

Street Furniture and Lighting Market Report - UK 2018-2022

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Introduction and Overview

The 3rd edition of the 'Street Furniture and Lighting Market Report - UK 2018-2022' incorporates original research and provides a comprehensive review of the street furniture market as well as the street lighting sector, with information collated from a wide range of trade and other sources. Data and comment is specific and relevant to the markets involved.



Key issues covered in the report:

- Street Furniture - benches and seats, bollards and barriers, bins, posts and rails, planters, cycle stands, etc.
- Street Lighting - lamps, luminaires, poles/posts etc.
- Street Lighting & Furniture market size 2015 to 2018.
- Street Lighting market prospects to 2022 - key influences, budget pressures, impact of Brexit.
- Street Furniture market prospects to 2022 - key influences, budget pressures, direct control/long term maintenance contracts etc.

Areas of particular interest:

- Key customer base - local authorities/highway maintenance contractors etc. - budget pressures.
- Review of street furniture market - fragmented range of products - market sizes in 2015 through to 2017 and future prospects up to 2022.
- Street lighting market - overall performance forecast through to 2022, mix between products, review of lighting types.
- Review of fragmented supply structure - key players, market structure, share estimates of leading players etc.

Some of the companies included

Amberol, Autopa, ATG Access, Bailey Streetscene, Bellsure (Streetsure), Broxap, D W Windsor, ESE World Falco UK, Frontier Pitts, Furnitubes, Woodscape, Glasdon, Hahn Plastics, Hartecaste, Townscape, Heritage Street Furniture, Hill & Smith - Mallatite, Langley Design, Leafield Environmental, Marshalls Street Furniture, Orchard Street Furniture, Safetyflex, Shelterstore, Wybone and more.

MARKET STRUCTURE

- Structure of customer base, local Government in the UK, Highways England and other stakeholders.
- Types of contracts, framework agreements, annual tenders, term maintenance contracts, buying consortia etc.

STREET FURNITURE MARKET

- Sales mix by product type - benches/seats, bollards/barriers, bins, planters, posts/rails, cycle stands etc. Review of each product, market sizes with forecasts 2015-2022, key trends, changing product mix, strengths and weaknesses, key suppliers etc.
- Sales mix by materials - benches, bollards etc - steel, timber, plastics, concrete etc - trends in usage etc.
- Review of product types - e.g. cycle stands etc.
- Market prospects to 2022 - key influences, budget pressures, direct control/long term maintenance contracts etc.

STREET LIGHTING MARKET

- Street lighting market size - market value 2015-18, recent trends.
- Share of market by product type - street lights, illuminated signs/bollards. Types of systems used (growth of LED, low/high pressure sodium, metal halide etc).
- Market prospects to 2022 - key influences, budget pressures, impact of Brexit.

GENERATOR MARKET

- Overview of generator power rating mix.
- Overall generator hire market - mix of generator equipment and ancillary products.
- Breakdown of generator hire end-use sectors.
- Legislation and product development.
- Major equipment suppliers.

DISTRIBUTION / SUPPLIERS FOR EACH MARKET

- Major channels of distribution for street furniture - share mix between direct supply, specialist distributors, internet, builders merchants.
- Major channels of distribution for street lighting - share mix between direct supply, specialists etc.
- Suppliers of street furniture - review of key suppliers by product sector, share estimates, fragmented supply chain etc.
- Suppliers of street lighting - key players split by luminaires, control systems, lighting columns, contractors, distributors etc.
- Profiles of key suppliers - product ranges, market position etc.

Report Summary

Street furniture is a collective term for objects and pieces of equipment installed on streets and roads for various purposes. The total street furniture market includes: benches, traffic barriers, bollards, post boxes, phone boxes, streetlamps, traffic lights, traffic signs, bus stops, tram stops, taxi stands, public lavatories, fountains, watering troughs, memorials, public

sculptures, and waste receptacles.

Street furniture is used on roads and pavements, motorways, urban roads, and parks and leisure facilities. Manufacturers and suppliers of street furniture supply a number of other markets, but this report focuses on the local authority sector, and excludes other sectors such as Education, Healthcare, Rail & Transport, Residential Developments, Retail & Commercial, Restaurants & Bars, Sports & Leisure, Ministry of Defence, etc.

There are companies who manufacture in the UK and market their own products, and others who mainly manufacture for others and do not have a high profile with end users. However, a substantial volume of products is imported into the UK. Imported products tend to be the simpler products, with many originating from China. Many companies specialised in only one or two products, while some supply the whole range. Others will specialise purely in one type of material such as stainless steel or timber, and sometimes street furniture is only a very small part of the business.

Our forecasts indicate some growth over the 2018-2022 period, though rates of growth will be modest due to increasing pressures on Local Authority budgets. With grants from Central Government to Local Authorities falling, over the next few years urban landscaping will be regarded as a lower priority for spending compared to social services and therefore likely to be under continual pressure for funding. Therefore, local authorities will be looking for ways to save money and maintenance budgets for street furniture may be limited because of high demand from other areas of highway maintenance expenditure, such as filling pot holes and converting street lighting to LEDs.

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