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Residential Doors Market UK 2011-2015

New AMA report reviews the UK Residential Doors Market

"Future prospects for the residential door market remain uncertain, with the speed, scale and timing of recovery in the sector dependent on a combination of growth in housebuilding activity and rising consumer confidence and spending on home improvements, offsetting the inevitable decline in the social housing replacement market".

This report is the 2nd edition and is widely recognised as one of the key reviews of the market for residential doors in the UK. 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.com.

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.**

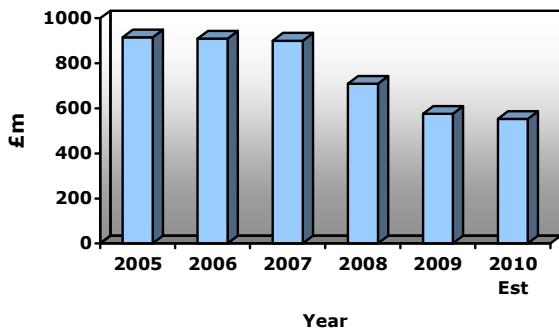
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Andrew Hartley or Chris Moore on (01242) 235724.

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 Residential Doors Market: 2011-2015

The UK Market For Residential Doors 2005-10 - By Value



The residential doors market has been relatively flat up to 2007 before declining steeply in 2008-10. Being linked solely with new housebuilding and spending on home improvement it is no surprise that the last 3 years have impacted heavily on the sales of residential doors with demand reflecting low consumer confidence and uncertainty in the housing market.

Our estimate of the total value of the residential doors market in 2010 is around £550m, at manufacturers selling prices.

Internal doors are the largest sector accounting for over 60% of sales, with entrance doors accounting for almost 30% of the market, and patio doors at 10%.

Home improvement is by far the largest market for internal doors at over 30%, with new housing share falling rapidly over the last 3 years. Social housing has been a strong sector for both internal and external door replacement. There is still ongoing funding under the Decent Homes programme, which will carry through until 2015, although cuts in public sector expenditure are now beginning to impact on refurbishment projects.

The market for patio doors in particular has been declining over the last decade and, although conservatory installation did help to maintain sales, this market has also slowed considerably in recent years.

Recent years have seen both sales turnover and profit margins decline for many door manufacturers, with raw materials continuing to rise in 2011. Although there has been comparatively little consolidation during 2010, some rationalisation of market supply is anticipated in 2011-12.

Frame material usage varies considerably between the 3 product sectors. For example, while timber dominates the internal door market, PVC-u remains the leading material for external doors at an estimated 33% - though both composites and timber are close behind, each with shares of around 30%.

Future prospects for the residential door market remain fragile, with the speed, scale and timing of recovery dependent on a combination of growth in housebuilding activity and rising consumer confidence and spending on home improvements, offsetting the inevitable decline in the social housing replacement market.

Given this background, while 2011 will be relatively flat, prospects are for modest growth in 2011-2015 providing modest recovery in the UK housing market is sustained. Material market share increases look to favour composite entrance doors mainly for reasons of strength and appearance at the expense of PVCu and aluminium, while timber for both entrance and internal doors is likely to keep its share reflecting strong sustainability credentials.

AMA Research's report "**Residential Doors 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.