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World Windows & Doors

Industry Study with Forecasts for **2011 & 2016**

Study #2235 | September 2007 | \$5800 | 387 pages

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World demand for plastic fenestration will outpace gains for other material types based on the cost/performance advantages of plastic windows and improved appearance of plastic doors.

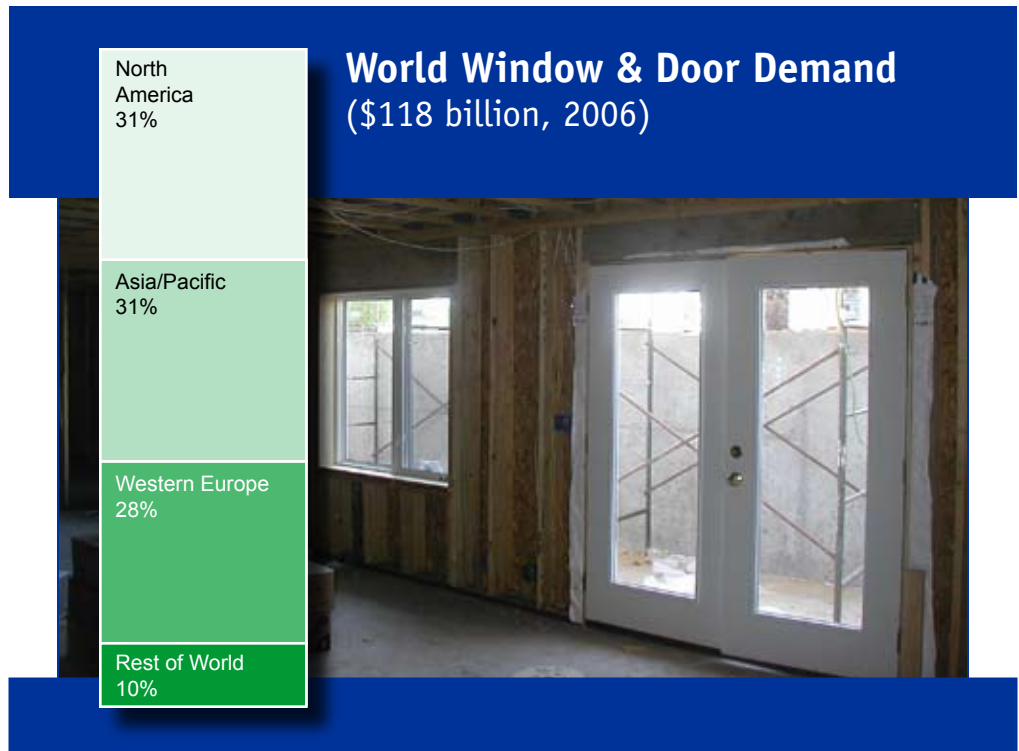
World demand to grow 5% annually through 2011

Global demand for windows and doors (fenestration) is projected to rise 5.0 percent per year to \$150 billion in 2011. Product sales will be spurred by generally healthy economic growth, rising per capita income and ongoing industrialization efforts in developing parts of the world. These trends will bolster building construction expenditures and associated window and door demand. China, India, Mexico and Russia will register some of the largest sales increases, and growth is also expected to be strong in lower-volume markets such as Malaysia, Indonesia, Ukraine, Iran and Turkey.

Although growth will be less robust than in developing nations, fenestration demand in developed areas will climb as well. Sales will be fueled by favorable economic conditions and higher income levels. In most industrialized countries, repair and improvement-related window and door demand will outperform sales in new construction applications. In the US and Japan, new housing starts are expected to decline, preventing overall window and door demand in these nations from expanding at a faster rate through 2011.

Plastic fenestration to outpace other materials

World demand for vinyl, fiberglass and other plastic door products will outpace increases for other product types. Plastic



door demand will be driven by technological advances that are enabling manufacturers to improve the appearance and performance of their products, resulting in competitive inroads being made in a number of markets now served by wood and metal doors. Sales of plastic windows will also grow at an above-average rate through 2011, stimulated by the relatively low cost of products like vinyl windows, with the durability, energy efficiency and low maintenance requirements of plastic windows also helping spur demand. However, wood and metal products will continue to account for a larger share of window and door demand in many areas, and sales of these items will rise along with construction spending.

Nonresidential building market to grow the fastest

Nonresidential building window and door demand will expand at a faster pace than residential building product sales, benefitting from a step-up in nonresidential building construction activity in Western Europe, Brazil, Canada and South Korea, and supported by renewed strength in the US and German markets following a period of decline. In contrast to trends in the residential building market segment, new window and door demand will outperform aftermarket product sales in the nonresidential building market, stimulated by increases in global new construction expenditures.

**Sample
 Text & Tables**

WESTERN EUROPE

Shipments of windows and doors from factories in France were valued at \$4.6 billion in 2006. Industry output has lagged domestic market demand over the last ten years, and in 2006 the nation had a trade deficit in window and door products equivalent to nine percent of demand. Export markets for window and door products include Belgium, Germany, Italy, the Netherlands and the United Kingdom. French window and door companies also export product to other regional neighbors, as well as to customers in the US, Eastern Europe and the Africa/Mideast region.

Window and door shipments by facilities in France are expected to expand at a 3.0 percent annual pace through 2011 to \$5.1 billion, but about the same pace as the rest of Western Europe due to France's economy and government helping support in building construction.

Construction expenditures are expected to slow, dampening related window and door sales. In 2005 and 2006, however, the French government expanded its zero percent PTZ loan program for moderate income homebuyers, removing a new building only stipulation on the loan and income caps in the more expensive parts of the country. These measures will provide some offsetting support, helping boost residential window and door demand.

Window and door shipments by facilities in France are expected to expand at a 3.0 percent annual pace through 2011 to \$5.1 billion, but about the same pace as the rest of Western Europe due to France's economy and government helping support in building construction.

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**SAMPLE
 TEXT**

TABLE V-6

**FRANCE - WINDOW & DOOR SUPPLY & DEMAND
 (million dollars)**

Item	1996	2001	2006	2011	2016
Bldg Construct Expend (bil 2005\$)	110.8	107.4	140.0	154.0	170.5
\$ demand/000\$ bldg construction	0.0	0.0	0.0	0.0	0.2
Window & Door Demand	0	0	0	0	0
By Product:					
Doors	0	0	0	0	0
Wood	0	0	0	0	0
Metal	0	0	0	0	0
Plastic	0	0	0	0	0
Windows	0	0	0	0	0
Wood	0	0	0	0	0
Metal	0	0	0	0	0
Plastic	0	0	0	0	0
By Market:					
Residential Building	0	0	0	0	0
Nonresidential Building	0	0	0	0	0
net exports	0	0	0	0	0
Window & Door Shipments	3340	4050	4610	5340	6190

**SAMPLE
 TABLE**

TABLE V-5

FRANCE - ECONOMIC INDICATORS

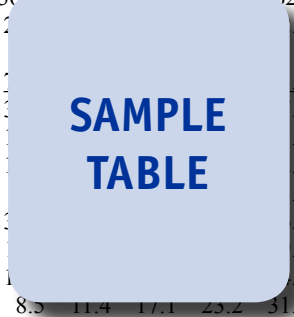
Item	1996	2001	2006	2011	2016
Population (millions)	59.7	60.0	61.6	62.7	63.6
per capita GDP	20,000	18,000	22,000	23,000	24,000
Gross Domestic Product (bil 2005\$)	1,200	1,100	1,400	1,500	1,600
% bldg construction	0.0	0.0	0.0	0.0	0.3
Bldg Construct Expend (bil 2005\$)	110.8	107.4	140.0	154.0	170.5
Residential	50.0	48.0	60.0	65.0	70.0
Nonresidential	60.8	59.4	80.0	89.0	100.5
\$ demand/capita	400	300	400	400	400
\$ demand/000\$ GDP	0.0	0.0	0.0	0.0	0.2
\$ demand/000\$ bldg construction	0.0	0.0	0.0	0.0	0.2
Window & Door Demand (mil \$)	0	0	0	0	0
% France	0.0	0.0	0.0	0.0	0.0
WE Window & Door Demand (mil \$)	24000	27110	32550	37900	43850

**SAMPLE
 TABLE**

**Sample Profile,
 Table & Chart**

TABLE III-2
WORLD WINDOW & DOOR DEMAND BY PRODUCT
 (billion dollars)

Item	1996	2001	2006	2011	2016
Bldg Construct Expend (bil 2005\$)	362.6	418.8	552.8	687.8	862.5
\$ demand/000\$ bldg construction	2.2	2.4	2.5	2.6	2.7
Window & Door Demand	7.9	10.0	13.8	18.1	23.2
Doors	2.5	3.2	4.3	5.6	7.2
Wood	1.6	2.0	2.6	3.4	4.4
Metal	0.9	1.2	1.7	2.2	2.8
Plastic	0.0	0.0	0.0	0.0	0.0
Windows	5.4	6.8	9.5	12.5	16.0
Wood	3.5	4.4	6.1	8.1	10.5
Metal	1.9	2.4	3.4	4.4	5.5
Plastic	0.0	0.0	0.0	0.0	0.0
	8.5	11.4	17.1	23.2	31.6



COMPANY PROFILES

MI Windows and Doors Incorporated
 650 West Market Street
 Gratz, PA 17030
 717-365-
 http://w

Annual S
 Employ

Key Pro and impact-resistant windows

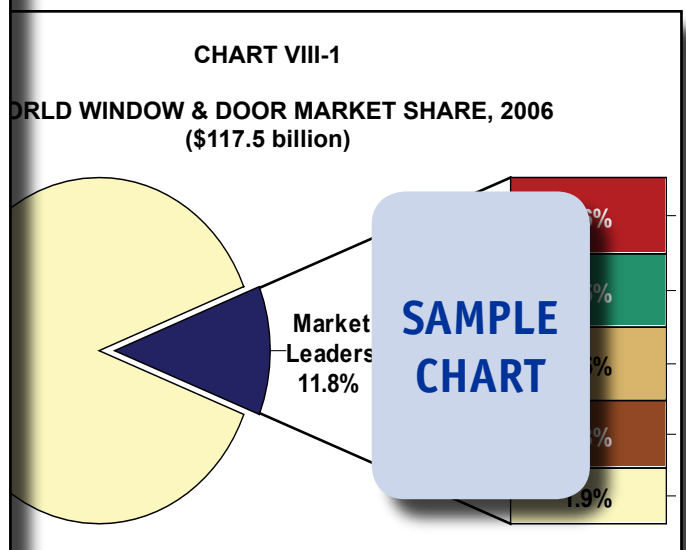
MI Windows and Doors is a privately held manufacturer of window and door products for the new construction and replacement markets. The Company fabricates its products from aluminum, vinyl and wood. MI Windows and Doors' parent company is JT Walker Industries Incorporated (Clearwater, Florida).

The Company manufactures aluminum, vinyl, cellular composite and impact-resistant windows in various models. Its products also include doors and patio doors.

Products -- MI Windows and Doors produces and markets windows under the BETTERBILT, HOMEMAKER II, ADMIRE and other brand names. The Company's BETTERBILT products include double extruded aluminum architectural windows, which feature multiple glass and grid options. The BETTERBILT line also includes REGAL VIEW aluminum sliding windows, which offer thermally broken extruded aluminum compositions, and baffled and offset weep systems.

MI Windows and Doors' HOMEMAKER II products include vinyl architectural windows that feature multichambered vinyl extrusion

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OTHER STUDIES

Windows & Doors in China

Demand for windows and doors (fenestration) in China will grow 11% annually through 2011. Gains will be driven by healthy growth in building construction, increased demand for larger living spaces, and further privatization of home ownership. Plastic fenestration will continue to supplant metal and wood types. This study analyzes the ¥115.6 billion Chinese fenestration industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates company market share and profiles major players.

#2258 10/2007..... \$4900

Composite & Plastic Lumber

US composite and plastic lumber demand will grow 10% yearly through 2011, based on performance advantages over wood. Wood-plastic composites will fare better than plastic lumber. Molding and trim will remain a key market while windows and doors, decking and other applications lead gains. This study analyzes the \$3.4 billion US composite and plastic lumber industry, with forecasts for 2011 and 2016 by material, application and market. It also evaluates company market share and profiles major players.

#2239 09/2007..... \$4500

World Insulation

Global consumption of thermal and acoustical insulation will reach 20.2 billion square meters in 2011. Developing Asian countries will continue to lead gains, driven by strong construction and manufacturing activity. Foamed plastic will remain dominant while mineral wool will grow the fastest. This study analyzes the \$26.5 billion world insulation industry with forecasts for 2011 and 2016 presented by material, market, world region and for 46 countries. It also evaluates market share and profiles major producers.

#2202 06/2007..... \$5500

Nanotechnology in Construction

US demand for nanomaterials in construction will reach \$100 million in 2011, and leap to \$1.75 billion by 2025. Coatings will be the largest application, followed by composites and concrete additives. Nanoscale silica, titanium dioxide, and clay will post substantial gains. This study analyzes the US market for nanomaterials in construction, with forecasts for 2011, 2016 and 2025 presented by product, application and market. It also considers market environment factors and profiles leading industry players.

#2185 05/2007..... \$4500

Windows & Doors

US window and door demand will grow 3.3% annually through 2010. The residential market will remain dominant, with the home improvement and repair segment leading gains. The nonresidential building market will grow the fastest. Plastic windows and doors will continue supplanting wood and metal products. This study analyzes the \$3.1 billion US window and door industry to 2010 and 2015 by material, market and region. It also evaluates company market share and profiles leading competitors.

#2144 01/2007..... \$4500

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