

FOR IMMEDIATE RELEASE MARCH 2010

Domestic Replacement Door and Window Market - UK 2010-2014

New AMA report reviews the domestic replacement door and window market in the UK and considers future prospects.

"The UK market for replacement domestic doors and windows is large, but mature and volumes have been declining – even prior to the current recession. In 2008/09, the market has been hit hard by the recession in the UK and, in 2010, the market is still experiencing some further consolidation. Defining characteristics in this market in 2010 are: maturity, fragmentation, increasing competition, building legislation, 'green' building issues, cost-management and diversification – as industry players seek to consolidate their market positions."

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

Priced at £650, 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.**

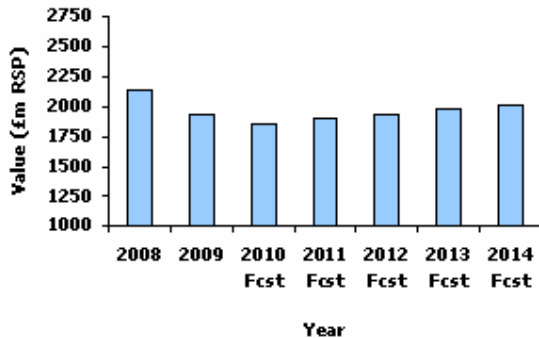
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Andrew Hartley or Chris Moore on (01242) 235724.

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 Domestic Replacement Door and Window Market (£m RSP) 2008-2014



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Defining characteristics in this market in 2010 are: maturity, fragmentation, increasing competition, building legislation, 'green' building issues, cost-management and diversification – as industry players seek to consolidate their market positions.

Replacement windows are the dominant sector, accounting for an estimated 55% of the replacement market by value. Residential doors account for an estimated share of 37%, whilst the patio door sector has a minor share at around 8%.

The private 'direct sell' or retail home improvement market remains the dominant sector representing around half of the market. However, we estimate that share has reduced in 2009, as a result of the sharp contraction in consumer spending on higher value home improvements. The public sector, by contrast, has increased as a proportion of the whole market, with this sector maintaining volumes in 2009. In the coming years, this is set to reverse as public spending cuts are implemented, with refurbishment programmes likely targets for cutbacks.

Changes in material usage continue to evolve. PVCu remains the key material across windows and doors, though timber has made some recovery in recent years – particularly in the window market. Composite entrance doors have also been successfully accepted in many sectors and now account for well over 10% of the replacement market - with an even higher share in public sector refurbishment.

Our forecasts for the development of the door and window replacement market are for a further decline in 2010, with only modest increases in value in 2011-13, reflecting the fact that this mature market has little scope for volume growth. Caution and uncertainty remain key features, as companies are anticipating future spending cuts after the Election in, for example, public sector building and refurbishment programmes, while a rapid return to high volumes in the new build or private RMI sectors is not anticipated.

Sustainability is becoming a key issue and, in the longer term, the development of the sustainable building concept will affect the choice of materials by specifiers and end-users. The design and specification of glazing products is already changing in response to these issues, which will become an increasingly important feature in driving commercial success in the medium term.

The structure of the industry has always been volatile with a high turnover of retail companies. As margins have become more depressed in this saturated market, and the pressure on companies to survive a downturn in sales alongside rapidly rising costs becomes more acute, it is expected that there will be further structural changes in the market – both at retail level and throughout the supply chain.

Long term prospects will be governed by the underlying level of second / third time replacements, though the underlying growth in housing stock provides some opportunities.

AMA Research's report "**Domestic Replacement Door and Window Market – UK 2010-2014**" is available in hard copy or electronic format for £650 and can be ordered online at www.amaresearch.co.uk or by calling 01242 235724.