

2017

# Domestic Glazing The Window, Door and Conservatory Markets in Housing in Great Britain

2017 EDITION

## THE WINDOW, DOOR AND CONSERVATORY MARKETS IN HOUSING IN GREAT BRITAIN 2017 EDITION

Palmer Market Research Office 104 61 Victoria Road Surbiton KT6 4JT © COPYRIGHT PALMER MARKET RESEARCH

NO PART OF THIS REPORT MAY BE REPRODUCED

OR QUOTED WITHOUT THE WRITTEN PERMISSION

OF PALMER MARKET RESEARCH EXCEPT FOR USE

WITHIN THE COMPANY SUBSCRIBING TO THE

SURVEY

### **LIST OF CONTENTS**

		Page No
INTRODUCT	TION	1
TOTAL MAR	RKET OVERVIEW	2
	Executive Summary	3
	2016 Market	4
	Windows	5
	Entrance Doors	8
	Patio Doors	10
	Conservatories	11
	Glazing Market Forecast to 2021	11
	Tables S.1 to S.18	14
SECTION O	NE - NEW HOUSING MARKET	31
	New Housing Market Overview	32
	2016 Market	32
	Forecast to 2021	34
	Housebuilding Market	35
	2016 Market	35
	Forecast to 2021 – Private Sector	36
	Forecast to 2021 – Social Sector	38
	Forecast to 2021 – All New Housing	39
	Window Market Details	40
	2016 Window Market	40
	Forecast to 2021	43
	Entrance Door Market Details	45
	2016 Entrance Door Market	45
	Forecast to 2021	47
	Patio Door Market Details	48
	2016 Patio Door Market	48
	Forecast to 2021	49
	Conservatory Market Details	51
	2016 Conservatory Market	51
	Forecast to 2021	51
	<b>Tables</b> 1.1 to 1.40	53
SECTION TV	WO - HOME IMPROVEMENT MARKET	73
	Home Improvement Market Overview	74

	2016 Market Forecast to 2021	74 75
	Home Improvement Window Market Details 2016 Window Market Energy Rated Windows Window Forecast (1) Summary Window Forecast (2) Direct Sell Window Forecast (3) Builders	78 78 82 83 84 87
	Home Improvement Entrance Door Market 2016 Entrance Door Market Forecast to 2021	88 88 90
	Home Improvement Patio Door Market Definitions 2016 Patio Door Market Patio Door Forecast to 2021	92 92 92 94
	Home Improvement Conservatory Market 2016 Conservatory Market Conservatory Styles Conservatory Sizes Conservatory Frame Materials Conservatory Walls Conservatory Windows and Doors Conservatory Roofs Routes to Market Conservatory Forecast to 2021	95 95 96 97 97 97 98 99 99
	Market Drivers - Home Improvements Introduction Housing Market Real Disposable Incomes Unemployment Interest Rates Housing Equity Withdrawal Consumer Confidence	102 102 102 104 105 105 106
	<b>Tables</b> 2.1 - 2.45	107
SECTION TH	REE – SOCIAL HOUSING REFURBISHMENT MARKET	132
	Social Housing Refurbishment Market Overview 2016 Market Forecast to 2021	133 133 134
	Social Housing Window Market Details 2016 Window Market Energy Rated Windows Window Forecast to 2021	136 136 137 138

	Social Housing Entrance Door Market Details 2016 Market Entrance Door Forecast to 2021	140 140 141
	How Contracts Are Placed	142
	Social Housing Background Housing Stock	143 143
	<b>Tables</b> 3.1 – 3.18	144
SECTION F	FOUR – ECONOMIC BACKGROUND	153
	Introduction 2016 2017 to 2021	154 154 154
APPENDIX		156
	Research Programme (1) Interview Programme (2) Desk Research	157

### **LIST OF CHARTS AND TABLES**

		Page No.
Total Mark Charts	et Overview	
Chart S.1	Glazing Market in Housing in Great Britain 2015 to 2016 (installed value and volume measures)	4
Chart S.2	Trends in the Glazing Market in Housing in Great Britain 2000 to 2016 (volume and installed value)	4
Chart S.3	Glazing Market in Housing in Great Britain by Main Product 2016 (£mn – installed value)	4
Chart S.4	Glazing Market in Housing in Great Britain Trends 2015 to 2016 by Major Product (Volume % change)	4
Chart S.5	Trends in the Window Market in Housing in Great Britain 2000 to 2016 (million frames)	5
Chart S.6	Window Market in Housing in Great Britain by frame material 2016 (% shares based on volume & value)	5
Chart S.7	Trends in PVC-U Windows in Housing in Great Britain 2000 to 2016	5
Chart S.8	Trends in Non-white Finishes on PVC-U Windows in Housing in Great Britain 2013 to 2016 (000 frames)	5
Chart S.9	Structure of the PVC-U Window Market in Housing in Great Britain 2016 (million frames)	6
Chart S.10	Trends in Wood Windows in Housing in Great Britain 2000 to 2016	6
Chart S.11	Sector Markets for Wood Windows in Housing in Great Britain 2016	6
Chart S.12	Trends in Aluminium Windows in Housing in Great Britain 2000 to 2016	7
Chart S.13	Sector Markets for Aluminium Windows in Housing in Great Britain 2016	7
Chart S.14	Trends in Aluminium/Timber Composite Windows in Housing in Great Britain 2010 to 2016	7
Chart S.15	Sector Markets for Aluminium/Timber Composite Windows in Housing in Great Britain 2016	7
Chart S.16	Configurations (Styles) in the Window Market in Housing in Great Britain 2016	8
Chart S.17	Trends in the Entrance Door Market in Housing in Great Britain 2000 to 2016 (Mill Doors)	8

Chart S.18	Entrance Door Market in Housing in Great Britain by door leaf material 2016 (% shares based on volume and value)	8
Chart S.19	Trends in Plastic Composite Entrance Doors in Housing in Great Britain 2000 to 2016 (000 doors)	8
Chart S.20	Sector Markets for Plastic Composite Entrance Doors in Housing in Great Britain 2016	9
Chart S.21	Trends in PVC-U Panel Entrance Doors in Housing in Great Britain 2000 to 2016 (000 doors)	9
Chart S.22	Sector Markets for PVC-U Panel Entrance Doors in Housing in Great Britain 2016	9
Chart S.23	Trends in Wood Entrance Doors in Housing in Great Britain 2000 to 2016 (000 doors)	9
Chart S.24	Sector Markets for Wood Entrance Doors in Housing in Great Britain 2016	10
Chart S.25	Trends in the Patio Door Market in Housing in Great Britain 2000 to 2016 by Door Type (000 doorsets)	10
Chart S.26	Patio Door Market in Housing in Great Britain by door frame material by Type of Door 2016 (% shares based on volume)	10
Chart S.27	Trends in the Conservatory Market in Housing in Great Britain 2000 to 2016 (000 cons)	11
Chart S.28	Replacement Conservatory Market in Great Britain 2006 to 2016 (000 conservatories)	11
Chart S.29	Forecast of the Glazing Market in Housing in Great Britain – Annual Percentage Growth 2017 to 2021 (volume measure)	12
Chart S.30	Forecast of the Glazing Market in Housing in Great Britain to 2021 by Major Product (annual % change)	12
Chart S.31	Forecast of Frame Materials in Housing in Great Britain to 2021 (annual % change)	13
<b>Tables</b> Table S.1	Trends in Glazing Products in the Housing Market in Great Britain	14
T-1-1- 0.0	Installed Value 2000 to 2021 (£ Million)	4.4
Table S.2	Trends in Glazing Products in the Housing Market in Great Britain Numbers of Units 2000 to 2021	14
Table S.3	Trends in Frame/Leaf Materials in the Housing Market in Great Britain Installed Value 2000 to 2021 (£ Billion)	15
Table S.4	Trends in Glazing Products in the Housing Market in Great Britain by Sector Installed Value 2000 to 2021 (£ Billion)	15

Table S.5	Glazing Products in the Housing Market in Great Britain by Sector 2016 – Installed Value - £ million	16
Table S.6	Glazing Products in the Housing Market in Great Britain by Sector 2016 – Numbers of Units	16
Table S.7	Trends in Window Frame Materials in the Housing Market in Great Britain Installed Value 2000 to 2021	17
Table S.8	Trends in Window Frame Materials in the Housing Market in Great Britain Million Frames 2000 to 2021	17
Table S.9	Window Frame Market in Housing in Great Britain – Sector Trends Installed Value 2000 to 2021 (£ Million)	18
Table S.10	Window Frame Market in Housing in Great Britain – Sector Trends Million Frames 2000 to 2021	18
Table S.11	Trends in Casements, Vertical Sliders, Tilt & Turn and Other Window Styles in the Housing Market in Great Britain Thousand Frames 2001 to 2016	19
Table S.12	Trends in the Market for Entrance Doors in Housing in Great Britain by Door Leaf Material 2000 to 2021 Installed Value (£ million)	20
Table S.13	Trends in the Market for Entrance Doors in Housing in Great Britain by Door Leaf Material 2000 to 2021 (Thousand Doors)	20
Table S.14	Entrance Door Market in Housing in Great Britain – Sector Trends Installed Value 2000 to 2021 (£ Million)	21
Table S.15	Entrance Door Market in Housing in Great Britain – Sector Trends Thousand Doors 2000 to 2021	21
Table S.16	Trends in the Market for Patio Doors in Housing in Great Britain by Door Type 2000 to 2021 Installed Value (£ Million)	22
Table S.17	Trends in the Market for Patio Doors in Housing in Great Britain by Door Type 2000 to 2021 Thousand Doorsets	22
Table S.18	Trends in the Market for <u>Sliding</u> Patio Doors in Housing in Great Britain by Frame Material 2000 to 2021 Installed Value (£ million)	23
Table S.19	Trends in the Market for <u>Sliding</u> Patio Doors in Housing in Great Britain by Frame Material 2000 to 2021 Thousand Doorsets	23
Table S.20	Trends in the Market for <u>Hinged</u> Patio Doors in Housing in Great Britain by Frame Material 2000 to 2021 Installed Value (£ million)	24
Table S.21	Trends in the Market for <u>Hinged</u> Patio Doors in Housing in Great Britain by Frame Material 2000 to 2021 Thousand Doorsets	24
Table S.22	Trends in the Market for <u>Bifold</u> Patio Doors in Housing in Great Britain by Frame Material 2000 to 2021 Installed Value (£ million)	25

Table S.23	Trends in the Market for <u>Bifold</u> Patio Doors in Housing in Great Britain by Frame Material 2000 to 2021 Thousand Doorsets	25
Table S.24	Sliding Patio Door Market in Housing in Great Britain – Sector Trends Installed Value 2000 to 2021 (£ Million)	26
Table S.25	Sliding Patio Door Market in Housing in Great Britain – Sector Trends Installed Value 2000 to 2021 (£ Million)	26
Table S.26	Hinged Patio Door Market in Housing in Great Britain – Sector Trends Installed Value 2000 to 2021 (£ Million)	27
Table S.27	Hinged Patio Door Market in Housing in Great Britain – Sector Trends Installed Value 2000 to 2021 (£ Million)	27
Table S.28	Bifold Patio Door Market in Housing in Great Britain – Sector Trends Installed Value 2000 to 2021 (£ Million)	28
Table S.29	Hinged Patio Door Market in Housing in Great Britain – Sector Trends Bifold Value 2000 to 2021 (£ Million)	28
Table S.30	Trends in the Market for Conservatories in Housing in Great Britain by Sector 2000 to 2021 Installed Value (£ Million)	29
Table S.31	Trends in the Market for Conservatories in Housing in Great Britain by Sector 2000 to 2021 Thousand Units.	29
Table S.32	Housing Stock in Great Britain By Tenure 2000 to 2015 Thousand Dwellings	30
SECTION O	NE NEW BUILD HOUSING MARKET	
Charts Chart 1.1	New Build Housing Glazing Market in Great Britain 2015 to 2016 (installed value and volume measures)	32
Chart 1.2	Trends in the New Build Housing Glazing Market in Great Britain 2000 to 2016 Volume and Installed Value	32
Chart 1.3	New Build Housing Glazing Market in Great Britain by Main Product 2016 (£mn – installed value)	32
Chart 1.4	New Build Housing Glazing Market in Great Britain Trends 2015 to 2016 by Major Product (Volume % change)	32
Chart 1.5	New Build Housing Glazing Market in Great Britain by Main Frame/Door Leaf Material 2016 (£mn – installed value)	33
Chart 1.6	Frame Material Trends in the New Housing Glazing Market in Great Britain 2000 to 2016 (% shares based on installed value)	33
Chart 1.7	Forecast of the Glazing Market in New Housing in Great Britain – Annual Percentage Growth 2016 to 2021 (volume measure)	34

Chart 1.8	Forecast of the Glazing Market in New Housing in Great Britain 2016 to 2021 by Major Product (Volume % change)	34
Chart 1.9	Trends in Housebuilding Starts in Great Britain 2008 to 2021 (Thousands)	35
Chart 1.10	Trends in Housebuilding Completions in Great Britain 2008 to 2021 (Thousands)	35
Chart 1.11	Trends in Housebuilding Starts in Great Britain by Sector 2008 to 2016 (Thousands)	35
Chart 1.12	Percentage Shares taken by Houses and Flats in New Housebuilding in Great Britain 2000 to 2016	36
Chart 1.13	Percentage Shares taken by House Types in New Housebuilding in Great Britain 2000 to 2016	36
Chart 1.14	Percentage of Housing Registrations in Great Britain 2015 and 2016 by Size of Housebuilder	36
Chart 1.15	Average House Prices for New Build Properties in Great Britain. Trends in Annual Percentage Changes 2007 to 2021	37
Chart 1.16	Housing Transactions – UK – 2007 to 2021 (000s)	37
Chart 1.17	Trends in Home Ownership – England – 1990 to 2016 (million dwellings)	37
Chart 1.18	Trends in Private Sector Housebuilding Starts and Completions in Great Britain 2010 to 2021 (000s)	38
Chart 1.19	Trends in Social Sector Housebuilding Starts and Completions in Great Britain 2010 to 2021 (000s)	39
Chart 1.20	Trends in All Housebuilding Starts and Completions in Great Britain 2010 to 2021 (000s)	39
Chart 1.21	Trends in the New Build Housing Window Market in Great Britain 2005 to 2016 (mill frames)	40
Chart 1.22	Trends in the New Build Housing Window Market in Great Britain 2005 to 2016 (annual % change)	40
Chart 1.23	Window Frame Materials in New Build Housing in Great Britain 2016 (% volume and installed value shares)	41
Chart 1.24	PVC-U Window Finishes in New Housing in Great Britain 2013 to 2016 (% shares)	41
Chart 1.25	Sector Trends in the New Build Housing Window Market in Great Britain 2010 to 2016 (annual % change – volume measure)	41
Chart 1.26	Window Frame Materials by Sector in New Build Housing in Great Britain 2016 (% volume shares)	41

Chart 1.27	Window Styles (configurations) in New Housing in Great Britain 2016	42
Chart 1.28	Window Frame Materials by Size of Housebuilder in New Build Housing in Great Britain 2016 (% volume shares)	42
Chart 1.29	Roof Windows Installed in New Housing in Great Britain 2000 to 2016	43
Chart 1.30	Forecast of Window Frame Market in Great Britain to 2021 (mill frames)	43
Chart 1.31	Forecast of Window Frame Materials in New Build Housing in Great Britain to 2021 (annual % change)	43
Chart 1.32	Trends in the New Build Housing Entrance Door Market in Great Britain 2005 to 2016 (000 doors)	45
Chart 1.33	Trends in the New Build Housing Entrance Door Market in Great Britain 2005 to 2016 (annual % change)	45
Chart 1.34	Entrance Door Materials in New Build Housing in Great Britain 2016 (% shares)	45
Chart 1.35	New Housing Entrance Door Market in Great Britain by Main Frame Material 2005 to 2016 (000 doors)	46
Chart 1.36	Entrance Door Market in New Build Housing in Great Britain 2016 – Door Leaf Material Shares by Front and Back Doors	46
Chart 1.37	Entrance Door Leaf Materials by Size of Housebuilder in New Build Housing in Great Britain 2016 (% volume shares)	47
Chart 1.38	Forecast of Entrance Door Materials in Great Britain to 2021 (000 doors)	47
Chart 1.39	Forecast of Entrance Door Materials in New Build Housing in Great Britain to 2021 (annual % change)	47
Chart 1.40	Trends in the New Build Housing Patio Door Market in Great Britain 2005 to 2016 (000 doorsets)	48
Chart 1.41	Trends in the New Build Housing Patio Door Market in Great Britain 2005 to 2016 (annual % change)	48
Chart 1.42	Incidence of Patio Doors in New Build Housing by Sector – Great Britain 2005 to 2016 (% of housing starts in sector)	48
Chart 1.43	Patio Door Market in New Build Housing in Great Britain 2005 to 2016 by Door Type – Volume (000 doorsets)	49
Chart 1.44	Patio Door Market in New Build Housing in Great Britain 2016 - Frame Materials by Door Type (% shares)	49
Chart 1.45	Patio Door Market in Private Sector New Build Housing by Size of Housebuilder in Great Britain 2016 – Door Types (% shares)	49
Chart 1.46	Forecast Trends in the Patio Door Market in New Build Housing in Great Britain 2017 to 2021 Product Split (annual % change)	50

Chart 1.47	Trends in the New Build Housing Conservatory Market in Great Britain 2008 to 2021 (nos)	51
Tables Table 1.1	Trends in Glazing Products in the New Housing Market in Great Britain Installed Value 2000 to 2021	53
Table 1.2	Trends in Glazing Products in the New Housing Market in Great Britain Numbers of Units 2000 to 2021	53
Table 1.3	Trends in Glazing Products in the New Housing Market in Great Britain by Sector Installed Value 2000 to 2021 (£ Million)	54
Table 1.4	Trends in Glazing Products in the New Housing Market in Great Britain by Material Installed Value 2000 to 2021	54
Table 1.5	Housing Starts and Completions 1985 to 2021 Great Britain by Sector (Thousands)	55
Table 1.6	Trends in the Market for Windows in New Housing in Great Britain by Sector – Thousand Frames 2000 to 2021	56
Table 1.7	Trends in the Market for Windows in New Housing in Great Britain by Sector Installed Value 2000 to 2021 (£ Million)	56
Table 1.8	Trends in the Market for Windows in New Housing in Great Britain by Frame Material 2000 to 2021 Thousand Frames	57
Table 1.9	Trends in the Market for Windows in New Housing in Great Britain by Frame Material 2000 to 2021 Installed Value (£ Million)	57
Table 1.10	Trends in the Market for Windows in Private Sector New Housing in Great Britain by Frame Material 2000 to 2021	58
Table 1.11	Trends in the Market for Windows in Social Sector New Housing in Great Britain by Frame Material 2000 to 2021	58
Table 1.12	Trends in Window Configurations in New Housing in Great Britain 2000 to 2016 (% Shares)	59
Table 1.13	Window Configurations in New Housing in Great Britain 2016 by Sector	59
Table 1.14	Trends in Roof Windows in New Housing in Great Britain By Sector 2000 to 2016 (Number of Frames)	60
Table 1.15	Trends in the Market for Entrance Doors in New Housing in Great Britain by Sector Thousand Doors 2000 to 2021	60
Table 1.16	Trends in the Market for Entrance Doors in New Housing in Great Britain by Sector Installed Value 2000 to 2021	61
Table 1.17	Trends in the Market for Entrance Doors in New Housing in Great Britain by Door Leaf Material 2000 to 2021 Thousand Doors	61

Table 1.18	Trends in the Market for Entrance Doors in New Housing in Great Britain by Door Leaf Material 2000 to 2021 Installed Value	62
Table 1.19	Trends in the Market for Entrance Doors in Private Sector New Housing in Great Britain by Door Leaf Material 2000 to 2021	62
Table 1.20	Trends in the Market for Entrance Doors in Social Sector New Housing in Great Britain by Door Leaf Material 2000 to 2021	63
Table 1.21	The Market for Entrance Doors in New Housing in Great Britain 2016 By Door Leaf Material by Front and Back Doors	63
Table 1.22	Trends in the Market for Patio Doors in New Housing in Great Britain by Sector Thousand Doorsets 2000 to 2021	64
Table 1.23	Trends in the Market for Patio Doors in New Housing in Great Britain by Sector Installed Value 2000 to 2021	64
Table 1.24	Trends in the Incidence of Patio Doors in New Housing in Great Britain By Sector 2000 to 2021	65
Table 1.25	Trends in the Market for Patio Doors in New Housing in Great Britain by Door Type 2000 to 2021 Thousand Doorsets	65
Table 1.26	Trends in the Market for Patio Doors in New Housing in Great Britain By Door Type 2000 to 2021 Installed Value (£ Million)	66
Table 1.27	Trends in the Market for Sliding Patio Doors in New Housing in Great Britain by Door Material 2000 to 2021 Thousand Doorsets	66
Table 1.28	Trends in the Market for Sliding Patio Doors in New Housing in Great Britain by Door Material 2000 to 2021 Installed Value	67
Table 1.29	Trends in the Market for Hinged Patio Doors in New Housing in Great Britain by Door Material 2000 to 2021 Thousand Doorsets	67
Table 1.30	Trends in the Market for Hinged Patio Doors in New Housing in Great Britain by Door Material 2000 to 2021 Installed Value	68
Table 1.31	Trends in the Market for Bifold Patio Doors in New Housing in Great Britain By Door Material 2010 to 2021 Thousand Doorsets	68
Table 1.32	Trends in the Market for Bifold Patio Doors in New Housing in Great Britain By Door Material 2011 to 2021 Installed Value	69
Table 1.33	Trends in the Market for Conservatories in New Housing in Great Britain 2000 to 2021 Number of Units and Installed Value	69
Table 1.34	Trends in the Market for Conservatories in New Housing in Great Britain 2003 to 2021 By (Window) Frame Material Number of Units	70
Table 1.35	The Market for Windows in Private Sector New Housing in Great Britain 2016 By Housebuilder Size	71

Table 1.36	The Market for Entrance Doors in Private Sector New Housing in Great Britain 2016 By Housebuilder Size	71
Table 1.37	The Market for Sliding Patio Doors in Private Sector New Housing in Great Britain 2016 By Housebuilder Size	71
Table 1.38	The Market for Hinged Patio Doors in Private Sector New Housing in Great Britain 2016 By Housebuilder Size	72
Table 1.39	The Market for Bifold Patio Doors in Private Sector New Housing in Great Britain 2016 By Housebuilder Size	72
Table 1.40	The Market for ALL Patio Doors in Private Sector New Housing in Great Britain 2016 By Housebuilder Size	72
SECTION 2	HOME IMPROVEMENT MARKET	
Charts Chart 2.1	Home Improvement Glazing Market in Great Britain 2015 to 2016 (volume and installed value measures)	74
Chart 2.2	Trends in the Home Improvement Glazing Market in Great Britain 2000 to 2016 (volume and installed value)	74
Chart 2.3	Home Improvement Glazing Market in Great Britain by Main Product 2016 (£mn – installed value)	74
Chart 2.4	Home Improvement Glazing Market in Great Britain Trends 2015 to 2016 by Major Product (Volume % change)	74
Chart 2.5	Home Improvement Market in Great Britain by Main Frame/Door Leaf Material 2016 (£mn – installed value)	75
Chart 2.6	Home Improvement Market in Great Britain by Main Frame/Door Leaf Material Share Trends 2000 to 2016 (%s based on installed value)	75
Chart 2.7	Home Improvement Market in Great Britain by Sector 2016 (£bn – installed value)	75
Chart 2.8	Forecast Sector Trends in the Home Improvement Market in Great Britain to 2021	76
Chart 2.9	Forecast Product Trends in the Home Improvement Market in Great Britain to 2021	76
Chart 2.10	Forecast Material Trends in the Home Improvement Market in Great Britain to 2021	76
Chart 2.11	Trends in the Total Home Improvement Window Market in Great Britain 2005 to 2016 (mill frames)	78

Chart 2.12	Trends in the Total Home Improvement Window Market in Great Britain 2005 to 2016	78
Chart 2.13	Window Frame Materials in Home Improvements in Great Britain 2015 (% shares)	78
Chart 2.14	Trends in the PVC-U Home Improvement Window Market in Great Britain 2005 to 2016 (000 frames)	78
Chart 2.15	Trends in Finishes to PVC-U Windows in the Home Improvement Market in Great Britain 2013 to 2016 (% shares)	79
Chart 2.16	Trends in the Wood Home Improvement Window Market in Great Britain 2005 to 2016 (000 frames)	79
Chart 2.17	Trends in the Aluminium Home Improvement Window Market in Great Britain 2005 to 2016 (000 frames)	80
Chart 2.18	Window Installations Home Improvement Market in Great Britain Direct Sell v Builders Sectors 2014 to 2015 (mil frames)	80
Chart 2.19	Window Styles (configurations) in Home Improvements in Great Britain 2016 (% shares)	81
Chart 2.20	Roof Window Market in Home Improvements – Great Britain – 2006 to 2016 (000s)	81
Chart 2.21	BFRC Energy Rating Levels of Replacement Windows in the Home Improvement Market in Great Britain 2015 to 2017 % Shares based on Nos of Frames	82
Chart 2.22	Forecast of the Home Improvement Window Market in Great Britain to 2021 (mill frames)	84
Chart 2.23	Forecast of the Home Improvement Window Market in Great Britain to 2021 by Main Frame Material (annual % change)	84
Chart 2.24	Numbers of Windows in the Existing Stock of Owner Occupied Dwellings in Great Britain 2001 to 2016 (million frames)	84
Chart 2.25	Replacement Window Frame Market in Home Improvements in Great Britain – Old Windows Taken Out by Frame Material 2005 to 2021 (% of replacements)	85
Chart 2.26	Replacement Window Market in Owner Occupied Dwellings in Great Britain 2000 to 2016 First Time Replacements v Replacements of Replacements	85
Chart 2.27	Reasons for Replacing Domestic Windows in Great Britain according to Installers 2015 to 2016 (% of mentions)	86
Chart 2.28	Trends in the Home Improvement Direct Sell Window Market in Great Britain to 2021 (mill frames)	86
Chart 2.29	Trends in the Home Improvement Builders Sector Window Market in Great	87

## Britain to 2021 (mill frames)

Chart 2.30	Trends in the Total Home Improvement Entrance Door Market in Great Britain 2005 to 2016 (000 doors)	88
Chart 2.31	Trends in the Total Home Improvement Entrance Door Market in Great Britain 2005 to 2016 (annual % change)	88
Chart 2.32	Entrance Door Leaf Materials in Home Improvements in Great Britain 2016 (% shares)	88
Chart 2.33	Trends in the Home Improvement Entrance Door Market in Great Britain 2005 to 2016 (000 doors)	88
Chart 2.34	Entrance Door Installations Home Improvement Market in Great Britain Direct Sell v Builders Sector 2015 to 2016 (000 doors)	89
Chart 2.35	Forecast of the Home Improvement Entrance Door Market in Great Britain to 2021 (000 doors)	90
Chart 2.36	Forecast of Major Entrance Door Leaf Materials in Home Improvements in Great Britain to 2021 (annual percentage change)	91
Chart 2.37	Trends in the Total Home Improvement Patio Door Market in Great Britain 2005 to 2016 (000 doorsets)	92
Chart 2.38	Trends in the Total Home Improvement Patio Door Market in Great Britain 2005 to 2016 (annual % change)	92
Chart 2.39	Patio Door Market in Home Improvements in Great Britain 2005 to 2016 by Door Type – Volume (000 doorsets)	93
Chart 2.40	Patio Door Market in Home Improvements in Great Britain 2016 – Frame Materials by Door Type (% shares)	93
Chart 2.41	Forecast of the Home Improvement Patio Door Market in Great Britain to 2021 (000 doorsets)	94
Chart 2.42	Forecast of Major Patio Door Frame Materials in Home Improvements in Great Britain to 2021 (annual % change)	94
Chart 2.43	Trends in the Home Improvement Conservatory Market in Great Britain 2005 to 2016 (000 conservatories)	95
Chart 2.44	Trends in the Home Improvement Conservatory Market in Great Britain 2005 to 2016 (annual % change)	95
Chart 2.45	Home Improvement Conservatory Market in Great Britain by First Time and Replacement Installations 2006 to 2016 (000 conservatories)	95
Chart 2.46	Home Improvement Conservatory Market in Great Britain – Trends in Main Styles 2005 to 2016 (000 conservatories)	96
Chart 2.47	Home Improvement Conservatory Market in Great Britain – Average Installed Prices 2005 to 2016 (£)	96

Chart 2.48	Home Improvement Conservatory Market in Great Britain – Installed Price Bands 2015 and 2016 (% shares)	97
Chart 2.49	Home Improvement Conservatory Market in Great Britain – Size (Floor Area) Bands 2016 (% shares)	97
Chart 2.50	Home Improvement Conservatory Market in Great Britain by Window Frame Material 2005 to 2016 (000 conservatories)	97
Chart 2.51	Home Improvement Conservatory Market in Great Britain – Types of Wall 2016 (% shares)	97
Chart 2.52	Home Improvement Conservatory Market in Great Britain – Number of External Doorsets per Conservatory 2016 (% shares)	98
Chart 2.53	Home Improvement Conservatory Market in Great Britain – Treatment of Openings between Conservatory and House 2016 (% shares)	98
Chart 2.54	Home Improvement Conservatory Market in Great Britain – Types of Doors by Location 2016 (% shares)	99
Chart 2.55	Home Improvement Conservatory Market in Great Britain – Trends in Roof Covering Types 2010 to 2016 (% shares)	99
Chart 2.56	Home Improvement Conservatory Market in Great Britain – Trends by Sales Route 2005 to 2016 (000 units)	100
Chart 2.57	Home Improvement Conservatory Market in Great Britain – Average Installed Prices by Sales Route 2016 (£)	100
Chart 2.58	Forecast of the Home Improvement Conservatory Market in Great Britain to 2021 (000 units)	101
Chart 2.59	Average House Prices v RMI in Private Sector Housing in Great Britain. Trends in Annual Percentage Changes 2005 to 2016	102
Chart 2.60	Average House Prices for Second Hand Properties in Great Britain. Trends in Annual Percentage Changes 2010 to 2021	103
Chart 2.61	Housing Transactions – UK – 2007 to 2021 (millions)	103
Chart 2.62	Trends in Home Ownership – England – Owner Occupied v Private Rented 1990 to 2016 (million dwellings)	104
Chart 2.63	Trends in Real Disposable Income 2005 to 2021 (% annual change)	104
Chart 2.64	Trends in Compensation Payments for Mis-sold Payment Protection Insurance 2011 to (May) 2017 (£million)	104
Chart 2.65	UK Unemployment Rate (ILO measure) Q1 2005 to Q2 2017	105
Chart 2.66	Trends in UK Bank Base Rates 2000 to 2021	105
Chart 2.67	UK Housing Equity Withdrawal Trends Q1 2000 to Q1 2017 (£ billion)	105

Chart 2.68	Remortgaging – Monthly Approvals January 2000 to July 2017 (Thousands)	106
Chart 2.69	Consumer Confidence UK 2008 to 2017 - % Balance: Getting Better, Getting Worse	106
Chart 2.70	Consumers' Likelihood of Investing in Home Improvements – UK 2008 to 2017 - % Saying Very or Fairly Likely	106
<b>Tables</b> Table 2.1	Trends in Glazing Products in the Home Improvement Market in Great Britain Installed Value 2000 to 2021 (£ Million)	107
Table 2.2	Trends in Glazing Products in the Home Improvement Market in Great Britain Numbers of Units 2000 to 2021	108
Table 2.3	Trends in Frame/Leaf Materials in the Home Improvement Market in Great Britain Installed Value 2000 to 2021	109
Table 2.4	Trends in Glazing Products in Home Improvements in Great Britain by Sector Installed Value 2000 to 2021	109
Table 2.5	Trends in Glazing Products in the Direct Sell Sector of the Home Improvement Market in Great Britain Installed Value 2000 to 2021	110
Table 2.6	Trends in Glazing Products in the Direct Sell Sector of the Home Improvement Market in Great Britain Numbers of Units 2000 to 2021	110
Table 2.7	Trends in Glazing Products in the Builders Sector of the Home Improvement Market in Great Britain Installed Value 2000 to 2021	111
Table 2.8	Trends in Glazing Products in the Builders Sector of the Home Improvement Market in Great Britain Numbers of Units 2000 to 2021	111
Table 2.9	Trends in Window Frame Materials in the Home Improvement Market in Great Britain Installed Value 2000 to 2021	112
Table 2.10	Trends in Window Frame Materials in the Home Improvement Market in Great Britain Thousand Frames 2000 to 2021	112
Table 2.11	Trends in Window Frame Materials in the Direct Sell Sector of the Home Improvement Market in Great Britain Installed Value 2000 to 2021	113
Table 2.12	Trends in Window Frame Materials in the Direct Sell Sector of the Home Improvement Market in Great Britain Thousand Frames 2000 to 2021	113
Table 2.13	Trends in Window Frame Materials in the Builders Sector of the Home Improvement Market in Great Britain Installed Value 2000 to 2021	114
Table 2.14	Trends in Window Frame Materials in the Builders Sector of the Home Improvement Market in Great Britain Thousand Frames 2000 to 2021	114
Table 2.15	Trends in Casements, Vertical Sliders, Tilt & Turn and Other Window Styles in the Home Improvement Market in Great Britain 2001 to 2016	115

Table 2.16	Trends in the Market for Entrance Doors in Home Improvements in Great Britain by Door Leaf Material 2000 to 2021 Installed Value	116
Table 2.17	Trends in the Market for Entrance Doors in Home Improvements in Great Britain by Door Leaf Material 2000 to 2021 (Thousand Doors)	117
Table 2.18	Trends in the Market for Entrance Doors in the Direct Sell Sector of Home Improvements in Great Britain by Door Leaf Material 2000 to 2021 Installed Value	118
Table 2.19	Trends in the Market for Entrance Doors in the Direct Sell Sector of Home Improvements in Great Britain by Door Leaf Material 2000 to 2021 (Thousand Doors)	118
Table 2.20	Trends in the Market for Entrance Doors in the Builders Sector of Home Improvements in Great Britain by Door Leaf Material 2000 to 2021 Installed Value	119
Table 2.21	Trends in the Market for Entrance Doors in the Builders Sector of Home Improvements in Great Britain by Door Leaf Material 2000 to 2021 (Thousand Doors)	119
Table 2.22	Trends in the Market for Patio Doors in Home Improvements in Great Britain by Door Type 2000 to 2021 Installed Value	120
Table 2.23	Trends in the Market for Patio Doors in Home Improvements in Great Britain by Door Type 2000 to 2021 Number of Doorsets	120
Table 2.24	Trends in the Market for Patio doors in the Direct Sell Sector of Home Improvements in Great Britain by Door Type 2000 to 2021 Installed Value	121
Table 2.25	Trends in the Market for Patio Doors in the Direct Sell Sector of Home Improvements in Great Britain by Door Type 2000 to 2021 Number of Doorsets	121
Table 2.26	Trends in the Market for Patio Doors in the Builders Sector of Home Improvements in Great Britain by Door Type 2000 to 2021 Installed Value	122
Table 2.27	Trends in the Market for Patio Doors in the Builders Sector of Home Improvements in Great Britain by Door Type 2000 to 2021 Number of Doorsets	122
Table 2.28	Trends in the Market for Patio Doors in Home Improvements in Great Britain by Frame Material 2000 to 2021 Installed Value	123
Table 2.29	Trends in the Market for Patio Doors in Home Improvements in Great Britain by Frame Material 2000 to 2021 Number of Doorsets	123
Table 2.30	Trends in the Market for Sliding Patio Doors in Home Improvements in Great Britain By Frame Material 2000 to 2021 – No. of Doorsets	124
Table 2.31	Trends in the Market for Hinged Patio Doors in Home Improvements in Great Britain By Frame Material 2000 to 2021 – No. of Doorsets	124

Table 2.32	Trends in the Market for Bifold Patio Doors in Home Improvements in Great Britain By Frame Material 2007 to 2021 – No. of Doorsets	125
Table 2.33	Trends in the Market for Conservatories in Home Improvements in Great Britain by Window Frame Material 2000 to 2021 Installed Value	125
Table 2.34	Trends in the Market for Conservatories in Home Improvements in Great Britain by Window Frame Material 2000 to 2021 Number of Units	126
Table 2.35	Trends in the Market for Conservatories in Home Improvements in Great Britain by Routes to Market 2000 to 2021 Installed Value	126
Table 2.36	Trends in the Market for Conservatories in Home Improvements in Great Britain by Routes to Market 2000 to 2021 Number of Units	127
Table 2.37	The Market for Conservatories in Home Improvements in Great Britain Volume and Price Details by Sales Route 2016	127
Table 2.38	The Market for Conservatories in Home Improvements in Great Britain Price Details by Sales Route 2016	127
Table 2.39	Trends in the Market for Conservatories in Home Improvements in Great Britain by Conservatory Style 2000 to 2016 Number of Units	128
Table 2.40	The Market for Conservatories in Home Improvements in Great Britain Window Frame Material by Sales Route 2016 Number of Units	128
Table 2.41	Trends in the Market for Conservatories in Home Improvements in Great Britain Dwarf Walls v Full Height Glazing 2000 to 2016 Number of Units	129
Table 2.42	Trends in the Market for Conservatories in Home Improvements in Great Britain Windows by Frame Material 2001 to 2021 – Thousand Frames	129
Table 2.43	Trends in Casements, Vertical Sliders, Tilt & Turn and Other Window Styles in Conservatories in the Home Improvement Market in Great Britain Thousand Frames 2001 to 2016	130
Table 2.44	The Market for Conservatories in Home Improvements in Great Britain Entrance Doors – Types by Situation 2016 Thousand Doorsets	130
Table 2.45	The Market for Conservatories in Home Improvements in Great Britain Sliding and Hinged Entrance Doors – By Frame Material 2016 Thousand Doorsets	130
Table 2.46	The Market for Conservatory Roofs in Home Improvements in Great Britain 2010 to 2021 Thousand Roofs	131
Table 2.47	Trends in the Market for Conservatories in Home Improvements in Great Britain Roof Glazing Details 2004 to 2016	131
Section 3	SOCIAL HOUSING MARKET	
Charts Chart 3.1	Social Housing Refurbishment Glazing Market in Great Britain 2015 to 2016 (installed value and volume measures)	133

Trends in the Social Housing Refurbishment Glazing Market in Great Britain 2000 to 2016 (volume and installed value)	133
Social Housing Refurbishment Glazing Market in Great Britain by Main Product 2016 (£mn – installed value)	133
Social Housing Refurbishment Glazing Market in Great Britain by Main Frame/Door Leaf Material 2016 (£mn – installed value)	133
Frame Material Trends in the Social Housing Refurbishment Glazing Market in Great Britain 2000 to 2016 (% shares based on installed value)	134
Trends in the Social Housing Refurbishment Glazing Market in Great Britain by Sector 2006 to 2016 (installed value £ million)	134
Forecast of the Glazing Market in Social Housing Refurbishment in Great Britain – Annual Percentage Growth 2017 to 2021 (volume measures)	135
Trends in the Social Housing Refurbishment Window Market in Great Britain 2005 to 2016 (mill frames)	136
Trends in the Social Housing Refurbishment Window Market in Great Britain 2005 to 2016 (annual % change)	136
Window Frame Materials in the Social Housing Refurbishment Market in Great Britain 2016 (% shares)	136
Window Trends in the Social Housing Refurbishment Glazing Market in Great Britain 2006 to 2016 (thousand frames)	136
Window Styles (configurations) in the Social Housing Refurbishment Glazing Market in Great Britain 2016 (% shares)	137
BFRC Energy Rating Levels of Replacement Windows in the Social Housing Refurbishment Market in Great Britain 2015 to 2017	138
Replacement Window Frame Market in Social Housing Refurbishment in Great Britain – Old Windows Taken Out by Frame Material 2008 to 2016 (% of replacements)	138
Two Most Important Reasons for Replacing Windows in Social Housing in Great Britain 2016	139
Forecast of the Window Frame Market in the Social Housing Refurbishment Market in Great Britain to 2021 (mill frames)	139
Trends in the Social Housing Refurbishment Entrance Door Market in Great Britain 2005 to 2016 (000 doors)	140
Trends in the Social Housing Refurbishment Entrance Door Market in Great Britain 2005 to 2016 (annual % change)	140
Entrance Door Materials in the Social Housing Refurbishment Market in Great Britain 2016 (% shares)	140
	Social Housing Refurbishment Glazing Market in Great Britain by Main Product 2016 (£mn – installed value)  Social Housing Refurbishment Glazing Market in Great Britain by Main Frame/Door Leaf Material 2016 (£mn – installed value)  Frame Material Trends in the Social Housing Refurbishment Glazing Market in Great Britain 2000 to 2016 (% shares based on installed value)  Trends in the Social Housing Refurbishment Glazing Market in Great Britain 2000 to 2016 (installed value £ million)  Forecast of the Glazing Market in Social Housing Refurbishment in Great Britain – Annual Percentage Growth 2017 to 2021 (volume measures)  Trends in the Social Housing Refurbishment Window Market in Great Britain 2005 to 2016 (mill frames)  Trends in the Social Housing Refurbishment Window Market in Great Britain 2005 to 2016 (annual % change)  Window Frame Materials in the Social Housing Refurbishment Market in Great Britain 2016 (% shares)  Window Trends in the Social Housing Refurbishment Glazing Market in Great Britain 2016 (% shares)  Window Styles (configurations) in the Social Housing Refurbishment Glazing Market in Great Britain 2016 (% shares)  BFRC Energy Rating Levels of Replacement Windows in the Social Housing Refurbishment in Great Britain 2016 (% shares)  BFRC Energy Rating Levels of Replacement Windows in the Social Housing Refurbishment in Great Britain – Old Windows Taken Out by Frame Material 2008 to 2016 (% of replacements)  Two Most Important Reasons for Replacing Windows in Social Housing in Great Britain 2016  Forecast of the Window Frame Market in the Social Housing Refurbishment Market in Great Britain to 2021 (mill frames)  Trends in the Social Housing Refurbishment Entrance Door Market in Great Britain 2005 to 2016 (000 doors)  Trends in the Social Housing Refurbishment Entrance Door Market in Great Britain 2005 to 2016 (annual % change)  Entrance Door Materials in the Social Housing Refurbishment Market in

Chart 3.20	Social Housing Refurbishment Entrance Door Market in Great Britain by Main Door Leaf Material 2005 to 2016 (000 doors)	140
Chart 3.21	Replacement Entrance Door Market in Social Housing Refurbishment in Great Britain – Old Doors Taken Out by Door Leaf Material 2013 to 2016 (% of replacements)	141
Chart 3.22	Forecast of the Entrance Door Leaf Market in the Social Housing Refurbishment Market in Great Britain to 2021	141
Chart 3.23	Forecast of Entrance Door Materials in the Social Housing Refurbishment Market in Great Britain to 2021 (annual % change)	141
Chart 3.24	How Window Contracts are placed in the Social Housing Refurbishment Market in Great Britain 2016	142
Chart 3.25	How Entrance Doors Contracts are placed in the Social Housing Refurbishment Market in Great Britain 2016	142
Chart 3.26	Social Housing Stock in Great Britain 1971 to 2015 – millions of dwellings	143
Chart 3.27	Social Housing Stock in Great Britain by Local Authorities and Housing Associations 1991 to 2015	143
<b>Tables</b> Table 3.1	Trends in Glazing Products in the Social Housing Replacement Market in Great Britain Installed Value 2000 to 2021 (£ million)	144
Table 3.2	Trends in Glazing Products in the Social Housing Replacement Market in Great Britain Numbers of Units 2000 to 2021	144
Table 3.3	Trends in Frame/Leaf Materials in the Social Housing Replacement Market in Great Britain Windows and Doors Installed Value 2000 to 2021	145
Table 3.4	Trends in Glazing Products in the Social Housing Replacement Market in Great Britain by Sector Installed Value 2000 to 2021	145
Table 3.5	Trends in Glazing Products in the Local Authority Sector of the Social Housing Replacement Market in Great Britain Installed Value 2000 to 2021 (£ million)	146
Table 3.6	Trends in Glazing Products in the Local Authority sector of the Social Housing Replacement Market in Great Britain Numbers of Units 2000 to 2021	146
Table 3.7	Trends in Glazing Products in the Housing Association Sector of the Social Housing Replacement Market in Great Britain Installed Value 2000 to 2021 (£ million)	147
Table 3.8	Trends in Glazing Products in the Housing Association Sector of the Social Housing Replacement Market in Great Britain Numbers of Units 2000 to 2021	147

Table 3.9	Trends in Windows in the Social Housing Replacement Market in Great Britain By Sector Installed Value 2000 to 2021 (£ million)	148
Table 3.10	Trends in Windows in the Social Housing Replacement Market in Great Britain By Sector – 000 Units 2000 to 2021	148
Table 3.11	Trends in Window Frame Materials in the Social Housing Replacement Market in Great Britain Installed Value 2000 to 2021	149
Table 3.12	Trends in Window Frame Materials in the Social Housing Replacement Market in Great Britain Thousand Frames 2000 to 2021	149
Table 3.13	Trends in Casements, Vertical Sliders, Tilt & Turn and Other Window Styles in the Social Housing Replacement Market in Great Britain Thousand Frames 2000 to 2016	150
Table 3.14	Trends in Entrance Doors in the Social Housing Replacement Market in Great Britain by Sector Installed Value 2000 to 2021 (£ Million)	150
Table 3.15	Trends in Entrance Doors in the Social Housing Replacement Market in Great Britain by Sector – 000 units – 2000 to 2021	151
Table 3.16	Trends in the Market for Entrance Doors in the Social Housing Replacement Market in Great Britain By Door Leaf Material 2000 to 2021 Installed Value	151
Table 3.17	Trends in the Market for Entrance Doors in the Social Housing Replacement Market in Great Britain By Door Leaf Material 2000 to 2021 (Thousand Doors)	152
Table 3.18	Trends in the Social Housing Stock in Great Britain by Tenure 2000 to 2015	152
Section 4	Economic Background	153
Chart 4.1	UK Consumer Confidence 2010 to 2017	155
Chart 4.2	UK Investment Intentions	155
Table 4.1	Summary of Macro-Economic Assumptions United Kingdom 2015 - 2021	155