

D&G Consulting

Factual Market Research

The Composite Door Industry in the UK

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Market & Forecasts

3rd Edition April 2011

1.1 Introduction to the 2011 Composite Door Report

We produce a detailed report for the composite door industry in the UK and Ireland annually. Each report contains up to date industry results and contains a forecast based upon construction industry and economic forecasts.

The composite entrance door has been the success story of the past five or six years for the window and door industry in the UK. It comes against the background of a UK PVC-U window and door industry that is mature with declining volumes and values. Additionally, the wider window industry in the Republic of Ireland (ROI), largely supplied by the UK composite door producers, has also seen declining volumes.

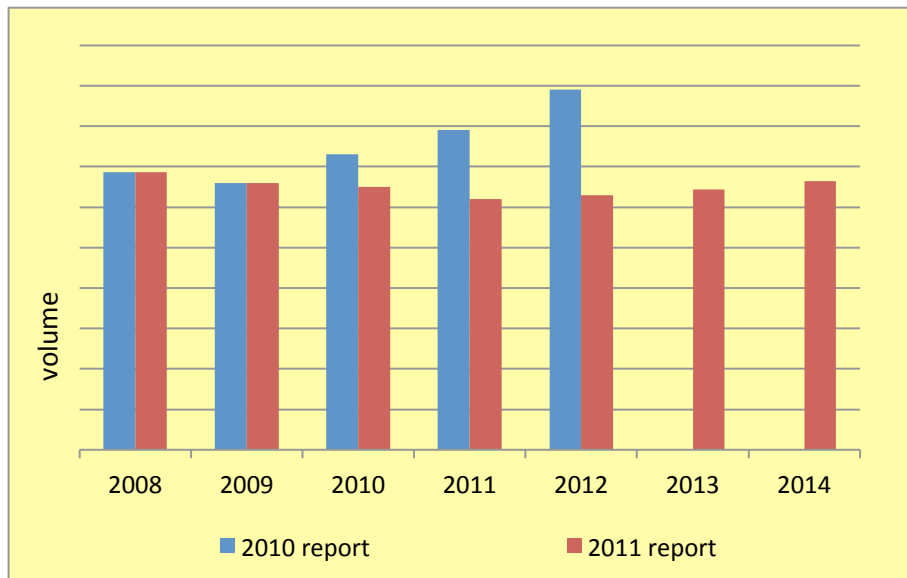
In the period up to 2003 the replacement market for PVC-U windows, doors and conservatories was booming. Producing composite doors required window fabricators, accustomed over many years to handling and processing PVC-U profile, to work with 'new' materials. Additionally, because composite door volumes in the period up to 2003 were small, when compared to windows and PVC-U panel doors, the majority of window fabricators tended to leave the composite door market to a handful of specialists.

Today the composite door is increasingly popular almost certainly down to the perceived quality, maintenance free and energy saving properties and kerbside appeal. The composite door is now considered a 'must' for inclusion in the product range for an increasing number of window system companies, window and door fabricators, window retailers and installers and increasingly builders merchants and plastics distributors/stockists.

The composite door industry has not been immune from the global credit crunch, bank failures and the subsequent recession. However, it is not all gloom and doom, there are bright spots and opportunities identified in the report.

The new UK Government has implemented a range of cut backs to public spending. To measure the effect of the Government's Comprehensive Spending Review (CSR) and cut backs on the composite door industry we have plotted the total volumes over the forecast years for our 2010 report (produced before the UK General election in May) and this 2011 report (after most of the details of the Governments austerity measures had emerged). Both forecasts are produced using the same process.

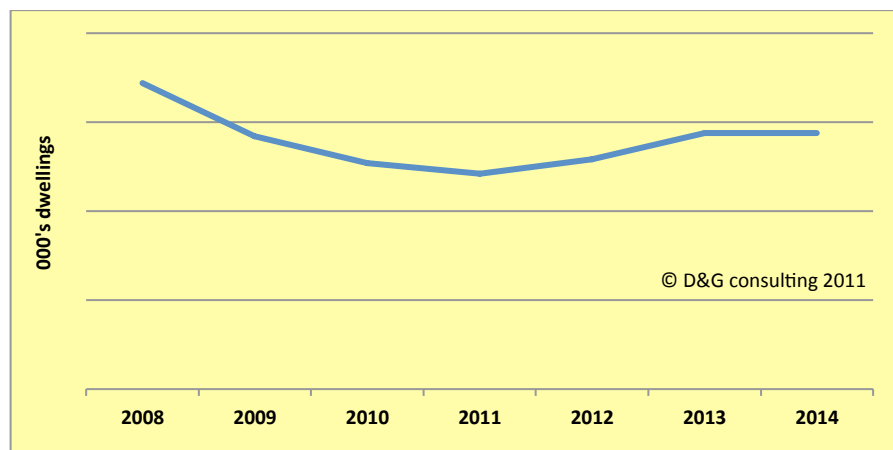
Chart: Comparison 2010 and 2011 Forecasts



The above chart shows is that the new Government's austerity measures have had the effect of reducing composite door volumes over the period 2010 to 2012. This conclusion is drawn by comparing the pre 2010 election forecast and this 2011 forecast . Additionally the worse than expected economic statistics over the past few months giving rise to forecasters downgrading their projections. The chart above shows the effect upon the industry of the Government's austerity measures and shows volumes flat over the forecast period.

Amongst the detail from the construction industry are forecasts covering new house building, Repair Maintenance and Improvement (RMI) and Non Residential construction (offices, shops, factories, leisure buildings etc). The chart below, just one of the 27 charts in the report and shows the total housing construction volumes for the UK over the forecast period – in the report the report volumes are sub divided into private and social housing.

Chart: UK Housing Construction Volumes



In the current fiercely competitive window and door market, window systems companies need to do all they can to keep competitors out of 'their' fabricators so increasingly they are marketing composite doors. Equally important, window fabricators and retail companies need to win all the business they can.

Our first report into the composite door sector, published in mid 2008 was the culmination of six years watching and recording movements. In that time companies entered the market and others left. Some designs have changed and materials, processes, methods and hardware have been subject to improvement. An important development has been the importing of door slabs from the Far-East enabling an increasing number of companies to enter the market relatively cheaply. Composite doors are here to stay and we are optimistic that growth will continue as the UK economy recovers.

The composite door market is attracting more and more new entrants. The inevitable consequence is that prices are falling and companies are changing suppliers (both at the slab and finished door set level) in an effort to get more business. Not everyone has been successful. On the positive side the increased competition has brought about a step change in efficiency, quality and especially lead times.

1.2 Report Scope

This study concentrates on the composite door market in the UK and combines information from extensive personal and telephone interviews carried out during 2010 & early 2011 with companies in the UK.

For this report a composite door is defined as:

- A composite structure door slab with a PVC-U, GRP (fibreglass), steel, aluminium, ABS, or other plastic skin.
- Solid timber doors (often constructed from engineered timber) with a GRP, steel, aluminium, ABS or other plastic skin.

Included in the report are a number of companies that produce composite door sets for specialist applications, most of whom are 'under the radar' of the PVC-U window and door industry.

The report contains data and analysis describing the UK market for composite doors with specific focus on volumes (past, current and forecast), importers, UK manufacturers (including fabricators), values and market sectors.

As is usual with our market reports there have been discussions with companies at all levels. Additionally data was obtained from business journals, company literature, published company

reports, web sites, official statistics issued by Government agencies and other surveys, both published and unpublished. All this has been augmented by our own estimates.

This report is believed to be the most comprehensive study of composite doors to date. Much of the information has been provided to us on a confidential basis such that we are able to use it to compile a picture of the composite door market without revealing the sources of data.

We have confidence in the overall picture because of the stringent and comprehensive nature of the research. Many of the statistics are derived from more than one source and where actual or suspected variances occur we track back through the information trail. As with all our market reports we are very pleased to hear from companies who wish to improve the accuracy of our research.

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