This report looks at the following areas:

- How the market segments between new build and the important replacement sector and the major differences between the prospects of the sectors.
- 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 but also the changing market conditions of 2022 particularly in the replacement sector.
- How the market segments between frame materials.
- How the industry is responding to the strongly changes in demand in the replacement sector and dealing with its own raw material price changes.

Demand for residential windows and doors from the new build sector continues to be buoyant following the short-term disruption of site closures during 2020 arising from the pandemic. Prospects remain positive largely because of the continued long-established issue of housing shortages.

In the replacement sector the market conditions have fundamentally changed in 2022, though in the first half of the year house price inflation, usually a major stimulus to home improvement investment, has remained strong but the rising inflation is retocussing discretionary spending. To make the situation more difficult, the fuel-based cause of the inflation directly impacts the PVC-u materials.

In the 1970s fuel-based inflation the level of housing with double glazing was low, and there remained opportunities to emphasise the thermal efficiency of installations. This is now much reduced as the majority of activity involves replacing existing double glazed items, and while the technology has progressed thermal efficiency, the magnitude of the benefit is reduced compared with the 1970s.

"2020 was a year of contrasting fortunes emanating from the pandemic."
- Terry Leggett, Senior Analyst, July 2022
Rising raw material prices, combined with the wider environmental considerations surrounding climate change are encouraging an even greater element to recycling. Installers have often diversified into related home improvement sectors to cross sell to the customer base, and this could now evolve into renewable energy sources as homeowners see fuel price inflation impacting their finances.
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