 67: Forecast repair & maintenance construction output in Great Britain, by type, 2017-21

## Civil engineering

Figure 68: Civil engineering construction output in Great Britain, by sector, 2012-16

Figure 69: Forecast civil engineering construction output in Great Britain, 2017-21

## Industry Structure

### Key points

### Industry development

Figure 70: Analysis of changes in the structure of the plumbing, heating and air conditioning sector, 2012-16

Figure 71: Analysis of the changes in the structure of the electrical installation sector, 2012-16

### Structure by employment

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

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

### Structure by turnover

Figure 74: Analysis of the financial structure of the plumbing, heating and air conditioning sector, 2015 and 2016

Figure 75: Analysis of the financial structure of the electrical installation sector, 2015 and 2016

### Company profiles

## NG Bailey

Figure 76: Financial analysis of NG Bailey, 2013-17

### Company strategy

## Balfour Beatty Engineering Services

Figure 77: Financial analysis of Balfour Beatty, 2012-16

Figure 78: Investment portfolio of Balfour Beatty by segment, 2013-16

### Company strategy

## TClarke

Figure 79: Financial analysis of TClarke, 2012-16

Figure 80: Turnover analysis of TClarke, 2016

### Company strategy

## Crown House Technologies

Figure 81: Financial analysis of Crown House Technologies, 2012-16

### Company strategy

## Michael J Lonsdale

Figure 82: Financial analysis of Michael J Lonsdale, 2012-16

### Company strategy

## Lorne Stewart

Figure 83: Financial analysis of Lorne Stewart, 2012-16

### Company strategy

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Mechanical and Electrical Engineering - UK - September 2017

Report Price: £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Skanska Rashleigh Weatherfoil

Figure 84: Financial analysis of Skanska Rashleigh Weatherfoil, 2011-15

Company strategy

## SPIE (formerly SPIE Matthew Hall)

Figure 85: Financial analysis of SPIE, 2011-15

Company strategy

## SSE Contracting

Figure 86: Financial analysis of SSE Contracting, 2012-16

Company strategy

## Forecast

Key points

Market overview

Figure 87: Forecast M&E contracting output in Great Britain, 2017-21

Market segmentation

Figure 88: Forecast segmentation of M&E contracting in Great Britain, by type, 2017-21

Mechanical contracting

Figure 89: Forecast mechanical contracting output in Great Britain, 2017-21

Figure 90: Analysis of mechanical contracting output in Great Britain, by type of work, 2017-21

Figure 91: Forecast segmentation of mechanical contracting output for new construction projects in Great Britain, by type, 2017-21

Figure 92: Forecast segmentation of mechanical contracting output for repair & maintenance activity in Great Britain, by type, 2017-21

Electrical contracting

Figure 93: Forecast electrical contracting output in Great Britain, 2017-21

Figure 94: Forecast analysis of electrical contracting output in Great Britain, by type of work, 2017-21

Figure 95: Forecast segmentation of electrical contracting output for new construction projects in Great Britain, by type, 2017-21

Figure 96: Forecast segmentation of electrical engineering output for repair & maintenance activity in Great Britain, by type, 2017-21

## Further Sources & Contacts

Trade associations

British Institute of Facilities Management

Chartered Institute of Building Services Engineers

Electrical Contractors Association

Electrical Contractors Association of Scotland

BEAMA Installation

Institution of Electrical Engineers

Institution of Incorporated Engineers (IIE)

Institution of Mechanical Engineers

Joint Industry Board for the Electrical Contracting Industry

National Association of Plumbing, Heating and Mechanical Services Contractors

National Inspection Council for Electrical Installation Contracting

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Mechanical and Electrical Engineering - UK - September 2017

Report Price: £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Trade magazines

Building (Weekly)

The Builder (Bi-Monthly)

Connections (Quarterly)

ECN Electrical Contracting News (Monthly)

Electrical & Mechanical Contractor (Monthly)

Electrical Engineering (Monthly)

Electrical Times (Monthly)

HouseBuilder (11 issues per year)

Local Authority Building and Maintenance (11 issues per year)

Professional Electrician and Installer (11 Issues per Year)

Public Sector Building (6 issues per year)

Trade exhibitions

INTERBUILD

IPOT

IFSEC

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)