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Door and Window Fittings Market – UK 2011-2015

New AMA report Reviews Developments in the Door and Window Fittings Market

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A brief summary of the report is included on the following page.

Priced at £665, the report is currently available from AMA Research Ltd.
Telephone 01242 235724 or e-mail at sales@amaresearch.co.uk.

Editors Note:

Attached is a summary of the report. Please use brief extracts if you wish, **but we would request that references to company market shares are not published without our prior permission.**

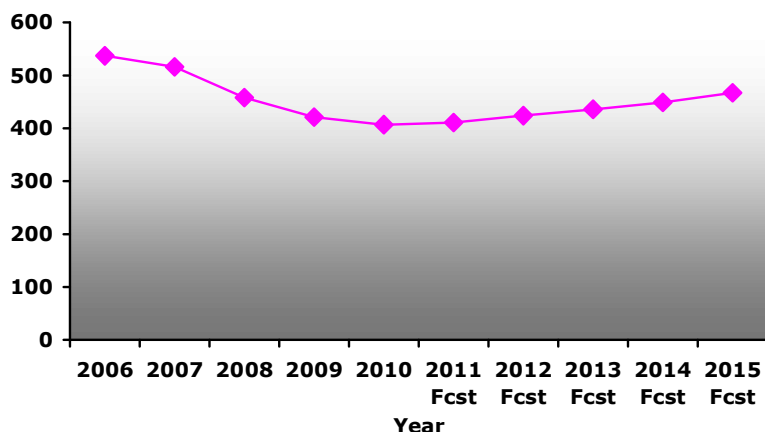
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Andrew Hartley or Chris Moore on (01242) 235724.

Please include our web address and telephone number on any review printed; it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

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Door and Window Fittings Market UK 2011-2015

UK Door & Window Fittings Market 2006-2015 (£m MSP)



Within our definition, the market for door and window fittings is estimated at just over £400m in 2010. The market is estimated to have declined by 3% in 2010, reflecting very difficult trading conditions in most key end-use sectors. However, this decline is much lower than previous years and represents some degree of market stabilisation – but the sector has still declined by over 25% in current value terms in the 2007-10 period.

In terms of product mix, the two largest sectors are locks and handles, which account for a combined share of

around 60% of the market by value.

The door & window fittings market is closely linked to the door and window fabrication and installation market, and the wider glazing industry in general. In 2011, the UK market for doors and windows is experiencing serious difficulties, reflecting a combination of a difficult housing sector, the underlying maturity of the market, and the generally poor economic climate.

The supply and distribution structure remains very fragmented, complex and competitive. The sector has seen some consolidation, with the emergence of leading groups such as Assa Abloy Arran Isle, IR and Grouphomesafe etc, but there is still scope for considerable further rationalisation, which seems likely given the expansion plans of the large multinationals and the very large number of smaller companies operating in many niche sectors.

Whilst traditionally having a strong UK base in the Midlands, this market has now become global with a mix of UK and other European companies represented in the market, together with the growth of low-cost imports from the Far East.

While the general public do buy door and window fittings at the retail level, the bulk of this market is trade-based and often a commodity sector. A reasonable share of the retail market is for retro-fit locks, handles or other hardware, making standard, traditional style fittings important in the product mix. There is also a sector of the market aimed at high specification developments – both domestic and non-domestic - where styling and functionality are more strongly marketed.

Low profit margins have become a key feature of the market in general, due to a combination of saturated markets, increasing competition, an increase in low cost imports and high raw material prices. Distribution is fragmented with several key channels – fabricators and systems companies, DIY Multiples, Builders Merchants and Architectural Ironmongers all strong in the market with shares in excess of 10% and often serving specific key sectors.

Prospects for the door & window fittings market are closely linked to the performance of the door and window markets and the glazing industry in general. AMA forecast a modest recovery and annual growth of around 2-3% over the next few years, which indicate a difficult market persisting in the domestic replacement sector, though new build housing and private non-domestic should offer some growth opportunities.

AMA Research's report "Door and Window Fittings Market – UK 2011-2015" is available in hard copy or electronic format for £665 and can be ordered online at www.amaresearch.co.uk or by calling 01242 235724.