Digging Deeper Into Market Knowledge

The Glass & Glazing Federation's Market Knowledge Report was released in August. The Installer wanted to know more. In this interview the GGF's Chief Development Officer, Anda Gregory, provides the answers to some of the questions our readers have asked.

For more information on FENSA, including details of how to join, visit: www.fensa.org.uk

When the Glass & Glazing Federation, together with two of the organisation's commercial entities, FENSA and BFRC, combined resources and data to produce the Market Knowledge Report in August, it was the first of any meaningful market survey to cover the UK glass & glazing industry since 2017.

The Market Knowledge Report uses analytical insights combined with factual installation data from FENSA registered installations stretching back to January 2018.

Combined with qualitative insights from acknowledged market experts, data derived from the British Fenestration Rating Council is also presented.

The Installer wanted to know more, and in this interview the Glass & Glazing Federation's Chief Development Officer Anda Gregory, provides the answers to some of the questions our readers have asked.

What is covered?

The Installer: The report generally covers window and door replacements but for clarity what might have been encompassed – do bi-folds and sliding doors get included in doors and would a conservatory roof pane be included as a window?

AG: Yes bi-folds and sliding doors would be included under the data shown for doors installed. However, we do not cover conservatories so no data is included on those in the report. Although a rooflight would be included as a window in the data.

Future plans

The Installer: Is there a feeling for what other products installers are fitting, such as rainwater systems or garden rooms? (And will there be an expansion of terms in future reports to get a rounded picture of the average installer product portfolio?)

AG: The aim for the future is for the report and the online data to provide an in-depth look at the products and materials being installed so the whole industry can see the consumer trends taking place. Until then, we can't comment on other items at this stage as it would be anecdotal rather than data based.

The Installer: And what can be said about the buoyancy of the new build house market? And indeed, what about commercial builds/refurbishment?

AG: The FENSA data included in the report refers to the replacement of windows and doors in a domestic setting. The report is based upon actual installation data for domestic installations so is highly comprehensive for that sector. New build and commercial markets are not covered by the report but again, we will look into broadening the scope in the future.

Grey market

The Installer: The report makes some guesses about the 'grey market' – can you clarify what suppositions are included? Is it true that more and more installers are being attracted to FENSA from the grey market and why?

AG: The size of the grey market was arrived at through research and survey work done in late 2018/early 2019. Since our TV campaign we've seen a four-fold increase (from about November 19 onwards) in the number of the companies applying to FENSA every month. The vast majority of them are not currently with any competent person scheme (we know because it's a question on the application form) so it indicates that the size of the grey market is shrinking. When you look at MHCLG [Ministry of Housing, Communities and Local Government] numbers you can also see that the number of companies joining CP schemes is up in general.

I think you can put it down to homeowner awareness of FENSA from the advertising campaigns which is pushing installers to join, combined with the fact that it's very cost effective to join us and that it wins them more work as a result.

Other players

The Installer: Is FENSA winning back former members from other competent schemes? (And does the report make any assumptions on how active installers are who belong to other competent person schemes?)

AG: The demand to join FENSA has been higher than it has been in a number of years from across the board and shows no signs of slowing down. But we can't make assumptions on other schemes as we don't have access to their data.

2022 and beyond

The Installer: It looks like 2021 has been a good year so far for installation businesses – have you a feeling at this stage how Brexit and the skills shortage will affect the end of the year and what are the prospects going forward?

AG: We are not seeing any drop in homeowner demand currently so Brexit doesn't seem to be having an effect on that but a combination of skills and product shortages will certainly push prices up, as the report alludes to and suppress the number of installations that can be completed despite the high level of demand. Going forward, it's whether homeowners will be willing to accept longer lead times and higher costs in the medium to long term, because those shortages aren't going away anytime soon.

Energy ratings

The Installer: How will revised U-Values affect the ABC/Rainbow BFRC Mark? Will the demand for A++ increase or is there an argument that the standard required to hit A is raised? (Ergo C and below will become redundant so is it time to revise the rainbow scale?)

AG: With regards to U-values and their impact on energy ratings, in some instances a product that no longer complies by U-value may comply by energy rating. It's possible to achieve a window A rating with U-values typically ranging from 1.6 to 0.8, as solar gain and air leakage is taken into account. At this stage there are no plans to re-align the rating bands.

We do expect to see greater demand for higher ratings, as installers usually offer a choice of rated products to homeowners and will therefore be looking to replace 'redundant' ratings with alternatives. Manufacturers and installers will need to tweak their product specifications to achieve these higher ratings if they don't already do so.

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