



# Market Report

A Snapshot of your Marketing Sector

## Plumbing

This pack has been designed to provide information on setting up a business in the **Plumbing** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website ([www.bgateway.com/businessplan](http://www.bgateway.com/businessplan)), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **April 2026**.

## What do I need to know about the Plumbing market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ The **UK HVAC-R market is valued at US\$8.76 billion in 2023**, forecast to reach US\$13.51 billion by 2033, growing at a CAGR of 4.4%. Growth is steady rather than rapid, reflecting a mature housing stock, high replacement/retrofit activity and strong regulatory influence rather than new-build expansion. **Residential applications dominate, accounting for 68% of UK HVAC-R demand** (BIS Research, *Global Heating, Ventilation, Air Conditioning, and Refrigeration (HVAC-R) Market, 2023-2033*, February 2024).
- ◆ In 2024, there were slightly more plumbing and HVAC contractors more in Great Britain than in the previous year. **The number of companies was about 44.7 thousand**. Due to the statistical reporting of economic activities worldwide, the two categories of plumbing and HVAC - the installation heating, ventilation, and air condition - are put together and are inseparable. (Statista, *Number of companies active in plumbing, heat, and air conditioning (HVAC) installation in England, Scotland, and Wales from 1998 to 2024*, February 2026)
- ◆ The UK plumbing and hard facilities management contractors' market, currently **valued at over £27 billion**, is forecast to grow steadily through **2029, reaching more than £32.4 billion**, according to the latest market research report from Barbour ABI. (Facilities Management Journal, [UK plumbing and hard FM contractors' market set to exceed £32bn by 2029](#), December 2025)
- ◆ A survey carried out in 2025 by Volkswagen Commercial Vehicles revealed that plumbers were expected to turn down jobs worth as much as £133 million due to increased demand. The survey also revealed that 67% of respondents will turn down at least one job they quote for every month. Reasons for turning down a job included lack of availability, travel time and economic viability. (Heating and Plumbing Monthly, [Plumbers to turn down £133m in jobs this winter, research revealing Monthly Magazine \(HPM\)](#))
- ◆ The national organisation for this industry is [Scottish and Northern Ireland Plumbing Employers Federation](#) (SNIPEF).
- ◆ Other industry bodies include [Chartered Institute of Plumbing and Heating Engineering](#) (CIPHE), [Association of Plumbing and Heating Contractors Limited](#) (APHC) and the [National Association of Professional Inspectors and Testers](#) (NAPIT).

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## Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email [info@bgateway.com](mailto:info@bgateway.com).

- ◆ **GlobalData Explorer - United Kingdom Gas Utilities (July 2025)** The UK government has set ambitious climate targets, aiming for net-zero emissions by 2050. Heating is a major contributor to greenhouse gas emissions, accounting for nearly 30% of the total, with residential heating being responsible for about half of this figure. To address, initiatives like the Great British Insulation Scheme and the Energy Company Obligation have been implemented, resulting in over 1 million home energy efficiency upgrades, including the installation of heat pumps. These measures are expected to save an estimated 58 million tonnes of CO<sub>2</sub> equivalent over their lifetimes. *(This content is reproduced under license from GlobalData PLC, Copyright 2026)*
- ◆ **BIS Research - Global Heating, Ventilation, Air Conditioning, and Refrigeration (HVAC-R) Market, 2023-2033 (February 2024)** Boilers represent a small but persistent segment of UK heating valued at US\$74.9m (2023) and rising to US\$121.7m by 2033, CAGR of 5.0%. Boilers remain embedded in the UK due to a well-established wet (hydronic) heating infrastructure and compatibility with existing radiators and pipework. Most installations are replacement boiler sales, not first-time installs.

There are also a number of online resources you may find helpful:

- ◆ [CIPHE - Chartered Institute of Plumbing and Heating Engineering](#). Provides information on careers, training and courses. The website offers guidance on career pathways and information on different courses, including interactive 3D Learning.
- ◆ [WaterSafe.org.uk](#) offers a guide on How to Become a Plumber with downloadable fact sheets and links to training providers.
- ◆ [PHMI - The Plumbing and Heating Merchant Index](#) is a monthly and quarterly update of sales data collated from specialist Plumbing & Heating Merchants throughout Great Britain accounting for around £3bn and representing over 70% of total value sales to this market.
- ◆ [COBRA Reports](#), Accessed from National Library of Scotland, have several Business Opportunity Profiles These contain key market issues and trends, trading, commercial and legal issues and legislation. Titles available include
  - **Plumber**
  - **Handyman Service**
  - **Gas Engineer**
  - **Bathroom Designer**

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## How can I find out about my competitors?

Business Gateway’s online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they’re doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#), [Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members’ directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you’ve identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company’s website as a first port of call. Not only does it give you a better understanding of the company’s activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company’s partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor’s performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing [info@bgateway.com](mailto:info@bgateway.com) or by calling **0300 013 4753**



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## What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please [info@bgateway.com](mailto:info@bgateway.com) or by calling **0300 013 4753**.

## Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these websites, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.



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## How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

### Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) ["Find a Chartered Accountant"](#) tool

### Funding

[Practical information](#) on finance and funding for starting and growing your business

### Insurance

[Business insurance guide](#)

### Legal Help

Gov.uk ["Licence Finder"](#) tool

Law Society of Scotland's ["Find a Solicitor"](#) tool

### Pricing

Business Companion [Pricing & payment guide](#).

**Please note:** the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

### Promotion

[BG guides to Marketing](#)

### Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

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You must not rely on the information in the report as an alternative to advice from an appropriately qualified professional. If you have any specific questions speak to your Business Gateway Advisor or consult an appropriately qualified professional.

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