

D&G Consulting

Factual Market Research

The PVC-U Vertical Sliding Window Industry

UK & Republic of Ireland



Market & Forecasts

2011 Edition

1.1 Introduction to the 2011 Vertical Sliding Window Report

We produce a report for the vertical sliding window (VS window) sector 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.

VS window volumes has been one of the success story's over 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. However, VS windows in both PVC-U and timber remain a niche product but as with all niche products there are good, viable opportunities for growth as described in the report.

In the period up to 2003 the replacement market for PVC-U windows, doors and conservatories was booming. Producing VS windows was something of an inconvenience to a busy fabricator. Additionally, the hardware was not straight forward and fabrication needed a degree of care when compared to casement windows so the majority of window fabricators tended to leave VS window fabrication to a handful of specialists. Some of these specialist fabricators produced VS windows in timber, PVC and aluminium.

Today more window fabricators are looking to the VS window to boost their volumes and margins. Window retailers too have been seeking out opportunities to sell and install VS windows in properties where, some years ago, they would have balked at even trying to interest the builder or householder.

The VS window sector 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.

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 VS window systems. Equally important, window fabricators and retail companies need to win all the business they can.

Since our first report into the VS window sector, published in mid 2004 more PVC window systems companies have developed and produced VS window systems and hardware companies have also improved operating mechanism's and balances. Tilt systems have been introduced to enable easy cleaning and removal of sashes. The overall visual appearance of hardware including locks has been improved.

The VS window is now considered as a 'must' for an increasing number of window system companies and fabricators despite being currently just a small proportion of the total PVC-U window market. In an increasingly competitive market place for windows and doors, systems companies want to keep competitors out of 'their' fabricators. Equally important, window fabricators and retail companies need to capture all the business they can.

There has been growth in the sales of VS windows and we expect that there will be even more in the near future. Because of this we annually research the VS window market and report on its current state, and forecast the future market size and value and rate of growth. This report also reviews issues that are likely to impact upon the market together with possible future developments.

The VS window market is attracting more and more new entrants. The inevitable consequence is that prices are falling and companies are changing suppliers 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 and product quality.

1.2 Report Scope

The report contains data and analysis describing the UK market for VS windows with specific focus on volumes (past, current and forecast), window profile volumes, UK manufacturers (including fabricators) and values.

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 VS windows 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 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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