



Information

**KNOWLEDGE HUB**

## FIS Partition Industry Forum

The FIS Partition Industry Forum is made up of Members and Associate members of the FIS who manufacture or distribute 'demountable' office partitioning.

The objectives of the group are:

- Develop technical standards as required
- Promote best practice in the market
- Educate and inform clients and specifiers about demountable and relocatable partitions
- Promote the products and skills of FIS members in this field
- Shape the market so that the correct adherence to standards is recognised and adhered to by all to the benefit of clients
- Ascertain the size of the UK partition market
- Extend FIS independent advisory service to include expertise in partition systems

In January this year FIS together with the Construction Products Association (CPA) commissioned a survey to ascertain the size of the market.

This report not only provides valuable information about the sectors where 'demountable partitions' are being used but for the first time helps the sector understand the depth of the issue where toughed glass is spontaneously breaking and where Nickel Sulfide inclusions (NiS) appear to be the cause. This data will be used in discussions to agree how our industry could address this matter going forward.

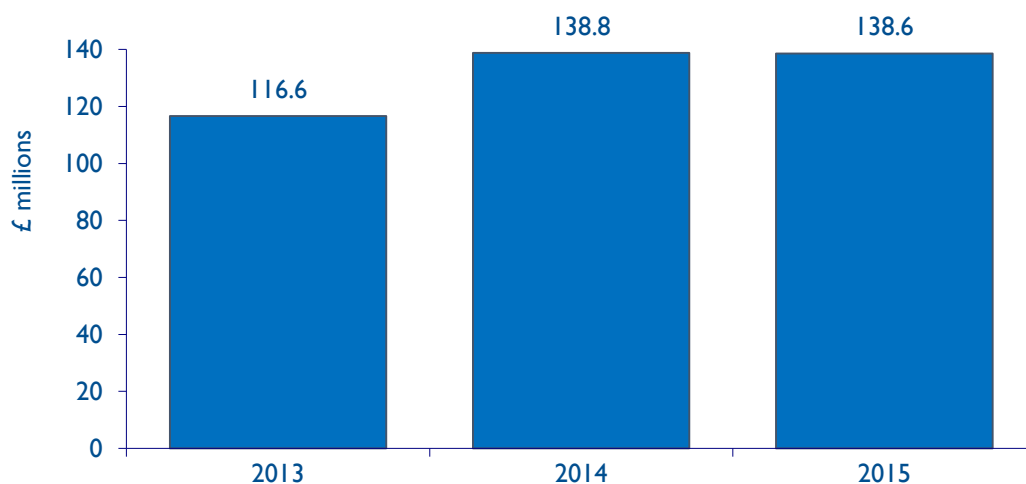
Ian Strangward  
Chair  
FIS Partitioning Industry Forum

March 2016

## Market size

- The UK partitioning market recorded a turnover of approximately £139 million in 2015
- Turnover was reported at £139 million in 2014 and £117 million in 2013
- In terms of quantity, market sales were estimated to be at least 500,000 linear metres in 2015

Value of UK partitioning sales



Source: Construction Products Association

- The majority (78.6%) of UK partitioning market turnover is in the commercial sector

Approximately what proportion of your turnover of partition systems was in the following sectors?

	%	2013	2014	2015
Commercial		78.5	78.6	78.6
Education		6.2	6.4	6.4
Energy		0.8	0.7	0.7
Health		3.1	2.1	2.9
Leisure		2.3	3.6	3.6
Retail		4.6	5.0	3.6
Transport		1.5	1.4	2.1
Other		3.1	2.1	2.1

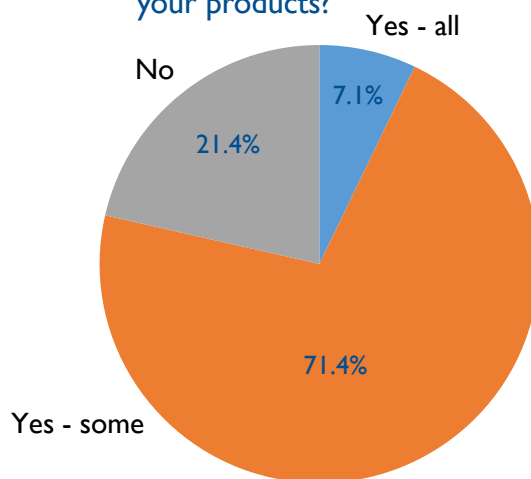
- Glazed partitioning represents the largest proportion of UK market turnover (59.2% in 2015)
- In 2015, 15.0% of UK market turnover was from fully relocatable partitioning (for example glazed steel and MFC biblock and monoblock)
- Solid partitioning and fire screens accounted for 9.2% and 8.3% of UK market turnover, respectively in 2015

Approximately what proportion of your turnover of partition systems was from the following product groups?				
	%	2013	2014	2015
Fire screens		4.5	3.3	8.3
Fully relocatable (glazed steel and MFC biblock and monoblock)		18.2	23.3	15.0
Glazed		55.5	56.7	59.2
Operable walls		1.8	1.7	0.8
Solid		13.6	9.2	9.2
Steel partitioning (single and double skin)		1.8	1.7	1.7
Storage wall		0.0	0.8	0.8
Timber		4.5	3.3	5.0

## Environmental Product Declarations

- Over three-quarters of respondents have an Environmental Product Declaration (EPD) for their products
- Of these respondents, 7.1% have an EPD for all their products and 71.4% have an EPD for some of their products
- One-fifth of respondents (21.4%) have no EPD for their products

Do you have an EPD (Environmental Product Declaration) for your products?



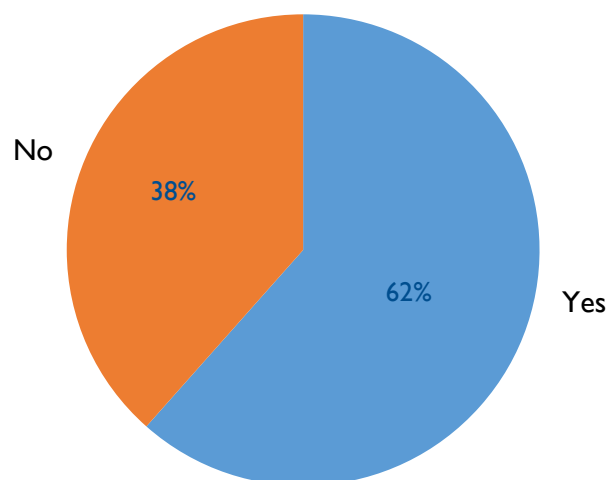
Source: Construction Products Association

## Nickel Sulfide Inclusions

In addition to gauging the size of the UK partitioning market, the survey aims to understand the extent of reported problems of nickel sulphide (NiS) inclusions in glazed partitioning, given that this product group accounts for over half of turnover in the overall partitions market.

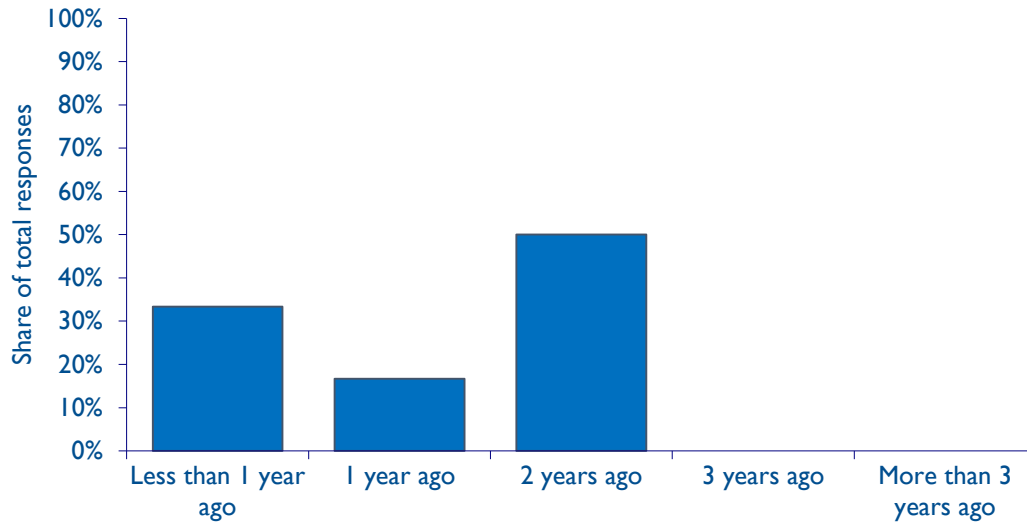
- Glazed partitioning represents the largest proportion of UK market turnover (59.2%)
- 62% of respondents reported that they had experienced spontaneous breakages of toughened glass, suspected to be due to NiS, in 2015
- For firms that install glazed partitions, on average, 6 sites were affected per respondent in 2015. One respondent reported that 17 sites were affected
- On average, 5 sheets of glass per respondent were estimated to have been lost to suspected NiS in 2015. This is an increase from 2 sheets per respondent in 2014
- All breakages were reported in glass that was installed two years ago or earlier
- All respondents reported these issues involved toughened glass, at thicknesses of 8mm, 10mm or 12mm
- Responses suggest these suspected cases of NiS inclusions involved glass from a range of manufacturers. Pilkington, Toughglaze, European Glass and Guardian were manufacturers cited by respondents.

Have you experienced spontaneous breakages of toughened glass, allegedly due to NiS, in 2015?



Source: Construction Products Association

### On average, how long ago was the glass installed?



Source: Construction Products Association