

**D&G Consulting**

Factual Market Research

**The PVC Window Door & Conservatory  
Industry in the UK & Republic of Ireland**



**Market & Forecasts to 2014**

**Incorporating:  
PVC-U Windows  
PVC-U Window Profile  
PVC Doors (PVC Panel, Composite, Patio, Bifold & French)  
PVC-U Conservatories**

**Winter 2011/12 Edition**

**Introduction, summary, contents & list of tables & charts**

## Introduction

**This PVC window products industry forecast report for the UK and Republic of Ireland is directed at volumes for the PVC-U window, door and conservatory markets covering the years to 2014.**

The Government's austerity measures have hit consumer confidence hard and have had the effect of reducing the demand for PVC window products. We have responded by producing this winter 2011/12 window industry forecast. **Importantly, the forecast uses the latest construction industry and economic forecasts to project volumes and values into 2014.**

Even so the PVC window products market in the UK is very important in terms of both volume and value for systems companies, fabricators, installers, hardware manufacturers, sealed unit manufacturers and glass suppliers.

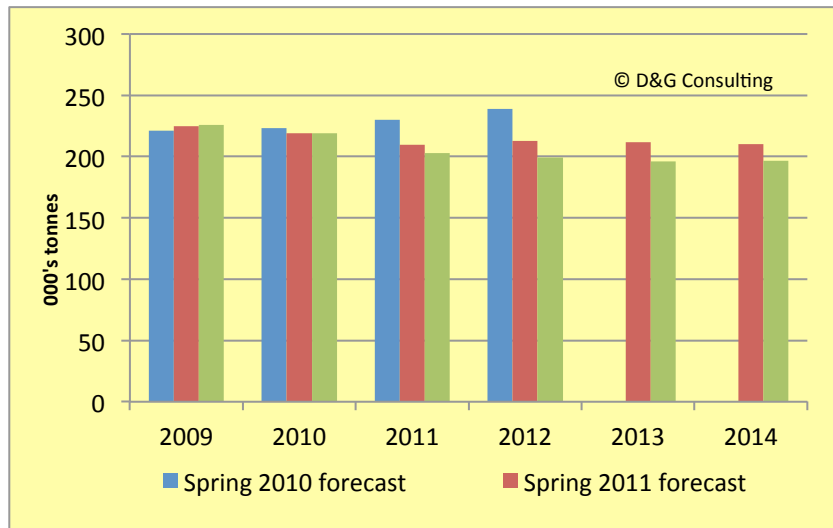
However, despite the significant product improvements that have happened over the past few years especially with regard to thermal performance, security and appearance the market in the UK and Republic of Ireland for PVC window products has continued to suffer from the effects of reduced new house building, the recession, rising unemployment and the economic uncertainty. *The 2011 Annual PVC-U Window, Door and Conservatory Market Report* published in August 2011 contained a forecast to 2014. Since the summer economic and construction forecasters have downgraded their forward projections – these are set out in detail in the report.

Importantly, the product lines are not equally affected. There are market sectors, identified in the report together with product lines where there is potential for growth. For example:

- ✚ Will the Green Deal give a boost to volumes?
- ✚ At what pace will the high performance (low U Value) window systems in evidence in increasing volumes in mainland Europe migrate into the UK?
- ✚ The report provides researched volumes and forecasts for WER 'A' rated windows and triple glazing – a subject where there has been considerable 'guess work' recently.

After the credit crunch of 2008 and the subsequent recession the new UK Government immediately implemented a range of cut backs to public spending. We were keen to see the effect of these cut backs on the window industry. So in the chart below we have plotted the total PVC window profile volume over the forecast years for our 2010 Spring Forecast (produced before the UK General election in May 2010), the 2011 Spring Forecast and this 2011/2 Winter Forecast.

**Chart: Comparison Spring 2010, Spring 2011 and Winter 2011/2 Forecasts**



The above chart shows there has been a steady reduction in total volumes over the forecast period. Worse than expected economic statistics over the past few months has resulted in economic and construction industry forecasters downgrading their forward projections for the forecast period

The Forecast Report concentrates on the demand for PVC window products in the UK over the period 2008 to 2014 specifically:

- ✚ PVC-U window profile demand;
- ✚ PVC-U windows.
- ✚ Doors - PVC panel, composite, patio, bifold and French
- ✚ PVC-U conservatories.

The forecast is based on independently researched facts to establish volumes (expressed in tonnes, of PVC) and values by product line and in total. We have set out to provide the best possible forecast for the industry by breaking it down into small elements (the building block approach) providing the best chance of a good quality forecast. Within the body of this forecast are the assumptions that have been used together with sources of information upon which predictions are based. The reader may disagree with some of the assumptions but the format allows readers to change the assumptions to arrive at a different forecast. It is intended as a dynamic forecasting and planning tool, not a take-it-or-leave-it tablet of stone.

To ensure the forecast is right up to date we have incorporated the current PVC-U window industry profile demand for 2011 as reflected in *The PVC-U Window Profile in the UK Summary Quarterly Profile Tracker* from D&G Consulting. Additionally, hard information is used together with other authoritative sources.

We have also sought the views and figures from companies and authorities in the industry. Much of the information has been provided to us in detail and on a confidential basis such that we are able to use it to compile trends and build up a model.

## Summary

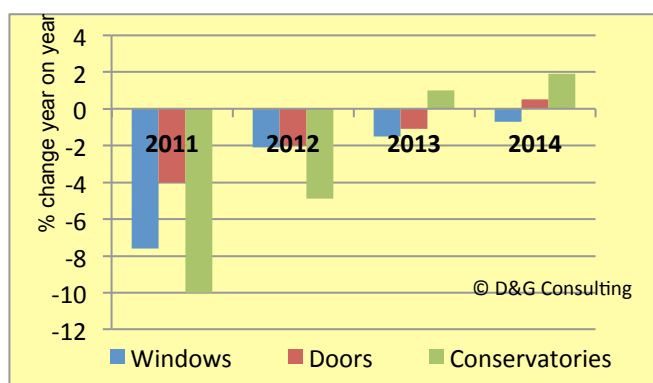
This summary is a brief outline of the chief findings of the very detailed Winter 2011/12 Window Products Forecast Report. We estimate that the combined installed value for PVC window products for 2011 is £5460 million. The volume of PVC window profile is estimated as 203,000 tonnes in 2011. The table below shows the estimated installed value of window products and volume of PVC-U window profile for the discrete years of 2011 and 2014.

### Volume and Value of PVC-U Window Products - 2011 & 2014

	2011	2014
Installed Value (£millions)	5,460	5,850
Window Profile Volume (000's tonnes)	203	198

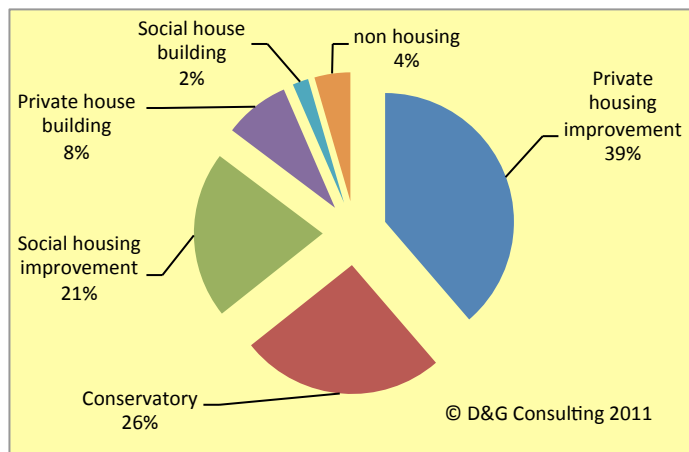
The chart below shows the annual percentage volume change for windows, doors and conservatories over the period 2011 to 2014. This chart shows that the markets for doors and conservatories are projected to move into a period of growth from 2014 but only after a difficult 2012.

**Chart: Annual Percentage Volume Change by Product Line**



The chart below shows the annual percentage value by sector at the fabricator level for 2011. The report shows the volume and value for each sector and product line.

Chart: Annual Percentage Value by Sector - 2011



The chart above shows:

- ✚ Private housing improvement is the most important sector by value for fabricators.
- ✚ House building in total only represents 10% of fabricator value.
- ✚ The forecast report shows that over the forecast period social housing improvement is affected by the cut-backs to both housing improvement and new building. However, there are a few bright spots that are identified in the report.

The window industry has been hit hard by the downturn in the economies of the UK and ROI. Since the summer construction industry and economic forecasts for the period to 2014 have taken a downturn resulting in domestic demand being severely constrained by the economic climate. This has impacted upon the window industries where much of the volume is of a discretionary nature so improvements to property are being put back until conditions look brighter. **But, (and it is an important but) there are pockets of opportunities.**

## **Report Details**

**Latest Publication Date – January 2012**

**Years Covered – 2008 to 2014**

**Number of Pages - 76**

**Number of Tables – 29 and charts - 35**

**The 'PVC Window Products Forecast Report' can be ordered by email**

**[info@dandgconsulting.co.uk](mailto:info@dandgconsulting.co.uk)**

**Or call David Amos on 01424 773134 or 07713877214**

**The report costs £950 and is sent by email**

**Past subscribers and contributors to our reports will be eligible for a 15% discount.**

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**With over 15 years of reporting detailed trends in the PVC window products industries the UK and mainland Europe this is the latest D&G Consulting report and draws on the hard information contained in many of the other reports produced and available from D&G Consulting. See [www.dandgconsulting.co.uk](http://www.dandgconsulting.co.uk)**

**D&G Consulting produces the window forecast report three times a year – Spring, Summer and Autumn ensuring companies are able to plan and budget with up to date information. Details and assumptions of the forecasts are shown in the body of the reports.**

**In these volatile times we watch for any event or action that could affect the industry. If there are any changes of significance in the construction industry and economy between this autumn forecast and the spring forecast we will update the forecast report and send free to clients who purchase this autumn report**

**The list of content, tables and charts are shown over.**

## Contents

### **Part 1: Introduction and Summary**

Section		Page
<b>1.0</b>	<b>Introduction and Summary</b>	9
1.1	Introduction	9
1.2	Autumn 2011 Edition	10
1.3	Summary	13

### **Part 2: Window, Door and Conservatory Volume Forecast**

<b>2.0</b>	<b>Window Volumes</b>	17
2.1	First Time Replacement Windows	17
2.2	Second Time Replacement Windows	20
2.3	New House Building Windows	22
2.4	Home Extensions	24
2.5	Conservatories	24
2.6	Total Windows Forecast	28
<b>3.0</b>	<b>Door Volumes</b>	31
3.1	First Time Replacement PVC-U Doors	31
3.2	Second Time Replacement PVC-U Doors	32
3.3	New House Building PVC Doors	33
3.4	Home Extension PVC Doors	34
3.5	Total PVC Doors	34
3.6	Composite Entrance Doors	35
3.7	Total Entrance Doors (Composite and PVC)	37
3.8	French Doors	38
3.9	Sliding Patio and Bifold Doors	40
4.0	Total PVC-U Profile Volume	41

### **Part 3: Construction Industry and Economic Forecasts**

<b>5.0</b>	<b>Construction Industry Forecasts</b>	45
5.1	Construction Industry Outlook	45
5.2	House Building	45
<b>5.3</b>	<b>Non Residential construction</b>	48
<b>5.4</b>	<b>Housing Repair Maintenance &amp; Improvement</b>	50
<b>5.5</b>	<b>ROI House Building and Housing RMI</b>	52
<b>6.0</b>	<b>The Macro Economic Outlook</b>	55

#### **Part 4: Sector Volume and Value Forecasts**

<b>7.0</b>	<b>Volume and Values by Sector</b>	<b>59</b>
7.1	Introduction	59
7.2	Windows	62
7.3	PVC Doors	64
7.4	Composite Doors	66
7.5	Patio/Bifold doors	69
7.6	French Doors	70
7.7	Conservatories	71
7.8	Market Value Summaries	72

#### **Tables**

ST1	Values at Installer, Fabricator & window Profile Levels 2011 & 2014	13
1	First Time Replacement Window Volumes 2008 - 2014	19
2	Second Time Replacement Window Volumes 2008 - 2014	21
3	New build Window Volumes 2008-2014	23
4	Home Extension window Volumes 2008-2014	24
5	Conservatory Equivalent Window Volumes 2008-2014	25
6	Annual Window Demand Forecast 2008-2014.	28
7	First Time Replacement PVC-U Door Volumes 2008-2014	31
8	Second Time Replacement PVC Door Volumes 2008-2014	33
9	New Build PVC-U Door Volumes 2008-2014	33
10	Home Extension PVC Door Volumes 2008-2014	34
11	Total PVC-U Door Volumes Forecast 2008-2014	35
12	Composite Door Volumes 2008-2014	36
13	Total Entrance Door Volumes 2008-2014	37
14	French Door Volumes 2008-2014	39
15	Sliding Patio/Bifold Door Volumes 2008-2014	40
16	PVC-U Window Profile Volume in Tonnes	41
17	Housing Construction Output Value 2008-2014	46
18	Forecast for Housing Construction	46
19	Non Residential Construction Output 2008-2014	48
20	Housing Repair Maintenance and Improvement	50
21	Forecasts for ROI House Building 2008-2011	53
22	ROI Housing Repair Maintenance & Improvement	53
23	Main Economic Indicators 2008-2014	57

24	Window Sector Volumes & Values 2008-2014	63
25	PVC-U Door Sector Volumes & Values 2008-2014	65
26	Composite Door Volumes & Values 2008-2014	66
27	Patio/Bifold Doors Sector Volumes & Values	69
28	French Door Sector Volumes & Values 2008-2014	70
29	Conservatories –Sector Volumes & Values 2008-2014	72

### Charts

SC1	Values at Installed & Fabricator Levels 2008-2014	14
SC2	Values by Product Line 2011	14
SC3	Values by Sector 2011	15
SC4	Volume of PVC-U Profile 2008-2014	15
1	First Time Replacement Windows	17
2	Comparison First & Second Time Replacement Windows	21
3	Annual Conservatory volumes	26
4	Annual Comparison Housing RMI & Conservatory Vols	27
5	Comparison UK Housing Stock & Conservatory Vols	28
6	Total Window Forecast Volumes	29
7	Window Volumes by Category	29
8	PVC-U Door Volumes by Category 2008-2014	35
9	Composite & PVC Door Volumes 2008-2014	38
10	Total of PVC-U & Composite Doors 2008-2014	38
11	French Door Volumes by Route to Market	39
12	PVC-U Window Profile in tonnes 2008-2014	42
13	Comparison Spring 2010, Summer & Autumn 2011 Forecasts	43
14	Comparison Private & Public Housing Construction Value	46
15	Housing Construction 2008-2014 (000's dwellings)	47
16	Public Non Housing , Industrial & Commercial Construction Output	50
17	Housing Repair Maintenance & Improvement 2008-2014	51
18	ROI Forecasts for house Building 2008-2011	53
19	ROI Housing Repair Maintenance & Improvement	54
20	Comparison Key UK Economic Indicators	57
21	Window Values by Sector - 2011	64
22	Window Values by Sector - 2014	64
23	PVC Door Values by Sector 2011	66
24	PVC Door Values by Sector - 2014	66
25	Composite Door Values by Sector - 2011	68

26	Composite Door Values by Sector - 2014	68
27	Patio/Bifold Doors by Sector - 2011	69
28	French Doors by Sector - 2011	71
29	French Doors by Sector- 2014	71
30	Window, Door & Conservatory Values by Product Line at Installer Level	72
31	Window, Door & conservatory Values by Sector at Installer Level	73
32	Window, Door & Conservatory Values by Product Line at Fabricator Level	73
33	Window, Door & Conservatory Values by Sector at Fabricator Level	74
34	Window, Door & Conservatory Values by Product Line for Window Profile	74
35	Window, Door & Conservatory Values by Sector for Window Profile	75