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Door and Window Fabricators Market – UK 2011-2015

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

“ At trade prices, the window and door fabrication market is estimated to be worth around £ 2.1 billion in 2010. The fabrication market is extremely complex reflecting differences in product definition, residential and commercial sector variations, market volatility, level of vertical integration in fabrication and installation, glazed / unglazed supply.

However, as we enter 2011, industry participants are facing a wide range of issues which will shape their decision-making processes such as: market maturity, competition, cost-management, building legislation, ‘green’ building, austerity and diversification.”

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.**

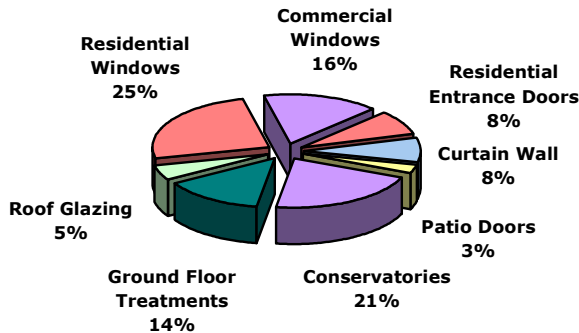
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Andrew Hartley or Chris Moore on (01242) 235724.

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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**UK Fabricators Market by Product Sector
at Trade Prices 2010**



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However, as we enter 2011, industry participants are facing a wide range of issues which will shape their decision-making processes such as: market maturity, fragmentation, competition, cost-management, building legislation, 'green' building, austerity and diversification.

Undoubtedly, there is significant over-capacity in the industry resulting in an intensely competitive market, especially in the PVC-U sector, where prices and margins remain under pressure as companies compete for business. Whilst some improvement has been seen in the new build sector, the commercial and domestic RMI markets have been less strong in 2010. .

The supply sector remains very fragmented as it comprises vertically integrated retail glazing companies, PVC-U trade fabricators and fabricator/installers, aluminium systems fabricators/installers, bespoke glazing contractors, composite door manufacturers, commercial glazing manufacturers, curtain walling, roof light manufacturers, steel window manufacturers and major joinery companies. However, there has been some consolidation across the industry with notable changes in the retail and trade fabrication sectors.

Residential and commercial windows, conservatories and ground floor treatments are all key sectors of the market, with a combined share of over 50% of the fabrication industry. Commercial sectors performed well in 2008, but have declined in 2009/10 as new orders in offices and retail applications fell away.

In the new build market, prospects for 2011 and beyond are for steady improvement, though a return to the levels seen in 2007 is unlikely in the short-medium term. Prospects for the private domestic RMI market for 2011, and beyond, are for some improvement, given general economic improvement, but this remains a market under severe strain. Over the next 5 years, however, we anticipate that public sector RMI spending will reduce, reflecting Government funding cutbacks.

The commercial market overall is expected to continue to suffer a downturn for the short to medium term, with a return to growth overall not anticipated until 2013/14. The education and health sectors, which have helped underpin the sector in recent years, will have spending cut in the next few years. The office sector, which has been one of the severest hit by a downturn in both RMI and new build, is likely to stabilise in the short-medium term but we do not anticipate any significant rise in value before 2013, though retail is likely to revive along with consumer spending in the medium term. The entertainment, leisure sectors and the industrial sectors are expected to remain subdued – though leisure should experience some reasonable activity from refurbishment projects leading up to the 2012 Olympics.

AMA Research's report "**Door and Window Fabricators 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.