

IBISWorld Industry Reports

User Guide

What Are IBISWorld Industry Reports?

IBISWorld industry reports are powerful business tools that provide strategic insights and analysis on over 400 UK SIC industries. We publish the UK's most comprehensive selection of reports, at the class level of UK SIC – everything from Hard Coal Mining to Pubs & Bars.

Each report consists of 25 to 30 pages of key statistics and analysis on;

- Market Characteristics
- Supply Chain, Key External Drivers
- Operating Conditions
- Current and Historical Performance, Five-year Forecasts
- Imports and Exports
- Industry Profit and Costs Benchmarks
- Employment, Enterprises and other Key Statistics, Major Industry Participants with Market Share and more



Navigating the Website

The screenshot shows the IBISWorld website interface with several callouts:

- Keyword Search:** A callout points to the search bar at the top, stating 'Keyword Search allows you to search for industry titles or text within any report'.
- Your IBISWorld contact:** A callout points to the contact information for Samsul Alam, including his email (E: Samsul.Alam) and phone number (T: 02076546827).
- Links to Report Catalogues:** A callout points to the 'Browse report listings' section, which includes links for 'UK Industry Reports (UK SIC)', 'UK Brexit Impact Statements', and 'UK Industry iExpert Summaries'.
- Five most Recently Updated Reports:** A callout points to the 'Recently Updated at IBISWorld' section, which lists reports such as 'B05.100 - Hard Coal Mining in the UK', 'H49.500 - Pipeline Transport in the UK', 'M73.110 - Advertising Agencies in the UK', 'M70.221 - Financial Management in the UK', and 'K64.303 - Private Equity in the UK'.

Inside a Report Catalogue

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HOME > INDUSTRY MARKET RESEARCH > UK INDUSTRY REPORTS (UK SIC)

UK Industry Reports (UK SIC)

Our UKSIC collection analyzes industries at the class level offering the latest content on 400 industries. Each report consists of 30 to 40 pages of key statistics and analysis on market characteristics, operating conditions, current and forecast performance, major industry participants and more.

Find your industry by keyword, major company or code:
 type here and hit enter to search

Browse Reports by industry sector:

- ▶ Accommodation and Food Service Activities (12)
- ▶ Administrative and Support Service Activities (23)
- ▶ Agriculture, Forestry and Fishing (10)
- ▶ Arts, Entertainment and Recreation (7)
- ▶ Construction (23)
- ▶ Education (5)
- ▶ Electricity, Gas, Steam and Air Conditioning Supply (7)
- ▶ Financial and Insurance Activities (25)
- ▶ Human Health and Social Work Activities (12)
- ▶ Information and Communication (25)
- ▶ Manufacturing (144)
- ▶ Mining and Quarrying (7)
- ▶ Other Service Activities (7)
- ▶ Professional, Scientific and Technical Activities (18)
- ▶ Real Estate Activities (1)
- ▶ Transportation and Storage (17)
- ▶ Water Supply; Sewerage, Waste Management and Remediation Activities (8)
- ▶ Wholesale and Retail Trade (82)

United Kingdom UKSIC Industry Reports

Accommodation and Food Service Activities

- ▶ I55.100 - Hotels
- ▶ I55.200 - Holiday Accommodation
- ▶ I55.300 - Caravan & Camping Sites
- ▶ I56.101 - Full-Service Restaurants
- ▶ I56.104 - Takeaway & Fast-Food Restaurants
- ▶ I56.210 - Catering Services
- ▶ I56.290 - Food-Service Contractors
- ▶ I56.301 - Nightclubs
- ▶ I56.302 - Pubs & Bars
- ▶ UK0.006 - Pizza Delivery & Takeaway
- ▶ UK0.007 - Juice & Smoothie Bars
- ▶ UK0.019 - Cafes & Coffee Shops

Download a full list of report titles in PDF format

Click on a Sector title to see the list of industries within that sector

The report title is a hyperlink to that report.

Navigating a Report

HOME > INDUSTRY MARKET RESEARCH > UK INDUSTRY REPORTS (UK SIC) > PRIVATE EQUITY

PRINT SAVE ALERT EXPERT SEARCH BREXIT TUTORIAL

About this Industry | Industry at a Glance | Industry Performance | Industry Outlook | Products & Markets | Competitive Landscape | Major Companies | Operating Conditions | Key Statistics

IBISWorld Industry Report K64.303
Private Equity in the UK

May 2017 | Gaetana Mak

Capital performance: The industry has recorded strong growth, a trend that is expected to continue

Industry Definition

Companies in this industry manage private equity funds - a type of collective investment fund that targets investment in private companies - on behalf of investors such as pension funds, insurance companies and individual investors. They generate revenue by charging management fees for their services.

Report Chapters – These are also hyperlinks

Last update & Analyst name

Reports are updated between 1 and 4 times a year depending on the industry

Function Buttons



HOME > INDUSTRY MARKET > RESEARCH > UK > INDUSTRY REPORTS (UK SIC) > PRIVATE EQUITY

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Report Content

All reports are presented in a standardized and consistent format. Data includes Supply Chain, Market Segmentation, Major Players and Key Statistics among others

About this Industry | Industry at a Glance | Industry Performance | Industry Outlook | Products & Markets | Competitive Landscape | Major Companies | Operating Conditions | Key Statistics

The Supply Chain

Key Economic Drivers: FDI inflows, Demand from pension funding mechanisms, Demand for investment trusts

Supply Sources: Investment Banking, Quantitative Drivage, Stock & Commodity Exchange

Private Equity in the UK

Related Industries: Investment Funds, Venture Capital, Investment Banking & Securities Brokerage, Fund Management Activities

Related International Industries: Global Investment Banking & Corporate

Products and Services

Products and services segmentation (2017-18)

- 7.2% Venture capital
- 13% Replacement capital
- 23% Expansion capital
- 56.8% Buyouts (MBO, MBI, LBO)

Total £2.2bn

Chart Info

About this Industry | Industry at a Glance | Industry Performance | Industry Outlook | Products & Markets | Competitive Landscape | Major Companies | Operating Conditions | Key Statistics

Major Companies

Major players (Market share)

- Kohberg Kravis Roberts & Co Partners LLP 85.5%
- Other 14.5%
- The Blackstone Group LP 10%

Chart Info

Key Statistics

Industry Data

Year	Revenue (€bn)	IVA (€bn)	Establishments (units)	Enterprises (units)	Employment (units)	Exports (€m)	Imports (€m)	Wages (€m)	Unemployed (units)
2008-08	2,487.4	1,944.4	483	228	6,745	-	882.2	-	-
2009-10	1,806.8	1,172.0	406	229	7,702	-	856.8	-	-
2010-11	1,632.6	1,246.6	406	227	7,069	-	887.8	-	-
2011-12	1,722.9	1,242.2	416	231	6,225	-	897.0	-	-
2012-13	1,746.2	1,356.0	393	240	5,392	-	926.4	-	-
2013-14	1,789.7	1,340.4	348	241	5,001	-	943.1	-	-
2014-15	1,704.1	1,431.1	367	258	4,857	-	1,024.1	-	-
2015-16	1,676.0	1,511.0	370	260	6,089	-	1,048.5	-	-
2016-17	2,009.3	1,611.4	481	266	6,213	-	1,121.2	-	-
2017-18	2,197.4	1,626.9	488	266	6,164	-	1,131.8	-	-
2018-19	2,248.8	1,696.3	506	269	6,667	-	1,171.8	-	-
2019-20	2,385.0	1,718.0	454	272	6,914	-	1,212.7	-	-
2020-21	2,444.8	1,830.0	430	275	7,001	-	1,246.0	-	-
2021-22	2,544.5	1,810.0	430	276	7,061	-	1,264.1	-	-
2022-23	2,687.5	1,992.0	400	281	7,061	-	1,301.0	-	-

iExpert Summary

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IBISWorld iExpert Industry Summary K64.303
Private Equity in the UK

Key Statistics Snapshot

Revenue	£2.2bn	Annual Growth 13-18	4.4%	Annual Growth 18-23	4.2%
Profit	£469.6m	Wages	£1.1bn	Businesses	266

Market Share

Revenue vs. employment growth

FTSE 100

Key External Drivers

Official bank rate

Demand from pension funding

Businesses' profit

Demand from investment trusts

Major Market Segmentation (2017-18)

Total £2.2bn

- 28% Pension funds
- 17.5% Funds of funds
- 15% Banks
- 9% Insurance companies
- 8.5% Sovereign wealth funds
- 8% Private individual investors
- 7.5% Other
- 6.5% Other corporate investors

Performance Summary

The United Kingdom is the largest European centre for the management of private equity investments and funds, and is second only to the United States in terms of global importance. Private equity firms and investment funds (capital committed to purchase other companies). Industry operators adapt to improve performance by implementing managerial and operational changes, before selling the company for a profit. Private equity transactions often involve a large amount of debt. The industry's key source of revenue are fees derived from managing investors' funds.

Over the five years through 2017-18, revenue is expected to increase at a compound annual rate of 4.3%. Growth has been supported by strong fund raising activity, and relatively high corporate profitability and company valuations. However, volatile investment activity, regulatory changes and uncertainty surrounding the EU referendum have curtailed funding and investment in recent years, constraining industry revenue growth to some extent. Revenue is anticipated to increase 4.8% in 2017-18, reaching £2.2 billion.

Cost Structure

Sector vs. Industry Costs

Category	Average Costs of all Industries in sector (2017-18)	Industry Costs (2017-18)
Profit	15.4	21.7
Rent	1.3	1.1
Utilities	2.1	3.1
Depreciation	1.1	0.9
Other	1.2	15.5
Wages	63.7	52.3
Purchases	14.4	5.3
	2.0	

iExpert is a summary version of the full industry report, condensing 30+ pages of data and analysis into a bite-sized and easily digestible 6 pages.

Get all the key graphs and data without the detailed analysis

Brexit Impact Statement

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HOME > UK BREXIT IMPACT STATEMENTS > PRIVATE EQUITY

Brexit Impact Statement K64.303
Private Equity in the UK

Following the outcome of the EU referendum on 23 June 2016, with the UK electorate voting to leave the European Union, uncertainty surrounds many industries. In addition to greater long-term uncertainty, UK industries are likely to face a series of short-term effects that are anticipated to have an immediate influence on their performance.

- Uncertainty following the EU referendum temporarily curtailed private equity deals.
- Fund flows into the industry have been adversely influenced by heightened investor concerns.
- Weaker business confidence is expected to have negatively influenced the value of assets managed by private equity firms.

Subdued activity

Economic turbulence and uncertainty regarding future trade negotiations following the UK's vote to leave the European Union has discouraged a number of private equity deals. Meanwhile, fund flows into the industry have been adversely affected as investors became wary of more risky propositions and chose to channel their money to safer investments, such as sovereign bonds. However, falling business confidence and a weak pound offered new opportunities for industry investors as well as industry operators. As the pound depreciated against key trading currencies, such as the euro, UK assets and funding became relatively cheaper to foreign investors. Conversely, the value of foreign assets under management increased.

Portfolio company performance

The performance of domestic portfolio companies was temporarily affected by weaker business confidence levels. This has negatively influenced the value of assets managed by private equity firms and therefore had a slight negative effect on industry revenue as revenue is derived as a percentage of AUM. The longer-term outlook of the industry remains uncertain. However, if the United Kingdom loses its leading position as the financial hub of Europe, the number of firms operating in the industry is likely to decline. Some operators are also expected to shift staff and transfer some operations abroad should Britain lose its dominant position. These outcomes are expected to be heavily influenced by the form of any future trade and regulatory arrangements agreed upon the UK's exit from the European Union.

Regulation and policy

However, the regulatory landscape for UK private equity firms is still in question. Industry operators rely less on EU passporting rights than other asset managers although a vast majority of buyout groups have separate funds that rely more on passporting rights to conduct deals. If the United Kingdom leaves the single market and assuming no provisional agreements are in place, the United Kingdom will become a third party country. As a result, all UK private equity funds will be classified as non-EEA alternative investment fund managers (AIFMs) under the Alternative Investment Fund Managers Regulations 2013. UK AIFMs will have to market on a country-by-country basis using the non principal private charge, which will increase the regulatory burden and compliance costs.

Each industry report is accompanied by a Brexit Impact Statement looking at the Key Economic Drivers most likely to be affected by Brexit and how they in turn will influence this industry