

Window & DOOR

INDUSTRY INSIGHT:

"This is a really interesting report. Masses of really interesting information."

NICK DUTTON, CEO BRISANT SECURE

"This report is a definitive look at long-term trends and the here and now, produced by two window & door industry experts. It's likely to become an invaluable reference for businesses that want to understand the market and where it's likely to go next."

ROB MCGLENNON, MD, DECEUNINCK UK

"Amidst the fog of PR hype and competing opinions, it's not been easy to see where the market is going. So, the publication of this report is to be welcomed. It establishes the facts and trends very clearly. The trend is strongly towards aluminium, accelerated by new competition which has forced more product development in the last two years than in the previous 20."

ROGER HARTSHORN, CEO, GARNALEX.

"You certainly know how to get a debate going in the industry. Our Sheerline aluminium window and door sales are very strong, in fact in a PVC market that's down 15-20% year on year Aluminium is up for us by 25% so bucking the current market trends."

ROY FROST, GROUP MD, GJB GROUP

"Very interesting and well put together. No blocks of text, as no one reads anything anymore, so good and clear."

BARRY SHEVLIN, MD, GLOBAL HOME IMPROVEMENTS.

MARKET TRENDS 2024



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windowBASE

talk to your next customers ●●●●●●●●

WindowBASE was set up in 1994 as a prospect database to help companies find new customers and grow and research their markets to improve their sales targeting and marketing.

New companies pop up, merge, split into smaller businesses, or die. People join, leave, change jobs, and the products and brands they use also change. The industry is complicated and constantly changing, so a prospect database must be dynamic too: up to date, reliable and easy to use.

The total number of firms in the database follows the rise and fall of market trends; increasing from 8729 in 2001 to a peak 14,629 in 2017, before falling back to over 13,200 in 2023.

The report's analysis shows how much has changed in the last 20 years nationally and regionally, by type of business and by window material.



Mike Rigby
CEO of MRA Research &
Founder of WindowBASE



Chris Brunsdon
CEO of Tommy Trinder &
Founder of Framepoint



TOMMY TRINDER
Framepoint Technology®

From one-man bands to nationals and from the highlands to the Channel Islands, Tommy Trinder has established itself as the go to app for installers looking to add zip to their sales process.

This report shares insights gleaned from analysis of more than 80,000 items quoted on Tommy every month, by 550 of the UK's leading window firms.

The picture that emerges is one of dizzying complexity; of installers juggling a vast array of materials, colours, and options in order to shore up conversion rates and keep growth on track.

One thing's for sure - long gone are the days when windows were white, and handles were gold.

window MATERIAL DEBATE, WHAT'S IT ABOUT & WHY?

Some treat trends like fashions; extras you can take or leave that make little difference.

But finding your business on the wrong side of a trend or being among the last to wake up to it can be expensive and damaging.

This report tells the story of three window materials, and the story's not over.

Building too few homes while the population grows creates strong latent demand which drives up house prices. It's harder then for younger people to get on the housing ladder. But it's also hard for the Have Nots, under 50s homeowners with mortgages and big outgoings, to spend on improving their properties. Meanwhile the Haves, the mortgage-free or nearly free over 50s, gain from ever increasing prices that accumulates housing wealth that transforms their outlook and spending.

The Have Nots may earn more, but with greater outgoings there is little to spare for home improvement.



Aluminium is the specifiers' material of choice for commercial projects, facades and tall buildings but it lost housing to PVCu in the 1980s and aluminium had just a foothold in retail.

At the end of the 90s, timber was nobody's choice. Its short life, high maintenance and poor performance made it easy for PVCu. Few would have bet on its revival.

PVCu was on a winning streak at the end of the 90s, replacing what could be replaced of the housing stock at the rate of 3.5% a year. But what would happen after PVCu had replaced everything that could be replaced – estimated to happen by the mid-2000s?

Money is tight, so when they need to replace their windows or doors, colour, style, and performance are secondary to price. Their installers' supply chains are affected by the choice and because price is a far higher priority for their end customer there is significantly less value and margin throughout the supply chain.

The Haves, generally over 50s homeowners who've paid off or nearly paid off their mortgages, have been benefitting hugely from 20 years of rising house prices and accumulating housing wealth. The Haves account for over 90% of UK savings and pensions, and the over 65s in particular

had £2.2 trillion in mortgage-free housing wealth in 2023 (source Savills). The Haves are the Bank of Mum & Dad. Innovation in the industry is focused on satisfying their wants. Price is secondary because whatever they want they can afford, and whatever they invest in their property is rapidly paid down by rising house prices. This group is the premium market, and in all home improvement categories the premium market has expanded by volume. Twenty years ago premium markets accounted for between 10-20% of market volume depending on the market. After 20 years it's grown to 20-33%.

And, like Apple's share of the smartphone market, its share of value is greater still. Much more money flows through the Haves' supply chain, and in downturns the Haves are far less affected.

Premium installers, the leading window companies, sell much more aluminium, timber, and top end PVCu than installers who sell to the Have Nots. Follow the money! It matters who you sell to, what you sell them, and what prices you sell at.

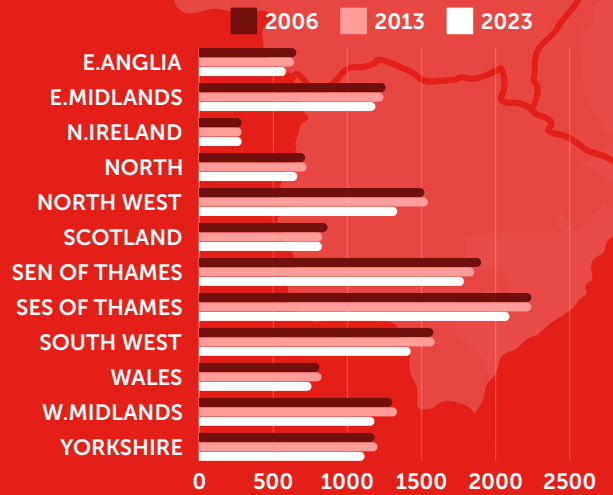
©WindowBASE 2024



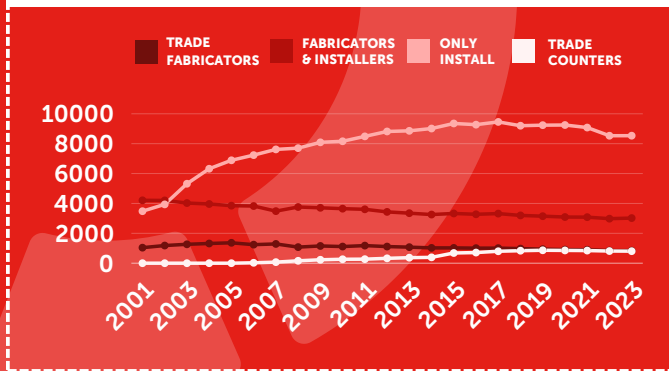
FABRICATOR & INSTALLER TRENDS

COMPANY BY REGION 2006-2023

Every region apart from NI has seen a decline in window companies.



TYPE OF COMPANY 2001-2023



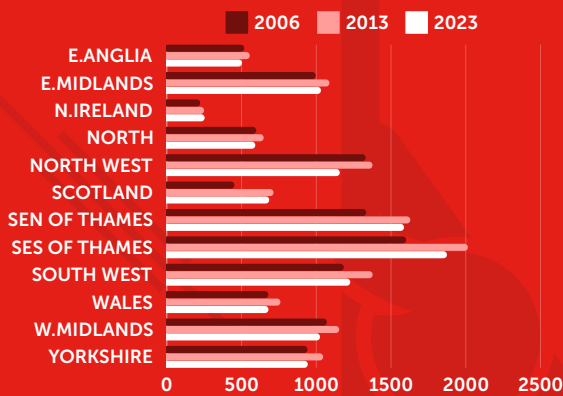
Trade counters grew fast until **2015**

Number of installers grew steadily until **2017** but then started to fall.

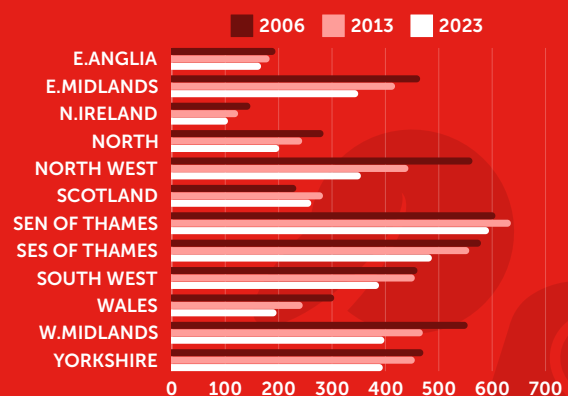
The number of fabricators has dropped **26%** in the last 20 years.

REGIONAL BREAKDOWN


INSTALLERS:



FABRICATORS:



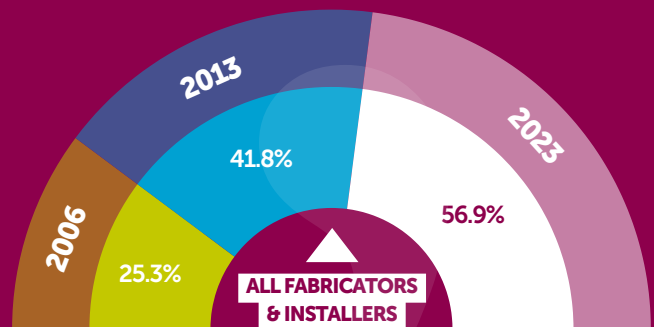
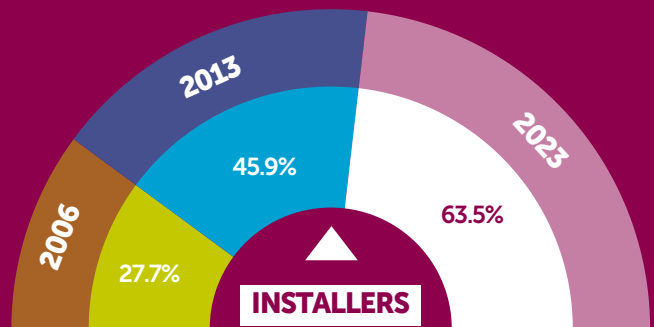
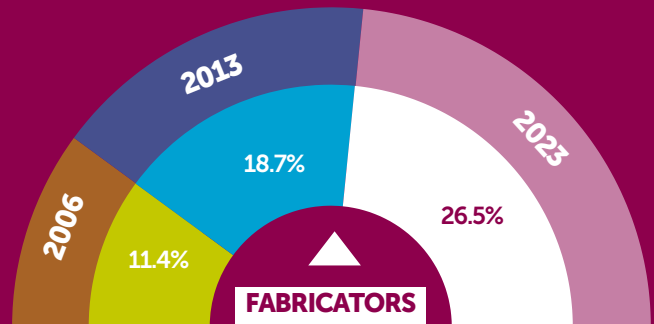
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Finding your business on the wrong side of a trend can be expensive. The longer it takes to respond, the harder it is to do something about it. Scanning for trends and responding to key trends early is what marks out successful businesses.

ALUMINIUM

Aluminium is on a roll, but its challenge is to keep on improving energy efficiency, as regulations are ratcheted up, without adding disproportionately to the effort and cost of achieving those improvements.

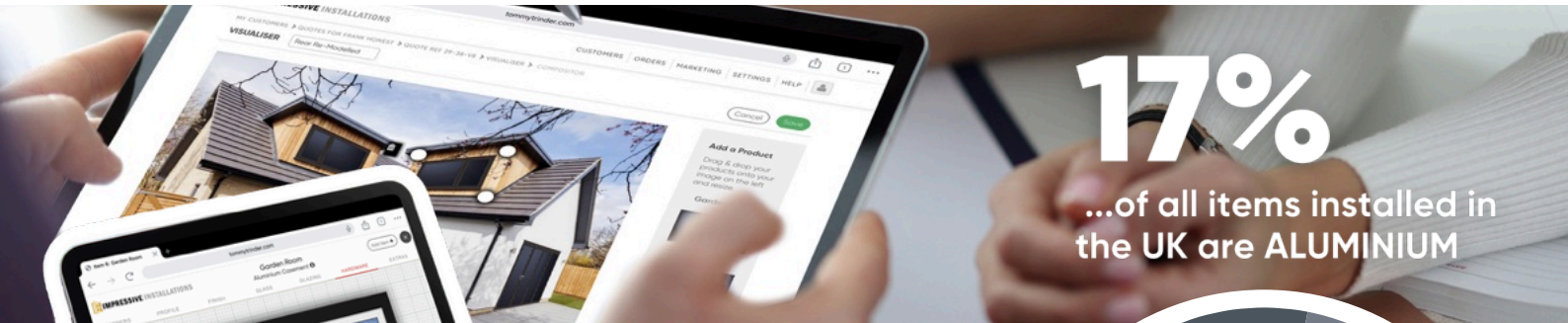


% Companies fabricating/installing aluminium



MARKET INTELLIGENCE

Hard data from the UK's leading sales app.

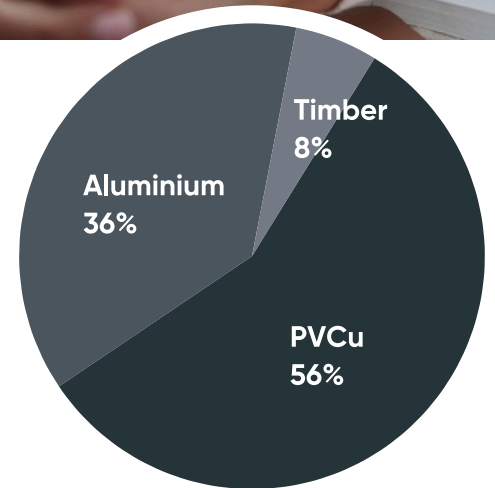


17%

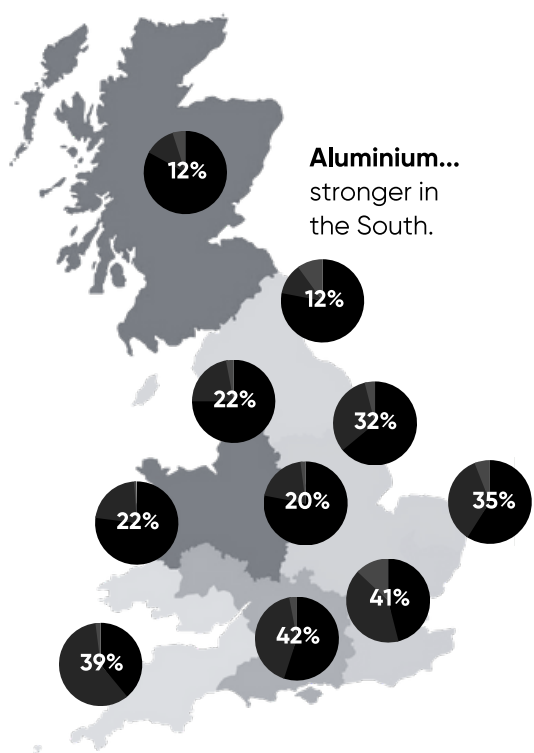
...of all items installed in the UK are ALUMINIUM



...But ALUMINIUM accounts for **36%** of the market BY VALUE



ALUMINIUM MARKET SHARE BY REGION (VALUE £)



Aluminium... stronger in the South.

DO YOU SELL ALUMINIUM?

85%

...of installers sell aluminium up from 78% 1 year ago



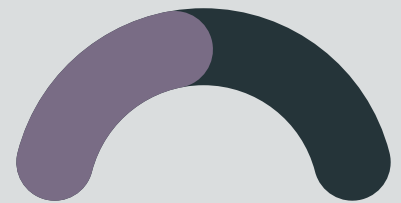
ON TREND - STEEL LOOK



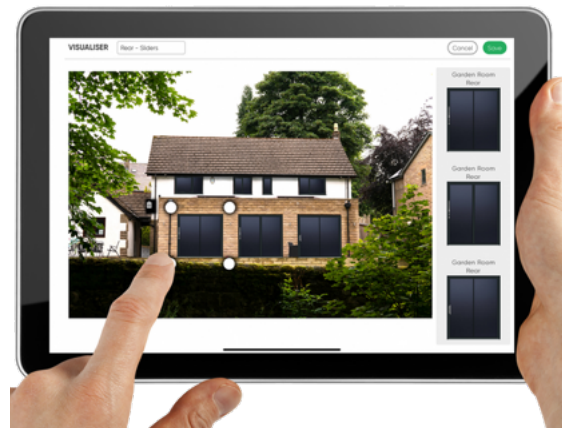
19% of aluminium entrance doors are 'steel look' profile

BIFOLDS VS SLIDERS

Bifolds still ahead, but sliders are closing the gap



52% BIFOLDS vs **48% SLIDERS**
(VALUE £)



Aluminium market share by value (£) based on analysis of the last 700,000 items quoted on Tommy Trinder by 500 window firms.

Building too few homes while the population grows quickly creates strong latent demand, which drives up house prices. It's harder then for younger people to get on the housing ladder or stay there. And it's hard for the Have Nots, the under 50s homeowners with mortgages and big outgoings on families, a rising cost of living and holidays to spend on improving their properties.



MARKET INTELLIGENCE

Hard data from the UK's leading sales app.

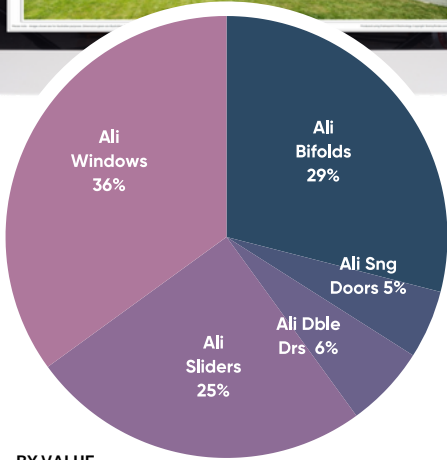
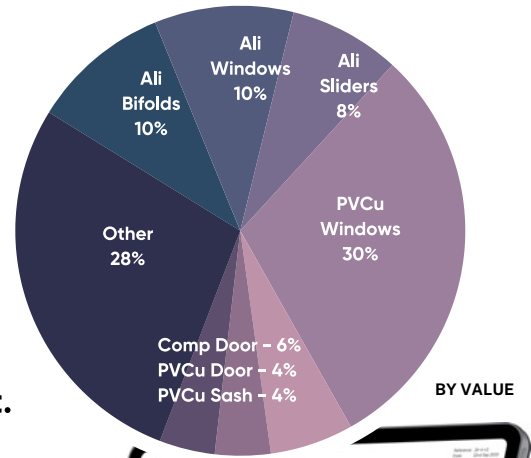
ALUMINIUM BIFOLDS MARKET SHARE



ALUMINIUM BIFOLDS account for

10%

...of the total UK windows & doors market.



...And ALUMINIUM BIFOLDS account for

29%

...of the UK aluminium windows & doors market.



SELLING PRICE PER DOOR LEAF - INSTALLED

NATIONAL AVERAGE SELLING PRICE

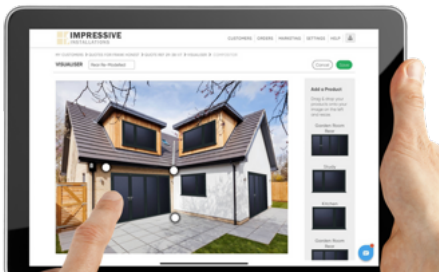
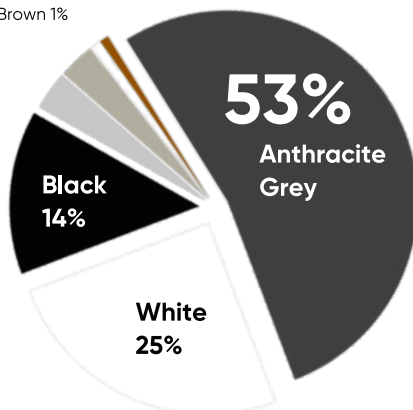
£1204 + VAT Per leaf installed



ALUMINIUM BIFOLDS - COLOUR

Agate Grey 3%
Other Greys 3%
Cream 1%
Brown 1%

Over half of ali bifolds are anthracite grey!



BIFOLDS VS SLIDERS

Bifolds still outselling sliders ..but getting close



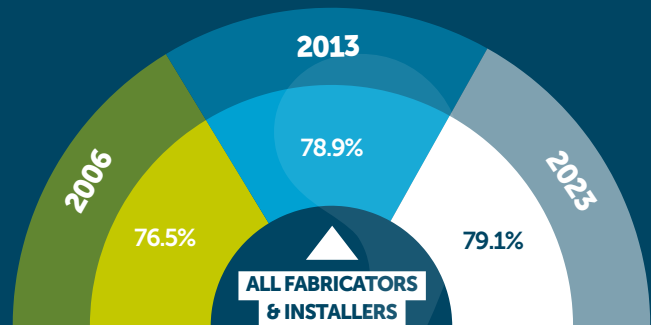
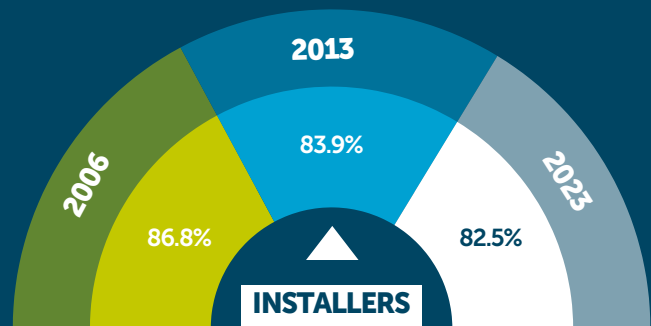
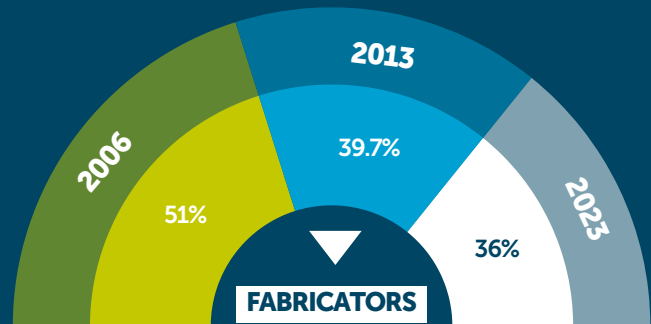
BIFOLDS 54% **SLIDERS 46%**

DO YOU SELL ALUMINIUM BIFOLDS?

84% ...of installers sell an ali bifold.

PVCu

PVCu’s challenge is to step up and speak out to differentiate itself clearly in the public’s perception, from the scourge of unsightly waste mountains and the floating debris islands of single use plastics and make its case? It’s a long life, low maintenance, readily recyclable, energy efficient, sustainable building material. But do people know that?



% Companies fabricating/installing PVCu



MARKET INTELLIGENCE

Hard data from the UK's leading sales app.

78%

...of all items installed in the UK are PVCu

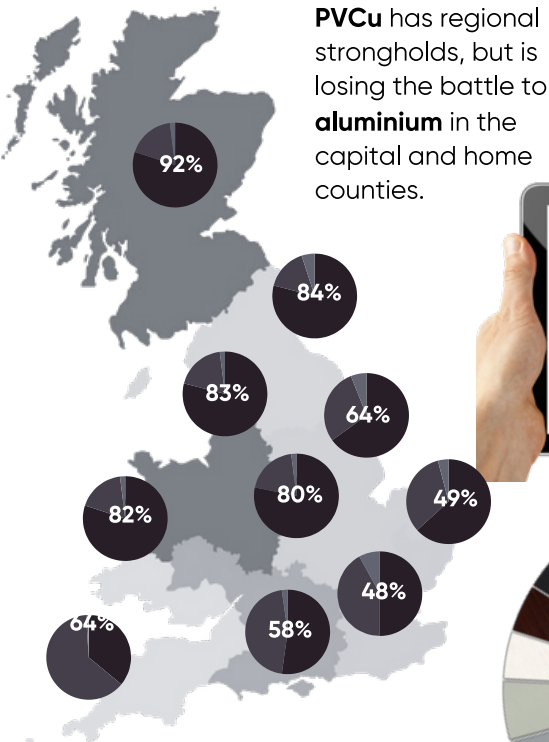


...But PVCu only accounts for

56%

of the market by £Value.

PVCU MARKET SHARE BY REGION (VALUE £)

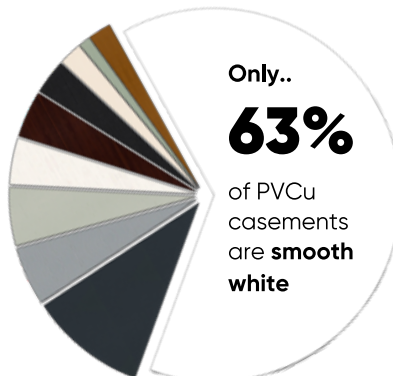


PVCu has regional strongholds, but is losing the battle to **aluminium** in the capital and home counties.

COLOUR

47%

...of PVC casements are foiled; flush casements are **81% foiled**.



FLUSH CASEMENTS MATTER

24%

...of all PVCu window sales are flush casements.



62% of installers now sell flush


ON TREND:
FLUSH FRENCH DOORS

8%

of PVCu French Doors are flush sash.



PVCu market share by value (£) based on analysis of the last 900,000 items quoted on Tommy Trinder by 500 window firms.



The Haves account for over 90% of UK savings and pensions, and the over 65s owned £2.2 trillion in mortgage-free housing wealth in 2023 (source Savills). The Haves are the Bank of Mum & Dad.

The Haves are the premium market, and in all home improvement categories the premium market has grown significantly. Twenty years ago premium accounted for 10-20% of market volume depending on the market. Now it's grown to 20-33% on the back of rising house prices and rising property values. And, like Apple's share of the smartphone market, its share of value is greater still.

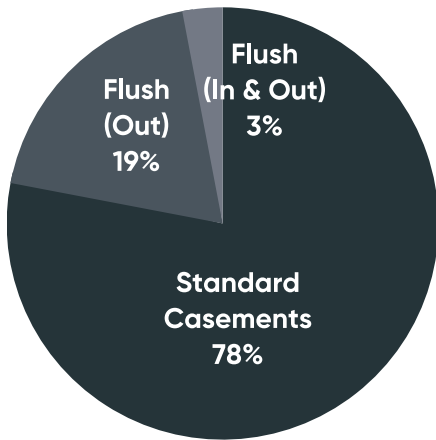
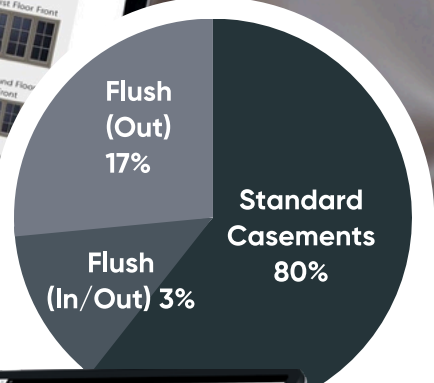


MARKET INTELLIGENCE

Hard data from the UK's leading sales app.

20%

...of all PVCu Windows installed in the UK are **FLUSH CASEMENTS**



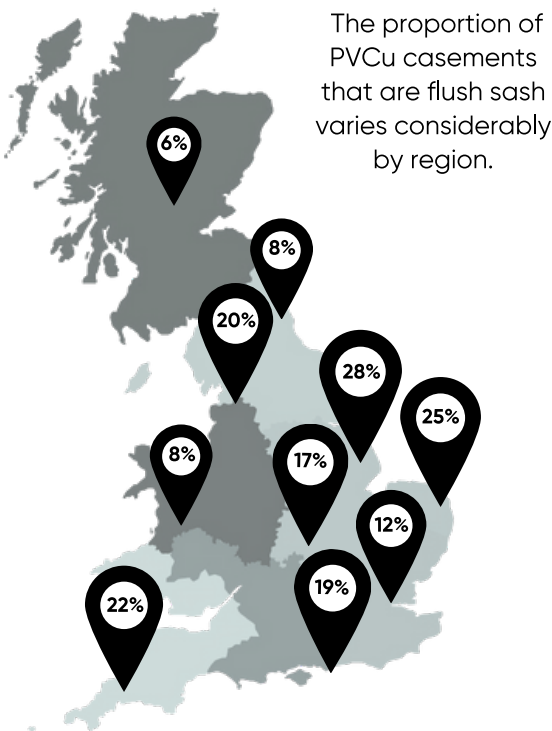
FLUSH CASEMENTS account for

22%

of the PVCu window market by value.



PVCU FLUSH SASH - MARKET SHARE BY REGION / PVCU FLUSH CASEMENTS MARKET SHARE

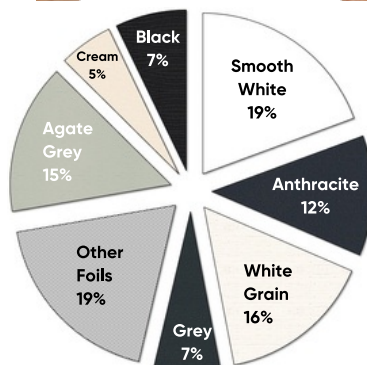


The proportion of PVCu casements that are flush sash varies considerably by region.

COLOUR

81%

...of **FLUSH CASEMENTS** are foiled!



DO YOU SELL PVCU FLUSH CASEMENTS?

54%

...of installers that sell PVCu offer a Flush Casement.



TRENDING...

7%

...of all PVCu Double Doors are Flush Sash



In the last 20 years the total number of PVC-U fabricators has almost halved, as many small PVC-U fabricators gave up fabricating to do what they do best: selling to homeowners. Organised and skilled, these top end installers have made the transition from single material PVC-U retailers to multi-material providers to the Haves. They sell much more aluminium, timber, and top end PVC-U than installers who sell to the Have Nots.

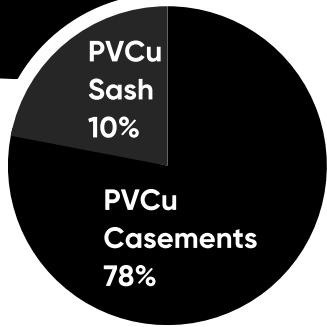
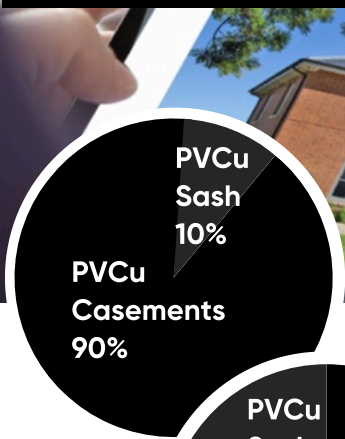
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MARKET INTELLIGENCE

Hard data from the UK's leading sales app.

PVCU VERTICAL SLIDERS MARKET SHARE



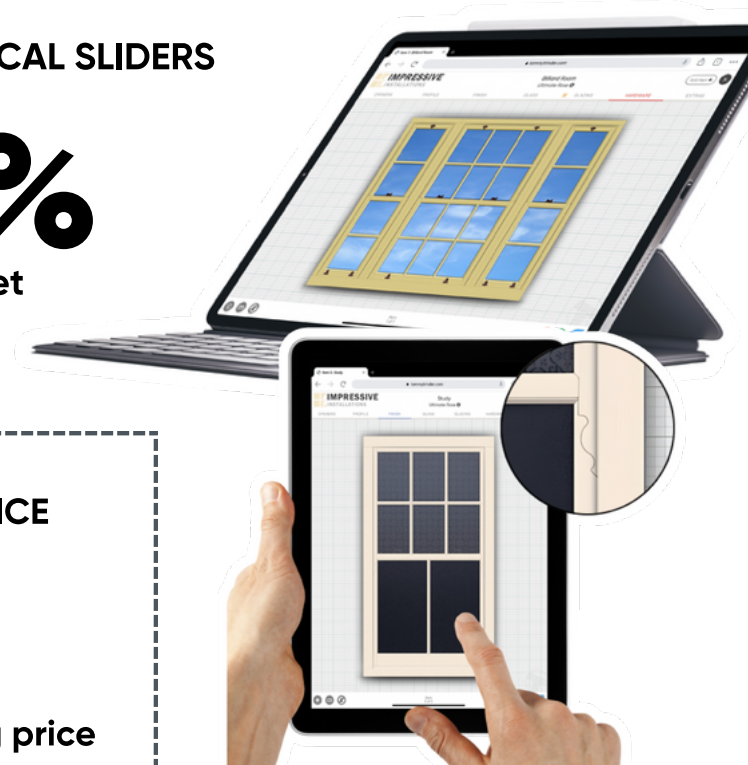
10%

...of all PVCu Windows installed in the UK are VERTICAL SLIDERS

...But VERTICAL SLIDERS account for

36%

of the market BY VALUE



PVCU VERTICAL SLIDER SELLING PRICES

NATIONAL AVERAGE SELLING PRICE

£1178 + VAT

Average installed selling price for PVCu vertical sliders

Average installed selling price ex VAT based on analysis of the last 270,000 items quoted on Framepoint® by 480+ window firms.

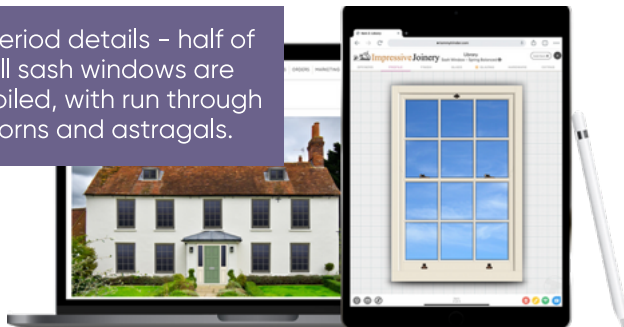


Character horns are trending...like this **Seahorse Horn** exclusively from **Roseview**

PREMIUM FEATURES MATTER

Astragals	53%
Thru' Horn	52%
Foiled	46%
Mech Joints	27%
Deep Btm Rail	20%

Period details – half of all sash windows are foiled, with run through horns and astragals.



DO YOU SELL PVCU SASH WINDOWS?

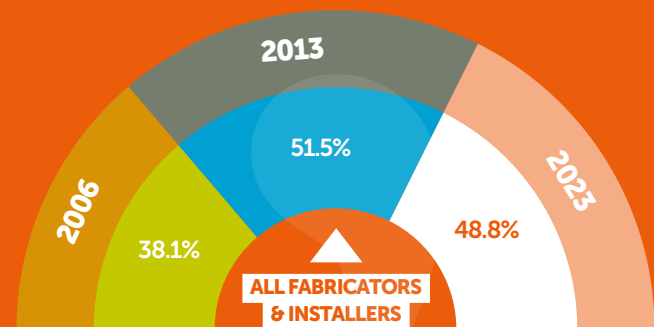
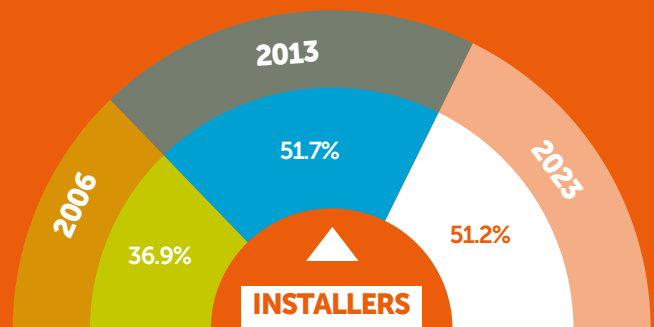
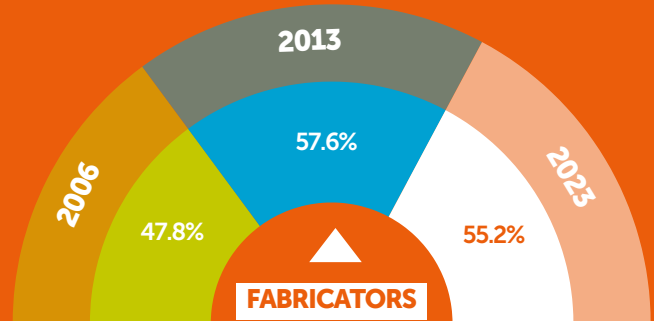
85%

...of installers have a Vertical Slider in their range



WOOD

Timber’s challenge is that few people remember, or perhaps have the stomach for, the necessary maintenance over its 60-year expected lifetime. Even light maintenance of the outside and inside of a property after the first 10 years will be very expensive (eye wateringly expensive if you’re not expecting it?). And without regular light maintenance, heavier and much more costly repair and restorative work will be required at some point. Will the owners, or new owners, be prepared to put in the time and effort themselves, or pay a professional?

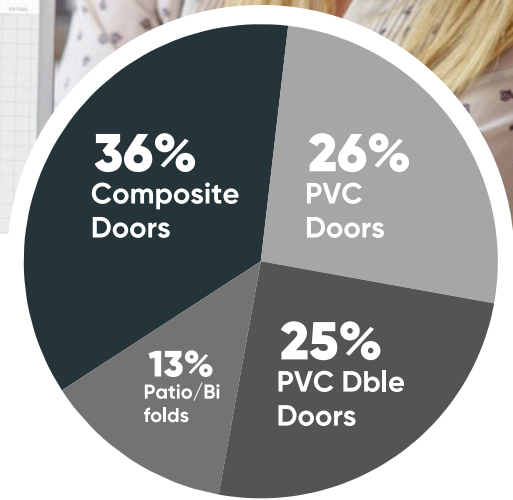
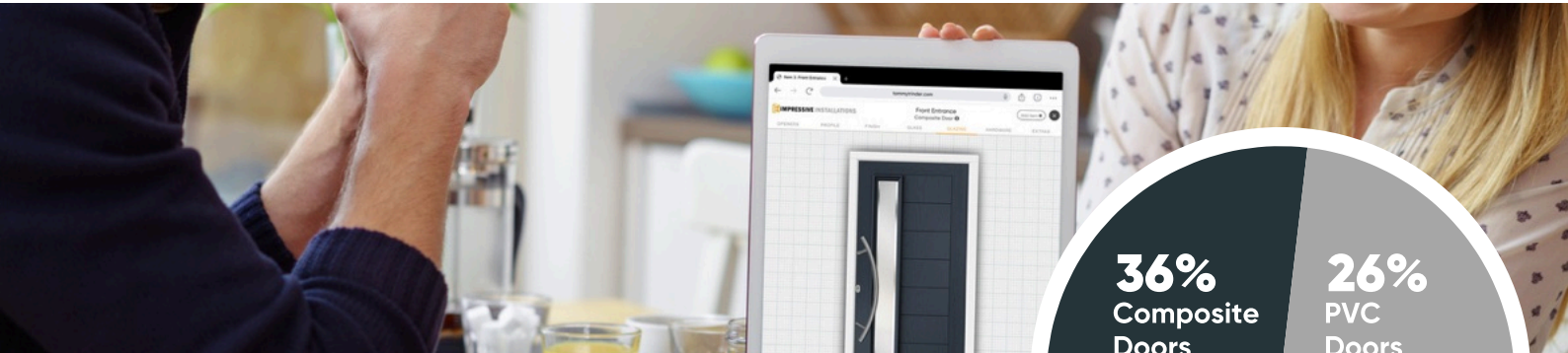


% Companies fabricating/installing timber



MARKET INTELLIGENCE

Hard data from the UK's leading sales app.



TOP 10 MOST POPULAR BRANDS ON TOMMY TRINDER



TRENDING STYLES

25% are this style



12% are contemporary

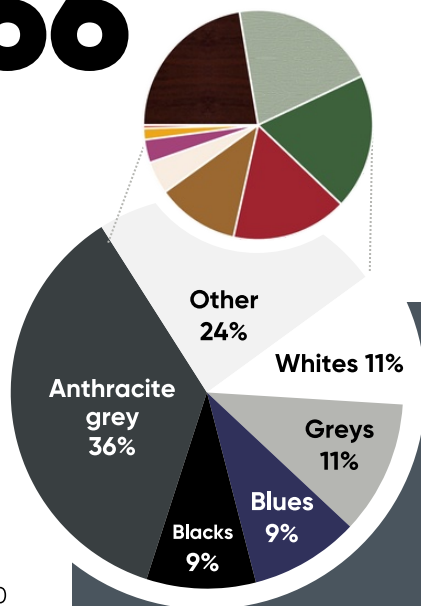
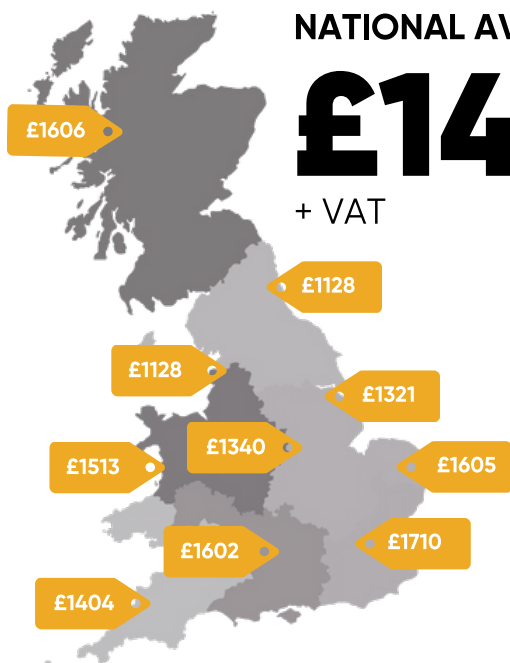


AVERAGE PRICE PER DOOR - INSTALLED

NATIONAL AVERAGE SELLING PRICE

£1466

+ VAT



COLOUR

36%

ARE ANTHRACITE

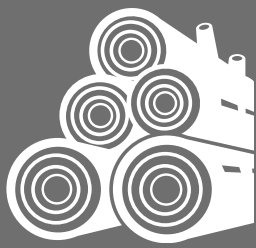
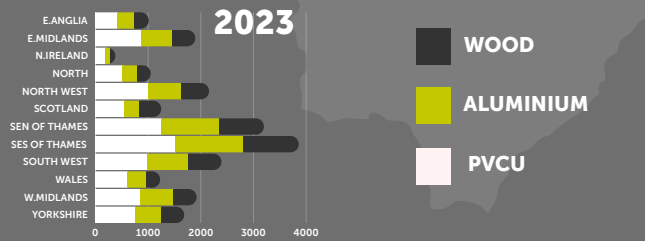
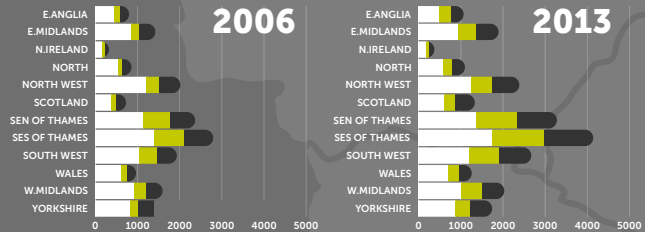
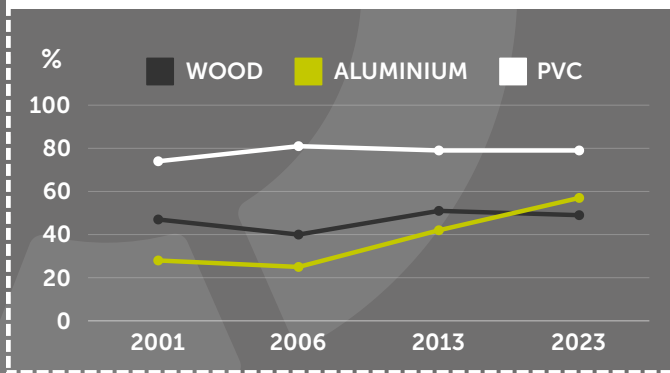
Colour choices remain more conservative than you'd think.

Prices exclude VAT & are based on the last 10,000 single composite doors quoted by installers on TOMMY TRINDER

FABRICATOR & INSTALLER MATERIALS

NUMBER OF FIRMS INSTALLING WINDOW MATERIAL BY REGION

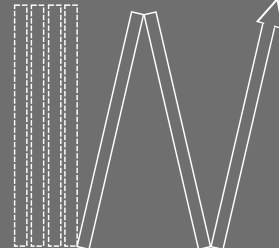
% OF COMPANIES USING EACH MATERIAL



Steady drop in firms using **TIMBER** since 2015

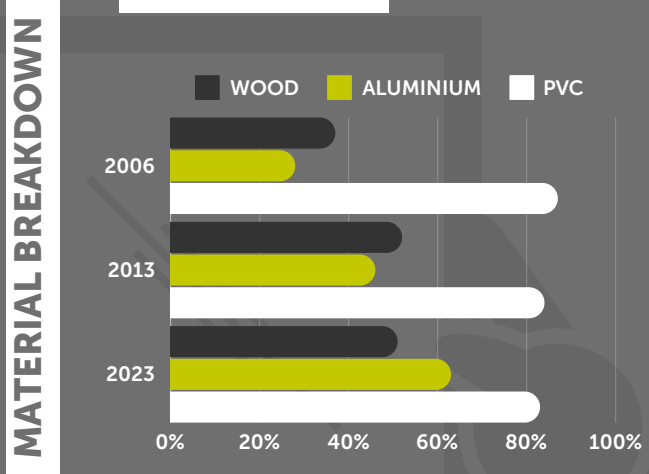


just under **80%** of firms use PVCu

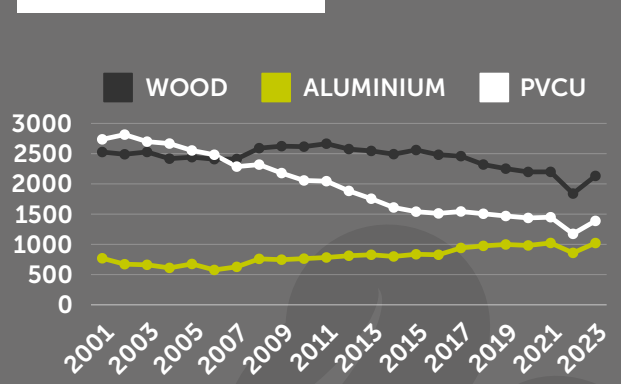


Strong growth in aluminium since **2006**

INSTALLERS:



FABRICATORS:



The number of PVCu fabricators has almost halved since 2002. The number of Aluminium fabricators has grown by almost 50% since 2005.

©WindowBASE 2024

Three times as many installers sell aluminium now as in 2001. Many of these leading window companies were once small PVC-U fabricators. An increasing number of large PVC-U fabricators make aluminium too.

PROPORTION OF FIRMS INSTALLING EACH WINDOW MATERIAL:

- The percentage of firms installing PVCu has fallen significantly in every region since 2006.
- The percentage of firms installing aluminium has risen significantly in every region since 2006.
- Trends in timber are mixed with the percent of firms installing timber falling in four regions since 2006, while being broadly stable in the other eight regions.

SCOTLAND

	2006	2013	2023
▼ PVC:	53.5%	45.9%	43.9%
▲ ALU:	16.7%	19.3%	22.8%
▲ TIM:	29.8%	34.8%	33.3%

NORTH WEST

	2006	2013	2023
▼ PVC:	61.0%	52.7%	47.0%
▲ ALU:	14.7%	20.7%	28.4%
▼ TIM:	24.6%	26.5%	24.6%

NORTH

	2006	2013	2023
▼ PVC:	63.5%	53.3%	48.8%
▲ ALU:	12.5%	19.7%	27.1%
▼ TIM:	24.0%	27.0%	24.1%

N.IRELAND

	2006	2013	2023
▼ PVC:	54.8%	48.2%	50.9%
▲ ALU:	17.1%	22.4%	25.5%
▼ TIM:	28.0%	29.4%	23.6%

WEST MIDS

	2006	2013	2023
▼ PVC:	58.8%	50.3%	44.7%
▲ ALU:	17.8%	24.1%	32.1%
▼ TIM:	23.4%	25.6%	23.1%

EAST MIDS

	2006	2013	2023
▼ PVC:	60.5%	50.3%	46.4%
▲ ALU:	13.5%	21.6%	30.4%
▼ TIM:	26.0%	28.1%	23.2%

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PROPORTION OF FIRMS INSTALLING EACH WINDOW MATERIAL:

- Aluminium has always been popular in the South and in 2023 34.5% of firms in S.E. North and 34.2% in S.E. South installed aluminium.
- A high percentage of firms in NI (50.6%), Wales (49.3%) and North (49.1%) installed PVCu.
- A higher percentage of firms in Scotland installed timber than in other regions.

YORKSHIRE

	2006	2013	2023
▼ PVC:	58.9%	50.1%	45.7%
▲ ALU:	13.9%	19.9%	28.7%
▼ TIM:	27.3%	30.0%	25.7%

WALES

	2006	2013	2023
▼ PVC:	63.7%	55.6%	48.9%
▲ ALU:	14.7%	21.3%	29.9%
▼ TIM:	21.7%	23.1%	21.3%

S.E. NORTH

	2006	2013	2023
▼ PVC:	48.6%	41.6%	39.0%
▲ ALU:	26.6%	29.7%	34.4%
■ TIM:	24.8%	28.7%	26.6%

EAST ANGLIA

	2006	2013	2023
▼ PVC:	56%	46.6%	40.7%
▲ ALU:	18.7%	26.2%	32.5%
■ TIM:	25.3%	27.2%	26.8%

SOUTH WEST

	2006	2013	2023
▼ PVC:	54.6%	44.9%	41.7%
▲ ALU:	21.3%	27.0%	32.0%
■ TIM:	24.1%	28.1%	26.3%

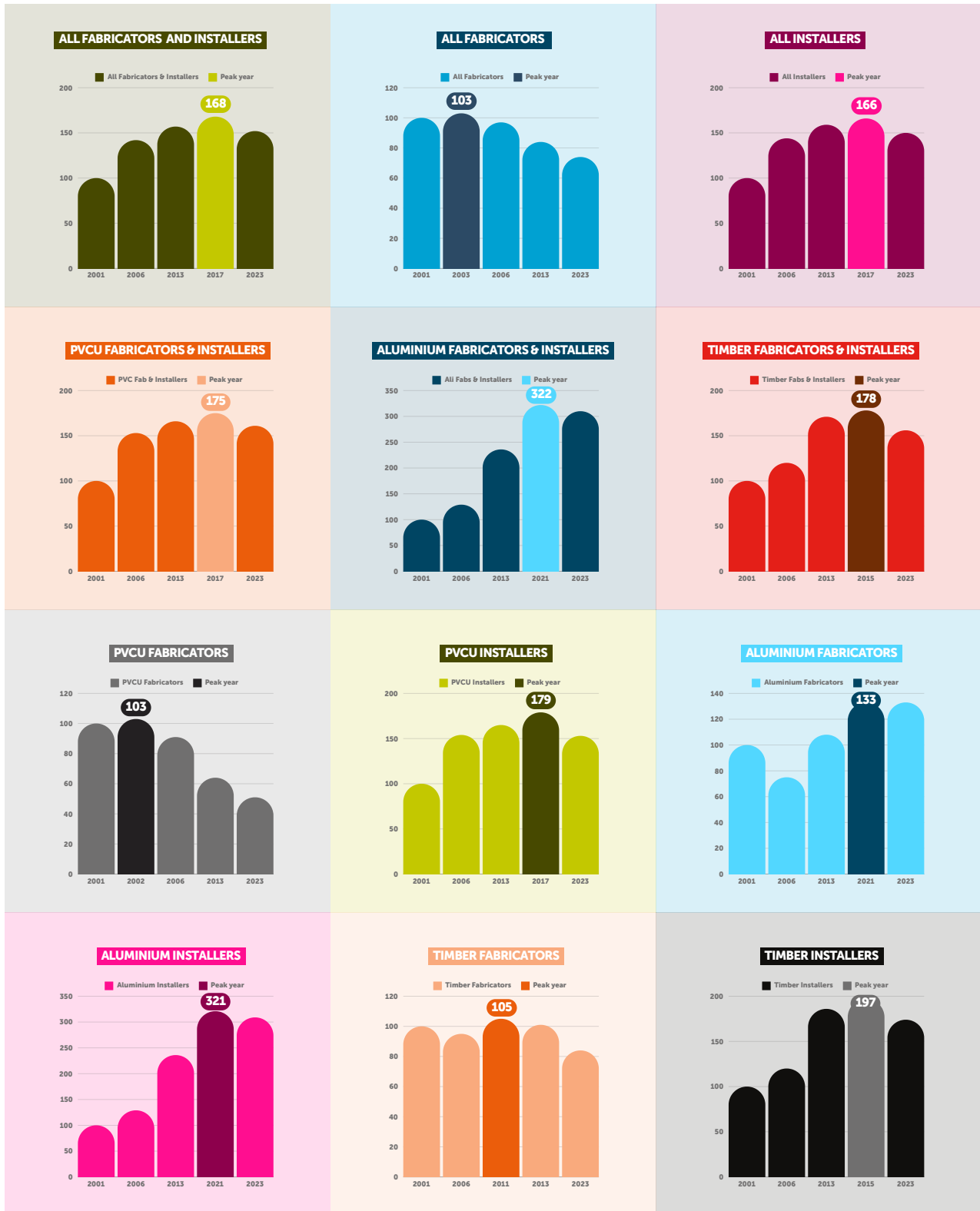
S.E. SOUTH

	2006	2013	2023
▼ PVC:	50.2%	42.0%	39.2%
▲ ALU:	25.7%	29.8%	33.9%
■ TIM:	24.1%	28.1%	26.9%

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WHAT DO THE TRENDS TELL US?

Trend summaries by type of firm – indexed on 2001



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WHAT DO THE TRENDS TELL US?

Timber's early 2000s revival with designed-to-last premium windows made with factory-painted engineered-timber appealed to homeowners looking for the natural beauty of wood, and it has become a staple with top end installers.

Aluminium's revival, after 20 years on the fringes of the domestic market, started with the premium market's love affair with slim-framed big-vista sliding patio doors. Since 2019, it's gone into overdrive with Garnalex' comprehensive investment in extrusion, new systems designs, fast service, colour on demand, and a seamlessly integrated range. Three times as many installers sell aluminium now as in 2001, and many PVCu fabricators now make aluminium too.

Faced with the prospect of market saturation by the mid 2000s, PVCu systems companies turned to wants not just needs, and improved their systems to attract homeowners with better energy efficiency and more attractive windows and doors.

But the turning point for PVCu came a decade later when the Haves fell first for Residence 9's stylish flush windows and wide colour choice, and then for Deceuninck's big-bet investment in colour on demand.

In the last 20 years the total number of PVCu fabricators almost halved as many small PVCu fabricators gave up fabricating to focus on what they were best at: selling to homeowners. Organised and skilled, these top end installers have made the transition from single material PVCu retailers to multi-material providers of high-end compatible aluminium, timber and PVCu windows and doors to the Haves. These top-end installers with their own showroom and two or more fitting teams are the playmakers shaping today's market and the products and materials we use.

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Image: Chris Brunson



Image: Chris Brunson



Image: Thanks to Deceuninck

INDUSTRY INSIGHTS:

"An insightful report on the window and door market and how the sector has evolved over the years in areas of innovation, material, colour, attitudes and much more. If you need answers to the big questions about the industry, products, companies, long term trends, regional differences, and prices then this is the 'go-to' report. Compact, authoritative, and interesting."

LUCIA DI STAZIO, GROUP MARKETING STRATEGY & COMMUNICATIONS DIRECTOR, ENCON GROUP.

"This 26 page WindowBASE-Tommy Trinder Windows & Door report is authoritative and packed with accessible facts and useful insights. And it's easy on the eye. Keep it handy for your marketing and business planning!"

ANDY BALL, CEO, BALLS2MARKETING

"The UK fenestration sector, unlike the European and US markets, has, until now, been lacking genuinely useful and actionable research and data. This is important for business owners to make informed decisions and to act on them, rather than go simply on gut instinct. This report is going to allow many to action and execute on decision which may very well be key in the coming 12 months."

JASON GRAFTON-HOLT, FOUNDER, THE DOUBLE GLAZING BLOGGER

"Great report. Good read."

CHRIS TAHMASABY, CHIEF EXECUTIVE OFFICER, ICAAL

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