

INSULATION AND BUILDING ENVIRONMENTS

Growth drivers:

- The need to reduce energy consumption
- More stringent Government regulation
- Public sector and Private Finance Initiatives



Focus, Specialisation and Service

SIG is the largest specialist supplier of insulation and related products in Europe. Insulation products have three main applications, being thermal management, fire protection and sound control. In the longer term, demand for insulation products, driven by continued and more stringent Government legislation and environmental issues, is expected to outperform overall construction demand.

The most widespread application for insulation is that of thermal management where insulation is most commonly used to retain heat within a building or industrial process. However, there are also applications, such as cold stores, where the requirement is to keep heat out. Fire protection is another important application for insulation where good design, material specification and installation are vital in protecting buildings from the ravages of fire and ultimately help save lives. The third application of insulation is that of sound control. Cities and towns are becoming increasingly dense and the ability to minimise the transmission of noise between dwellings is now an integral part of building design. The technical capabilities for this application

are developing apace and the Group has positioned itself as a leader within this area as well as the wider insulation market.

High energy costs and environmental concerns drive the use of insulation products across a wide range of construction and industrial applications. In general, insulation is used to control the transfer of heat and sound and provide resistance to fire, all of which are subject to the specific Building Regulations in each country. In addition, the goal of reducing carbon emissions driven by Government policy and regulation is placing increasing importance on the use of appropriate insulation materials and systems. As Building Regulations, environmental issues and modern methods of construction become ever more complex, customers increasingly rely upon the knowledge, support and impartial advice only a specialist distributor can provide. SIG's sales and technical staff receive continuous training in the latest legislation, building methods, products and applications.

Building methods and products are rapidly changing. SIG works closely with manufacturers to introduce wide ranges of new, specialist,

sustainable products to progress innovative building methods.

The Group has 224 trading sites (80 of which also supply interiors products in Mainland Europe) focused on the requirements of the insulation and building environment market and is able to provide expert advice, wide stock holding and rapid service and delivery. In the UK, the Group is also engaged in domestic insulation contracting, being predominantly the retrofitting of thermal insulation in the walls and lofts of houses, thus improving the efficiency of existing residential properties. Demand for domestic retrofitting of insulation is driven through a number of Government supported schemes such as the Carbon Emissions Reduction Target ("CERT") in the UK. SIG has built upon its extensive experience in the industrial and Heating, Ventilation and Air Conditioning ("HVAC") insulation market to develop into the adjacent and complementary area of air handling and air conditioning materials with activities spread across eight countries and twelve trading sites around Europe. This market offers excellent growth prospects driven by increasing regulation on thermal efficiencies in the non-residential environment.

Revenue



£1,086.4m

39.6%

of total revenue



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