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Windows & Doors

US Industry Study with Forecasts for **2014 & 2019**

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An expected recovery in new home construction will boost the residential market for windows and doors through 2014, even as housing completions remain below 2006 levels.

US demand to rise 6.6% annually through 2014

Demand for windows and doors in the US is forecast to rise 6.6 percent per year to \$31.2 billion in 2014, a rebound from the 2004-2009 period, when demand fell 4.3 percent annually, reflecting the collapse of the housing market between 2007 and 2009. Although housing completions will remain below the level reached at their cyclical peak in 2006, the recovery in new home construction will fuel above-average gains in the residential market for windows and doors through 2014.

Plastic windows & doors to see most rapid growth

Among material types, plastic windows and doors will see the most rapid growth through 2014, advancing over ten percent per year to \$7.4 billion. Gains will be spurred by rising demand for fiberglass entry doors, which will take market share from wood and steel entry doors. Fiberglass doors are less costly, more aesthetically pleasing and more energy-efficient than steel doors. While traditionally wood doors were seen as more attractive than those made from fiberglass, improvements in processing techniques have enabled manufacturers to make fiberglass that more closely resembles wood. Further gains for plastic windows and doors will be supported by continuing demand for vinyl windows because of their low cost, durability, minimal maintenance requirements and superior energy efficiency.

US Window & Door Demand, 2009 (\$20.9 billion)



Metal windows & doors to remain largest segment

Metal windows and doors accounted for the largest share of window and door demand in 2009, overtaking wood products, which saw their share of the market decline due to the steep drop in spending on residential building construction, where wood windows and doors are most commonly used. Metal windows and doors are expected to continue to lead the market in 2014. Rebounding housing activity will drive gains. Moreover, population growth in the South and West, where metal products are most often installed, will also spur advances. Homeowners concerned with preventing storm dam-

age, such as those in coastal regions, will continue to install metal windows and doors. Demand will also be supported by the nonresidential market, where metal products are preferred due to their low cost and durability.

Demand for wood windows and doors is forecast to rise 7.2 percent per year to \$10.9 billion in 2014. The rebound in residential building construction activity will drive gains, especially in the high-end housing market. Wood windows and doors are seen as aesthetically pleasing products that add value to a home. However, strong plastic window and door demand, which is taking share from wood, will prevent wood products from overtaking metal products.

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Sample Text, Table & Chart

METAL

Demand by Material

Aluminum is the dominant material used to make metal accounting for 94 percent of demand in 2009. Among the characteristics of aluminum that make it well suited for use in windows is its strength-to-weight ratio, low maintenance requirements, resistance to corrosion and fire, and the ability to be extruded into the complex shapes required to produce varying window designs. The use of aluminum windows has also been supported by the use of factory-baked finishes or vinyl coatings to improve the aesthetics of the material. These helps encourage the use of aluminum windows in residential construction applications, where there is significant competition from plastic and wood windows.

Demand for aluminum and other metal windows is projected to advance to \$9 billion in 2014. Growth is driven by new completions and residential improvement and replacement of depressed 2009 bases. Aluminum windows are used in building construction applications because of their strength and durability. Moreover, their light weight facilitates installation and consideration for home builders and remodelers. Aluminum windows are used in commercial and continued institutional construction to support advances, as the durability and corrosion resistance of aluminum windows make them a popular choice for building structures.

Steel windows are expected to offer competitive prices through 2014. However, steel windows will lag those of aluminum windows primarily due to consumer perception of the performance benefits of aluminum being superior to those of steel windows. Moreover, aluminum windows, especially in the residential market, will opt for vinyl windows, which are seen as being more environmental

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SAMPLE TEXT

TABLE V-1

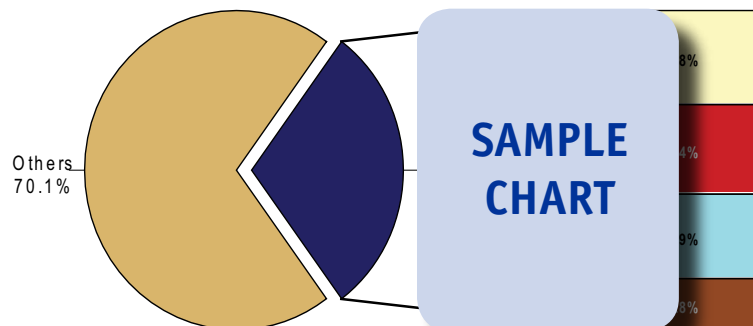
WOOD WINDOW & DOOR SUPPLY & DEMAND (million dollars)

Item	1999	2004	2009	2014	2019
Residential Building Constr (bil 2005\$)	140	140	140	140	140
\$ window & door/000\$ construction	1.2	1.2	1.2	1.2	1.2
Wood Window/Door Dmnd (mil '05\$)	10	10	10	10	10
price deflator (2005=100)	100	100	100	100	100
Window & Door Demand % wood	20	20	20	20	20
Wood Window & Door Demand	10	10	10	10	10
Doors	10	10	10	10	10
Windows	10	10	10	10	10
Other Products	10	10	10	10	10
- imports	10	10	10	10	10
+ exports	10	10	10	10	10
Wood Window & Door Shipments	90	90	90	90	90

SAMPLE TABLE

CHART IX-1

US WINDOW & DOOR MARKET SHARE BY COMPANY (\$22.7 billion, 2009)

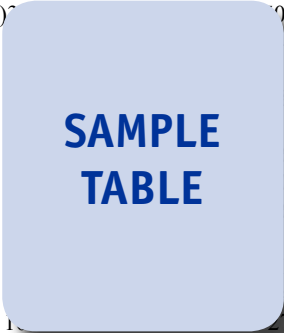


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-2
PLASTIC DOOR DEMAND BY MARKET
 (million dollars)

Item	1999	2004	2009	2014	2019
Residential Building Construction (bil \$) \$ plastic doors/000\$ construction					
Plastic Door Demand					
Residential:					
New					
Improvements & Repairs					
Nonresidential:					
New					
Improvements & Repairs					



COMPANY PROFILES

ODL Incorporated
 215 East Roosevelt Avenue
 Zeeland, MI 49464
 616-772-9111
 http://www.odl.com

Annual Sales:
 Employment:

Key Products: tubular skylight accessories,

ODL is a manufacturer of a variety of windows and window and door accessories, including decorative windows and door glass, traditional skylights, tubular skylights, retractable screens, blinds and shades. The Company is privately held.

The Company is involved in the US window and door industry through the manufacture and sale of decorative windows, clear and decorative door glass, tubular skylights and entry treatments. ODL's decorative windows feature a high level of opacity, can be installed horizontally or vertically, and are available in eight designs and a number of sizes. The Company's ODL clear door glass products are supplied as two panels of tempered safety glass. This glass is available in many shapes and sizes with various low-maintenance internal or external grille options. ODL's decorative door glass is offered in a number of styles sold through the CLASSIC, CONTEMPORARY, OLD WORLD and CARFTSMAN collections. Additionally, the Company manufactures ARCHITECTURAL ELEMENTS door glass, which features fluted moldings and corner medallions. Frame options for ODL's door glass include ODL SMARTFRAME, SEVERE WEATHER and screw frames. ODL SMARTFRAME frames are characterized by a

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"US demand for windows and doors is projected to advance 6.6 percent per year to \$31.2 billion in 2014. Plastic products' increasing popularity will drive gains going forward. In the Northeast and Midwest, vinyl windows and fiberglass doors will see solid growth, as homeowners replace older wood and metal windows and doors with more efficient plastic varieties. The older housing stock of these regions will boost demand in the improvement and repair market."
 --Section VIII, pg. 269

OTHER STUDIES

Advanced Flat Glass

US advanced flat glass demand will rise 11.6% annually through 2014, driven by a rebound in residential construction and motor vehicle production. Consumption will also benefit from increasing market penetration of low-emissivity glass, heads-up display windshields, electrochromic mirrors, smart glass and other products. This study analyzes the \$4.1 billion US advanced flat glass industry, with forecasts for 2014 and 2019 by type and market. It also evaluates company market share and profiles industry players.
 #2674December 2010 \$4800

World Housing

Global demand for new housing will rise 3% yearly to 2014. North America, Western Europe and Japan will grow the fastest from steep recent declines. Among developing areas, the Asia/Pacific region will build the most new units while the Africa/Mideast region grows the fastest. The global housing stock will rise 1.8% yearly. This study analyzes the 1.9 billion unit world housing industry, with forecasts for 2014 and 2019 by type, world region and for 22 countries. It also considers market environment influences on demand.
 #2692September 2010..... \$5300

Siding

Demand for siding in the US is forecast to grow 6.5% annually through 2014, driven by a rebound in housing completions from depressed levels in 2009. Fiber cement, stucco and brick siding will see the most rapid advances. Vinyl siding will remain the largest segment and will continue to supplant wood. This study analyzes the 74 million square US siding industry, with forecasts for 2014 and 2019 by material, market and US region. It also evaluates company market share and profiles industry players.
 #2523April 2010 \$4900

Extruded Plastics

US demand for extruded plastics is forecast to expand 2.6% yearly through 2013, supported by a turnaround in the housing market. PVC will remain the largest segment, and will be one of the fastest growing. Slower advances for LDPE will reflect saturated film and sheet applications in packaging. Extruded polypropylene will grow the fastest. This study analyzes the 30 billion pound US extruded plastics industry, with forecasts for 2013 and 2018 by resin and market. It also evaluates company market share and profiles industry players.
 #2566December 2009 \$4700

World Windows & Doors

Global window and door demand will grow 4.3% yearly through 2013. China will claim over half of gains based on rapid growth in nonresidential building construction, and will surpass the US as the largest market. India and Indonesia will also grow at above average rates. Plastic windows and doors will grow the fastest. This study analyzes the \$136 billion world window and door industry, with forecasts for 2013 and 2018 by product, market, world region and for 22 countries. It also details market share and profiles industry players
 #2513June 2009 \$6100

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