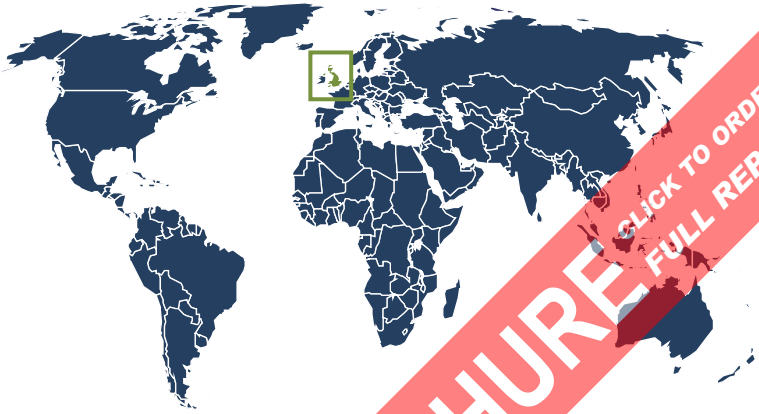




Freedonia Focus Reports
Global Collection

Windows & Doors: United Kingdom

December 2017



CLICK TO ORDER
FULL REPORT **BROCHURE** CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	6
Key Product Trends & Growth Opportunities	7
Environmental & Regulatory Factors	9
Regional Outlook	10
3. Segmentation & Forecasts	12
Products	12
Wood Windows	14
Metal Windows	15
Plastic Windows	15
Wood Doors	16
Metal Doors	16
Plastic Doors	17
Markets	19
New Residential Construction	20
Residential Improvement & Repair	20
New Nonresidential Construction	21
Nonresidential Improvement & Repair	21
4. Industry Structure	23
Industry Characteristics	23
Industry Leaders	24
Anglian Group	25
Everest	25
Safestyle UK	26
5. About This Report	27
Scope & Method	27
Sources	28
Industry Codes	29
Resources	30

List of Tables & Figures

Figure 1 UK: Key Trends in the Window & Door Market, 2016 – 2021	3
Figure 2 UK: Window & Door Demand Trends, 2006 – 2016	5
Table 1 UK: Key Indicators for Window & Door Demand, 2006 – 2021 (2015US\$ bil)	6
Figure 3 Western Europe: Window & Door Demand by Country, 2016 (%)	10
Figure 4 UK: Window & Door Demand by Product, 2006 – 2021 (US\$ mil)	12
Table 2 UK: Window & Door Demand by Product, 2006 – 2021 (US\$ mil)	12
Table 3 UK: Window & Door Demand & Production, 2006 – 2021 (US\$ mil)	13
Figure 5 UK: Window & Door Demand by Product, 2006 – 2021 (%)	18
Figure 6 UK: Window & Door Demand by Market, 2006 – 2021 (US\$ mil)	19
Table 4 UK: Window & Door Demand by Market, 2006 – 2021 (US\$ mil)	19
Figure 7 UK: Window & Door Demand by Market, 2006 – 2021 (%)	22
Table 5 UK: Select Participants in the Window & Door Industry	24
Table 6 Industry Codes Related to Windows & Doors	29

About This Report

Scope & Method

This report forecasts to 2021 window and door demand and production in nominal US dollars at the manufacturer level (i.e., excluding the value of features and services added between the manufacturer and end user, including door hanging and finishing operations not offered by the door slab manufacturer) in the UK. Total demand is segmented by product in terms of:

- wood windows
- metal windows
- plastic windows
- wood doors
- metal doors
- plastic doors

Total demand is also segmented by market as follows:

- new residential construction
- residential improvement and repair
- new nonresidential construction
- nonresidential improvement and repair

To illustrate historical trends, total demand is provided in annual series from 2006 to 2016; production and the various segments are reported at five-year intervals for 2006, 2011, and 2016.

For the purposes of this report, the value of installed glazing is included in the demand numbers for all window products, with the exception of curtain wall, which includes only the framing materials. Windows with multiple openings (e.g., bay and bow types) that are sold as one unit are considered to be one window. For doors, the value of installed glazing, sidelites, and/or transoms is included if these features are sold by the manufacturer as part of the framed system.

To avoid double counting, parts and components sold to, or imported by, manufacturers for assembly into new windows and doors are excluded from the scope of this report.

Also excluded are windows and doors for automobiles or other transportation equipment, cabinets, fencing gates, shower doors and bathroom stall doors, elevator doors, and pet doors. Molding and trim are excluded as well. Separately sold replacement hardware not typically sold as part of the window or door unit (e.g., door knobs, locks, door stops, and

About This Report

garage door openers) are outside the scope of this report. However, the value of these products is included when they are sold as part of an integrated new window or door unit.

The wood segment includes wood doors clad with metal or plastic materials, but which have a wood interior. Wood windows include only those products in which all the framing components (e.g., jambs, sills, stiles, rails, and mullions) are made of wood.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate at that prevailing in 2016. All figures cited are in US dollars unless otherwise specified.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Windows & Doors: United Kingdom (FB60041) is based on *Global Windows & Doors*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

About This Report

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 6 | Industry Codes Related to Windows & Doors

HS Code	Description
392520	Plastic doors, windows, and their frames and thresholds for doors
441810	Wood windows and their frames
441820	Wood doors, French doors, and their frames
730830	Steel doors, windows and their frames and thresholds for doors
761010	Aluminum doors, windows and their frames and thresholds for doors

Source: World Customs Organization

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Global Windows & Doors, December 2017

Freedonia Industry Studies

Global Housing Outlook, October 2017

Electronic Security Products US Market Forecasts, September 2017

Windows & Doors Market Forecasts, September 2017

Doors Market in the US, August 2017

Windows Market in the US, June 2017

Fiber-Reinforced Plastic Composites Market in the US, January 2017

Prefabricated Housing Market in the US, January 2017

Molding & Trim in the US, November 2016

World Flat Glass, August 2016

World Insulation, July 2016

Wood-Plastic Composite & Plastic Lumber, May 2016

Mechanical Security Products, February 2016

World Prefabricated Housing, February 2016

Freedonia Focus Reports

Construction: United States

Doors: United States

Fabricated Metal Products: United States

Global Housing

Global Windows & Doors

Molding & Trim: United States

Nonresidential Building Construction: United States

Plumbing Fixtures & Fittings: United Kingdom

Thermoplastic Resins: United States

Window Coverings: United States

Windows & Doors: Canada

Windows: United States

Wood Millwork: United States

World Prefabricated Housing

Freedonia Custom Research

Trade Publications

Construction Europe

Door and Window Market Magazine

Fenestration News

About This Report

Glass Magazine

The Journal of Light Construction

Metal Architecture

Metal Construction News

Plastics News

Professional Remodeler

Window & Door

Agencies & Associations

British Fenestration Rating Council

British Plastics Federation

British Woodworking Federation

Council for Aluminium in Building

European Commission

Eurostat

Glass and Glazing Federation

International Code Council

International Organization for Standardization

National Home Improvement Council

Plastics Window Federation

Steel Window Association

United Nations Comtrade

Window and Door Manufacturers Association

World Bank