

Residential Windows & Doors – UK – 2021

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This report looks at the following areas:

- How COVID-19 caused major demand changes in both the replacement and new build markets following Brexit, resulting in pent-up demand in the latter stages of 2020/early 2021.
- How the industry has faced material shortages following temporary factory closures and the bulge in demand directly resulting from the pandemic.
- How the market is expected to develop after the short-term impact of high levels of house moving, home improvement activity and the escalation of house price inflation.
- How the market segments between frame materials.
- How the market segments between new build and the important replacement sector.

COVID-19 quickly impacted demand in the new build sector, as well as supply in the replacement sector, causing a 14.2% decline in sales to the new build and contractor-led home improvement market and a slightly lower reduction of 10.8% in the direct sell replacement market. Generally, the markets recovered strongly in the second half of 2020, with the latter sector reporting a benefit from pent-up demand.

However, there are long-term implications from the pandemic that are expected to be positive. New build demand, already on a long-term upward trend, could be enhanced as existing commercial buildings are repurposed to residential accommodation, and existing homes may be encouraged to extend to accommodate working space, with remote working propelled as a practice.

The important direct sell market is dependent on a complex mix of market influencers, many of which relate to consumer confidence and the ability and willingness of householders to invest in their properties. Interest rates are at record low levels but must be expected to increase, making investments more



“COVID-19 caused a temporary decline in demand in the new build sector, disrupting the buoyant conditions which continue to offer long-term potential. In the home improvement sector, there is proving to be a boost to demand as remote working stimulates demand for workspace.”

– Terry Leggett, Senior Analyst

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expensive, while replacement windows do not offer the lifestyle gains seen to be achieved with competing improvements such as bathrooms and kitchens.

While the direct sell market is largely mature, though subject to annual fluctuations because of the varied influences on demand, the new build sector has been and will continue to be very buoyant. The remaining contractor market is now getting a boost as the growth in remote working encourages people to extend their property to accommodate new demands on space.

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