

Conservatories: UK

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**THE MARKET REPORT WITH THE ANSWERS YOU
NEED**

“MSI believe that the UK market for conservatories increased by 20% in volume terms and by 28% in value terms between 2001 and 2004. However, in contrast, MSI project that the market declined in both volume and value terms in 2005.”

**See inside for a
full table of contents
and list of tables.....**

THIS REPORT HAS THE ANSWERS

This report provides information you will need when:

- planning your future sales and marketing campaigns
- monitoring the competition
- developing new products/services

This report includes the following:

- The **volume and value** of the UK market for **conservatories**, 2001-2005, with annual forecasts to 2010
- The **volume** of the UK market for conservatories, **by type of design**, 2001-2005, with annual forecasts to 2010:
 - Edwardian
 - Victorian
 - Lean-to
 - Other
- The **volume** of the UK market for conservatories, **by frame material**, 2001-2005, with annual forecasts to 2010:
 - UPVC
 - Timber/hardwood
 - Aluminium
- The **volume** of the UK market for conservatories, **by type of roofing material**, 2005, with annual forecasts to 2010:
 - polycarbonate
 - glass
 - specialised glass
 - sandwich panels
- The **volume** of the UK market for conservatories, **by surface area**, 2005,,:
 - < 15m²
 - 15m² to 30m²
 - > 30m²
- The **volume** of the UK market for conservatories, **by sector**, 2001-2005, with annual forecast to 2010:
 - residential
 - non-residential
- The **volume** of the UK market for conservatories, **by type of installation**, 2001-2005, with annual forecasts to 2010:
 - first installation
 - replacement
- The **volume** of the UK market for conservatories, **by frame colour**, 2001-2005, with annual forecasts to 2010:
 - white & derivatives
 - wood stained
- The **volume** of the UK market for conservatories, **by type of vertical glazing**, 2005, with annual forecasts to 2010:
 - double glazing
 - performance glass
 - single glazing

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have become more price conscious. This has had a negative impact on the market in value terms in 2005.

Trade sources report that certain homeowners that can no longer afford to move house will sometimes choose to improve their existing home by the purchase of a conservatory, thus also expanding their living space. However, these homeowners are more likely to purchase budget-priced conservatories in an attempt to maintain their savings.

1.1 Market Segmentation, 2001-2005

1.1.1 By Type Of Design

MSI project that Edwardian, Victorian and Lean-to conservatories will together account for ..% of the UK market for conservatories in volume terms in 2005. Edwardian conservatories are projected to account for ..% of the total market in 2005. Victorian style conservatories will represent ..% of the market during the same year, as illustrated in the following table.

TABLE 1: THE UK MARKET FOR CONSERVATORIES IN VOLUME, BY TYPE OF DESIGN, 2001-2005

Type of Design	2001	2002	2003	2004	2005*
Edwardian					
Victorian					
Lean-to					
Other					
Total					

Unit: number of conservatories

Note: * = projections

Source: Trade and MSI estimates and projections

The popularity of each style of conservatory has changed during the review period. The change in consumer preference is mainly attributable to increasing consumer awareness of the various styles available for conservatories. Trade sources report that the production efficiency improvements achieved in the manufacturing Edwardian and Victorian styles of conservatories has meant that a greater number of people have been able to afford these conservatories during the review period.

Edwardian conservatories are projected to account for ..% of the UK market for conservatories in volume terms in 2005, compared with a market share of ..% in

The following table illustrates the UK market for conservatories in volume, by type of installation, between 2001 and 2005.

TABLE 2: THE UK MARKET FOR CONSERVATORIES IN VOLUME, BY TYPE OF INSTALLATION, 2001-2005

Type Of Installation	2001	2002	2003	2004	2005*
First Installation					
Replacement					
Total					

Unit: number of conservatories

Note: * = projections

Source: Trade and MSI estimates and projections

The first installation sector accounted for the largest proportion of the UK market for conservatories throughout the review period.

Trade sources report that the lifetimes of UPVC, timber and aluminium conservatories are greater than 15 years, and that a large proportion of conservatory sales have taken place within the last 15 years, resulting in a relatively small potential for replacement sales. Trade sources state that when maintenance work does occur, the frame material usually remains the same.

Most first installation sales are within the existing houses segment rather than new build. Some trade sources report that when homeowners purchase a new home there is often insufficient savings available to install a new conservatory. Moreover, the market for conservatories is stimulated by homeowners' desire for an extension of living space, a desire less frequently experienced when purchasing a new home. Moreover, a greater level of disposable income is available with cost-effective housing extensions becoming more appealing.

Conservatories usually require only minor maintenance work, and not a complete conservatory system overhaul. Considering that conservatories are usually a major investment, homeowners are willing to make the effort for the upkeep of their conservatories, thus reducing the potential for replacement conservatory sales because of poor maintenance or neglect.

1.1.2 By Frame Colour

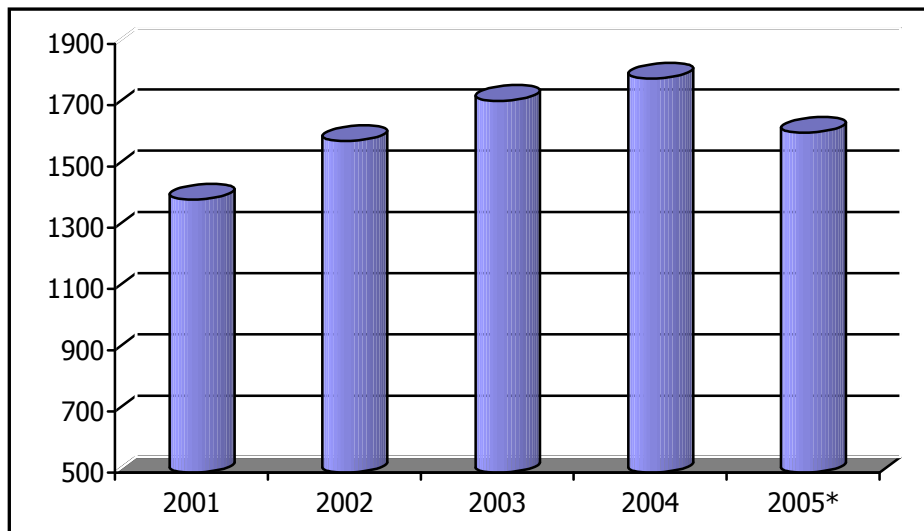
MSI project that conservatories with a frame coloured white or a derivative of white will account for ..% of the UK market for conservatories in 2005. MSI project that

CONSERVATORIES: BUOYANCY OF THE MARKET IN SPITE OF A DECLINE IN 2005

After several years of increase, the market for conservatories experienced a decline in 2005, related to a weaker performance of the UK economy, a lower number of house sales, a lower rate of house prices growth and high market penetration.

The market for conservatories faced an increase in competition as several window companies have entered the conservatories market in the UK by selling low margin conservatories by taking advantage of existing manufacturing capability and employees knowledge.

UK MARKET FOR CONSERVATORIES IN VOLUME, 2001-2005



Year	2001	2002	2003	2004	2005*
Volume	167 000	182 400	197 900	200 900	186 900
% Change	+9%	+9%	+8%	+2%	-7%

Units: number of conservatories

Note: * = projections

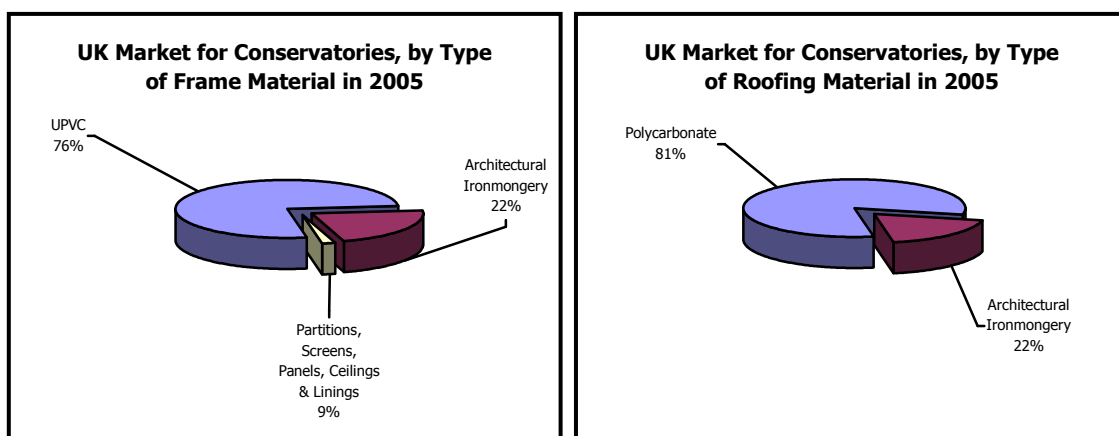
Source: Trade and MSI estimates and projections

Conservatories have remained an economic way of extending living space in the home and adding value to the house. Further, small sized budget-priced conservatories increased in popularity between 2001 and 2005.

Consumer awareness of each style of conservatory has changed in the past five years as consumers became more aware of the various styles available for conservatories.

In addition, production efficiency improvements in the manufacturing of Edwardian and Victorian styles of conservatories have made these items more affordable between 2001 and 2005. Lean-to conservatories have gradually started to replace Victorian style conservatories, following the growth of the budget sector.

UPVC framed conservatories remained popular in the past five years as many UPVC window replacement companies entered the market by selling cheaper UPVC conservatories. Further, by selling essentially UPVC framed conservatories, the popularity of UPVC is also related to the growing role of DIY outlets between 2001 and 2005. However, timber/hardwood framed conservatories have started to gain market share due to their environmental advantage.



Conservatories' roofing made of polycarbonate represented 79% of the market, being less expensive than glass, remaining then a popular choice for conservatories. On the other hand, the demand of glass has grown as many installers have offered their clients to upgrade their existing conservatories to glass, complying at the same time with concerns of Part L of Building Regulations in terms of insulation.

+ 24% increase between 2006 and 2010

Between 2006 and 2010, the market for conservatories in the UK is expected to increase by 24% in volume terms. The market is forecasted to be driven by Building Regulations in terms of buildings' insulation, coupled with the technological improvements in performance of materials such as glass for vertical glazing and specialised glass for roofing. These drivers are expected to improve the quality of the conservatories between 2006 and 2010.

In addition, the UPVC market is expected to become a mature market, leading to a growing interest in other frame materials in the next five years.

The market is also expected to be positively driven by the growing number of replacement of early installations of conservatories with better thermal and acoustic insulation properties in the next five years. Further, sales in the non-residential sector are expected to have the biggest increase, driven by the sales in food and drink sector.

MSI Reports, specialise in business-to-business market research reports in the UK, France and Germany, published in January 2006 a detailed report on **The UK Market for Conservatories**.

Containing 73 pages with 40 tables, MSI analysed in detail the market for conservatories in the UK, both in the residential and non-residential sectors, by type of design in 2004, tracking the developments which have taken place since 2001, and forecasting the drivers and expected development of the market until 2010. The report also provides a distribution and industry overview with the profiles of 20 manufacturers of conservatories. Similar report is available from MSI on the French market.

This report is available at the price of £495 from :

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