

Published by

MTW Research

Professional Market Research - Superior Reports

Rainwater Harvesting Market UK 2008-2012

A Review of the UK Rainwater Harvesting Market, including Product Shares, End Use Sector Mix, Review of Key Trends, Supplier Overview, Future Prospects and Market Forecasts to 2012

April 2008

Market Report Contents

1.	Introduction	9
2.	Macro Economic & Overall Construction Market Issues	10
2.1	Political	10
2.2	Economic	11
2.2.1	UK Gross Domestic Product	12
2.2.2	UK Inflation 2000-2012	12
2.2.3	Interest Rates	14
2.2.4	Disposable Income Levels By Region	15
2.3.	Construction & Refurbishment	16
2.4.	Construction Material Price Inflation	19
3.	Rainwater Harvesting Systems Market 2004-2012	20
3.1	Rainwater Harvesting Products Market Definition	20
3.2	Rainwater Harvesting Market Size By Value 2004-2012	21
3.2.1	Rainwater Harvesting Market 2004-2007	21
3.2.2	Rainwater Harvesting Market 2007-2012	23
3.3	Rainwater Harvesting Market By Roof Area 2004-2012	24
3.3.1	Rainwater Harvesting Market By Roof Area 2004-2007	24
3.3.2	Rainwater Harvesting Market By Roof Area 2007-2012	25
3.3.3	Rwh Systems Penetration Scenarios To 2020	26
3.4	Rainwater Harvesting Market Value By Uk Country & Region 2007	27
3.4.1	Rainwater Harvesting Sales By Uk Country 2007	27
3.4.2	Rainwater Harvesting Sales By English Region In 2007	28
3.5	Rainwater Harvesting Market Drivers, Trends & Influences	30
3.5.1	Key Positive Market Drivers & Influences	31
3.5.2	Key Negative Influences For The Rwh Systems Market	45
4.	Product & End Use Sector Mix By Value	48
4.1	Key Product Sectors Share By Value 2008	48
4.2	Domestic & Non-Domestic End Use Sector Mix By Value	49
4.2.1	Share By Domestic & Non-Domestic Sectors In 2008	49
4.2.2	Domestic Rwh Market	50
4.2.3	Non-Domestic Rainwater Harvesting Market	52
5.	Key Rainwater Harvesting Suppliers Profiles	54
	3p Technik Uk Ltd	54
	Aliaxis Holdings Uk (Marley & Glynwed)	54
	Alumasc Exterior Building Products	54
	Aquaco Ltd	55
	Aquality Trading & Consulting Ltd	55
	Aquatek Water Management Systems	55
	Big Web Warehouse Ltd Trading As Rainwaterharvesting.Co.Uk	55
	British Eco	56
	Carlow Precast Tanks Uk Ltd	56
	Combined Harvesters Ltd (Mfr)	56
	Conder Products Ltd	56
	Construction Resources (Ecological Builders Merchant)	57
	Cpm Group Ltd	57
	Cress Water Solutions	57
	Dab Pumps	57
	Direct Pumps & Tanks Ltd	57
	Ecotech Environmental Ltd	58
	Ecovision Systems	58
	Ecozi Ltd	58

Edincare Pumped Drainage Systems	58
Freerain Ltd	59
Freewater Uk Ltd	59
Gm Autoflow	59
Otto Graf	59
Gusto	60
Hydro International Plc	60
Ice Renewables	60
Irrigation Systems & Service Llp (Iss)	60
Ecofirst Ltd	60
Klargester Environmental Ltd (Kingspan, Envireau)	61
Marley Plumbing & Drainage	61
Northavon Pumps & Controls Ltd	61
Pims Group	62
Polypipe Civils Ltd	62
Ps Clarke Groundworks (Rainwater Economy Systems)	62
Rain Harvester Ltd	62
Rainharvesting Systems Ltd	62
Raintec Ltd	63
Rainwater Storage Solutions	63
Regen Tec	63
Rehau	63
Rewatec Uk	63
Scp Environmental Ltd	64
Source Control Systems Ltd	64
Stormsaver Ltd	64
Watermatic Ltd	64
Water Support Services Ltd	64
Wavin Plastics Ltd	65
Wpl Ltd (Suplies Graf)	65
Wisy	65
6 Key Suppliers – Financial Profiles	66
3p Technik Uk Ltd	66
Company Profile Overview	66
Key Financial Indicators Analysis - 3p Technik Uk Ltd	66
Aliaxis Holdings Uk	67
Company Profile Overview	67
Key Financial Indicators Analysis - Aliaxis Holdings Uk	67
Alumasc Exterior Building Products	68
Company Profile Overview	68
Key Financial Indicators Analysis - Alumasc Exterior Building Products	68
Aquaco Ltd	69
Company Profile Overview	69
Key Financial Indicators Analysis - Aquaco Ltd	69
Aquality Trading & Consulting Ltd	70
Company Profile Overview	70
Key Financial Indicators Analysis - Aquality Trading & Consulting Ltd	70
Big Web Warehouse Ltd Trading As Rainwaterharvesting.Co.Uk	71
Company Profile Overview	71
Key Financial Indicators Analysis - Big Web Warehouse	71
Carlow Precast Tanks Uk Ltd	72
Company Profile Overview	72
Key Financial Indicators Analysis - Carlow Precast Tanks Uk Ltd	72
Cpm Group Ltd	73

Company Profile Overview	73
Key Financial Indicators Analysis - Cpm Group Ltd	73
Dab Pumps	74
Company Profile Overview	74
Key Financial Indicators Analysis - Dab Pumps	74
Direct Pumps & Tanks Ltd	75
Company Profile Overview	75
Key Financial Indicators Analysis - Direct Pumps & Tanks Ltd	75
Ecovision Systems	76
Company Profile Overview	76
Key Financial Indicators Analysis - Ecovision Systems	76
Freerain Ltd	77
Company Profile Overview	77
Key Financial Indicators Analysis - Freerain Ltd	77
Freewater Uk Ltd	78
Company Profile Overview	78
Key Financial Indicators Analysis - Freewater Uk Ltd	78
Hiflow Ltd	79
Company Profile Overview	79
Key Financial Indicators Analysis - Hiflow Ltd	79
Hydro International Plc	80
Company Profile Overview	80
Key Financial Indicators Analysis - Hydro International Plc	80
Irrigation Systems & Service Llp (Iss)	81
Company Profile Overview	81
Key Financial Indicators Analysis - Irrigation Systems & Service Llp (Iss)	81
Ecofirst Ltd	82
Company Profile Overview	82
Key Financial Indicators Analysis - Ecofirst Ltd	82
Marley Limited	83
Company Profile Overview	83
Key Financial Indicators Analysis - Marley Limited	83
Pims Group	84
Company Profile Overview	84
Key Financial Indicators Analysis - Pims Group	84
Polypipe Civils Ltd	85
Company Profile Overview	85
Key Financial Indicators Analysis - Polypipe Civils Ltd	85
Ps Clarke Groundworks (Rainwater Economy Systems)	86
Company Profile Overview	86
Key Financial Indicators Analysis - Ps Clarke Groundworks	86
Rainharvesting Systems Ltd	87
Company Profile Overview	87
Key Financial Indicators Analysis - Rainharvesting Systems Ltd	87
Rehau	88
Company Profile Overview	88
Key Financial Indicators Analysis - Rehau	88
Source Control Systems Ltd	89
Company Profile Overview	89
Key Financial Indicators Analysis - Source Control Systems Ltd	89
Stormsaver Ltd	90
Company Profile Overview	90
Key Financial Indicators Analysis - Stormsaver Ltd	90
Watermatic Ltd	91

Company Profile Overview	91
Key Financial Indicators Analysis - Watermatic Ltd	91
Wavin Plastics Ltd	92
Company Profile Overview	92
Key Financial Indicators Analysis - Wavin Plastics Ltd	92
Wpl Ltd	93
Company Profile Overview	93
Key Financial Indicators Analysis - Wpl Ltd	93

Market Report Tables & Charts

Figure 1: Rainwater Harvesting Market 2004-2014 £M	9
Figure 2: UK GDP 2003-2012 £m Current Prices	12
Figure 3: UK Inflation – All Items 2000 – 2012 £m	12
Figure 4: UK Inflation – Furnishing & RMI of Dwellings 2000-2012 £m	13
Figure 5: UK Inflation – Products & Services for RMI of Dwellings 2000-2012 £M	14
Figure 6: UK Interest Rates – Bank of England Base Rate 2000-2012	14
Figure 7: Average Disposable Income by Region £ 2000-2012	15
Figure 8: New Build & Refurbishment Market by Value 2000-2012 £m	16
Figure 9: New Build Activity – Value Share by End Use Sector 2007	17
Figure 10: RMI Activity – Value Share by End Use Sector 2007	18
Figure 11: New Build & Refurbishment Market by Value 2000-2012 £m	19
Figure 12: Rainwater Harvesting Market 2004-2007 £M	21
Figure 13: Rainwater Harvesting Market 2007-2012 £M	23
Figure 14: Rainwater Harvesting Market by Roof Area 2004-2007 M2	24
Figure 15: Rainwater Harvesting Market by Roof Area 2007-2012 M2	25
Figure 17: Rainwater Harvesting Systems Sales Share by UK Country in 2007	27
Figure 18: Sales Share by English Region of RWH Systems in 2007	28
Figure 19: Sales Value of Rainwater Harvesting Systems By English Region 2007	29
Table 20: Key Positive & Negative Market Influences	30
Figure 21: UK Water Meter Levels in Comparison to OECD Countries 2007	35
Figure 22: Water Metering Household Penetration Levels 2007-2012	36
Table 23: Environment Agency Views on Water Metering	37
Chart 24: Regional Average Rainfall Levels – UK 2007	38
Table 25: The Water Technology List	39
Figure 26: Rainwater Harvesting Systems Key Product Mix 2008 by Value	48
Figure 27: RWH Systems Mix by Domestic & Non-Domestic Sectors 2008	49
Table 28: Key Uses in the Domestic RWH Systems Market 2008	50
Figure 29: Typical Domestic Water Usage Per Person by Application 2008	51
Table 30: Key Sectors in the Non-Domestic RWH Systems Market 2008	52
Figure 31: Share by Key Non-Domestic End Use Sector for RWH Systems 2008	53
Overview of 3P Technik UK Ltd's Profile	66
Key Financial Indicators, Year Ending to 31/12/2006	66
Overview of Aliaxis Holdings UK's	67

Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	67
Overview of Alumasc Exterior Building Products's	68
Key Financial Indicators, Year Ending 30/06/2004 to 30/06/2006	68
Overview of Aquaco Ltd's	69
Key Financial Indicators, Year Ending 30/11/2004 to 30/11/2006	69
Overview of Aquality Trading & Consulting Ltd's	70
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	70
Overview of Big Web Warehouse Ltd's	71
Key Financial Indicators, Year Ending 30/04/2005 to 30/04/2007	71
Overview of Carlow Precast Tanks UK Ltd's Profile	72
Key Financial Indicators, Year Ending 30/11/2004 to 30/11/2006	72
Overview of CPM Group Ltd's Profile	73
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	73
Overview of DAB Pumps's Profile	74
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	74
Overview of Direct Pumps & Tanks Ltd's Profile	75
Key Financial Indicators, Year Ending 31/07/2005 to 31/07/2007	75
Overview of Ecovision Systems's Profile	76
Key Financial Indicators, Year Ending to 31/03/2007	76
Overview of Freerain Ltd's Profile	77
Key Financial Indicators, Year Ending 31/03/2005 to 31/03/2007	77
Overview of Freewater UK Ltd's Profile	78
Key Financial Indicators, Year Ending 31/07/2005 to 31/07/2007	78
Overview of Hiflow Ltd's Profile	79
Key Financial Indicators, Year Ending to 31/12/2006	79
Overview of Hydro International PLC's Profile	80
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	80
Overview of Irrigation Systems & Service LLP (ISS)'s Profile	81
Key Financial Indicators, Year Ending to 28/02/2007	81
Overview of Ecofirst Ltd's Profile	82
Key Financial Indicators, Year Ending to 31/03/2007	82
Overview of Marley Limited's Profile	83
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	83
Overview of Pims Group's Profile	84
Key Financial Indicators, Year Ending 30/04/2005 to 30/04/2007	84

Overview of Polypipe Civils Ltd's Profile	85
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	85
Overview of PS Clarke Groundworks (Rainwater Economy Systems)'s Profile	86
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	86
Overview of Rainharvesting Systems Ltd's Profile	87
Key Financial Indicators, Year Ending 31/08/2004 to 31/08/2006	87
Overview of Rehau's Profile	88
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	88
Overview of Source Control Systems Ltd's Profile	89
Key Financial Indicators, Year Ending 31/05/2004 to 31/05/2006	89
Overview of Stormsaver Ltd's Profile	90
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	90
Overview of Watermatic Ltd's Profile	91
Key Financial Indicators, Year Ending 31/07/2005 to 31/07/2007	91
Overview of Wavin Plastics Ltd's Profile	92
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	92
Overview of WPL Ltd's Profile	93
Key Financial Indicators, Year Ending 31/12/2004 to 31/12/2006	93

This report reflects MTW Research's independent view of the market which may differ from other third party views. Whilst we try to ensure that our reports are an accurate depiction of their respective markets, it must be emphasised that the figures and comment contained therein are estimates based on a mix of primary and secondary qualitative research, and should therefore be treated as such.

Terms & Conditions of Use

The information contained within this report remains the copyright of MTW Research. Subject to these Terms and Conditions (this "Agreement"), MTW Research ("we", "our", "us") makes available this publication and data or information contained therein (the "Report"). Your use of this report constitutes your acknowledgment and assent to be bound by this Agreement.

Permitted Use, Limitations on Use

You may access purchased Reports only as required to view the Reports for your individual use, and may print/copy a purchased Report once for your use. You may copy extracts from purchased Reports onto your own documents, provided that all citations are attributed to "MTW Research", and are for internal use only. You may not republish, resell or redistribute any Report, or do anything else with any Report, which is not specifically permitted in this Agreement. You may not reproduce, store in a retrieval system or transmit by any means, electronic or mechanical, any report without the prior permission of MTW Research.

Limitation of Liability

You are entirely liable for activities conducted by you or anyone else in connection with your use of the Report. We take no responsibility for any incorrect information supplied to us during the research process. Market information is based on telephone interviews and secondary sources whose accuracy we cannot guarantee. You acknowledge when ordering that MTW Research Reports are for your internal use and not for general publication or disclosure to third parties, unless otherwise agreed. Neither MTW Research nor any of its affiliates, owners, employees or other representatives will be liable for damages arising out of or in connection with the use of the Report or the information, content, materials or products included in the Report. This is a comprehensive limitation of liability that applies to all damages of any kind, including (without limitation) compensatory, direct, indirect or consequential damages, loss of data, income or profit, loss of or damage to property and claims of third parties.

Applicable Law

This Agreement will be governed by and construed in accordance with the laws of England and Wales without giving effect to the principles of conflict of laws thereof, and to the extent permitted by applicable law, you consent to the jurisdiction of courts situated in England and Wales in any action arising under this agreement.

Intellectual Property Rights

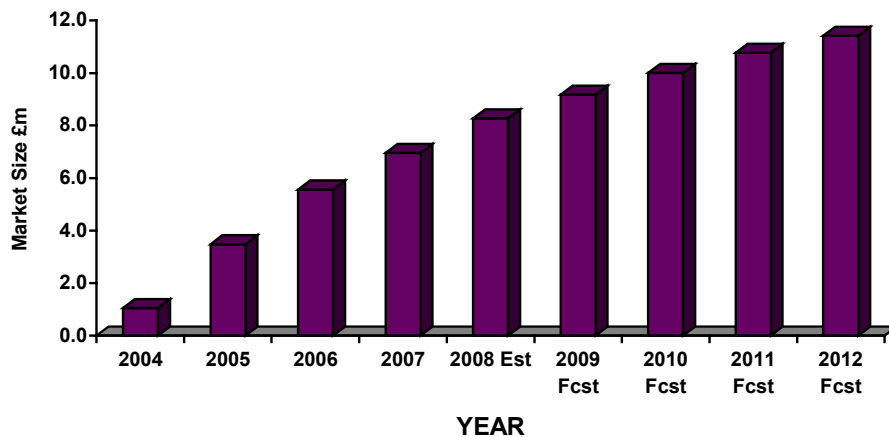
You acknowledge that legal and beneficial interest in Intellectual Property Rights in connection with the Report belong to us. This includes all Intellectual Property Rights in any Material. You have no rights in or to the Report and you may not use any Material other than as permitted under this Agreement. We grant you a non-exclusive, non-transferable licence to use the Intellectual Property Rights referred to above solely for the use of Material as permitted under this agreement.

1. Introduction

MTW Research are an independent market research publisher focused on providing high quality, value for money market reports within the UK Building & Construction Industry. MTW Research reports are researched, collated and compiled by experienced and qualified professionals, ensuring that the information contained within the report is as accurate, relevant and up to date as possible.

MTW Research offers professional, quality market reports which are easy to read and digest and provide valuable information on which to base further research or decision-making. This report reviews the relatively new market sector of rainwater harvesting products in the UK, with the following chart providing the market size by value since 2004 and forecasts to 2012:-

Figure 1: Rainwater Harvesting Market 2004-2014 £M



Source: MTW Research / Trade Estimates (figures censored from sample)

For the purposes of this report the UK Rainwater Harvesting Market is defined as consisting of the following key domestic and non-domestic product sectors:-

- **Rainwater Tanks** – below & above ground tanks (all materials), header tanks, excluding 'water butts'.
- **Filters** – downpipe, leaf separators & catchers, garden filters, tank filters (suction filters), industrial filters, calmed inlet etc.
- **Pumps & Controls** - Flow controllers, submersible pressure pumps, 240V / 12V etc.
- **Accessories** – Pipes, trapped overflow, tank level gauges, hose, UV sterilisation, solar panels etc.

The methodology for this report included primary research information from Government sources, manufacturers, contractors, and other trade sources. This was supported by secondary research from trade journals, company reports, Companies House, Government statistics, trade associations, company websites and existing knowledge in this sector.

2. Macro Economic & Overall Construction Market Issues

2.1 Political

3. Rainwater Harvesting Systems Market 2004-2012

3.1 Rainwater Harvesting Products Market Definition

For the purposes of this report, the UK rainwater harvesting market is composed of a number of product sectors which are manufactured and supplied to divert, filter and re-distribute rainwater collected on the roof of domestic and non-domestic buildings to replace mains water use in non-potable applications.

Specifically, the key product sectors included are:-

- **Rainwater Tanks** – under & above ground tanks (all materials), header tanks
- **Filters** – downpipe, leaf separators & catchers, garden filters, tank filters (suction filters), industrial filters, calmed inlet etc.
- **Pumps & Controls** - Flow controllers, submersible pressure pumps, 240V / 12V etc.
- **Accessories** – Pipes, trapped overflow, tank level gauges, hose, UV sterilisation, solar panels supplied as part of the package etc.

It should be noted that water butts are **excluded** from our definition of rainwater harvesting systems.

End use sectors include both domestic and non-domestic applications, including industrial, commercial, leisure, public sector, office buildings as well as domestic dwellings.

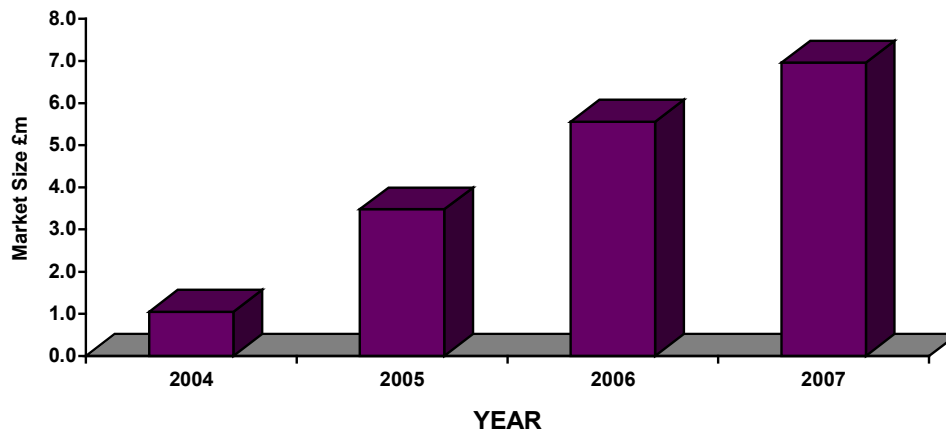
Typical applications for rainwater harvesting (RWH) systems include toilet and urinal flushing, laundry, irrigation, vehicle washing and some process applications in the non-domestic sector. Domestic systems can be shared between 2 households and typically used over 4 storeys.

3.2 Rainwater Harvesting Market Size by Value 2004-2012

3.2.1 Rainwater Harvesting Market 2004-2007

The UK rainwater harvesting market is currently estimated to be worth around £x million at distributor selling prices, reflecting substantial growth in recent years as indicated in the following chart:-

Figure 12: Rainwater Harvesting Market 2004-2007 £M



Source: MTW Research / Trade Estimates (figures censored from sample)

There are a number of complexities in terms of quantifying the RWH market, given the number of smaller suppliers active in the market, coupled with the relative lack of accurate reporting. As such, the above figures should be regarded with a degree of caution.

From historically low, stable levels, the rainwater harvesting market has received renewed attention in recent years as an alternative to mains water use, from both the domestic and non-domestic end use sectors. The market remains a relatively immature one in the UK, despite the products themselves being well established in Europe, and as such has experienced rapid and substantial growth in both volume and value terms.

Since 2004, indications are that the market has grown from a value of just over £x million, to reach around £x million in 2007, reflecting growth in excess of xxx%, albeit from very low levels. Sources indicate that the RWH market is still very much in a rapid growth phase of its life cycle, with a substantial potential target market on which to develop further healthy levels of growth.

Rainwater harvesting techniques have been used for thousands of years as a method of storing water throughout the year, negating the seasonality of rainfall to some extent. Relating specifically to the UK, rainwater harvesting represented a standard feature in most new houses in the nineteenth century, prior to the advent of mains water, as the technology resulted in homeowners not needing to make use of the village pump.

Whilst the drivers for RWH systems have changed significantly since this time, the general principles have remained the same throughout history, with roofs used to collect rainfall, and underground cisterns used to store the water to maintain water purity and prevent contamination.

By undertaking a strategic PEST analysis, it is clear that there are a large number of key market drivers in the rainwater harvesting industry which have provided substantial growth in this sector in recent years, including:-

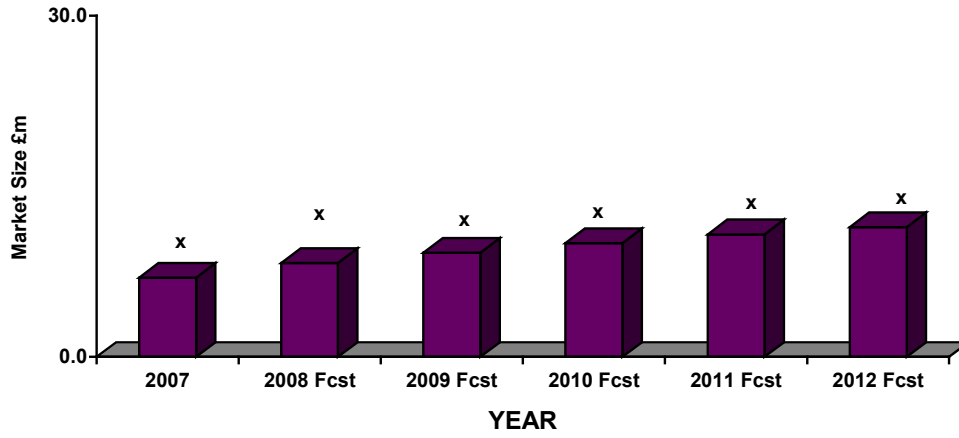
- **Politico-legal** – Government targets, tax concessions and initiatives promoting RWH
- **Economic** - Savings in respect to whole life cycle costs, particularly in non-domestic sectors
- **Environmental** – Growing concern relating to a wide range of environmental issues
- **Societal** – A growing appreciation of water consumption issues by society
- **Technological** – Modern RWH products offer new methods of achieving greater efficiency

Within each of the main headings identified above, there are a myriad of positive and negative influencing factors which have already impacted on the market in recent years and will continue to influence the sector in the medium to longer term. These issues are discussed in further detail later in this chapter.

3.2.2 Rainwater Harvesting Market 2007-2012

The following chart provides an illustration of our forecasts for the rainwater harvesting market between 2007 and 2012 in value terms:-

Figure 13: Rainwater Harvesting Market 2007-2012 £M



Source: MTW Research / Trade Estimates (figures censored from sample)

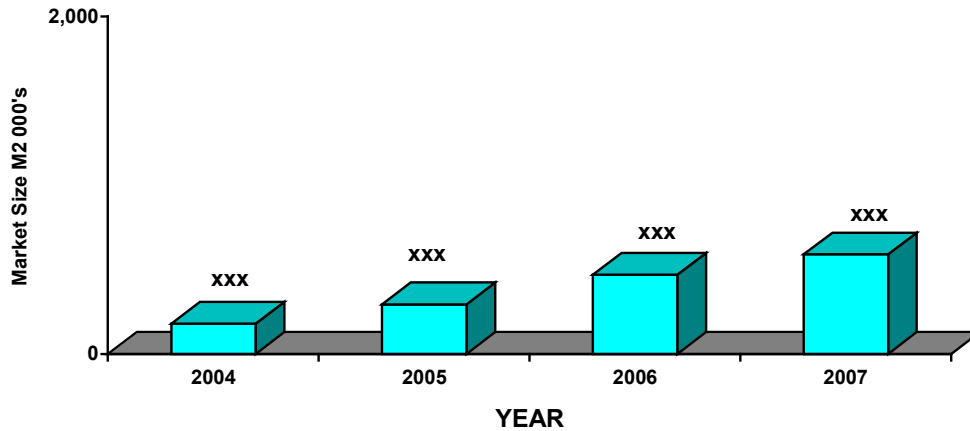
The

3.3 Rainwater Harvesting Market By Roof Area 2004-2012

3.3.1 Rainwater Harvesting Market by Roof Area 2004-2007

In order to further understand the recent performance of the UK RWH sector, the following chart provides our estimates of the roof area used by such systems since 2004 until 2007:-

Figure 14: Rainwater Harvesting Market by Roof Area 2004-2007 M2



Source: MTW Research / Trade Estimates (figures censored from sample)

It should be noted

3.5 Rainwater Harvesting Market Drivers, Trends & Influences

As previously discussed, there are a wide range of factors which influence the performance of the RWH systems market and this section addresses some of these issues in terms of positive and negative influences.

The following chart briefly illustrates some of the key positive and negative issues impacting the RWH sector at present and in the future:-

Table 20: Key Positive & Negative Market Influences	
Positive Influences	Negative Influences
<ul style="list-style-type: none"> • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored 	<ul style="list-style-type: none"> • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored • Censored
Source: MTW Research /Trade Sources	

The above issues are discussed in more depth below:-

6. Key Rainwater Harvesting Suppliers Profiles

The following section provides a brief profile of some of the key players active in the UK Rainwater Harvesting Market at present. Whilst we have sought to include the key suppliers in the market, their inclusion or otherwise in this report may not necessarily reflect a company's significance in the industry.

7. Key Suppliers – Financial Profiles

The following section identifies some of the leading suppliers of rainwater harvesting products in the UK at present and briefly profiles these companies alongside a financial indicator chart where such data is available from Companies House.

Sample Company Ltd

Sample Address Line 1

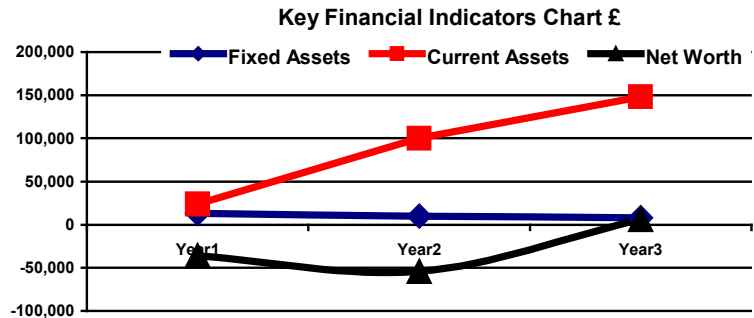
Sample Address line 2

Sample Address line 3

Postcode

Company Profile Overview

Sample Company is a private limited company, incorporated on sample date. The company's main activities are officially described as "other non-store retail sale".



The following table briefly provides a top line overview on Sample Company

Overview of Sample Company's Profile

Company Name	Sample Company Ltd
Incorporation Date	Sample date
Official Description of Activities	other non-store retail sale
Parent Company	Sample Parent Name
Ultimate Holding Company	Sample Ultimate Holding Company Name
Stated Number of Employees	n/a

Key Financial Indicators Analysis - Sample Company Ltd

Key Financial Indicators, Year Ending 31/03/2005 to 31/03/2007

Key Indicator	Year Ending 31/03/2005	Year Ending 31/03/2006	Year Ending 31/03/2007
Turnover	n/a	n/a	n/a
Profit Before Tax	n/a	n/a	n/a
Debtors	17,000	49,000	84,000
Fixed Assets	13,000	10,000	8,000
Current Assets	24,000	100,000	148,000
Current Liabilities	73,000	164,000	150,000
Long Term Liabilities	0	0	0
Net Worth	-36,000	-54,000	6,000