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## Suspended Ceilings and Partitioning Systems Market – UK 2011-2015

New AMA report Reviews Developments in the Suspended Ceilings and  
Partitioning Systems Market

“There was a sharp decline in the suspended ceilings and partitions market in the 2008-2010 period when the market suffered from a decline in construction output in key end use sectors. While 2011 will be another difficult year, moderate growth levels of 3-6% are forecast for the total suspended and partitions market between 2012-15, when the market is forecast to be worth over £300m ”

A brief summary of the report is included on the following page.

Priced at £665, the report is currently available from AMA Research Ltd.  
Telephone 01242 235724 or e-mail at [sales@amaresearch.co.uk](mailto:sales@amaresearch.co.uk).

### **Editors Note:**

Attached is a summary of the report. Please use brief extracts if you wish, **but we would request that references to company market shares are not published without our prior permission.**

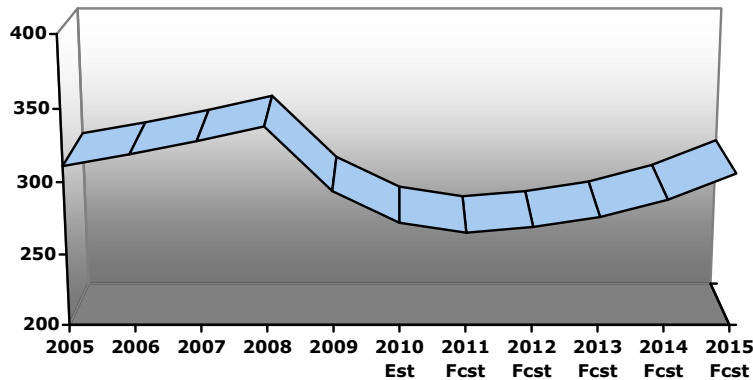
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Andrew Hartley or Chris Moore on (01242) 235724.

Please include our web address and telephone number on any review printed; it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

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# Suspended Ceilings and Partitioning Systems Market UK 2011-2015

UK Market for Suspended Ceilings and Partitioning Systems  
(£m MSP) 2005-2015



There was a sharp decline in the suspended ceilings and partitions market in the 2008-2010 period to a current value of around **£270m** when the market suffered from a decline in construction output in key end use sectors. In particular, the office construction sector has declined substantially in 2009-10 and this has impacted negatively on demand for both ceilings and partitioning as new and refurbished offices are the major end use sector. Other key end use sectors such as retail, health, leisure & entertainment and factories also saw declines in new build and refurbishment in a difficult economic climate.

The **suspended ceilings** market is the larger sector by value and is estimated to be worth almost **£150m** in 2010, having experienced an estimated 7% decline over the previous year. Although in decline, the market performed marginally better than the partitioning sector as suspended ceilings are specified in a wider range of end use sectors, e.g. retail, education etc. Lower value tiles have experienced some gain in share, with metal tiles suffering from a the downturn in the premium end of the market – but still accounting for over 15% of the market

The market for **partitioning systems** accounts for over 45% of the overall market and is also in decline over the last 2-3 years. This sector is more reliant than suspended ceilings on the office sector for sales and market performance has, therefore, been more badly affected.

Future prospects for the overall suspended ceilings and partitions market are relatively pessimistic in the short term, with decline expected to continue at 3% in 2011 for the total market.

Competition will remain high and it is likely that some suppliers will find it increasingly difficult to operate in a tough and declining market. The market may therefore become more concentrated in terms of supply structure, although it is expected to remain a fairly fragmented market due to the wide range of materials and product types, particularly in the partitions market.

Low growth is expected to resume from 2012 as construction in key end-use markets is forecast to begin to grow again in the retail, entertainment & leisure and industrial sectors with office construction remaining fairly stable. Office vacancy rates are anticipated to be lower, reflecting a shortage of available office space due to the decline in new build, which is already resulting in the go-ahead for some major new schemes. However, in the short term, higher take-up of existing office space will benefit sales of partitioning systems, which are usually installed upon tenant occupation.

Moderate growth levels of 3-6% are forecast for the total suspended and partitions market between 2013-15, when the market is forecast to be worth over £300m at msp. However, the construction new build and fit-out markets face an uncertain period, with early-mid 2010 seeing tentative signs of recovery which were not sustained into early 2011. If office construction picks up more quickly than anticipated, then future prospects would be much more favourable. Conversely, if conditions were to remain difficult for longer than anticipated then the suspended ceilings and partitions market would experience further decline or very slow recovery.

AMA Research's report "**Suspended Ceiling and Partitioning Systems Market – UK 2011-2015**" is available in hard copy or electronic format for £665 and can be ordered online at [www.amaresearch.co.uk](http://www.amaresearch.co.uk) or by calling 01242 235724.