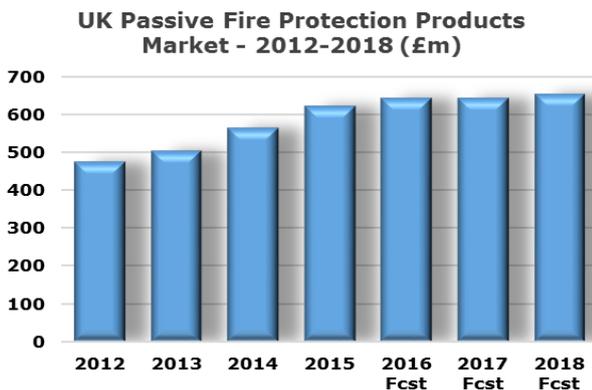




PRESS RELEASE

23% growth over two years in the UK passive fire protection market

September 2016 – Cheltenham, UK



The UK market for passive fire protection products has seen good growth during the last two years, in line with increased construction output. According to a new report by AMA Research, strong value growth of 23% was achieved between 2013 and 2015, driven by higher levels of construction and RMI activity. Forecasts indicate a more subdued performance in the short term, with lower levels of construction activity anticipated following the decision to leave the EU.

The passive fire protection market is comprised of fire resistant doors, fittings and intumescent seals, cables, partitions and suspended ceilings, glass, structural protection and ductwork and damper systems. This market is highly dependent on new construction activity, particularly in the key end use sectors of offices, education, healthcare and industrial, with product development and regulatory changes also key factors contributing to value growth in recent years.

Fire resistant doors, fittings and seals represents the largest sector of the market, accounting for around 60% of total market value. Product development is an important driver, and recent innovations include intumescent coatings with shortened drying times; electronic fire door closers that are linked to fire alarm systems; and more flexible fire stopping pipe collars that allow a greater range of applications compared to conventional collars.

Within the passive fire protection market, there are a number of vertically integrated manufacturers-installers operating across the fire and security sector. In addition, there are a number of manufacturers operating in a specific sector, e.g. suspended ceilings, offering fire resistance within their product range, while others are specialist manufacturers of passive fire protection products. Other key suppliers are large multi-national corporations with interests across a broad range of sectors and products.

Distribution channels and routes to market vary depending on the type of fire protection product. Some manufacturers also install their own products, and specialist installers play a significant role, as specific fire-related expertise is often required to ensure passive fire protection will perform as expected in the event of a fire.

Keith Taylor, Director of AMA Research said: *"Underlying prospects for the fire protection market remain positive, though the short term growth is brought into question by the recent referendum and the likely resulting shock to the economy. That said, the medium term forecasts are stable and growth in the market is anticipated at around 1-3% per annum until 2020."*

New office construction, a key market for fire protection products, is forecast to experience a moderate fall in the short term with delays in investment and expansion expected following the Brexit decision. This may impact on demand in a number of product sectors in the passive fire protection market including structural, suspended ceilings and partitions.

Education is also a major sector for fire protection products such as structural, ceilings, doors and cabling. Public sector investment is the key driver for this sector, and the most recent Government Spending Review forecasts that the level of investment in new school building will increase significantly over the next few years. Capital building programmes in the higher education sector might also provide impetus to the market in the short to medium term.

The '**Passive Fire Protection Market Report – UK 2016-2020 Analysis**' report is published by AMA Research, a leading provider of market research and consultancy services within the construction and home improvement markets. The report is available now and can be ordered online at www.amaresearch.co.uk or by calling 01242 235724.

Editor's Note:

If you would like to receive further information or would like to speak to an author of this report, please contact Anna Eriksson or Keith Taylor on (01242) 235724.

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

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