



INDUSTRY OVERVIEW

Brought to you by:



Jade Greenhow
Operations Director



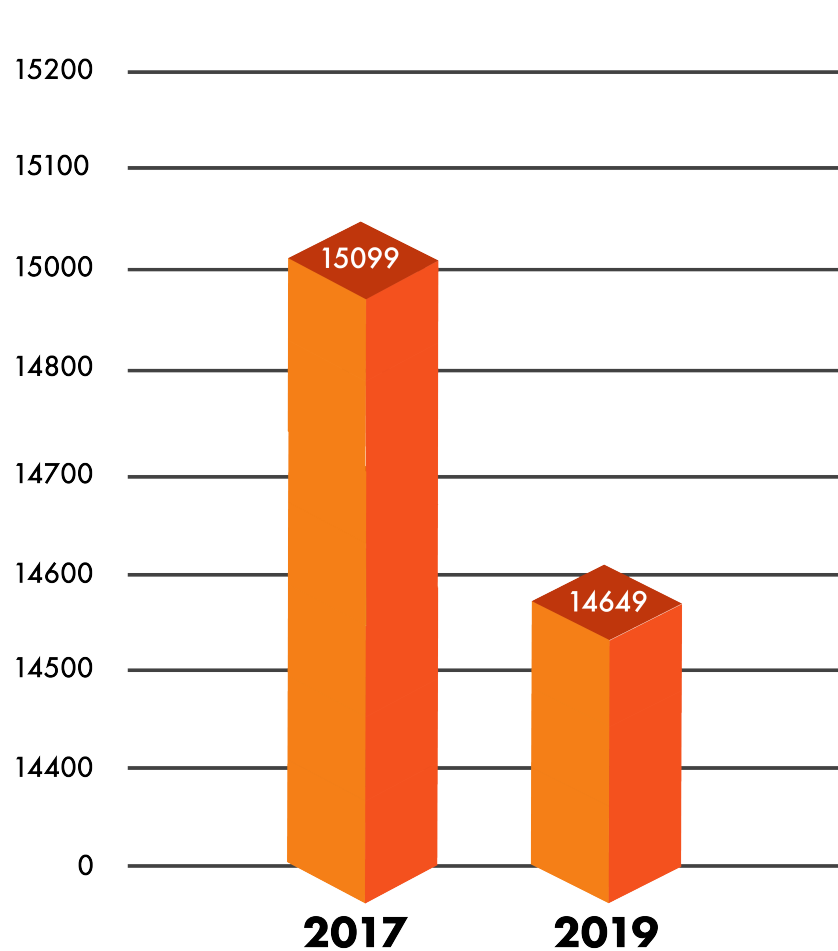


Mapping out 100,000 decision makers across the fenestration and construction supply chain

- Fabricators and Installers
- Trade-counters
- Small/local builders
- House builders
- Construction and R&R
- Architects & specifiers
- Builders merchants



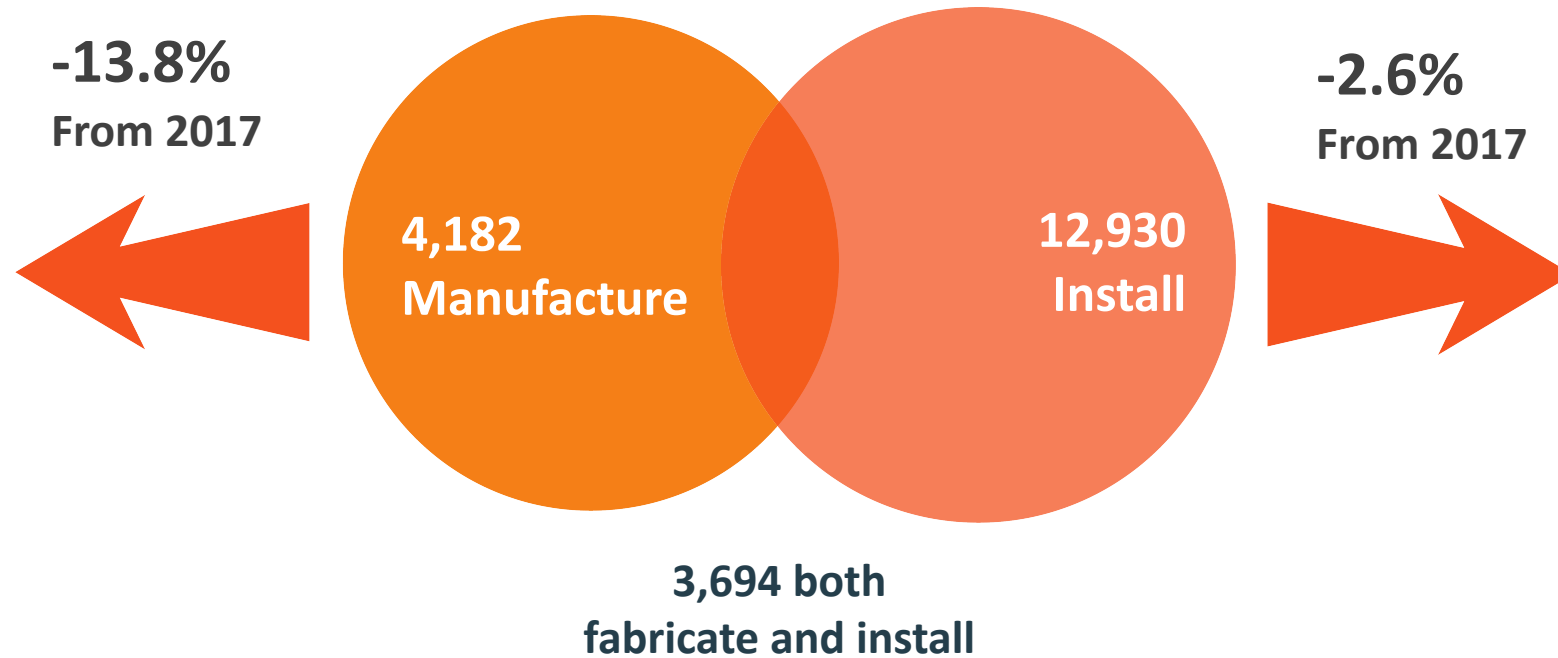
Overview of the market



450
companies since 2017

Fabricators and installers

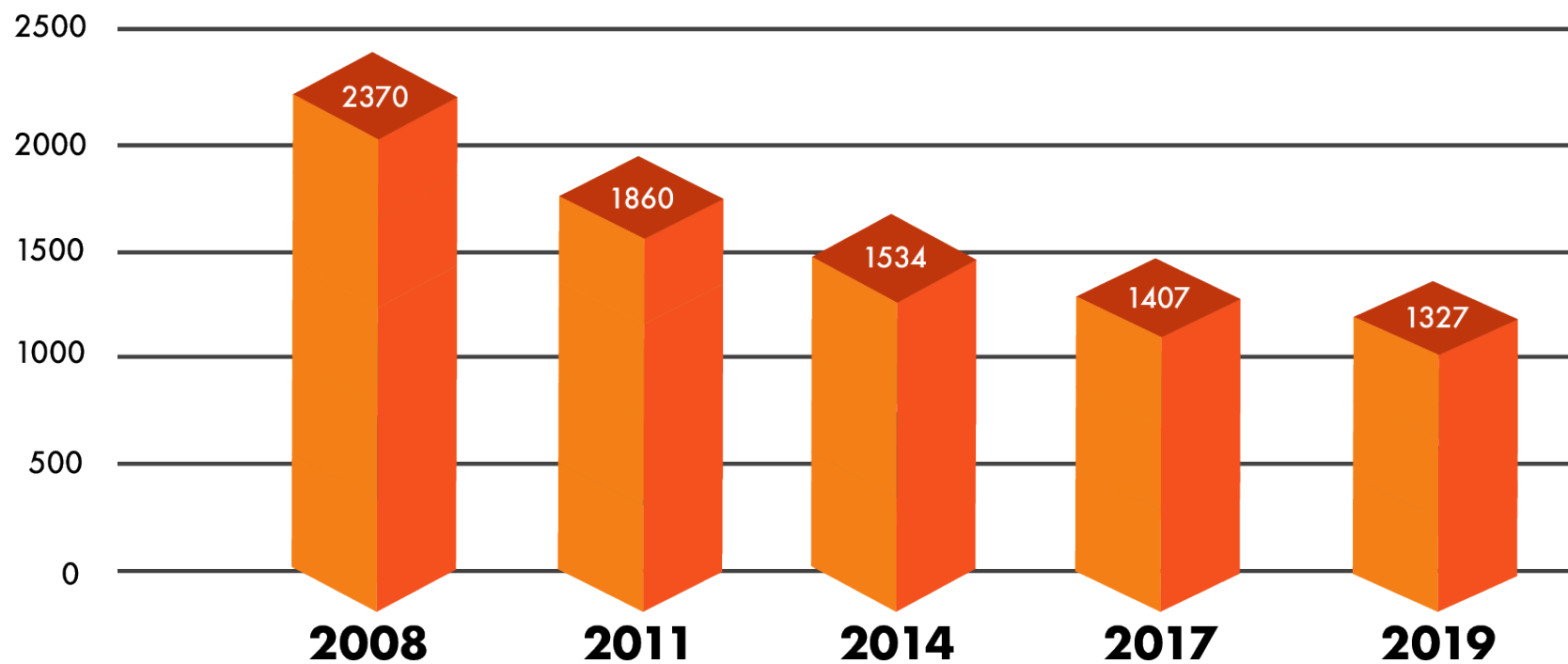
PVC-U, aluminium and timber products





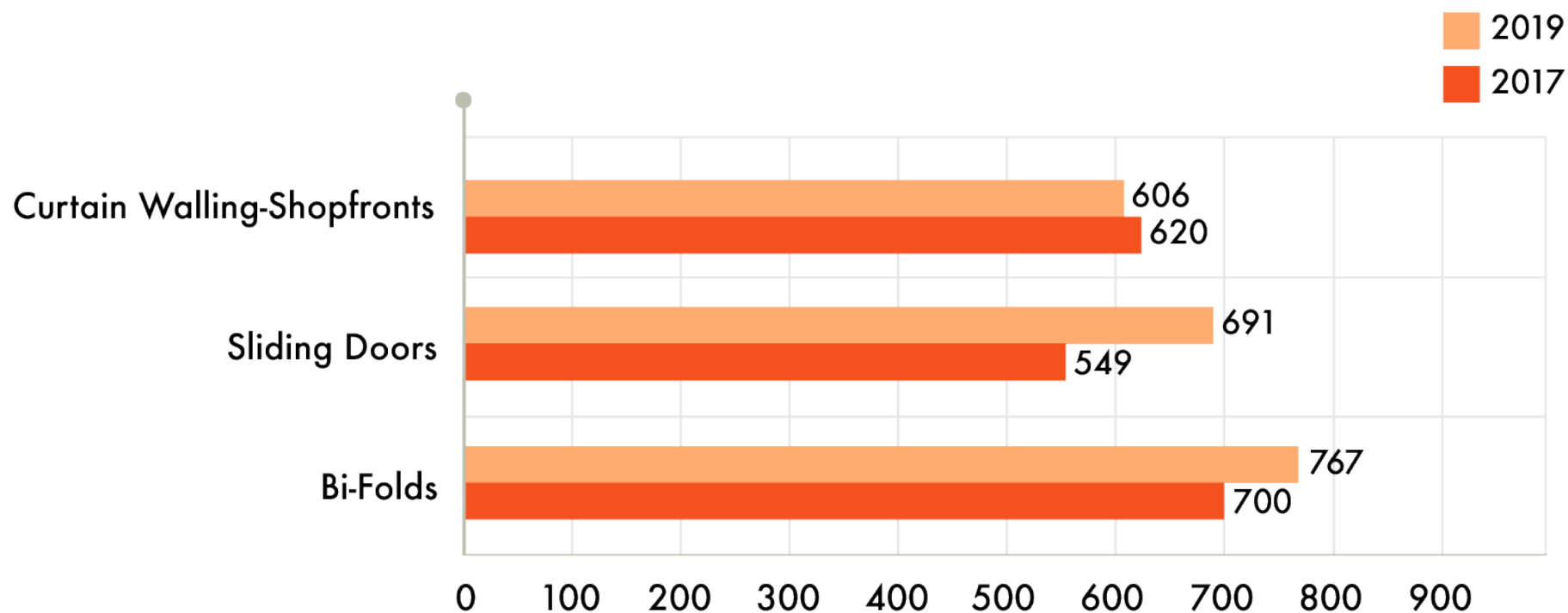
PVC-U fabricators

The number of PVC-U fabricators has dropped 44% to 1,327 companies since 2008.



Aluminium fabricators

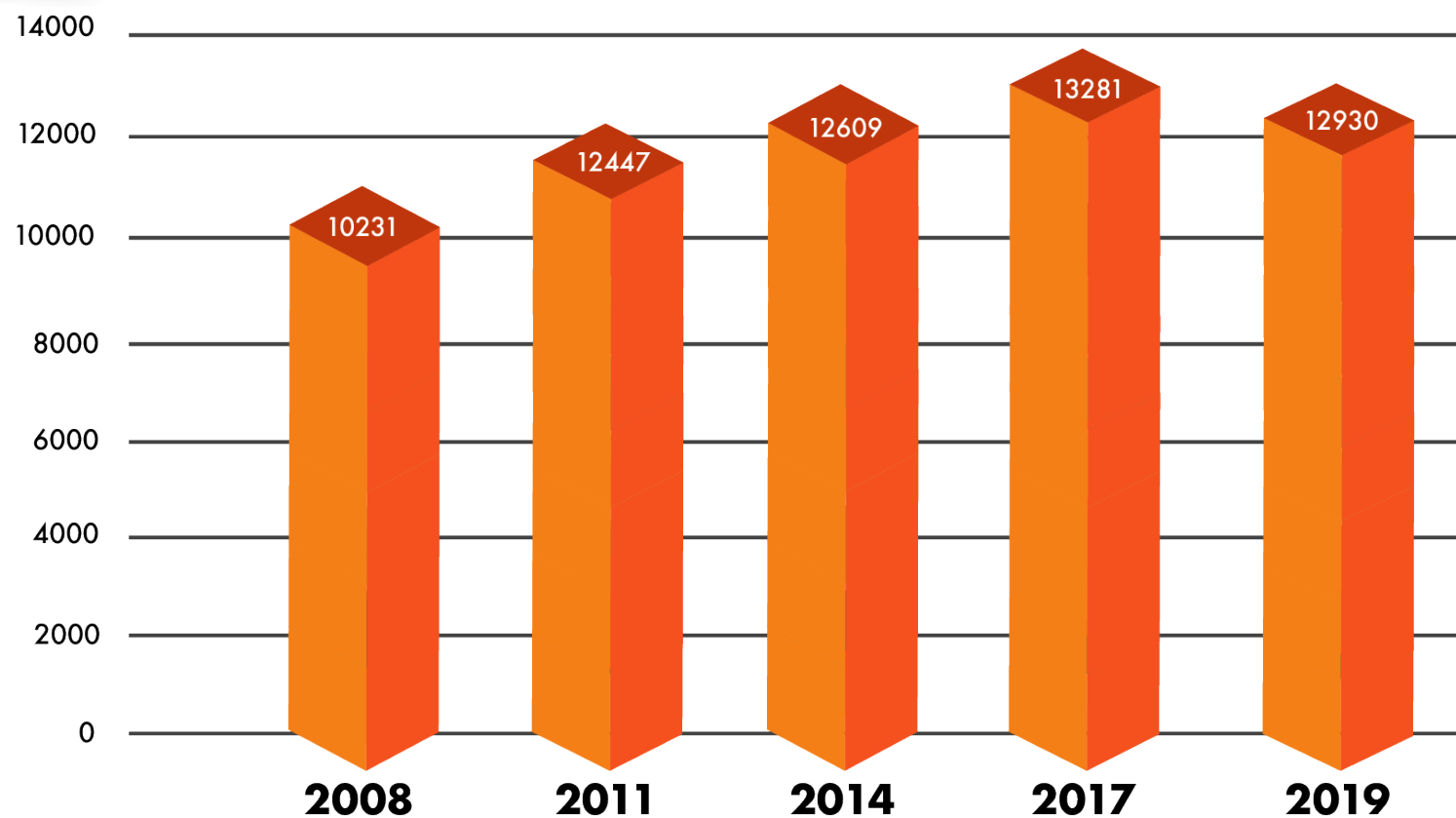
Number of aluminium fabricators has risen from 801 to 870 since 2017.





Installers

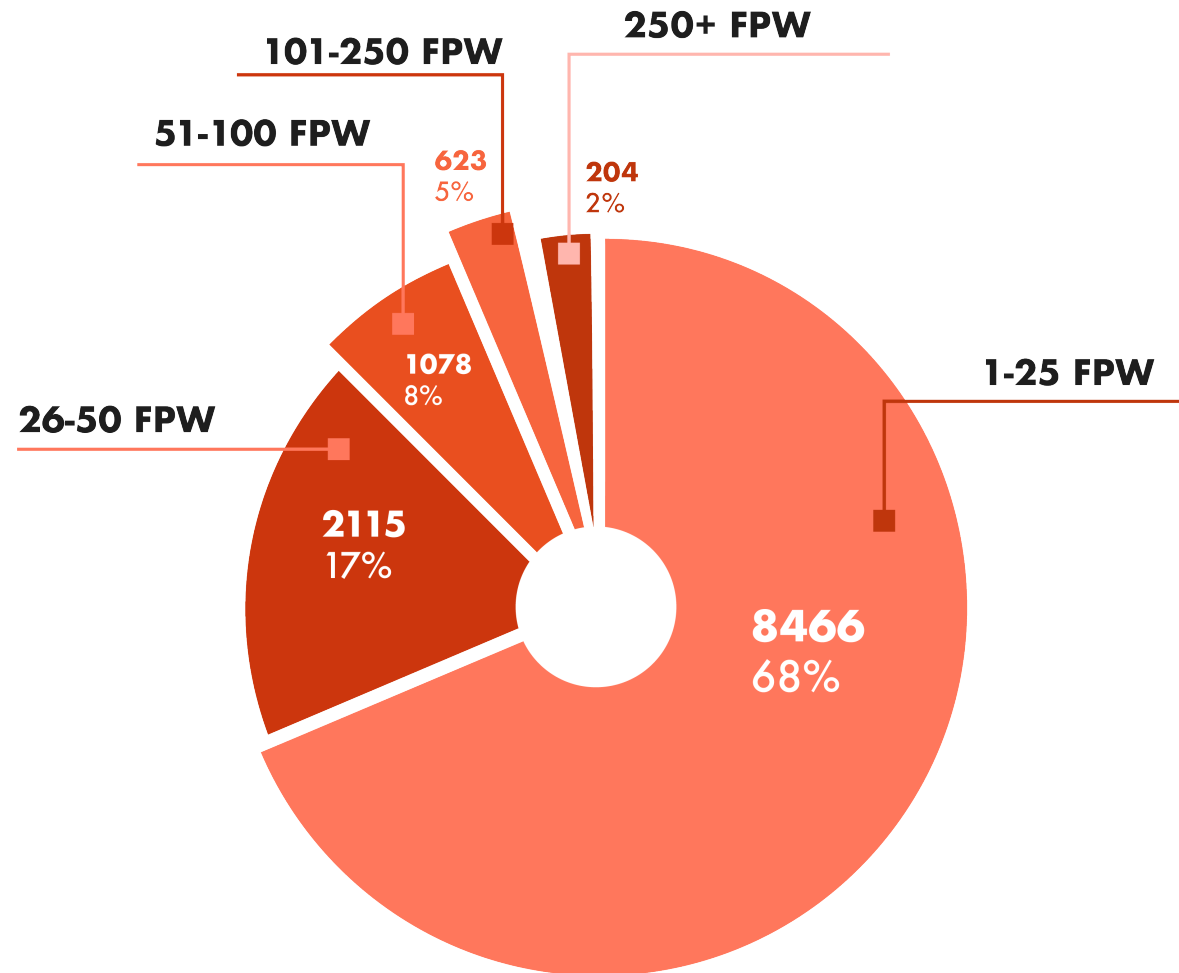
After peaking in 2017, the number of installers has declined slightly.





Installers by volume

Number of firms vs
frames per week





Industry Observations

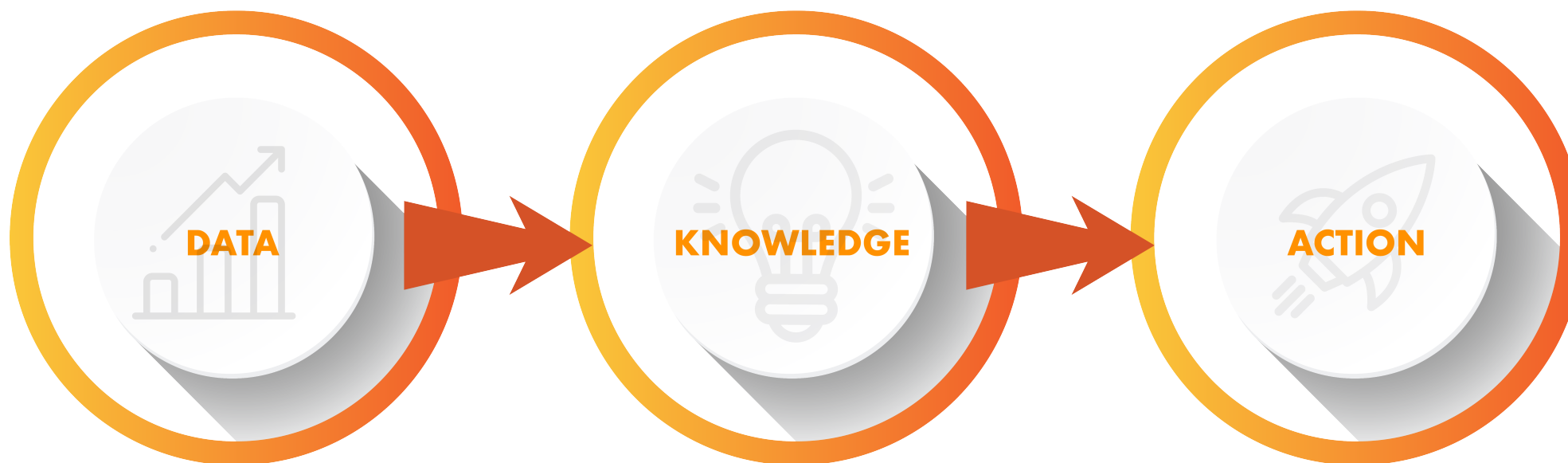
- Installers now offering good, better, best solutions
- More builders than ever competing with installers
- Fabricators extending product ranges to improve revenue/margins and tie-in trade customers
- Consolidation throughout the supply-chain, with significant M&A activity
- The rate of change within the industry highest ever





Market Intelligence

Use data to help inform decision making and make better business decisions.





Thank you.



Jade Greenhow
Operations Director

