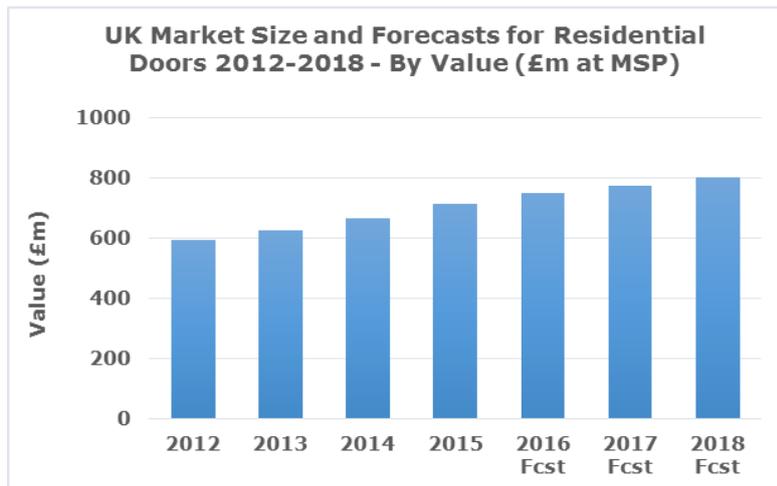


## Current forecasts indicate steady growth of 3-5% in the UK residential door market

September 2016 – Cheltenham, UK



The UK residential door market is estimated to have grown by around 7% in 2015, with further steady growth forecast for 2016. The significant decline in demand following the downturn has now been almost completely reversed, due to a strong recovery in the housing sector and greater confidence in the home improvement market.

During the review period, the market has experienced significant growth in demand,

driven by large-scale increases in house completions and a positive underlying trend in home improvements. In addition, there has been a positive switch to higher value products driven by changing consumer preferences and by legislation and standards requiring improved security, thermal and fire performance ratings.

In terms of product mix, internal doors dominate the sector in 2016 with a share of around 60%, in value terms, followed by entrance doors and patio doors. Replacements dominate the mix, with private sector home improvements and social housing replacements estimated to account for combined value share of almost 70% in 2016. Although a mature market, the residential doors sector has seen a range of new developments which have influenced demand positively, with composite and bi-fold doors both experiencing strong growth and helping drive market expansion.

Composite doors in particular have continued to take share across all sectors of the external door market. In addition, the internal door market has been expanding following significant decline in 2007-10, and has benefited from a number of trends including increased glazing options and the move towards more factory finished/semi-finished products boosted by the recovery of the housebuilding sector.

The experience of the patio doors sector in recent years 2012-15 has been for steady underlying value growth from sales of higher value products and increased volumes of patio/French doors and balcony/*Juliet* balcony doors in the new build sector – and more importantly the wider adoption of bi-folds in the new build and replacement sectors, which are now a significant sector.

*"The supply structure for residential doors remains complex and fragmented but increasingly competitive, particularly in the entrance door market."* said Andrew Hartley, Director of AMA Research. *"Many companies that originally focused on single materials – e.g. aluminium, PVCu or timber – have extended their product ranges to include alternative products in order to widen channel exposure."*

All sectors of the residential door market are likely to benefit from the continuation of the current trend for maximising daylight which that promotes the increased use of glazed products specified for all three product categories. It is likely that composites will continue to gain share of the entrance door market, mainly at the expense of PVCu, although not at the same rate of growth in previous years, while bifolds will become more prominent in the 'patio' door sector.

Current forecasts indicate steady good growth into the medium-term with the residential doors market forecast to grow by 3-5% per annum until 2020. However, market growth could be compromised by the UK's decision to leave the EU, which could lead to less buoyant consumer confidence and spending than previously forecast. While it is too early to forecast the impact of Brexit, the early signs are reasonably positive though a fall in housebuilding levels will undoubtedly impact negatively on the market.

The '**Residential Doors Market Report – UK 2016-2020 Analysis**' report is published by AMA Research, a leading provider of market research and consultancy services within the construction and home improvement markets. The report is available now and can be ordered online at [www.amaresearch.co.uk](http://www.amaresearch.co.uk) or by calling 01242 235724.

### **Editors Note:**

If you would like to receive further information or would like to speak to an author of this report, please contact Anna Eriksson or Andrew Hartley on 01242 235724.

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

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