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October 2017

FABRICATOR & INSTALLER MARKET REPORT

The most in-depth analysis of the window, door and conservatory market in the UK

2017

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THE 2017

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Insight Data Ltd provides market intelligence and information on the UK construction, building products and fenestration industry. Real-time data is available via Salestracker, an online database trusted by over 700 industry professionals.

The Insight Fabricator & Installer Report was first launched in 2012 and is now regarded as the most in-depth analysis of the window, door and conservatory market in the UK.

Insight updates and verifies information on a daily basis with a highly knowledgeable team conducting extensive research and telephone interviews carried out with over 15,000 companies on the Insight Data Fenestration Database. This data is then matched with financial information from a credit reference agency to provide a transparent view of the industry.

The companies featured in the Report include those who fabricate, install, or supply windows, doors, conservatories or sealed units. Component and raw material suppliers, such as systems companies, hardware suppliers or flat glass manufacturers are excluded from the Report, unless they manufacture and actively sell finished products.

Historically, the Insight Report has been produced in arrears; the 2014 Report being launched in late 2015. We have taken the opportunity to bring the Report up-to-date as of June 2017, and the Report compares trends and analysis from previous years.

The 2017 Report has been revised to give a wider and more in-depth view of the industry particularly relating to materials and products, routes to market and sectors.

The Report has 7 sections:

- Industry overview
- Manufacturing/fabrication
- Window, door and conservatory installers
- Trade counters/distribution outlets
- New products and emerging trends
- Conclusion
- UK Top 100 fabricators/installers




INDUSTRY OVERVIEW

There are 15,099 window, door, IGU and conservatory companies in the UK, a rise of 328 since 2014. This excludes builders and DIY outlets who may also supply products.

Insight Data records over 1,200 changes every month – business changes, relocation, new products/suppliers and staff changes are all occurring on a daily basis.

The 'Churn Rate' is an important factor when analysing the industry. Since 2014, 1,592 companies have been removed from the database (withdrawn from the sector, ceased trading, retired or failed), while 1,920 businesses have been added.

There are 4,852 companies who manufacture with 4,178 fabricating windows and doors, the balance consisting of dedicated composite door manufacturers, conservatory roofs and IGU's (sealed units).

The industry continues to diversify, with fabricators and installers offering a wider range of products and materials, while supply-chains are also evolving with the growth of trade-counters, vertical integration and increased merger and acquisition activity.

A small but emerging market is online ordering/e-commerce for consumers, particularly for products such as composite doors and roof lights/lanterns.

328

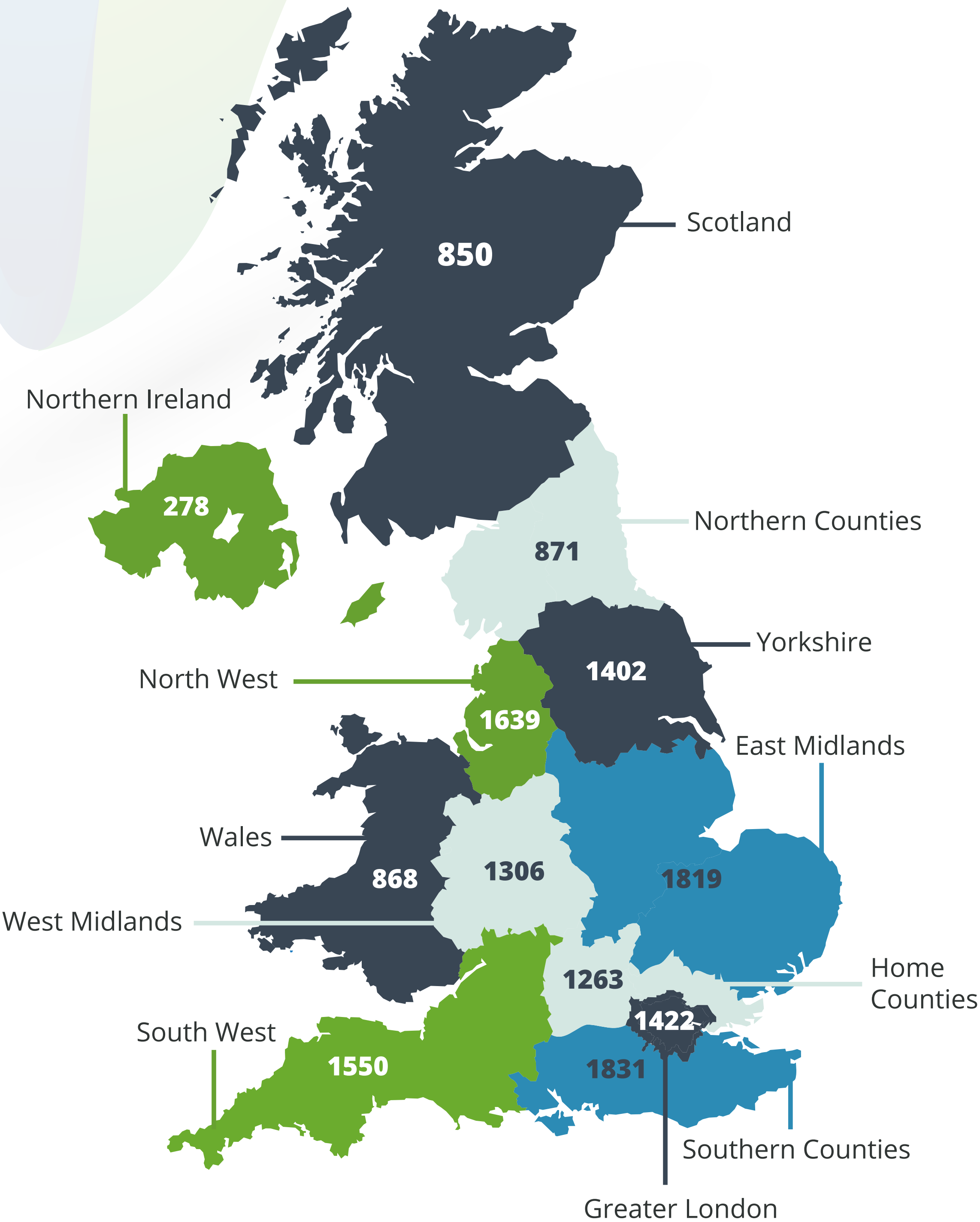
Rise since 2014

+1920 New businesses added since 2014

–1592 Companies ceased trading, retired or failed since 2014

COMPANIES BY REGION

The Map shows all records held on the Insight fenestration database. The Southern Counties and East Midlands have the highest number of companies with 1,831 and 1,819 respectively while Northern Ireland has the fewest at 278. Since 2014 more new companies started trading in the Home Counties (+72) than any other region, while the greatest decline was in the South West (-11).



WINDOW AND DOOR FABRICATORS

There are 4,178 PVC-U, aluminium or timber window and door fabricators in the UK.

Although there are more timber manufacturers than PVC-U or aluminium, the vast majority are small local joinery workshops producing bespoke products in low volumes. However, demand among homeowners and installers has created renewed interest in timber and a number of larger national timber fabricators have made significant gains in the last 5 years.

A growing number of fabricators manufacture more than one material. In particular, PVC-U fabricators have branched out into aluminium manufacture, either within their existing business or by forming a separate company.

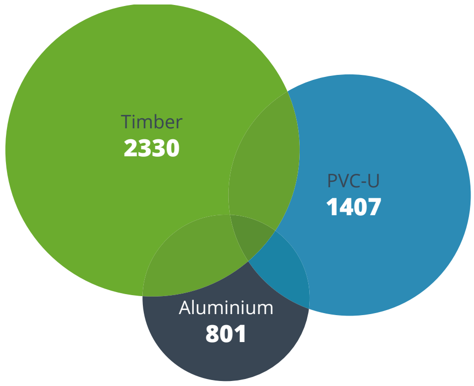
Some window and door fabricators 'supply only' and do not offer an installation service, while others 'fabricate and install'.

There are four markets that fabricators typically target, and more companies than ever are supplying more than one market.

- Domestic (direct to homeowner)
- Trade (supplying other fabricators, installers or distributors/trade-counters)
- Commercial (such as offices, retail parks, local authority, etc)
- New-build (supplying house-builders)

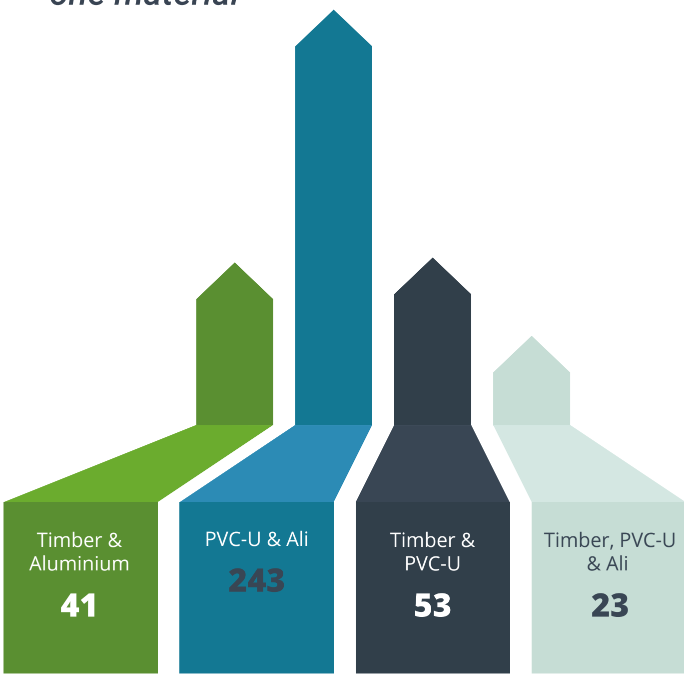
Indeed, the number of fenestration companies subscribing to the Insight 'Architects' database or 'Construction File' database of house builders and main contractors has more than doubled in the last two years, indicating a strong move into the commercial and new-build markets.

Number of fabricators by material

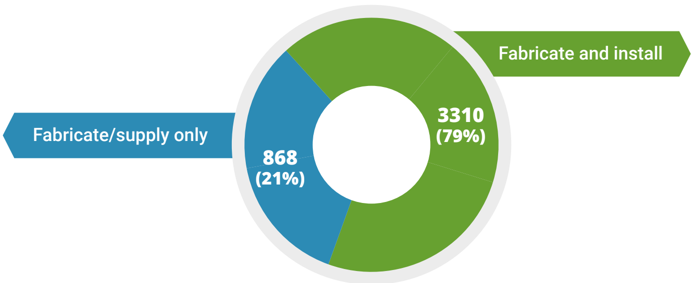


NOTE:
The figures combined equal more than the total number of fabricators because some companies manufacture more than one material.

Fabricators who manufacture more than one material



Window/door fabricate and install vs fabricate/supply only



WINDOW AND DOOR FABRICATORS

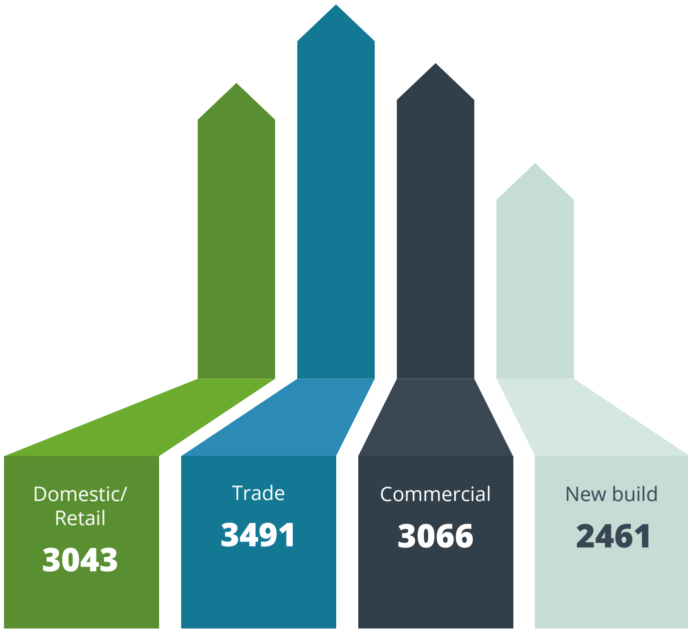
Of the 4,178 window and door fabricators in the UK 72% are limited companies or LLP's.

Turnover is not available on all companies, however we have compared the average 'net worth' of fabricators taken from accounts published in 2014 and those published in 2017. Those who fabricate/ supply only performed significantly better.

	2014 Accounts	Latest Accounts	Change
Fabricate & Install	£219,903	£265,228	+21%
Fabricate only	£280,220	£505,047	+80%

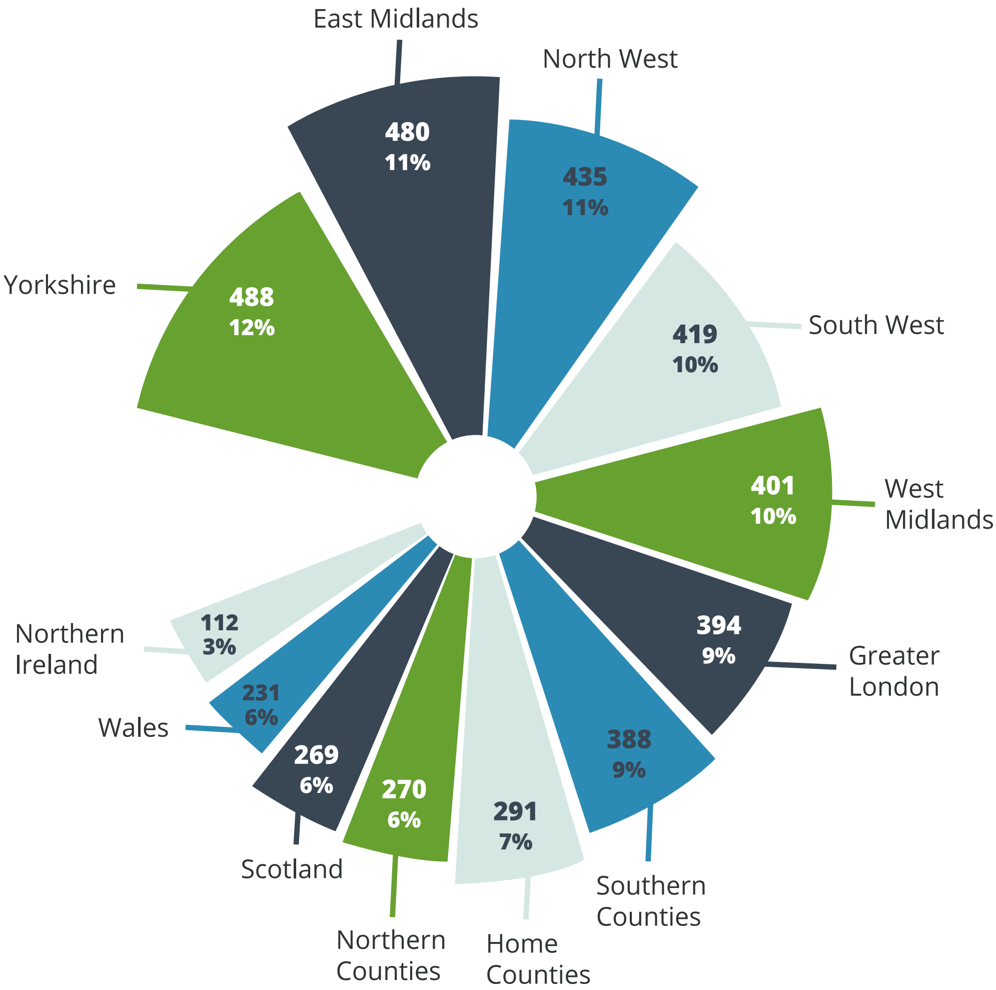
NOTE:
Financial data provided by a third party credit reference agency. The latest accounts will be the latest published accounts which may have been 2016 or earlier. Similarly, the 2014 was the latest financial data available as at September 2014. Where data is not readily available, such as group structures, we remove the information completely.

Number of fabricators by sector



NOTE:
The figures combined equal more than the total number of fabricators because most fabricators operate in more than one sector.

Fabricators by region



PVC-U FABRICATORS

In 2008 there were 2,370 PVC-U fabricators, but this number has declined year on year and by 2014 had dropped to 1,534 companies.

Since 2014 the decline has slowed and now stands at 1,407 firms, however, the reduction is among the smallest fabricators, those manufacturing 1 - 100 frames per week.

The number of fabricators manufacturing 250 to 1000 frames per week has remained stable while 30 more firms are producing 100 - 250 per week compared to 2014. Those firms fabricating 1,000 + frames per week has also increased from 47 to 68.

So although the number of fabricators has reduced, the frame output per fabricator has increased.

Most PVC-U fabricators are now offering a broader range of products; either to improve revenue or margins, or to secure customer loyalty. Some companies have increased their manufactured range, while others are distributing products from specialist manufacturers.

Window/door systems

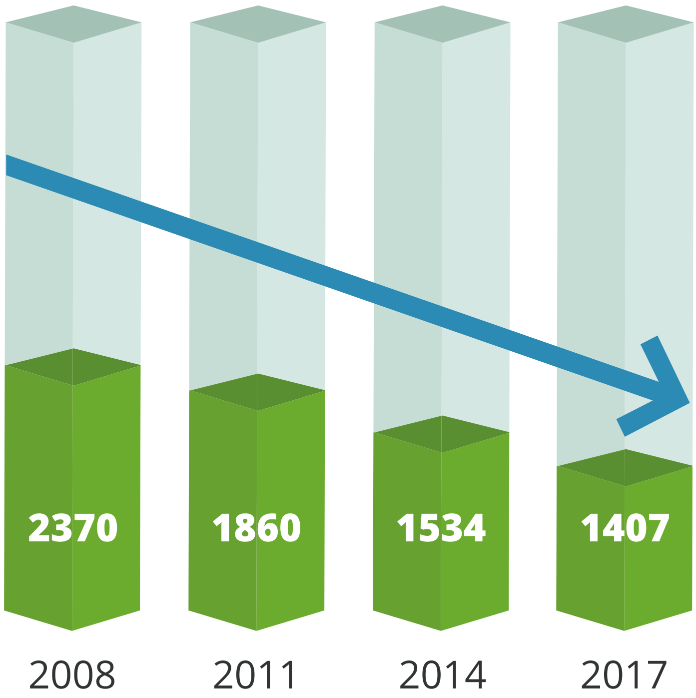
The number of window/door systems companies has reduced and consolidated significantly over the last 10 years.

Fewer PVC-U fabricators are switching system companies completely, although more fabricators than ever are manufacturing more than one system.

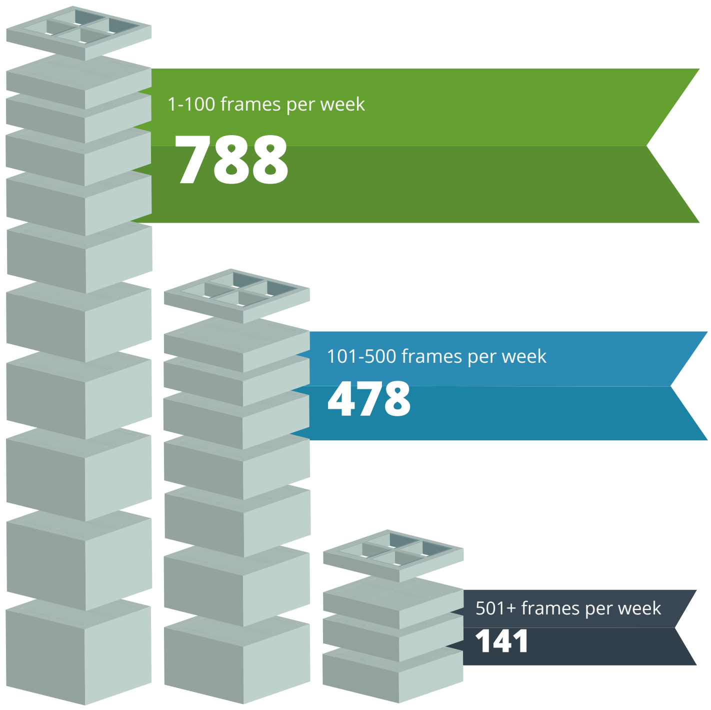
There are 175 PVC-U companies who dual or multi-source, while a number of merger/acquisitions have led to several fabricators within a group manufacturing different systems to satisfy market demands.

Residence 9 was instrumental in creating the niche ‘flush sash’ PVC-U window market, giving consumers an alternative to existing PVC-U casement windows. Other systems companies have followed, but overall flush-sash volumes are still relatively small.

Number of PVC-U window/door fabricators



PVC-U fabricators by frame-per-week volume



ALUMINIUM FABRICATORS

Aluminium has always remained the default fenestration product in the commercial market but over the last 5 years the material has enjoyed considerable resurgence within the residential window and door market. The main driver behind this has been aluminium bi-fold doors as consumers demand greater space and light within living areas.

There are 801 aluminium fabricators in the UK, a number that has remained relatively constant since 2011 although the nature of companies has changed dramatically. Many small life-style fabricators have ceased manufacturing or gone out of business, while a new breed of aluminium fabricator has emerged with heavy investment in automation.

Bi-folding doors continue to be the 'jewel in the crown' for fabricators with strong demand across all sectors and significant growth in retail/ domestic, particularly in the South East. Several fabricators now specialise exclusively in bi-fold door manufacture.

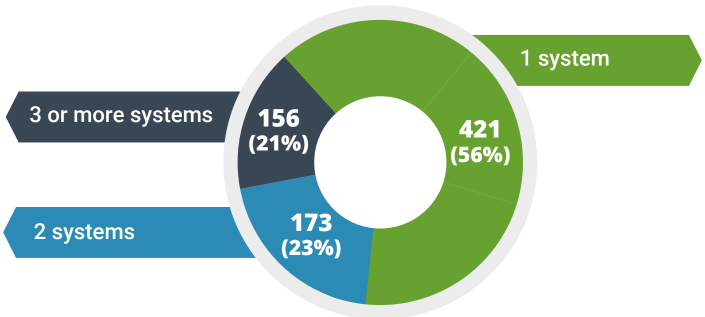
There is renewed interest in sliding patio doors as an alternative to bi-folds, particularly large-span sliders that provide maximum glass area.

Product mix

The product mix within aluminium cannot be directly compared with PVC-U. With a mix of curtain walling and shop fronts a 'frames per week' comparison with PVC-U would show significantly smaller volume but much higher order values.

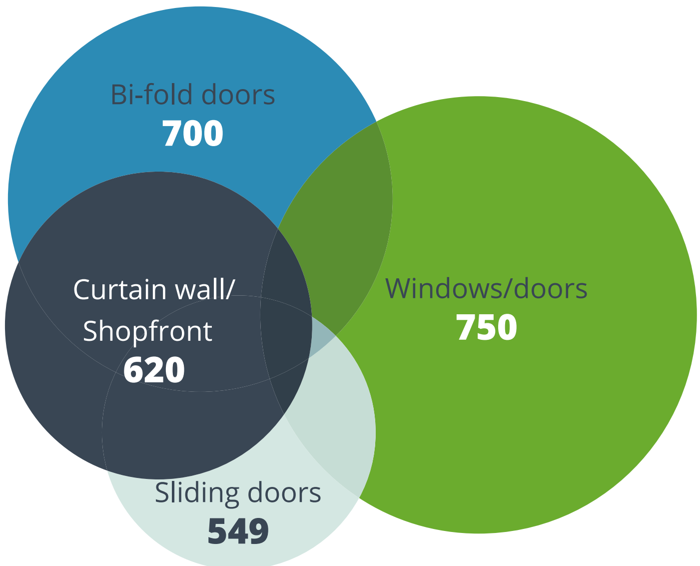
Commercial aluminium fabricators will usually manufacturer a range of systems depending on project requirements, while residential fabricators, particularly those specialising in bi-fold or sliding doors, will typically manufacture one or two systems.

Number of aluminium window/door systems manufactured



Number of aluminium fabricators

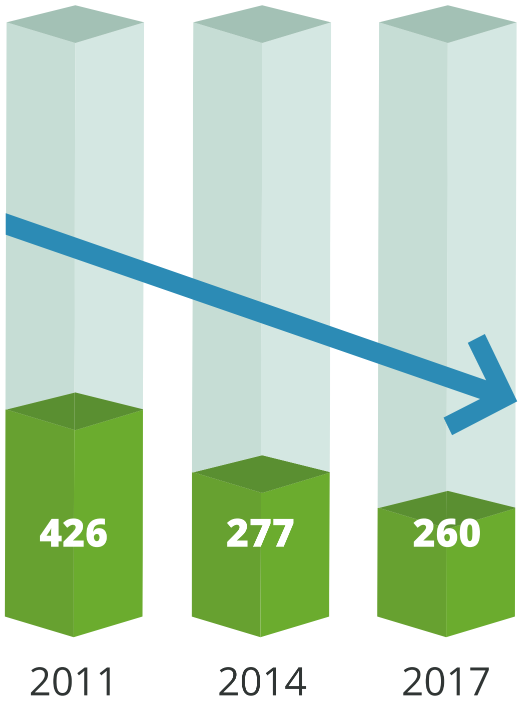
Number of fabricators by product range



NOTE:
The figures combined equal more than the total number of fabricators because most manufacture more than one product range.

CONSERVATORY/CONSERVATORY ROOF MANUFACTURERS

Number of conservatory roof fabricators



The conservatory market has been volatile for many years as consumer demand and aspirations change, regulations impact building practice and product innovation remains sluggish.

However, the sector has seen a recent upturn through consumer demand for alternatives to traditional conservatories. Better performing glass, feature-rich orangery solutions, and more recently solid-roof conservatories (single story glazed extensions) are in vogue and on-trend, with companies offering real tiled roof or light-weight tiled roof 'effect' solutions.

Glazed roof lanterns have been around for many years, but increased demand for residential extensions with flat roofs have ignited the market for lanterns.

Moreover, the desire among homeowners to replace old conservatories and conservatory roofs with better insulated products to create all-year-round living has formed a substantial new market.

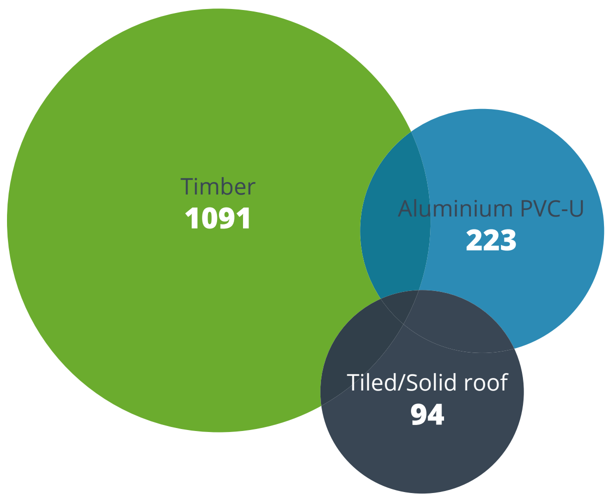
Conservatory roof systems and materials

The 'systems market' is dominated by Ultraframe, Synseal and Eurocell, with several other competitors being absorbed by 'the big 3' over the years including Wendland, Quantal and K2. A number of aluminium window/door systems companies also offer a roof solution, typically aimed at large span and commercial applications.

Most residential conservatory roofs are manufactured from an aluminium/PVC-U combination, with aluminium providing the structural strength.

A large number of joinery/timber companies manufacture bespoke timber conservatory roofs, but the volumes are very low; often only two or three a year.

Roof fabricator by material



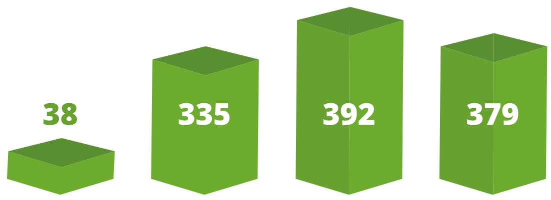
NOTE:
The figures combined equal more than the total number of fabricators because some companies manufacture more than one type of product.

COMPOSITE DOOR FABRICATORS

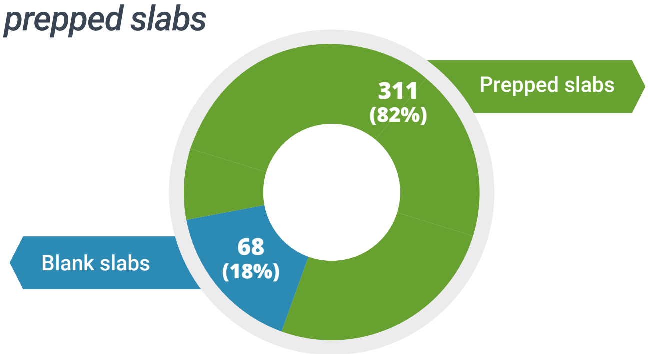
Composite doors, mainly specified with a PVC-U door frame, have moved from a niche product into the mainstream. The product range continues to develop with more companies offering a choice of solutions; single or double rebate doors, foam or solid core. The primary market for composite doors is residential, either as a replacement home improvement product or through new-build with house builders.

There are two types of composite door manufacturers; those that buy-in already prepared (prepped) door slabs to incorporate within their PVC-u production process, and those that fully manufacture the complete door using 'blank slabs', which requires investment in specialist machinery. The number of fabricators (using prepped slabs or blank slabs) now stands at 379.

Number of composite door manufacturers



Fabricators using blank slabs vs prepped slabs



IGU MANUFACTURERS

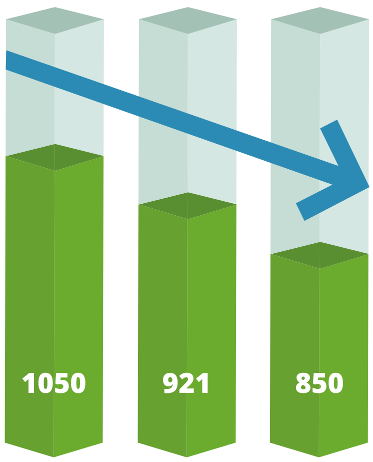
The IGU sector has witnessed significant change over the last 10 years. The industry had a large number of independent sealed unit manufacturers who supplied window/door fabricators and installers, mainly with simple, easy-to-manufacture 'squares'.

Consumer demand for larger glazing apertures combined with tighter regulations around energy efficiency and improvements in product technology has transformed the IGU sector.

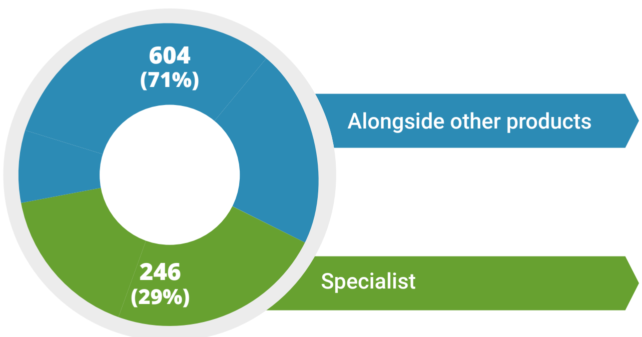
However, while triple glazing has made the headlines in recent years, the volume is still relatively small compared to double glazing and the debate over whether triple glazing or higher performing double glazing is better, rages on.

It is not surprising then that the market has consolidated with a smaller number of high-volume specialist manufacturers offering a complex array of IGU products. Although some window/door fabricators moved into sealed unit production to gain better control of their supply chains and margins, the highly specialised nature of IGU production has resulted in specialist manufacturers going from strength to strength.

Number of IGU manufacturers



Exclusive IGU manufacturers



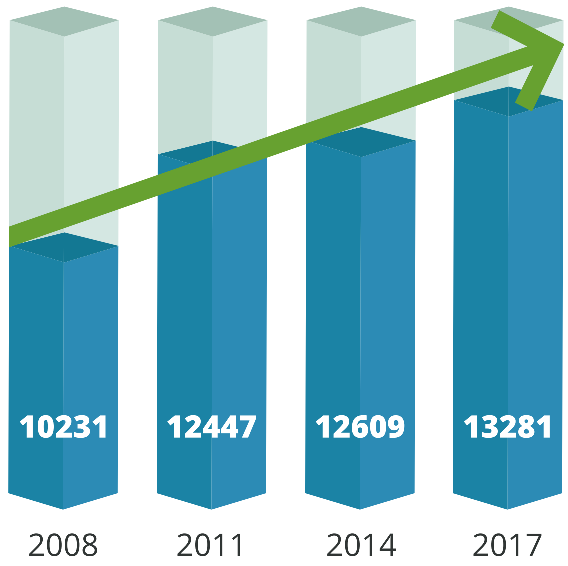
WINDOW, DOOR & CONSERVATORY INSTALLERS

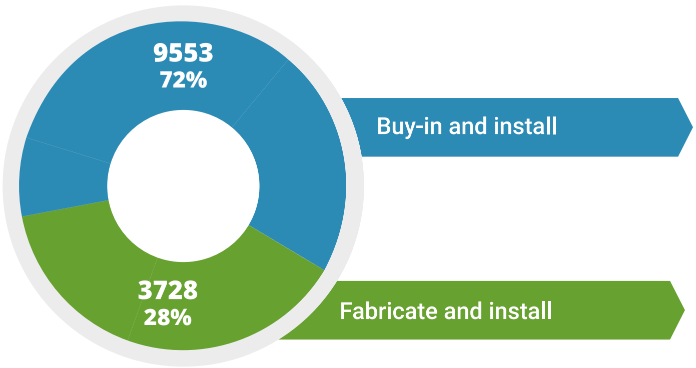
There are 13,281 companies whose principle activity is the installation of windows, doors or conservatories. Installers can be split into two groups, those that fabricate and install, and those who buy-in and install.

The number of installation firms has risen sharply over the years particularly among small companies (1 - 25 frames per week). Several installers have left their jobs with larger national companies and set up on their own, while other installers are the result of the decline among fabricators, resulting in several 'splinter' firms.

Installers have diversified too; extending their range of products to include additional niche window/door products, single storey extensions and other home improvements such as garage doors, driveways, security systems and even kitchens/bathrooms.

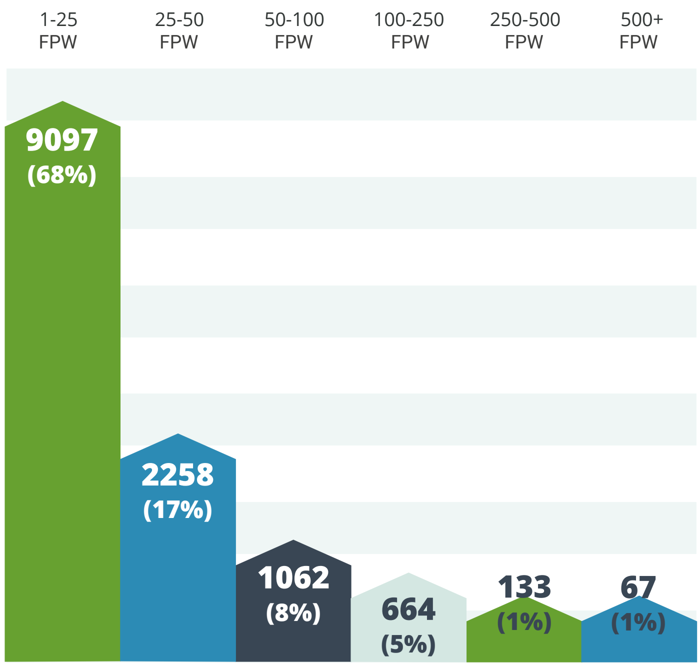
Number of window, door and conservatory installation firms





NOTE:
Some companies who fabricate and install may also buy in some products from other manufacturers. For example, a PVC-U window and door fabricator and installer may buy-in PVC-U vertical sliding sash windows or aluminium products.

Average size of installer, based on window/door frames per week (FPW) volume



Showrooms

Showrooms were a typical feature of home improvement firms from the 1980s, but showrooms declined as companies cut overheads and margins were squeezed, and as homeowners turned to the internet for information.

However, this trend is now reversing, with more companies investing in showrooms to demonstrate premium products such as bi-folding doors, flush sash windows, vertical sliders and solid/tiled roof solutions.

Number of installers with showrooms

INSTALLER BUSINESS OPERATIONS

Most installers fit PVC-U windows and doors, but today installers are offering a wider range of products and materials. While standard PVC-U windows have become almost commoditised and price driven, alternatives such as flush sash and vertical sliders are giving installers an opportunity to increase average order values and profit margins.

Aluminium bi-folding doors have created numerous opportunities for installers both with previous and new customers and really opened the market for installers to offer a wider range of materials, both aluminium and timber.

Most window, door and conservatory installers operate in the residential/domestic market, while a number specialise primarily in the commercial or new-build sector.

Product diversification has had an impact on supplier relationships. Historically installers who buy-in products had one or two trade suppliers, today they are much more likely to use several fabricators to maximise their range of products and materials.

Corporate and financial

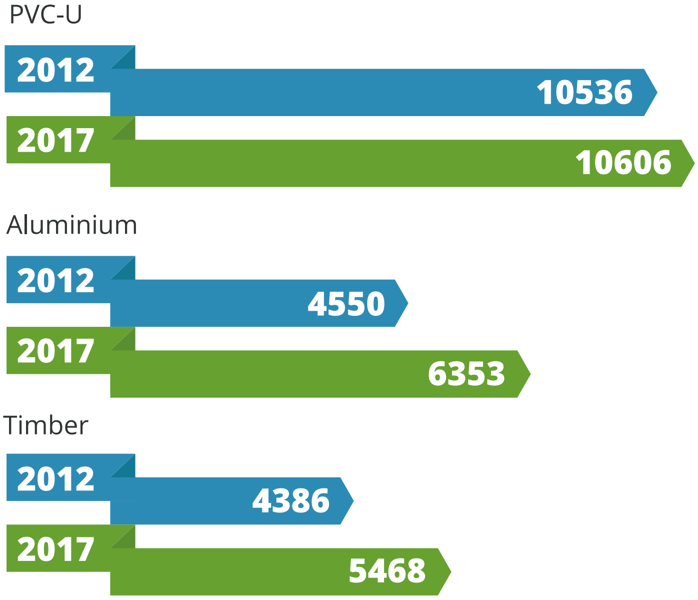
It is difficult to analyse companies who fabricate and install alongside those who buy-in and install as the business models and scale of operations are vastly different. However, we can analyse each business type and assess key information.

Turnover is not available on all companies, however we have compared the average 'net worth' of installers taken from accounts published in 2014 and those published in 2017.

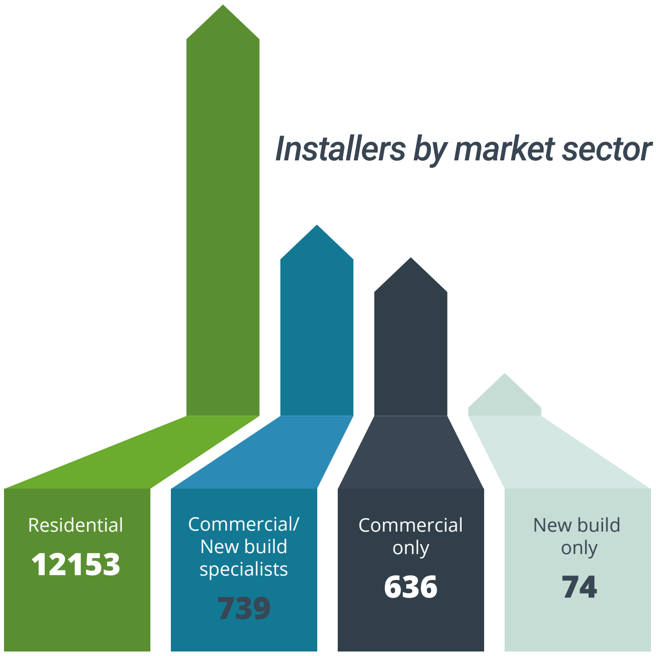
	2014 Accounts	Latest Accounts	Change
Fabricate & Install	£219,903	£265,228	+21%
Buy-in and install	£49,651	£54,280	+9%

NOTE:
Financial data provided by a third party credit reference agency. The latest accounts will be the latest published accounts which may have been 2016 or earlier. Similarly, the 2014 was the latest financial data available as at September 2014. Where data is not readily available, such as group structures, we remove the information completely.

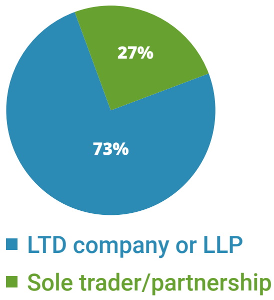
Number of installers by material



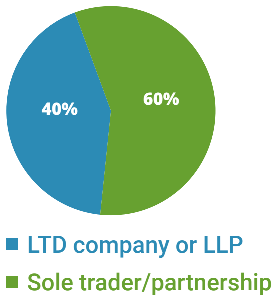
NOTE:
The figures combined equal more than the total number of installers because some companies install more than one material



Fabricate and install



Buy-in and install



INSTALLED PRODUCTS

Bi-fold and sliding doors

Bi-fold doors remain an aspiration and hi-demand product. It is interesting to note that while the number of PVC-U bi-fold door fabricators has declined year-on-year, the number of installers offering the product has increased significantly from 6,131 to 6,837 (11.5%) since 2014.

However, it is still aluminium bi-fold doors that homeowners are demanding, so it is no surprise that the number of installers offering the product has increased by 22% since 2014 to 5,626 firms.

Sliding patio doors fell out of fashion as bi-folds became popular, however this trend is starting to reverse as homeowners choose large-span sliding doors to maximise glass area. Demand is gaining traction both in aluminium and PVC-u.

PVC-U vertical sliding sash windows

PVC-U vertical sliding sash windows are a higher order-value, higher margin product that is proving particularly popular as installers offer this as an alternative to standard PVC-U windows.

Historically much of the UK housing stock would have had traditional box-sash timber windows and over the years many of these have been replaced by standard PVC-U casement windows. As replacing older generation PVC-U frames becomes common-place, savvy installers are recognising the opportunity to 'upsell' and put back traditional-looking box sash windows in PVC-U.

Composite doors

Composite doors have evolved from a specialist, premium product to a standard product offering, with 90% of all PVC-U installers now selling composite doors. Composite doors continue to evolve as product specifications improve and many PVC-U installers 3,031 now offer at least two alternative composite door products, typically a 'standard' and a 'premium' option.

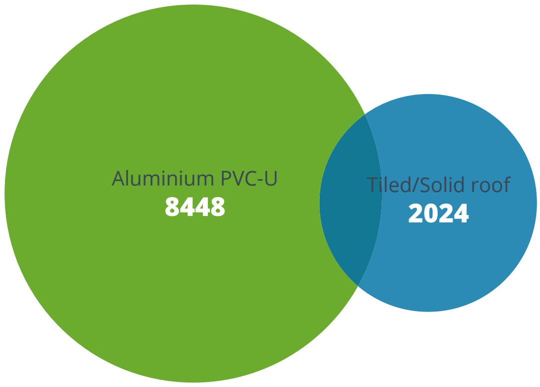
Number of companies offering more than one composite door range

Conservatories and single storey extensions

Installers have benefited from consumer demand to replace existing conservatories/conservatory roofs with upgraded, higher performance solutions, as well as a move towards more bespoke, higher specification orangeries and single storey extensions with glazed roof lights and lanterns.

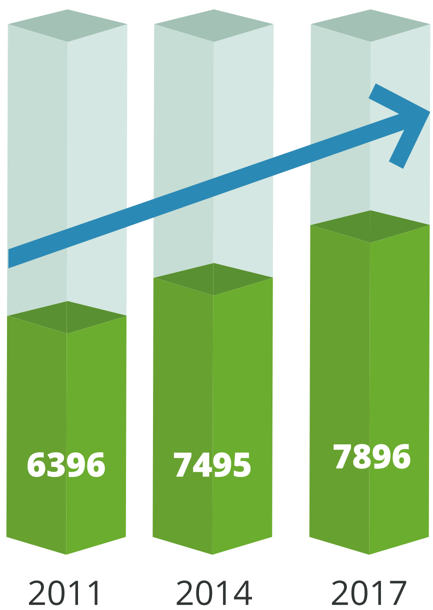
The replacement conservatory/roof represents significant order values, profit margins and faster cashflow without the costs and time associated with baseworks and construction. It also gives consumers more choice including new solid/tiled roof options.

Conservatory installers who buy-in conservatory roofs



NOTE:
The figures combined equal more than the total number of conservatory installers because some companies install more than one roof type.

Number of installers offering PVC-U vertical sliding sash windows



TRADE COUNTERS / DISTRIBUTION OUTLETS

Jobbing builders, window fitters and small installation companies will often purchase their windows, doors and conservatory roofs from local suppliers who specialise in dealing with small/infrequent orders and buy in volume from a larger fabricator, gaining a wholesale margin.

These suppliers, often referred to as 'trade counters' usually offer a wide range of made-to-order products from different manufacturers and provide storage facilities and technical expertise, and many offer added value services such as skip/waste disposal and marketing support.

Originally a small market, in recent years the business model has evolved rapidly as larger suppliers see significant opportunities in local distribution depots as a way of securing more product volume and increased buying-power.

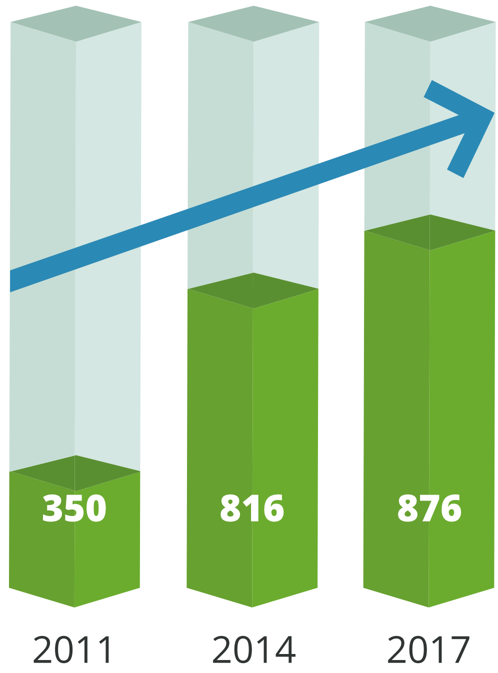
A number of mergers and acquisitions have created some significant trade counter networks, while several larger fabricators have established their own network of trade counters.

The growth of trade counters has enabled builders to access a much wider range of products and thus compete directly with traditional double glazing companies. Indeed, the rapid expansion of trade depots has helped fuel a new category of home improvement company; the 'builder installer', and many traditional builders now actively offer double glazing and conservatories.

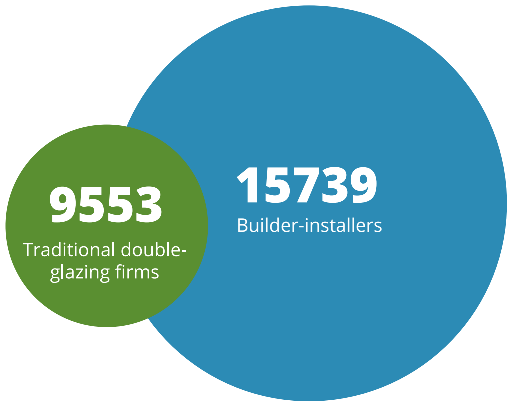
In fact there are now 15,739 builders who actively offer windows, doors, conservatories or extensions, which is higher than the number of traditional double glazing installers who buy-in from a fabricator or trade counter.

NOTE:
Window, door and conservatory trade counters should not be confused with plastic building material merchants, such as Eurocell or National Plastics, that specialise in building plastics mainly from stock.

Number of PVC-U window, door and conservatory 'trade counter' depots



Firms who buy-in and install windows, doors, conservatories or single-story extensions



NEW PRODUCTS AND EMERGING TRENDS

After several years of stagnation, innovation is yet again driving the fenestration industry across all product groups and components.

The move towards better energy efficiency in home improvements is self-evident but the race to increase A++ Window Energy Ratings has potentially caused confusion among homeowners and needs to be addressed by the relevant bodies.

The publicity around triple glazing in recent years has not yet translated into large-scale triple glazing production or installation, although on average, sealed units are getting larger with better specifications.

Aluminium product development

While aluminium bi-folding doors remain extremely popular, large-span aluminium sliding doors are increasingly being chosen by homeowners and our research indicates this product will gain considerable traction.

Another aluminium product to watch is featured entrance doors. Whereas PVC-U fabricators/installers offer a wide range of PVC-u panelled doors and GRP/PVC-U composite doors, aluminium entrance doors had limited range and appeal. This is now changing as manufacturers see the potential opportunity to launch an aluminium alternative to the composite door.

Hybrid Systems

The industry has debated hybrid window and door systems for many years, and several systems have existed that were a combination of PVC-U, aluminium or timber. Recent developments, such as Synseal's 'Warmcore' has stimulated renewed interest in hybrid systems.

As aluminium gains in popularity the argument for hybrid systems increases; the benefits of recycled PVC-U core and aluminium capping/cladding offer lower u-value and lower price-point but the aesthetic and technical benefits of aluminium.

Technology

It is inevitable that new technology such as 'smart homes' will impact the fenestration industry. Keyless door entry systems, whether biometric, remote controlled or using NFC (near field communications) from devices such as smart phones are already on the market.

Connecting automated hardware and ventilation to home hubs and Wi-Fi enabled smart thermometers such as Nest or Hive is only a matter of time for many home owners.

The glass and conservatory roof industry offers some exciting opportunities as we move towards a low carbon future. Harvesting of solar radiation transmitted through IGUs has long been discussed while Tesla/Solar City in the USA has gained international recognition for solar roof tiles.

Installers vs Builder Installer

With double glazing installers diversifying into other home improvements such as single storey extensions and garage conversions, and general builders now actively selling windows and doors, it is inevitable that the lines will blur. Small/medium installers who don't fabricate and general builders are morphing into general home improvement companies.

This is a major development for the industry, more than doubling the number of trade buyers of windows, doors and conservatories to over 25,000 and creating enormous opportunities for local depots/trade counters.

Other developments

Foiled or paint-finished coloured frames have become increasingly popular. Consumer demand for alternatives to white plastic together with better stock availability and facilities from systems companies has enabled fabricators and installers to capitalise on this growing market.

Advances in machinery and manufacturing technology has enabled fabricators to offer new options such as seamless joints and mechanical 'effect' joints.

CONCLUSION

The industry has had an unpredictable year with more companies reporting a slow down in sales, some by as much as 15%. However, others are reporting strong performance, particularly in premium products and commercial/new build sectors.

Despite a tumultuous period that has seen a Referendum and Brexit vote, and huge political upheaval on both sides of the Atlantic, many companies have made significant investment in the last 12 months; in people, products, machinery, marketing and showrooms to name a few.

We don't yet know the full extent of Brexit. Imported raw materials prices have risen due to the value of the pound against the Euro, while skills shortages are affecting the entire construction industry; this is likely to worsen if tighter immigration controls are enforced.

However, interest rates remain low, unemployment is at a record low and consumers are spending, albeit more cautiously. Furthermore, recent government stimulus to increase house-building will ensure the new-build market will remain buoyant while a continued drive towards lower carbon, energy efficient homes will help bolster the replacement market.

Product diversification and economies of scale have become major drivers in the fenestration industry and this has created a new round of Mergers & Acquisitions. This is likely to continue as banks and private equity/venture capital firms take renewed interest in the UK manufacturing sector.

Customers, whether this is the homeowner, trade buyer or commercial buyer now place much greater emphasis on brand recognition and trust signals. Good products or service is no longer enough; the companies who are investing in their brand and marketing activity are out-performing their competitors, gaining market share, increasing order values and improving margins.

UK TOP 100 FABRICATORS/INSTALLERS

The Insight Top 100 is a new feature of the Insight Fabricator and Installer Report and replaces the 'Top 30 PVC-U fabricators' we have published in previous years.

To compile the list, our analysts have used the latest publicly available financial data as of 14/06/2017. There are two versions, based on (a) turnover excluding VAT and (b) net worth.

Please refer to notes on page 21 for a detailed explanation of how the list is compiled.

Top 100 based on overall turnover

Note: The information was correct as of 14/06/2017, however since that date some companies on this list have gone into administration and are now trading under new owners.

	Company	Turnover
1	Anglian Windows Ltd	214,386,000
2	HPAS Ltd (Safestyle UK)	163,116,000
3	Jeld-Wen UK Limited	118,995,000
4	Everest Limited	112,319,000
5	Munster Joinery (U.K.) Limited	73,629,923
6	VELFAC Limited	54,568,000
7	Sidey Solutions Limited	42,026,217
8	Zenith Staybrite Limited	39,229,093
9	Camden Group Limited	38,662,437
10	A&B Glass Company Ltd	37,440,767
11	IG Doors Ltd (Truedor)	36,083,000
12	Door-Stop International Limited	35,501,000
13	CMS Enviro Systems Ltd	32,033,844
14	Nationwide Windows Limited	28,835,518
15	NorDan UK Ltd	27,588,028
16	Eltherington Group Limited	27,204,253
17	Crystal Windows & Doors Limited	27,051,598
18	Penicuik Home Improvements Limited	24,867,896
19	CWG Choices Limited	24,609,094
20	Glazerite Windows Limited	24,074,794
21	Alumet Systems (UK) Limited	23,862,439
22	Total Glass Ltd	23,671,349
23	Salisbury Glass Centre Limited	23,353,980
24	Weatherseal Home Improvements Limited	22,715,442
25	Origin Frames Limited	22,023,044
26	C R Smith Glaziers (Dunfermline) Limited	21,921,999
27	Affordable Aluminium Limited	21,828,551
28	Garrard Windows Limited	21,431,329
29	Solidor Limited	21,219,269
30	Rationel Windows (UK) Ltd	20,833,000
31	Express Bi Folding Doors Limited	20,822,417
32	Sovereign Group Limited	20,257,898
33	Euramax Solutions Limited	19,528,000
34	Ford Windows Limited	18,607,081
35	Dunraven Manufacturing Limited	18,605,399
36	Graham Holmes Astraseal Limited	18,180,500
37	Starglaze Windows & Conservatories Ltd Sternfenster)	17,664,180
38	Tradelink Direct Limited	16,953,106
39	Direct Trade (Yorkshire) Limited	16,928,915
40	Anglia First Home Improvements Limited	16,789,263
41	Customade (UK) Limited	15,737,299
42	Sash UK Limited	15,615,222
43	SEHBAC Limited	15,432,924
44	SWC Trade Frames Limited	15,386,635
45	Consort Limited	15,317,465
46	Conservatory Outlet Ltd	15,311,218
47	Emplas Window Systems Limited	15,224,426
48	Britelite Windows Ltd	15,100,478
49	Polyframe Norwich Ltd	14,941,081
50	Crittall Windows Ltd	14,704,000
51	Unique Window Systems Ltd	14,685,009

52	Quailfalcon Ltd (Duration Windows)	14,549,428
53	Phoenix Door Panels Limited	14,440,000
54	Masterdor Limited	14,317,000
55	Cornwall Glass & Glazing Ltd	14,286,285
56	Modplan Limited	14,160,851
57	Ashford Commercial Limited	14,049,334
58	Indigo Products Limited	13,926,559
59	Whiteline Manufacturing Limited	13,787,741
60	Vista Panels Limited	13,652,831
61	Soundglobal Trading Ltd (Sterling PVCu)	13,355,297
62	Stevenswood Limited	13,021,299
63	Supaglaze Ltd (Shepley Windows)	12,997,930
64	David Salisbury Joinery Ltd	12,806,995
65	Joedan Manufacturing (U.K.) Limited	12,775,288
66	Scotia Double Glazing Limited	12,758,941
67	PWG Trading Ltd (Performance Window Group)	12,705,687
68	TruFrame Trade Frames Ltd	12,499,479
69	Victorian House Sales Ltd (Victorian Sliders)	12,350,282
70	Dessian Products Limited	12,325,069
71	Everglade Windows Limited	12,111,177
72	Hazlemere Window Company Limited	12,071,168
73	East Yorkshire Aluminium & Glass Ltd (EYG)	12,052,532
74	Innovative Design Systems Limited (ID Systems)	11,800,068
75	C A Goss Ltd (Direct Window Company)	11,725,269

76	FrameXpress Ltd	11,676,460
77	Martindales Limited	11,667,897
78	Quick Slide Limited	11,653,819
79	Hurst Plastics Limited	11,604,000
80	Warmseal Windows (Newcastle) Limited	11,417,786
81	Apple Panels Ltd (Apple Home Improvements)	11,043,775
82	Future Products Limited	11,024,930
83	Sekura Trade Frames Limited	11,003,850
84	Lancashire Double Glazing Group Limited	10,900,083
85	New World Developments Ltd	10,823,086
86	Nova Group Limited	10,818,218
87	Dekko Window Systems Limited	10,595,633
88	Super Seal Window Systems Limited	10,575,259
89	Lister Trade Frames Limited	10,111,854
90	Pearl Window Systems Limited	9,903,213
91	Solar Windows Limited	9,898,896
92	Sliders (UK) Ltd.	9,849,267
93	McMullan & O'Donnell Limited	9,844,825
94	New View Window Systems Limited	9,669,002
95	Heritage Somerfield Group Ltd (Heritage Trade Frames)	9,657,002
96	Euro Windows Limited	9,267,652
97	Vale Window Company Limited	9,226,469
98	Crownfold Ltd (Pennine Home Improvements)	9,226,008
99	Climatec Windows Ltd	9,209,909
100	Interframe (South West) Limited	9,056,018

Top 100 based on overall net worth

	Company Name	Net Worth
1	Jeld-Wen UK Limited	56,191,000
2	Anglian Windows Ltd	49,981,000
3	HPAS Ltd (Safestyle UK)	29,443,000
4	Eltherington Group Limited	18,600,351
5	Crystal Windows & Doors Limited	14,716,496
6	Door-Stop International Limited	11,667,000
7	IG Doors Ltd (Truedor)	10,551,000
8	Salisbury Glass Centre Limited	7,635,976
9	Graham Holmes Astraseal Limited	7,500,625
10	Solar Windows Limited	7,139,606
11	Solidor Limited	7,039,894
12	VELFAC Limited	6,781,000
13	Euramax Solutions Limited	6,711,000
14	Tradelink Direct Limited	6,611,686
15	Dunraven Manufacturing Limited	6,330,526
16	Vista Panels Limited	6,317,540
17	Origin Frames Limited	6,135,972
18	Innovative Design Systems Limited (ID Systems)	6,116,197
19	Mumford & Wood Limited	5,549,592
20	CWG Choices Limited	5,402,153
21	Munster Joinery (U.K.) Limited	5,343,847
22	Bon Accord Glass Limited	5,282,769
23	Sekura Trade Frames Limited	4,981,350
24	PE Barton Ltd (Barton Windows, Doors & Conservatories)	4,896,403
25	Total Glass Ltd	4,862,133
26	Crownfold Ltd (Pennine Home Improvements)	4,751,957
27	CMS Enviro Systems Ltd	4,751,796
28	Trent Valley Window & Door Company Ltd	4,467,502
29	McMullan & O'Donnell Limited	4,406,869
30	3 D Aluminium Plas Limited	4,305,196
31	Camden Group Limited	4,185,650
32	A&B Glass Company Ltd	4,152,800
33	Sash UK Limited	4,102,185
34	Nationwide Windows Limited	4,093,922
35	Conservatory Outlet Ltd	4,026,958
36	Starglaze Windows & Conservatories Ltd (Sternfenster)	3,978,486
37	Sovereign Group Limited	3,954,303
38	Clivnars Limited	3,942,141

39	Acorn Aluminium Limited	3,919,652
40	Supaglaze Ltd (Shepley Windows)	3,833,872
41	Hadrian Architectural Glazing Systems Limited	3,701,127
42	Roundbrand Limited	3,657,399
43	Ford Windows Limited	3,457,938
44	Ashford Commercial Limited	3,451,043
45	Nova Group Limited	3,398,692
46	New World Developments Ltd	3,386,855
47	Britannia Windows (UK) Limited	3,385,475
48	Consort Limited	3,338,044
49	Warwick Glass and Glazing Limited	3,291,999
50	Warwick Development (North West) Limited	3,243,015
51	Victorian House Sales Ltd (Victorian Sliders)	3,242,316
52	Direct Trade (Yorkshire) Limited	3,176,525
53	SupaGlazing Limited	3,116,488
54	Quailfalcon Ltd (Duration Windows)	3,113,391
55	Phoenix Door Panels Limited	3,087,000
56	Granada Glazing Limited	3,066,735
57	MH Joinery Products PLC	3,059,025
58	Martindales Limited	2,906,869
59	Hazlemere Window Company Limited	2,894,155
60	Crest Glazing Limited	2,893,536
61	Dempsey Dyer Limited	2,828,728
62	Everglade Windows Limited	2,811,917
63	Glazerite Windows Limited	2,807,022
64	West Leigh Limited	2,750,000
65	Exterior Plas Limited	2,709,548
66	Dessian Products Limited	2,637,030
67	Dungannon Window Company Limited	2,611,890
68	Customade (UK) Limited	2,586,492
69	Garrard Windows Limited	2,564,665
70	Fox Aluminium Systems Limited	2,492,390
71	Unique Window Systems Ltd	2,481,823

72	NorDan UK Ltd	2,477,515
73	Lancashire Double Glazing Group Limited	2,457,810
74	New View Window Systems Limited	2,455,816
75	Premier Window Systems (Grimsby) Limited	2,404,715
76	Weathershield Limited	2,364,633
77	Affordable Aluminium Limited	2,335,478
78	Scotia Double Glazing Limited	2,297,118
79	Euro Windows Limited	2,291,246
80	Arkay Windows Ltd	2,204,106
81	Seal-Lite Windows Doors & Conservatories Limited	2,200,147
82	Cornwall Glass & Glazing Ltd	2,178,358
83	Turford Bros Limited	2,145,349
84	Sheffield Window Centre Limited	2,143,223
85	Yorkshire Trade Windows Limited	2,134,149
86	Bromfield Group Ltd (Holts Conservatories)	2,114,935
87	Hallmark Panels Limited	2,099,865
88	H. Jarvis Ltd	2,085,202
89	Kloeber UK Ltd	2,061,655
90	East Yorkshire Aluminium & Glass Ltd (EYG)	2,044,253
91	Polyframe Doors Ltd (WB Group)	2,009,671
92	Rationel Windows (UK) Ltd	1,957,000
93	Leay Limited	1,956,189
94	Super Seal Window Systems Limited	1,940,589
95	Nolan UPVC Limited	1,917,150
96	Britplas Commercial Limited	1,915,304
97	Fineline Windows & Conservatories Limited	1,907,672
98	Folding Sliding Doors Limited	1,900,594
99	Design Window and Door Systems Limited	1,899,154
100	Symphony (Windows, Doors & Conservatories) Limited	1,797,701

Important Notes

Financial Comparisons: Where we use financial data for comparison purposes, this information is supplied by a third party credit reference agency and is used in aggregate. Only financial data from limited companies or LLP's are used.

Top 100: The Top 100 lists include individual limited companies where the core activity is fabrication, supply or installation of windows, doors or conservatories. Where financial data is not readily available, for example if combined within a group structure, it is excluded from the list. If two or more individual companies are part of a group, each individual company is listed separately unless otherwise shown. Please note the latest publicly filed accounts will not relate to the same trading period as financial year-ends vary and companies publish their accounts at different times.

Disclaimer: Information within this Report is sourced from our own market research and through publically available financial accounts. Insight Data Ltd provides this information in good faith but errors or omissions may exist.
Published financial accounts will indicate historical information and may not reflect the most recent trading history.

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