

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom Research, Related Studies, Corporate Use License 8](#)



World Windows & Doors

Industry Study with Forecasts for **2013 & 2018**

Study #2513 | June 2009 | \$6100 | 379 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Economic Performance	5
World Economic Outlook	8
World Demographic Overview	11
Population	12
Households	13
Personal Income Trends.....	15
World Building Construction Outlook.....	17
Residential	20
Nonresidential	22
Housing Quality.....	23
Pricing Patterns.....	25
Technology Trends.....	27
Legal & Regulatory Environment.....	29
General & Product Performance Considerations	29
Energy Considerations	31
Materials Considerations	32

WORLD SUPPLY & DEMAND

General	34
Window & Door Demand by Region	35
Relationship of Per Capita Income & Window & Door Demand.....	39
Window & Door Demand by Product	42
Doors	43
Wood	44
Metal.....	46
Plastic	48
Windows	50
Wood	51
Metal.....	53
Plastic	55
Window & Door Demand by Market.....	57
Residential Buildings	59
New Construction.....	60
Improvement & Repair.....	61
Nonresidential Buildings.....	61
New Construction.....	62
Improvement & Repair.....	63
World Window & Door Production.....	63
International Trade Flows.....	66

NORTH AMERICA

North America	69
Supply & Demand	70
Demand by Product & Market.....	73
United States	75
Canada	80
Mexico	84

WESTERN EUROPE

Western Europe.....	90
---------------------	----

Supply & Demand	91
Demand by Product & Market.....	95
Germany	97
France.....	102
United Kingdom.....	106
Spain	111
Italy	116
Netherlands	121
Other Western Europe	126

ASIA/PACIFIC

Asia/Pacific.....	133
Supply & Demand	135
Demand by Product & Market.....	139
China	141
Japan.....	147
India	152
South Korea	156
Australia.....	161
Taiwan	166
Indonesia	171
Other Asia/Pacific	176

OTHER REGIONS

Latin America.....	182
Supply & Demand	183
Demand by Product & Market.....	185
Brazil	188
Argentina.....	192
Other Latin America.....	197
Eastern Europe	203
Supply & Demand	204
Demand by Product & Market.....	206
Russia	209
Poland	213
Other Eastern Europe	218
Africa/Mideast.....	223
Supply & Demand	225
Demand by Product & Market.....	227
Turkey	229
Iran	233
Other Africa/Mideast.....	238

INDUSTRY STRUCTURE

General	243
Industry Composition	243
Market Share	246
YKK	246
Andersen	247
Jeld-Wen	247
JS Group	247
Masonite International	248
Other Leaders	248
Product Development & Manufacturing	249
Marketing & Distribution	251
Cooperative Agreements.....	253
Mergers & Acquisitions.....	256

COMPANY PROFILES

Andersen Corporation	261
Anglian Windows	269
ASSA ABLOY	271
Associated Materials	278
Atrium Companies	282
Builders FirstSource.....	286
Cardo AB	287
Champion Windows	290
Dalian Shide Group.....	292
Deceuninck NV	293
Fortune Brands	295
GEALAN Fenster-Systeme	299
Georgia Gulf.....	301
Griffon Corporation	304
Hoermann KG	307
HT Troplast	310
Inwido AB.....	313
Jeld-Wen Incorporated.....	316
JLL Partners	322
JS Group.....	324
LG Chem Limited.....	326
LG Hausys Limited.....	327
Marvin Companies	328
Masco Corporation.....	332
Masonite International	335
MI Windows and Doors.....	339
NorDan AS	341
Otto Fuchs KG.....	342
Panpan Security.....	345
Pella Corporation	346
Ply Gem Holdings.....	350
Reynaers Aluminium.....	354
Sanwa Holdings	357
ShenyangYuanda Aluminium Industry	361
VEKA AG	364
VKR Holding.....	367
Wayne-Dalton Corporation	370
Weather Shield Manufacturing	373
YKK Corporation.....	377

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region.....	11
2 World Population by Region.....	13
3 World Households by Region.....	15
4 World Per Capita GDP by Region	17
5 World Building Construction Expenditures by Region	19
Cht World Building Construction Expenditures by Region, 2008.....	20

(continued on next page)

List of Tables/Charts

(continued from previous page)

6 World Residential Building Construction Expenditures by Region21

7 World Nonresidential Building Construction Expenditures by Region23

8 World Window & Door Price Indices.....26

Cht Window & Door Price Changes, 1998-2018 ...27

WORLD SUPPLY & DEMAND

1 World Window & Door Demand by Region.....37

Cht World Regional Window & Door Demand, 2008 with Annual Growth Rates to 201338

Cht Gross Domestic Product Per Capita & Window & Door Demand Per Capita Relationship, 200841

2 World Window & Door Demand by Product....42

Cht World Window & Door Demand by Product, 2008.....43

3 World Wood Door Demand by Region46

4 World Metal Door Demand by Region48

5 World Plastic Door Demand by Region50

6 World Wood Window Demand by Region.....53

7 World Metal Window Demand by Region.....55

8 World Plastic Window Demand by Region57

9 World Window & Door Demand by Market59

10 World Window & Door Shipments by Region .65

Cht World Window & Door Shipments by Region, 2008.....65

11 World Window & Door Net Exports by Region 67

Cht Interregional Trade in Windows & Doors, 200868

NORTH AMERICA

1 North America -- Window & Door Supply & Demand71

Cht North America Window & Door Demand by Country, 2008 with Annual Growth Rates to 201372

2 North America -- Window & Door Demand by Type & Market.....74

3 United States -- Window & Door Supply & Demand77

4 United States -- Window & Door Demand by Type & Market.....79

5 Canada -- Window & Door Supply & Demand.82

6 Canada -- Window & Door Demand by Product & Market84

7 Mexico -- Window & Door Supply & Demand .87

8 Mexico -- Window & Door Demand by Product & Market89

WESTERN EUROPE

1 Western Europe -- Window & Door Supply & Demand93

Cht Western Europe Window & Door Demand by Country, 2008 with Annual Growth Rates to 201394

2 Western Europe -- Window & Door Demand by Product & Market96

3 Germany -- Window & Door Supply & Demand99

4 Germany -- Window & Door Demand by Product & Market101

5 France -- Window & Door Supply & Demand 104

6 France -- Window & Door Demand by Product & Market106

7 United Kingdom -- Window & Door Supply & Demand109

8 United Kingdom -- Window & Door Demand by Product & Market111

9 Spain -- Window & Door Supply & Demand .114

10 Spain -- Window & Door Demand by Product & Market116

11 Italy -- Window & Door Supply & Demand ..119

12 Italy -- Window & Door Demand by Product & Market121

13 Netherlands -- Window & Door Supply & Demand124

14 Netherlands -- Window & Door Demand by Product & Market.....126

15 Other Western Europe -- Window & Door Supply & Demand130

16 Other Western Europe -- Window & Door Demand by Product & Market.....132

ASIA/PACIFIC

1 Asia/Pacific -- Window & Door Supply & Demand137

Cht Asia/Pacific Window & Door Demand by Country, 2008 with Annual Growth Rates to 2013138

2 Asia/Pacific -- Window & Door Demand by Product & Market140

3 China -- Window & Door Supply & Demand .144

4 China -- Window & Door Demand by Product & Market146

5 Japan -- Window & Door Supply & Demand 149

6 Japan -- Window & Door Demand by Product & Market151

7 India -- Window & Door Supply & Demand .154

8 India -- Window & Door Demand by Product & Market156

9 South Korea -- Window & Door Supply & Demand159

10 South Korea -- Window & Door Demand by Product & Market161

11 Australia -- Window & Door Supply & Demand164

12 Australia -- Window & Door Demand by Product & Market166

13 Taiwan -- Window & Door Supply & Demand 169

14 Taiwan -- Window & Door Demand by Product & Market171

15 Indonesia -- Window & Door Supply & Demand174

16 Indonesia -- Window & Door Demand by Product & Market176

17 Other Asia/Pacific -- Window & Door Supply & Demand179

18 Other Asia/Pacific -- Window & Door Demand by Product & Market.....181

OTHER REGIONS

1 Latin America -- Window & Door Supply & Demand185

2 Latin America -- Window & Door Demand by Product & Market.....187

3 Brazil -- Window & Door Supply & Demand190

4 Brazil -- Window & Door Demand by Product & Market192

5 Argentina -- Window & Door Supply & Demand195

6 Argentina -- Window & Door Demand by Product & Market.....197

7 Other Latin America -- Window & Door Supply & Demand201

8 Other Latin America -- Window & Door Demand by Product & Market.....203

9 Eastern Europe -- Window & Door Supply & Demand206

10 Eastern Europe -- Window & Door Demand by Product & Market.....208

11 Russia -- Window & Door Supply & Demand211

12 Russia -- Window & Door Demand by Product & Market213

13 Poland -- Window & Door Supply & Demand216

14 Poland -- Window & Door Demand by Product & Market218

15 Other Eastern Europe -- Window & Door Supply & Demand221

16 Other Eastern Europe -- Window & Door Demand by Product & Market.....223

17 Africa/Mideast -- Window & Door Supply & Demand226

18 Africa/Mideast -- Window & Door Demand by Product & Market.....228

19 Turkey -- Window & Door Supply & Demand231

20 Turkey -- Window & Door Demand by Product & Market233

21 Iran -- Window & Door Supply & Demand...236

22 Iran -- Window & Door Demand by Product & Market237

23 Other Africa/Mideast -- Window & Door Supply & Demand240

24 Other Africa/Mideast -- Window & Door Demand by Product & Market.....242

INDUSTRY STRUCTURE

1 Window & Door Sales for Selected Manufacturers, 2008245

Cht World Window & Door Market Share, 2008..246

2 Selected Cooperative Agreements255

3 Selected Acquisitions & Divestitures258

[Click here to purchase online](#)

Window and door demand in China is forecast to rise nearly 12% annually to \$40 billion in 2013, when China is expected to surpass the US as the largest market for windows and doors.

Global demand to grow 4.3% yearly through 2013

Global demand for windows and doors (fenestration) is forecast to grow 4.3 percent per annum to \$167 billion in 2013, roughly one-half the pace achieved between 2003 and 2008. Much of this deceleration will be caused by projected declines in prices for plastic and metal windows and doors from their elevated 2008 level, but a weak outlook for building construction in the large West European market will also hinder gains. Demand in China will account for over one-half of market expansion between 2008 and 2013.

China to outpace all other major national markets

Window and door demand in China is forecast to rise nearly twelve percent annually to \$40 billion in 2013, outpacing all other major national markets. Although the rate of growth will slow from the pace of the 2003-2008 period (when demand tripled), the size of the gains will continue to increase. China's expansion will be driven by the rapid growth of building construction in that country, especially in the nonresidential market. In the next several years, China is expected to surpass the US as the largest market for windows and doors.

Other markets forecast to experience above average growth between 2008 and 2013 include India and Indonesia. Although window and door demand in



these countries is much smaller than that in China, relatively low per capita demand levels provide the potential for strong market expansion as incomes in both nations continue to rise.

The US was the largest national market for windows and doors in 2008, but its share of the global window and door market is being eroded by the rising emerging markets, especially China. US demand growth lagged that of most other advanced economies between 2003 and 2008, as housing construction fell precipitously from its 2005 peak. As building construction in the US recovers from its 2008 level, demand for windows and doors is forecast to increase 3.5 percent per year to \$35 billion in 2013.

Plastic fenestration to be fastest growing products

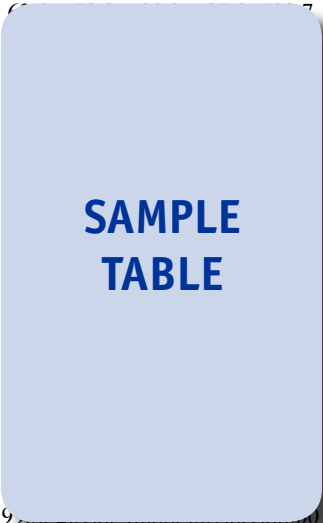
Plastic windows and doors are projected to be the fastest growing products through 2013; however, these products will only make up one-fifth of the global market. Gains will largely be driven by demand in China, where plastic products are gaining market share at the expense of metal products. Plastic materials have benefited from their relatively low cost and reduced maintenance requirements. However, their insulative properties are expected to be one of the most important contributors to their growth, as building owners around the world seek to reduce the energy consumed by climate control systems.

Sample Text, Table & Chart

TABLE VI-12

AUSTRALIA -- WINDOW & DOOR DEMAND BY PRODUCT & MARKET (million US dollars)

Item	1998	2003	2008	2013	2018
Building Construction (bil 2007US\$)	60.0	60.0	60.0	60.0	60.0
\$ demand/000\$ bldg construction					
Window & Door Demand					
By Product:					
Doors					
Wood					
Metal					
Plastic					
Windows					
Wood					
Metal					
Plastic					
By Market:					
Residential Building					
Nonresidential Building					
% Australia					
Asia/Pacific Window/Door Demand	19.0	19.0	19.0	19.0	19.0



ASIA/PACIFIC

Demand by Product & Market

Residential market accounted for two-thirds of Australian windows and doors in 2008. Although the market posted a decline between 1998 and 2003, residential construction activity rebounded between 2003 and 2008, resulting in weak residential demand for windows and doors in this latter period. Going forward, residential construction activity is expected to improve, and the residential market for windows and doors is projected to reach 1.5 billion US dollars by 2018, slightly slower than the overall market. In contrast to the residential market, commercial doors performed better during the 1998-2003 period. In the latter period, economic growth spurred nonresidential construction activity. Consequently, the nonresidential market is forecast to grow less than the residential market.



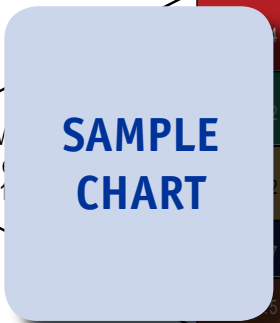
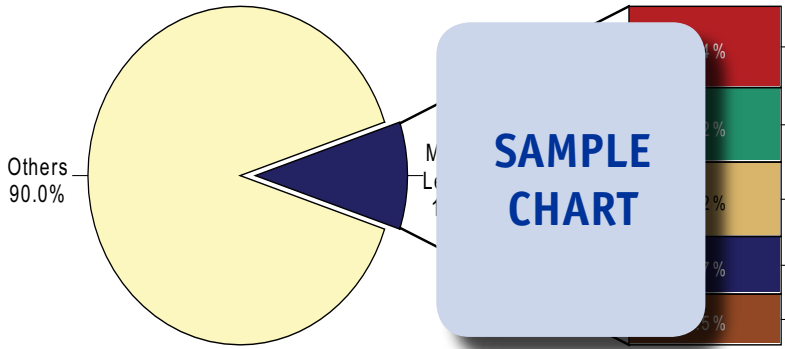
million in 2013, a sharp deceleration from the pace of growth achieved between 2003 and 2008.

Although Australia encompasses a range of climates, most of the population is concentrated on the east coast where the climate ranges from temperate to subtropical. Metal products account for the largest share of both doors and windows in Australia. Demand for metal products is driven by their superior resistance to such damaging factors as tropical storms and insects. However, plastic products made significant inroads into the Australian market over the 1998-2008 period, and are expected to continue to be the fastest growing window type through 2013.

Copyright 2009 The Freedonia Group, Inc.

CHART VIII-1

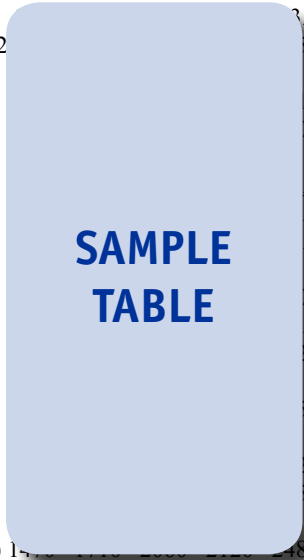
WORLD WINDOW & DOOR MARKET SHARE, 2008 (\$135.6 billion)



Sample Profile, Table & Forecast

TABLE VI-11
AUSTRALIA -- WINDOW & DOOR SUPPLY & DEMAND

Item	1998	2003	2008	2013	2018
Population (millions)					23.3
GDP/capita	22,000	27,000	32,000	37,000	40,000
Gross Domestic Prdct (bil 2007 US\$)	480	720	960	1,200	1,330
\$ bldg construction/000\$ GDP	1.9	2.0	2.1	2.2	2.3
Building Construction (bil 2007 US\$)	91	144	202	264	306
Residential	67	103	143	190	227
Nonresidential	24	41	59	74	79
\$ demand/capita	19	20	21	22	23
\$ demand/000\$ GDP	0.5	0.5	0.5	0.5	0.5
\$ demand/000\$ bldg construction	0.3	0.3	0.3	0.3	0.3
Window & Door Demand (mil US\$)	180	216	242	269	284
- imports	20	24	27	29	31
+ exports	10	12	14	15	16
Window & Door Shipments (mil US\$)	170	204	228	254	268



COMPANY PROFILES

GEALAN Fenster-Systeme GmbH
 Hofer Strasse 80
 95145 Oberkotzau
 Germany
 49-9286-77-0
 http://www.gealan.com

SAMPLE PROFILE

Annual Sales: 100 million US\$ (2008)
 Employees: 1,000 (2008)
 Key Products: extruded and sliding windows

GEALAN produces vinyl profiles for windows and doors, shutter systems, foil laminates and construction products. The Company's operations include extrusion, coextrusion, tool construction for vinyl extrusion and dry-blend composition.

The Company makes a wide variety of profiles for windows and doors, as well as sliding doors and windows. GEALAN sells vinyl profiles under the S 3000, S 7000 IQ, S 8000 IQ and S 7000 PASSIVE HOUSE tradenames for residential end uses. The S 3000 profiles are constructed with steel frame and casing reinforcements, narrow heights and a curved appearance. The Company's S 7000 IQ profiles offer improved heat insulation and stability, and narrow optic surfaces. The S 8000 IQ profiles from GEALAN feature four-, six- or seven-chamber designs, as well as the Company's proprietary GECCO 3 ventilation system, which provides controlled air exchange between the interior and exterior. These window profiles include a French casement assembly system. In March 2009, the Company introduced GECCO 4 ventilation systems. These ventilation systems are independent elements

299 Copyright 2009 The Freedonia Group, Inc.

"The market for windows and doors in Australia was US\$2.1 billion in 2008. As a relatively small, high income nation, Australia's per capita window and door demand is among the highest in the world, but in 2008 the nation's demand only accounted for four percent of the Asia/Pacific total. The Australian market for windows and doors is projected to expand less than one percent per year to US\$2.2 billion in 2013."

--Section VI, pg. 162

OTHER STUDIES

World Siding (Cladding)

This study analyzes the world siding industry. It presents historical demand data for 1998, 2003 and 2008 and forecasts to 2013 and 2018 by siding product (e.g., brick and tile, stucco and EIFS, concrete and stone, fiber cement, vinyl, metal, wood), market (e.g., residential buildings, nonresidential buildings, new construction, improvement and repair), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2498 06/2009..... \$5800

Construction Outlook in China

Construction spending in China is forecast to grow 8.1% yearly through 2013. Nonbuilding construction will rise at the fastest pace based on government efforts to modernize the transportation and utility infrastructure. Nonresidential building will remain the largest segment based on ongoing industrialization and institutional modernization. This study analyzes the 5.6 trillion yuan construction industry in China, with forecasts for 2013 and 2018 by type and region. It also evaluates market share and profiles industry participants.

#2507 05/2009..... \$5200

Windows & Doors

US demand for windows and doors will reach \$40 billion in 2012, a slowdown from the 2002-2007 pace. Demand for more costly products that enhance home security and energy efficiency will promote value gains in the key residential market. Plastic will be the fastest growing window and door material overall, while wood remains the largest. This study analyzes the US window and door industry, with forecasts for 2012 and 2017 by material, type, market and region. It also details market share and profiles industry players.

#2406 11/2008..... \$4800

World Flat Glass

Global demand for flat glass will rise 5.5% annually through 2012, spurred by a healthy building construction environment and rapid growth in newer flat glass technologies. Developing countries in Asia (especially China and India), Latin America, Eastern Europe and the Africa/Mideast region will show the strongest advances. This study analyzes the \$52.6 billion world flat glass industry, with forecasts for 2012 and 2017 by market, world region and for 21 countries. It also evaluates company market share and profiles industry players.

#2399 09/2008..... \$5800

Advanced Flat Glass

Demand for advanced flat glass in the US will grow 5% annually through 2012. Ongoing rapid growth in a variety of emerging technologies (e.g., smart glass, self-cleaning glass) and strong gains in laminated glass used as hurricane glass, ballistic glass and burglary resistant glass will help drive gains. This study analyzes the \$5.6 billion US advanced flat glass industry, with forecasts for 2012 and 2017 by product and market. It also considers market environment factors, profiles industry competitors and evaluates their market share.

#2342 06/2008..... \$4500

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)