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Prefabricated Frame and Panel Building Systems Market UK 2010-2014

AMA report reviews the market for prefabricated frame and panel building systems and considers future developments

"After a difficult period in 2008- 09, current forecasts indicate that the UK prefabricated frame and panel building systems market is likely to stabilise during 2010-2011, with low level recovery forecast 2012-2014, reaching a market value of over £400 million in 2014."

A brief summary of the new edition 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.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.**

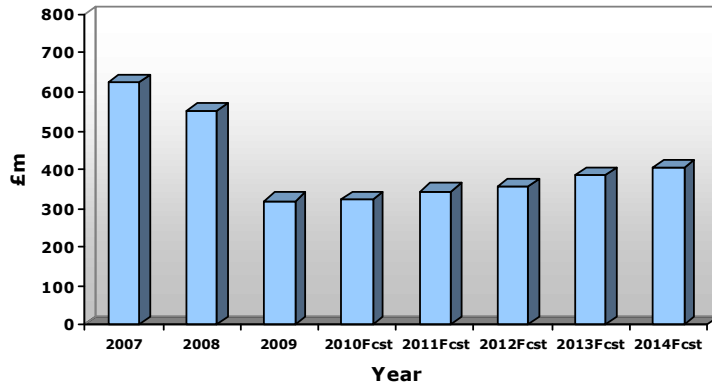
If you would like to speak to an author of this report, please contact Andrew Hartley or Chris Moore on (01242) 235724.

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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UK Prefabricated Frame and Panel Building Systems Market 2007-2014 (£m MSP)



The UK prefabricated frame and panel building systems market is estimated to be worth some **£320 million in 2009**. The market comprises **off-site manufactured** load-bearing wall, floor and roof assemblies, which are erected on-site to form three-dimensional units. Specifically, the market consists of four principal product sectors – timber frame, light gauge steel framing systems, concrete, and structural insulated panels.

Timber frame represents the largest sector at over 50% of market value, with concrete and light steel framing systems each accounting for around 20% share, with SIPs representing a small share of the market.

While the market experienced positive growth up to 2007, reflecting growth in housebuilding and high levels of government expenditure in health, education and defence, the global financial crisis adversely impacted the frame and panel sector during 2008 and 2009, resulting in a significant market downturn. Market performance in 2008-09 has been particularly difficult, with a decline of over 45% over the 2-year period – primarily due to the major decline in housebuilding.

Key application areas for prefabricated frame and panel building systems include housebuilding (accounting for over 50%), defence, healthcare, education, hotel, commercial and industrial, with expansion in cellular construction and single living accommodation applicable to many of these sectors, in particular student accommodation.

The trend to offsite manufacturing is set to continue in the medium to long term, driven by environmental legislation and the need for greater accuracy and speed of construction. Different applications will have vastly differing requirements in terms of materials and the level of prefabrication, but panellised systems offer significant advantages which should help underpin specifier interest and underlying market growth.

The top 10 players in the market account for around 50% share. While there has been some consolidation in the frame and panel building systems market, the market remains relatively fragmented, with many manufacturers and suppliers specialising in particular end use sectors and prefabricated materials. Our view, however, is that further restructuring in the market is anticipated given the level of downturn in 2008-10.

Current forecasts indicate that the UK prefabricated frame and panel building systems market is likely to stabilise during 2010-2011, with low level recovery forecast 2012-2014 and reaching a market value of over £400 million in 2014. While the economy has technically emerged from recession, the short to medium term outlook remains relatively pessimistic and uncertain, particularly given the uncertainty over the outcome of the General Election, with no indication of a significant recovery in business and consumer confidence in the UK.

AMA Research's report "**Prefabricated Frame and Panel Building Systems Market – UK 2010-2014**" 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.