

# Consulting Engineers (Industrial Report) - UK - October 2014

Report Price: £995.00 | \$1611.35 | €1263.96

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

image

"The prospects for UK consulting engineers improved during 2013 and the market is set for sustained growth over the next five years. The more buoyant construction sector is expected to boost demand in the UK. Transport infrastructure and the energy sector will provide the strongest growth potential, making up the majority of projects in the government's infrastructure plan."

– Claudia Preedy - Industrial Analyst

This report looks at the following areas:

- How has the market for UK consulting engineers performed over the last five years?
- How strongly will the market develop over the next five years?
- What is the impact of the legislative/regulative environment on individual sectors?
- Which sectors will provide the strongest growth potential for consulting engineers over the next five years?
- How have individual key companies active in the industry fared during the last five years?

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

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

# Consulting Engineers (Industrial Report) - UK - October 2014

Report Price: £995.00 | \$1611.35 | €1263.96

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

Improved prospects for UK consulting engineers in 2013

Figure 1: Total fees rendered by UK Consulting Engineers. By Sector, 2009-13

Government's renewed focus on infrastructure investment to provide a positive impetus for the sector

Commercial/domestic building sector on road to recovery

Power and energy sector offers strong growth potential

Market for UK consulting engineers anticipated to grow by 30% between 2014 and 2018

Figure 2: Forecast Market for UK Consulting Engineers, 2014-18

Demand structure

Transport to remain largest sector for consulting engineers

Figure 3: Forecast Market for UK Consulting Engineers in the Power and Energy Sector, 2014-18

Shift in focus from capital investment towards asset maintenance in water and sewerage

Figure 4: Forecast Segmentation of the Fees Rendered by UK Consulting Engineers in the Building Sector, 2014-18

Companies

What we think

### Introduction

Definitions

Methodology

Abbreviations

Market Positioning

Market Factors

UK Economy

Overview

Inflation

Interest Rates

House prices

Consumer Spending

Manufacturing

Business Investment

Imports

Exports

### Market Overview

Key Points

Market Size

Figure 5: Total Fees Rendered by UK Consulting Engineers, 2009-13

Figure 6: Total Fees rendered by UK Consulting Engineers, 2009-13

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 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Consulting Engineers (Industrial Report) - UK - October 2014

**Report Price:** £995.00 | \$1611.35 | €1263.96

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

## Market Segmentation

### Key Sectors

Figure 7: Analysis of Fees Rendered by UK Consulting Engineers, by Industrial Sector, 2009-13

Figure 8: Proportional Importance of Key Sectors of Consulting Engineers' Income, 2013

### Market Forecast

Figure 9: Forecast Market for UK Consulting Engineers, 2014-18 (£ Million at 2013 Prices)

Figure 10: Analysis of Forecast Fees Rendered by UK Consulting Engineers, by Industrial Sector, 2014-18 (£ Million at 2013 Prices)

Figure 11: Forecast of Fees Rendered by UK Consulting Engineers, by Industrial Sector, 2014-18

## Building and Construction Sector

### Key Points

#### The Market

Figure 12: Fees Rendered by UK Consulting Engineers in the Building Sector, 2009-2013 (£ Million)

#### Market Segmentation

Figure 13: Segmentation of the Fees Rendered by UK Consulting Engineers in the Building Sector, 2009-13 (£ Million)

## Building and Construction Market Factors

### Key Points

#### PFI Sector

#### Industrial construction

Figure 14: Analysis of private industrial construction output in Great Britain, 2009-13 (£ million)

Figure 15: Analysis of private industrial new construction work in Great Britain, by sector 2009-13 (£ million)

#### Industrial construction forecast

Figure 16: Forecast private industrial construction output in Great Britain, 2014-18 (£ million at 2014 prices)

Figure 17: Forecast of private industrial new construction work in Great Britain, by sector 2014-18 (£ million at 2014 prices and growth)

#### Commercial construction

Figure 18: Analysis of the composition of the private commercial construction market in Great Britain, 2013

#### Offices

#### Shops

#### Education

#### Health

Figure 19: Analysis of private commercial construction output in Great Britain, 2009-13 (£ million)

Figure 20: Analysis of private commercial construction in Great Britain, by type, 2009-13 (£ million)

#### Commercial construction forecast

Figure 21: Forecast private commercial construction output in Great Britain, 2014-18 (£ million at 2014 prices)

Figure 22: Forecast of private commercial construction in Great Britain, by sector, 2014-18 (£ million at 2014 prices)

#### Public non-residential construction

Figure 23: Analysis of the composition of the public sector non-residential construction market in Great Britain, 2013

#### Health

#### Education

Figure 24: Contractors appointed to the PSBP batches of schools, March 2014 (Number of schools and £ million)

**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 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Consulting Engineers (Industrial Report) - UK - October 2014

**Report Price:** £995.00 | \$1611.35 | €1263.96

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

## "Other" Sector

Figure 26: Analysis of public sector non-residential construction in Great Britain, by type, 2009-13 (£ million)

## Public non-residential construction forecast

Figure 27: Forecast public non-residential construction output in Great Britain, 2014-18 (£ million at 2014 prices)

Figure 28: Forecast of public non-residential construction in Great Britain, by type, 2014-18 (£ million at 2014 prices)

## Building and Construction Sector Forecast

### Key Points

### Market Forecast

Figure 29: Forecast of Fees rendered by UK Consulting Engineers in the Building Sector, 2014-18 (£ Million at 2013 Prices)

Figure 30: Forecast of Fees rendered by UK Consulting Engineers in the Building Sector, 2014-18

Figure 31: Forecast Segmentation of the Fees Rendered by UK Consulting Engineers in the Building Sector, 2014-18 (£ Million at 2013 Prices)

## Transport Sector

### Key Points

### The Market

Figure 32: Fees Rendered by UK Consulting Engineers in the Transport Sector, 2009-13 (£ Million)

Figure 33: Fees Rendered by UK Consulting Engineers in the Transport Sector, 2009-13

### Market Segmentation

Figure 34: Segmentation of the Fees Rendered by UK Consulting Engineers in the Transportation Sector, 2009-13 (£ Million)

## Transport Market Factors

### Key Points

### The National Infrastructure Plan

### Roads

Figure 35: Road Network in Great Britain, by Type, 2013 (Miles)

Figure 36: Road Network Expenditure in England, by Activity and Road Type, 2010/11-2011/12 (£ Million)

Figure 37: New Construction and Improvements of Roads, Motorways and All Purpose Trunk Roads, in England, 2008/09-2012/13 (Kilometres)

Figure 38: Civil engineering new road construction output in Great Britain, 2009-13 (£ Million)

Figure 39: Civil Engineering New Road Construction Output in Great Britain, 2009-13

### Road Sector Forecast

### Reform of Highways Agency

Figure 40: Forecast Civil Engineering Construction Output for the Roads Sector, 2014/18 (£ Million at 2013 prices)

### Rail

Figure 41: Rail infrastructure in Great Britain, 2008/09-2012/13 (Route km and number of stations)

Figure 42: Rail industry infrastructure activity, 2008-13 (Km and number)

Figure 43: Rail infrastructure renewals, enhancements and maintenance expenditure in Great Britain 2010-2013 and planned 2014 (£ Million at 2013 Prices)

Figure 44: Renewal Expenditure by Asset, 2010-2013 (£ million at current prices)

Figure 44: Rail Renewal Expenditure by Asset, 2012/13

Figure 46: Private sector investment in stations, 2009-13 (£ Million at Current Prices)

Figure 47: Analysis of enhancement expenditure in England and Wales, by type, 2010-13 and planned 2014 (£ million at 2013 prices)

**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 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Consulting Engineers (Industrial Report) - UK - October 2014

**Report Price:** £995.00 | \$1611.35 | €1263.96

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

Figure 48: Analysis of Enhancement Expenditure in Scotland, by Type, 2010-13 and planned 2014 (£ million at 2013 prices)

Figure 49: Analysis of Enhancement Expenditure on non PR08 funded schemes by Type, 2010-13 and Planned 2014 (£ Million at 2013 Prices)

## ORR's Review of Network Rail's Performance in Last Five Years

### Rail Civil Engineering Construction Output

Figure 50: Civil Engineering Construction Output for the Rail Transport Sector in Great Britain, 2009-13 (£ Million)

### Rail Sector Forecast

Figure 51: Rail infrastructure projects pipeline, as of September 2014 (£ million)

### High speed rail network (HS2)

### Maintenance expenditure in CP5

Figure 52: Forecast rail maintenance expenditure for CP5, 2014/15-2018/19 (£ million at 2012/13 prices)

Figure 53: Forecast rail maintenance expenditure for CP5, by Activity, 2014/15-2018/19 (£ million at 2012/13 prices)

### Capital Expenditure in CP5

Figure 54: Forecast capital expenditure for CP5, by type, 2014/15-2018/19 (£ Million at 2012/13 Prices)

### Renewals expenditure in CP5

Figure 55: Forecast rail renewals expenditure for CP5, by activity, 2014/15-2018/19 (£ million at 2012/13 prices)

Figure 56: Forecast rail track renewal activity for CP5, by activity, 2014/15-2018/19 and CP5 total (Kilometres and number)

Figure 57: Forecast rail structures renewal for CP5, by activity, 2014/15-2018/19 (Square Metres)

Figure 58: Forecast rail electrification and plant renewal for CP5, by Activity, 2014/15-2018/19 (Number and km)

Figure 59: Forecast building renewal for CP5, by activity, 2014/15-2018/19 (Square metres)

### Enhancements expenditure in CP5

Figure 60: Cost of enhancement projects during CP5 (£ billion at 2012/13 prices)

### Crossrail

### Thameslink Programme

### Electrification schemes

### Other committed schemes

### Other named schemes and CP4 rollover schemes

### HLOS capacity metric schemes

### Edinburgh to Glasgow Improvements Programme (EGIP)

### Borders

### Other Scottish projects

Figure 61: Forecast Civil Engineering Construction Output for the Rail Sector, 2014-18 (£ Million at 2013 Prices)

### Ports, Airports, Harbours and Canals

Figure 62: Civil engineering construction output for the harbours and waterways sectors in Great Britain, 2009-13 (£ million)

Figure 63: 10 largest airports in the UK, 2009-13 (air transport movements, thousands)

Figure 64: Civil engineering construction output for the air transport industry in Great Britain, 2009-13 (£ million)

Figure 65: Civil Engineering Construction Output for the Air Transport Industry in Great Britain, 2009-13

### Ports, Airports, Harbours and Canals Sector Forecast

Figure 66: Forecast civil engineering construction output for the harbours sector, 201418 (£ million at 2013 prices)

Figure 67: Forecast civil engineering output for the airport transport sector, 201418 (£ million at 2013 prices)

**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 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Consulting Engineers (Industrial Report) - UK - October 2014

**Report Price:** £995.00 | \$1611.35 | €1263.96

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

## Transport Sector Forecast

### Key Points

### Market Forecast

Figure 68: Forecast UK Market for Consulting Engineers in the Transport Sector, 2014-18 (£ Million at 2013 Prices)

Figure 69: Forecast Segmentation of the Fees Rendered by UK Consulting Engineers in the Transport Sector, 2014-18 (£ Million at 2013 Prices)

Figure 70: Forecast Segmentation of the Fees Rendered by UK Consulting Engineers in the Transport Sector, 2014-18

## Environment, Water, Waste Water and Waste

### Key Points

### The Market

Figure 71: Fees Rendered by UK Consulting Engineers in the Environment, Water, Waste Water, Waste, Flooding and Coastal Sector, 2009-13 (£ Million)

Figure 72: Fees Rendered by UK Consulting Engineers in the Environment, Water, Waste Water, Waste, Flooding and Coastal Sector, 2009-13

### Market Segmentation

Figure 73: Segmentation of the Fees Rendered by UK Consulting Engineers in the Environment, Water and Waste Water and Waste Sector, 2009-13 (£ Million)

## Environment, Water, Waste Water and Waste Market Factors

### Key Points

### Market Factors

Potable Water and Sewerage Industry

Water Framework Directive (WFD)

Urban Waste Water Treatment Directive (UWWTD)

Revised Bathing Water Directive

The Flood and Water Management Act 2010

Asset Management Plan (AMP)

### Water and Sewerage Capital Expenditure

Figure 74: Total capital expenditure by water and sewerage companies in England and Wales, 2005-10 and 2010-15 (£ million)

Figure 75: Actual UK capital expenditure on water and sewerage services, 2008/09-2012/13 (£ million)

Figure 76: UK capital expenditure on water and sewerage services, 2008/09-2012/13 (£ million)

Figure 77: Analysis of Scottish Water Capital Expenditure on Water and Sewerage Services, 2007/08-2012/13 (£ Million)

Figure 78: Progress of Scottish Water to Date in the Five Year Investment Programme 2010/15 (Number)

Figure 79: Analysis of Northern Ireland Water capital expenditure on water and sewerage services, 2008/09-2012/13 (£ million)

### Waste Management

Figure 80: Waste Arisings in the UK, by Source, 2009-2013 (Million Tonnes)

## Environment, Water, Waste Water and Waste Forecast

### Key Points

### Market Forecast

Figure 81: Forecast Market for UK Consulting Engineers in the Environmental Sector, 2014-18 (£ Million at 2013 Prices)

Figure 82: Forecast Market for UK Consulting Engineers in the Environmental Sector, 2014-18

Figure 83: Forecast Segmentation of the Fees Rendered by UK Consulting Engineers in the Environmental Sector, 2014-18 (£ Million at 2013 Prices)

## Power and Energy Sector

**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 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Consulting Engineers (Industrial Report) - UK - October 2014

**Report Price:** £995.00 | \$1611.35 | €1263.96

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

## Key Points

### The Market

Figure 84: Fees Rendered by UK Consulting Engineers in the Power and Energy Sector, 2009-13 (£ Million)

## Power and Energy Market Factors

### Key Points

#### Oil and Gas

Government initiatives to encourage investment in oil and gas exploration

Oil and gas reserves

#### Capital Expenditure in Oil and Gas Industry

Figure 85: UK Total Capital Expenditure in the Oil and Gas Industry, by Type, 2008-2012 (£ Million)

Figure 86: UKCS Oil and Gas Production Platforms and Floating Installations, 2014 (Number)

#### Future Investment in Oil and Gas Industry

#### Electricity

#### Electricity Market Reform

Contracts for Difference (CfDs)

Capacity Market (CM)

#### The UK Electricity Generation Mix

Figure 87: Analysis of electricity supplied in the UK, by type of fuel used in generation, 2009-13 (TWh)

Figure 88: Composition of electricity supplied in the UK, by type of fuel used in generation, 2013

#### Renewables generation

Figure 89: Renewable electricity generation in the UK, 2009-13 (GWh)

Figure 90: Renewable Energy Projects in Pipeline, by Technology, as of July 2014 (MW)

#### Coal generation

#### Nuclear generation

Figure 91: UK Nuclear Sites Planned Closure Dates, as of August 2014 (Year)

#### CCGT

#### Distributed Generation

#### Interconnectors

#### Gas Supply

The UK's increased reliance on gas imports

Potential for shale gas extraction

#### Gas transmission and distribution capital expenditure

Figure 92: Total gas transmission and distribution capital expenditure, 2008/09-2012/13 (£ million)

Figure 93: Total gas transmission capital expenditure, 2008/09-12/13 (£ million)

Figure 94: Total gas distribution capital expenditure, 2008/09-2012/13 (£ million)

Figure 95: Capital Expenditure Boundaries for National Grid Gas Considered for Ofgem's RIIO-T1, 2014-2021 (£ Million at 2010 Prices)

Figure 96: Capital Expenditure Plans by National Grid Gas Under RIIO-T1, by Category, 2014-2021 (£ Million at 2010 Prices)

## Power and Energy Sector Forecast

### Key Points

**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 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Consulting Engineers (Industrial Report) - UK - October 2014

Report Price: £995.00 | \$1611.35 | €1263.96

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

## Market Forecast

Figure 97: Forecast Market for UK Consulting Engineers in the Power and Energy Sector, 2014-18 (£ Million at 2013 Prices)

Figure 98: Forecast Market for UK Consulting Engineers in the Power and Energy Sector, 2014-18

## Industry Structure

### Key Points

### Company Profiles

## Arup Group

Figure 99: Financial Analysis of Arup Group, 2009-13 (£ Million)

Figure 100: Fees Rendered by Arup Group, by Project Sector, 2012 and 2013 (£ Million)

## WS Atkins

Figure 101: Financial analysis of WS Atkins, 2010-14 (£ Million)

Figure 102: Fees Rendered by Atkins, by Project Sector, 2012 and 2013 (£ Million)

## Jacobs U.K

Figure 103: Financial Analysis of Jacobs U.K., 2009-13 (£ 000s)

Figure 104: Fees Rendered Jacobs, by Project Sector, 2012 and 2013 (£ Million)

## AMEC Environment and Infrastructure UK

Figure 105: Analysis of AMEC Environment and Infrastructure UK, 2009-12 (£ 000)

Figure 106: Fees Rendered by AMEC Environment and Infrastructure, by Project Sector, 2012 and 2013 (£ Million)

## Amey Uk

Figure 107: Financial analysis of Amey UK, 2009-13 (£ Million)

Figure 108: Fees Rendered by Amey UK, by Project Sector, 2012 and 2013 (£ Million)

## Aecom

Figure 109: Financial Analysis of AECOM, 2009-13 (£ 000)

Figure 110: Fees Rendered by AECOM, by Project Sector, 2012 and 2013 (£ Million)

## Mace

Figure 111: Financial Analysis of Mace, 2009-13 (£ Million)

Figure 112: Fees Rendered by Mace, by Project Sector, 2012 and 2013 (£ Million)

## Mott Macdonald Group

Figure 113: Financial Analysis of Mott MacDonald Group, 2009-13 (£ 000)

Figure 114: Fees Rendered by Mott MacDonald Group, by Project Sector, 2012 and 2013 (£ Million)

## Mouchel

Figure 115: Financial Analysis of Mouchel, 2009-13 (£ 000)

Figure 116: Fees Rendered by Mouchel, by Project Sector, 2012 and 2013 (£ Million)

## Pell Frischmann Group

Figure 117: Financial Analysis of Pell Frischmann Group, 2009-13 (£ 000)

**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 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)



# Consulting Engineers (Industrial Report) - UK - October 2014

Report Price: £995.00 | \$1611.35 | €1263.96

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

Figure 118: Fees Rendered by Pell Frischmann, by Project Sector, 2012 and 2013 (£ Million)

## Parsons Brinckerhoff

Figure 119: Financial Analysis of Parsons Brinckerhoff, 2008-12 (£ Million)

## PB

Figure 120: Financial Analysis of PB, 2008-12 (£ 000)

Figure 121: Fees Rendered by Parsons Brinckerhoff Group, by Project Sector, 2012 and 2013 (£ Million)

## R P S Group

Figure 122: Financial Analysis of R P S Group, 2008-2012 (£ 000)

Figure 123: Fees Rendered by R P S Group, by Project Sector, 2012 and 2013 (£ Million)

## URS Infrastructure and Environment

Figure 124: Financial Analysis of URS Infrastructure and Environment UK, 2010-13 (£ 000)

Figure 125: Fees Rendered by URS, by Project Sector, 2012 and 2013 (£ Million)

## WSP Group

Figure 126: Financial Analysis of WSP Group, 2007-11 (£ 000)

Figure 127: Financial Analysis of WSP UK, 2008-12 (£ 000)

Figure 128: Fees Rendered by WSP Group, by Project Sector, 2012 and 2013 (£ Million)

## Further Sources and Contacts

Trade Associations

Trade Magazines

Trade Exhibitions

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 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)