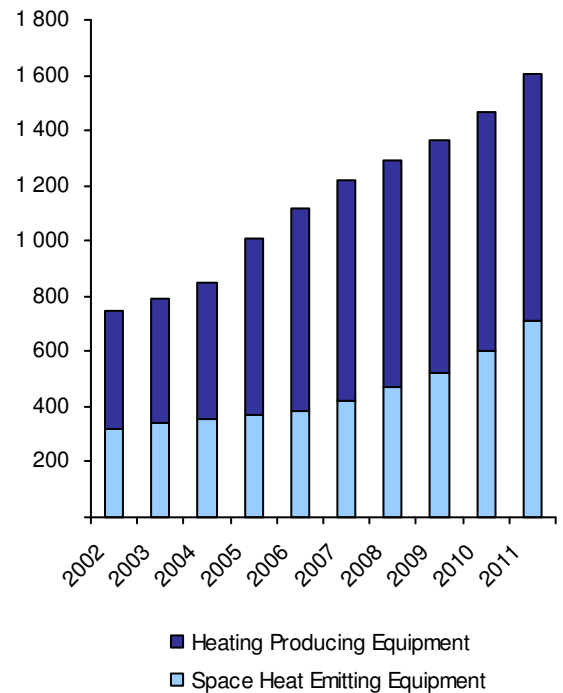


# Market for Domestic Central Heating in the UK, 2002-2011



## THIS ESSENTIAL REPORT WILL ENABLE YOU TO:

- Analyse trends within the UK Domestic Central Heating market, from 2002 with forecasts to 2011
- Examine the trends for each type of heat producing equipment and space heating emitting equipment
- Understand the factors affecting the market
- Learn more about the industry structure, the pricing strategies, and lots more...

**Original research is at the heart of this report, prepared through interviews with manufacturers of boilers, radiators, heat pumps and underfloor heating systems, as well as government ministry and trade associations.**

**This report contains the most up-to-date information on the domestic central heating market in the UK. See inside for further details...**

***This report contains 170 pages of analysis with 72 statistical tables and graphics.  
The following information is presented within this MSI report:***

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***With this report, you will find essential data to help you plan your business strategy and budgeting.***

***The quantitative and qualitative analysis in this report includes:***

- The volume of **domestic central heating ownership**, by type of dwelling, 2002-2011:
    - existing
      - central heating
      - no central heating
    - new build
      - central heating
      - no central heating
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    - flats
- This report also contains:**
- PESTEL Analysis:
    - ↳ political                      ↳ technological
    - ↳ economic                    ↳ environmental
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  - Distribution
  - Mergers and Acquisitions
  - Profiles of 26 major manufacturers
  - SWOT Analysis:
    - ↳ strengths                    ↳ weaknesses
    - ↳ opportunities              ↳ threats
- All quantitative data are also provided on an Excel spreadsheet. With this you can:**
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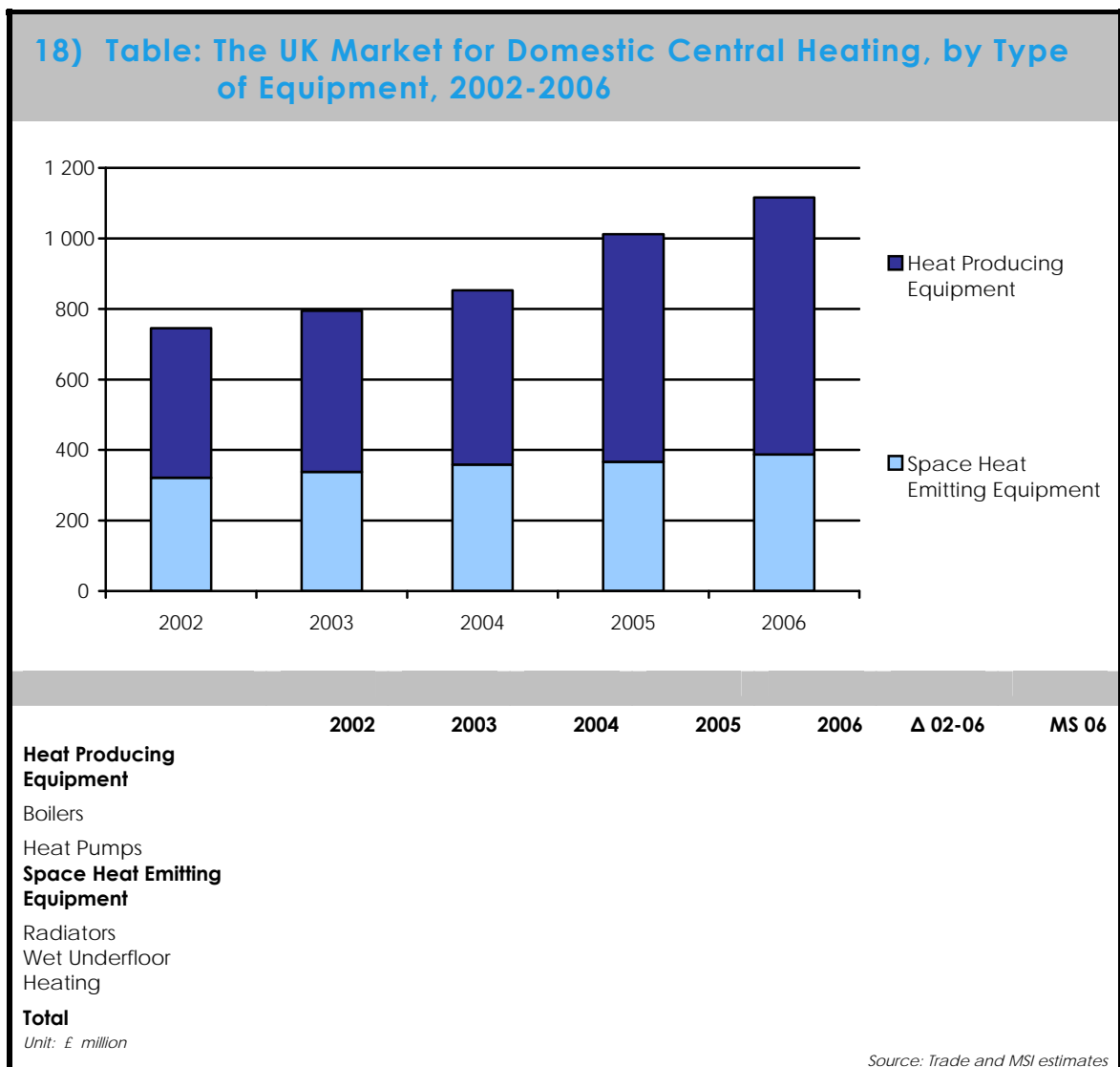
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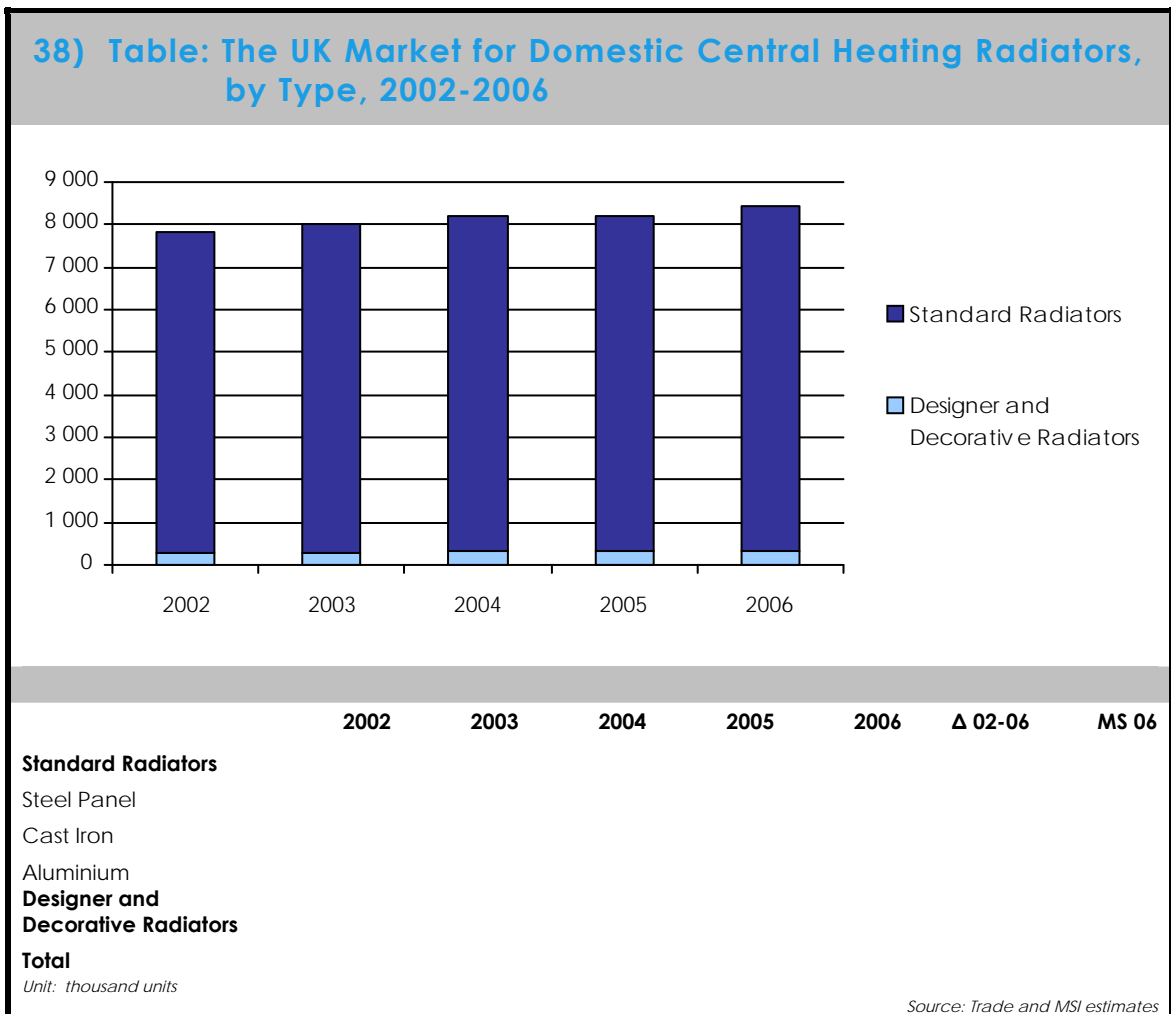
### 6.1.3 by Type of Equipment, 2002-2006



- **Heat producing equipment represented most of domestic central heating sales.** This market even gained some market share during the review period due to a significant increase in average boiler prices. This predominance demonstrates how important these elements are in any central heating installation as the choice of other appliances depends on what system is used to produce heat.

- **Sales of boilers** increased strongly in 2005 with the sudden development of condensing boilers encouraged by new Building Regulations coming into force. However, in 2006, these boilers' price started diminishing. Thus, main boiler manufacturers and suppliers had to adapt quickly. Therefore competition focused on them, enabling average prices to decrease.

### 6.3.1.3 by Type, 2002-2006



- Central heating radiators have **two functions in the domestic environment:**

- the basic purpose remains to distribute heat in a dwelling
- over the years a second function has been added. It involves primarily a decorative function. Some of the radiators thus conceived can also enable other applications such as towel warming. Trade sources consider that TV programmes have contributed to popularise the fact that radiators can also be seen as a

decorative tool. Moreover the opportunity to have the shape of designer or decorative radiators meet end users' decorative needs has added to households' interest in these products. Indeed trade sources report a strong demand for such a possibility

- The **basic heating function still accounted for most central heating radiator sales** during the review period. Therefore, the vast majority of radiators sold were standard ones.

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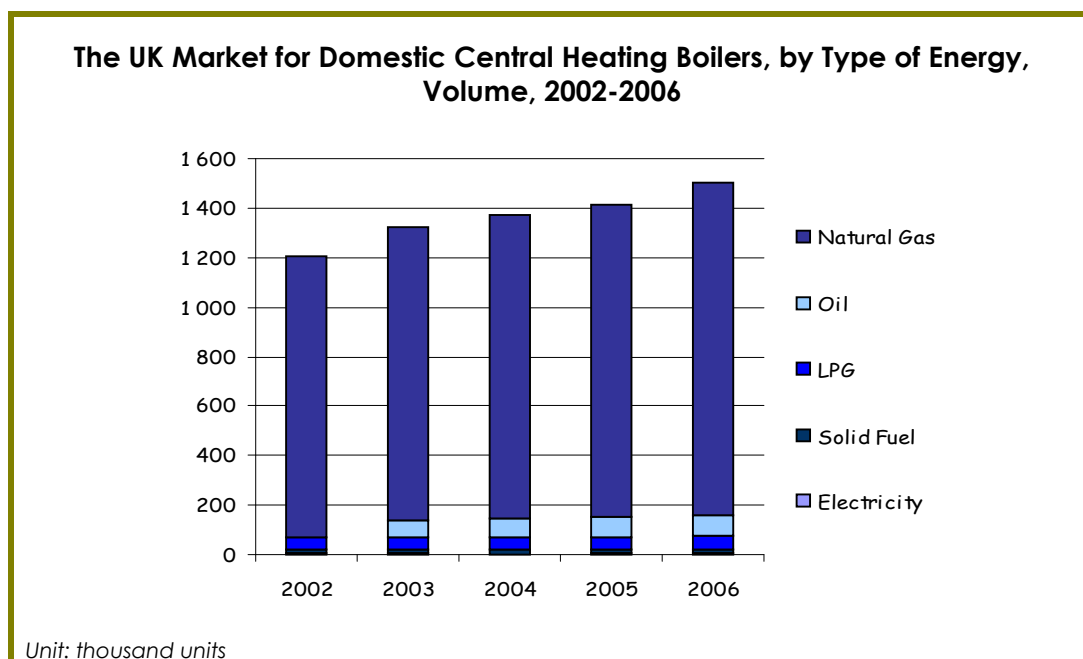
- New format
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- PESTE and SWOT Analysis

## DOMESTIC CENTRAL HEATING IN THE UK: A DEVELOPING MARKET

Ensure you gain an advantage over your competitors and receive the latest market trends from the **UK market for domestic central heating**. This report will complete your knowledge of the market, help you target the needs of your customers and assist you with a range of business planning and strategies.

The increasing replacement of inefficient or old heating installations has contributed to the growth of the market for **domestic central heating**. The market also benefited from the buoyancy of the new build market. The significant rise of fossil fuel prices from 2004 made households more concerned by **energy savings** and led them to replace their heating installation in order to lower the energy bills and choose energy efficient products.

However, **new regulations** came into force to oblige English and Welsh households to equip their new or refurbished property with new products. Therefore, the UK market for domestic central heating increased strongly in value since 2003. However the return on **investments** for such products is longer, therefore households prefer to delay the purchase of new products and repair failing systems.



**Heat producing equipment** remains the main segment of the market with an increase in volume by 72% between 2002 and 2006. The boiler market whose growth stems from demands of new installations has mostly driven this market. Because of the increase of the fossil fuel prices, the development of **natural gas condensing boilers** that was imposed by new regulations, have boosted the sales of this type of equipment. The companies main goal is to develop the boilers' efficiency. Indeed, condensing boilers emerged in 2004 and as households were willing to reduce their **energy consumption**, they did not hesitate in investing extra money in the boiler and also new radiators.

The market for **heat pumps** still represents an emerging market in the UK but with a high developing potential. In fact, the market has increased in volume by 298% between 2002 and 2006. The main driver of this market's development remains the **high cost of natural gas** and oil but also in the **thermodynamic principles** on which the pumps are based as it enabled households to reduce their energy consumption significantly. **Ground source heat pumps** dominated the market on this sector even though the installation remains expensive and can only be set up in houses.

Between 2002 and 2006, the **central heating radiator** market experienced various trends. Indeed until 2004, this market has not only followed the trends of the boiler market but was influenced by the decision of some households to change only their **space heat emitting equipment** without changing to a new boiler. The radiator market increased in volume by 7,4% during the review period. Radiators were more installed as part of **repair, replacement or improvement** than new built since the competition from **underfloor heating** (with an increase in volume by 97,6% between 2002 and 2006) was more important in this sector.

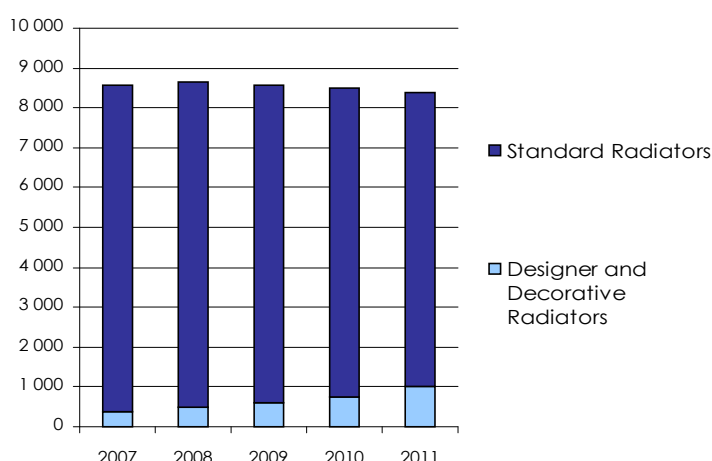
### **2007-2011: A market expected to increase**

The **domestic central heating market** is expected to grow between 2007 and 2011 in volume by 31,7%. Its dynamism will come mainly from a decrease of the prices, the new built market that will follow the trend to compensate inappropriate dwelling stock and also the growth of social housing contracts.

**Heat pump sales** are expected to grow strongly between 2007 and 2011 due to incentives from national authorities that will limit required investments and will then attract more households to purchase these products. **Wet underfloor heating** is going to attract more customers and is expected to compete strongly with others segments of the domestic central heating market.



### The UK Market for Domestic Central Heating Radiators, by Type, in Volume, 2007-2011



Unit: thousand units

**MSi Reports**, specialist in business-to-business market research, have published a detailed report on **The UK Market for Domestic Central Heating** in September 2007.

Containing **170 pages** with **72 tables**, MSI analyse the UK market for domestic central heating for a five-year review period (**2002-2006**) and a five year forecast period up until **2011**. The market is segmented by type of equipment. All **figures** within the report are also presented in a separate **Excel spreadsheet** supplied as part of your order, which is ideal for future planning and presentations.

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