

Residential Windows & Doors - UK - 2021

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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.

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- Key issues covered in this Report
- COVID-19: market context
- Economic and other assumptions
- Products covered in this Report

EXECUTIVE SUMMARY

- **Impact of COVID-19 on residential windows and doors**
Figure 1: Short-, medium- and long-term impact of COVID-19 on residential windows and doors, (prepared on 11 June 2020)
- **The market**
- **Market size and forecast**
Figure 2: The UK market for residential windows and doors, 2015-25 (prepared on 11 June 2020)
- **New build and contractor demand**
Figure 3: Development of the builders and contract market for residential windows and doors, 2015-25
- **Direct sell demand**
Figure 4: Development of the direct sell market for residential windows and doors, 2015-25
- **Market drivers**
Figure 5: Monthly comparison of new house building registrations, by month, 2019 and 2020
Figure 6: Public housing R&M expenditure, 2015-25
Figure 7: Private housing R&M expenditure, 2015-25
- **Companies and brands**
- **Major variation in sectors served**

ISSUES AND INSIGHTS

- How will long-term demand be impacted by COVID-19?
- How influential are green credentials?

THE MARKET – KEY TAKEAWAYS

- Covid-19 disruption
- Complex mix of market drivers
- Green issues

MARKET SIZE AND FORECAST

- The COVID-19 market disruption

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 8: Short-, medium- and long-term impact of COVID-19 on residential windows and doors, (prepared on 11 June 2020)

- **The market**
- **Overview**
Figure 9: The UK market for residential windows and doors, 2015-25 (prepared on 11 June 2020)
- **New build and contractor demand**
Figure 10: Development of the builders and contract market for residential windows and doors, 2015-25
- **Direct sell demand**
Figure 11: Development of the direct sell market for residential windows and doors, 2015-25
- **Market drivers and assumptions**
Figure 12: Key drivers affecting MBD's market forecast, 2015-25 (prepared on 5 March 2021)
- **Forecast methodology**

MARKET SEGMENTATION – APPLICATION

- **New build and replacement sectors impacted in 2020**
Figure 13: Segmentation of residential window and door market, by application, 2015-20

MARKET SEGMENTATION – MATERIALS

- **Convenience and aesthetics remain critical factors**
Figure 14: Material segmentation of window frames, 2020 (£ million)
Figure 15: Material segmentation for doors and door frames, 2020 (£ million)

MARKET SEGMENTATION – BUILDERS AND CONTRACT

- **Covid-19 changed everything**
Figure 16: Development of the builders and contract market for residential windows and doors, 2015-25
Figure 17: Product segmentation in the builders and contractor sector, 2015-20
Figure 18: Material and product segmentation of the builders and contract sector, 2015-20 (£ million)

MARKET SEGMENTATION – DIRECT SELL

- **Introduction**
- **COVID-19 causes major disruption**
Figure 19: Development of the direct sell market for residential windows and doors, 2015-25

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 20: Product segmentation in the direct sell sector, 2015-20

Figure 21: Material and product segmentation of the direct sell sector, 2015-20 (£ million)

MARKET INFLUENCERS

- **Overview**
- **COVID-19**
- **Interest rates**
Figure 22: Bank rate, by date of adjustment, 2008-21
- **House prices**
Figure 23: House price inflation, Jan 2006-March 2021
- **Housing transactions**
Figure 24: Residential property transactions in the UK, by country, 2006-2021 (number)
Figure 25: Monthly residential property transactions in the UK, 2019-April 2021
- **Double glazing role in home improvements**
Figure 26: Proportion of homes in England fully double glazed, 2008-18
Figure 27: Market penetration of double glazing by tenure and house size in England, 2017 (%)
Figure 28: Top 10 most common energy efficiency improvements undertaken by owner-occupiers in last five years, 2018

MARKET DRIVERS

- **Overview**
- **New housebuilding and the COVID-19 impact**
Figure 29: Monthly comparison of new house building registrations, by month, 2019 and 2020
Figure 30: House building expenditure, 2015-25
Figure 31: Segmentation of house building expenditure, by sector, 2015-25
Figure 32: Housing completions in England, by sector, 1978-2020
- **Housing stock**
Figure 33: Number of UK households, 1991-2020
- **Geographic distribution**
Figure 34: UK housing stock, by region, 2020
- **Tenure**
Figure 35: Home ownership levels in the UK, 2006-20

What's included

- Executive Summary

- Full Report PDF

- Infographic Overview

- Powerpoint Presentation

- Interactive Databook

- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 36: Relationship between public and private home rental in England, 2001-20

- **Property type and size**

Figure 37: Composition of UK housing stock, by type of property, 2017

Figure 38: Composition of UK households, by size and country, 2020

- **Age structure**

Figure 39: Age profile of the UK housing stock, 2020 (000 properties)

- **R&M expenditure**

- **Overview**

- **Public housing R&M**

Figure 40: Public housing R&M expenditure, 2015-25

- **Private housing R&M**

Figure 41: Private housing R&M expenditure, 2015-25

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **The structure**
- **COVID-19 causes huge disruption**
- **A digital and sustainable future**

INDUSTRY STRUCTURE

- **Introduction**

- **Metal doors and frames**

Figure 42: Development of the metal doors and window frames industry, 2016-20

- **PVC-u doors and frames**

Figure 43: Development of the PVC-u doors and window frames industry, 2016-20

- **Timber doors and frames**

Figure 44: Development of the timber doors and window frames industry, 2016-20

COMPETITIVE STRATEGIES

- **COVID-19 disruption**
- **Sustainability and recycling**
- **Digital development**
- **Customer-facing sector still encountering issues**

COMPANY PROFILES

- **Anglian Windows**
- **Activity**
- **Performance**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 45: Financial performance of Anglian Windows, 2016-20 (£ million)

- **Strategy**
- **Epwin Group**
- **Activity**
- **Performance**

Figure 46: Financial performance of Epwin Group, 2016-20 (£ million)

- **Strategy**
- **Everest 2020**
- **Activity**
- **Performance**

Figure 47: Financial performance of Everest 2014-18 (£ million)

- **Strategy**
- **Jeld-Wen**
- **Activity**
- **Performance**

Figure 48: Financial performance of Jeld-Wen, 2015-19 (£ million)

- **Strategy**
- **REHAU**
- **Activity**
- **Performance**

Figure 49: Financial performance of REHAU 2015-19 (£ million)

- **Strategy**
- **Safestyle UK**
- **Activity**
- **Performance**

Figure 50: Financial performance of Safestyle UK, 2016-20 (£ million)

- **Strategy**
- **VEKA**
- **Activity**
- **Performance**

Figure 51: Financial performance of VAKA (UK), 2015-19 (£ million)

- **Strategy**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.