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ACTIVE AND PASSIVE FIRE PROTECTION MARKET - UK 2009-2013

New AMA report provides a major review of the fire protection market

"Decline in the housing market is likely to influence the active and passive fire protection sector with regard to fire doorset installations, fire alarms and sprinklers - mainly in multi storey apartments - with safety and sustainability becoming increasingly important issues. In addition, further decline within the non-domestic construction sector - particularly in offices, retail and industrial - will have a negative effect on the passive fire protection market and will see decline in fire resistant glass, partitions, and cable during 2009."

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

Priced at £650, the report is currently available from AMA Research Ltd,
Telephone 01242 235724 or e-mail at sales@amaresearch.com.

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.**

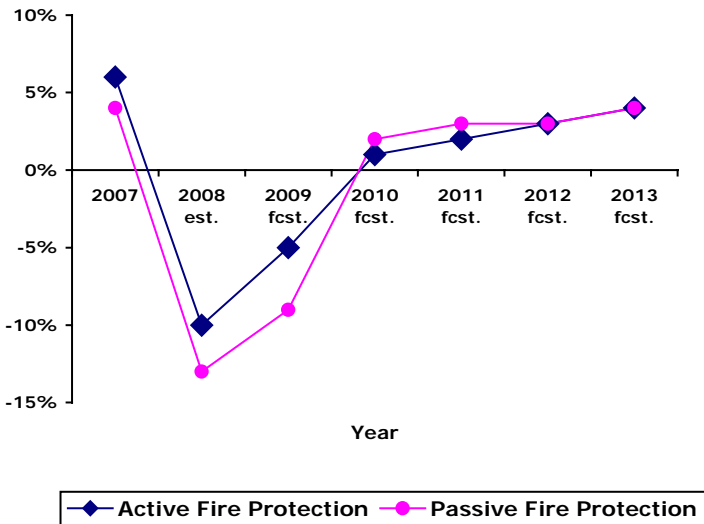
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Chris Moore or Andrew Hartley on (01242) 235724.

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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ACTIVE AND PASSIVE FIRE PROTECTION MARKET UK 2009-2013

UK Active and Passive Fire Protection Products Market– 2007-2013 (£m MSP)



The Fire Protection systems market is generally regarded as a relatively mature sector and is influenced by a number of factors, including the general health of the economy, levels of consumer confidence and spending, changing Building Regulations and Standards, and most significantly the underlying performance of the UK building and construction market.

Output values are now declining in the non-domestic construction market which includes all new work and RMI. The changing situation in 2008 has fed through into output and new order figures for 2009, with rapid decline in sectors such as offices, retail and industrial. The uncertainty surrounding the UK and global economies continues to have an effect on non-domestic construction into H2 2009 with levels of business confidence and investment remaining

subdued, and no indication of a recovery in investment in new build work into the medium term.

The **active fire protection** market is comprised of alarms and extinguishers / sprinkler systems, with the market estimated at around £330m in 2008. In terms of **passive fire protection**, the market for **fire doors** had experienced steady growth up to 2007. However, the recent downturn in the construction of new houses and flats, together with a decline in many commercial and industrial sectors has had a negative impact on the industry and, as such, has reduced the market value to around £300m, while the **fire door fittings** market is worth approximately £200m.

The situation into H2 2009 continues to remain pessimistic for the office sector in particular with new projects postponed, further reductions in demand for new and refurbished office space, continuing downward pressures on average rental values and more evidence of commercial office developers facing increasing financial restraints. As a result, the market for **suspended ceilings and partitions** is likely to decline by 5-7% in 2009, with 'fire performance' products accounting for 15-20% of the sector – though definition is subject to some interpretation.

The growth in **fire resisting ductwork and damper systems** is again largely influenced by overall construction output. Market size for ductwork and damper systems is estimated at over £75m in 2008 but forecast to decline by up to 5% in 2009.

Decline in the housing market is likely to influence the active and passive fire protection sector with regard to fire doorset installations, fire alarms and sprinklers, mainly in multi storey apartments with safety and sustainability becoming increasingly important issues. In addition, further decline within the non-domestic construction sector - particularly in offices, retail and industrial will have a negative effect on the passive fire protection market and will see decline in fire resistant glass, partitions, and cable during 2009. Medium term prospects are more uncertain as rising Government debt levels are likely to result in some cutbacks in public sector capital spending programmes – particularly from 2011.

Continuing concerns over terrorism and public safety should provide further specification opportunities within the commercial sector, with many organisations likely to increase or upgrade their fire safety measures. In particular, transport, stadia or other buildings / locations where there are large crowds etc, are considered key areas, with the Olympics development programme offering good market opportunities.

AMA Research's report "**Active and Passive Fire Protection Market – UK 2009-2013**" is available in hard copy or electronic format for £650 and can be ordered online at www.amaresearch.co.uk or by calling 01242 235724.