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World Windows & Doors

Industry Study with Forecasts for **2015 & 2020**

Study #2790 | October 2011 | \$6300 | 368 pages

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The residential building construction market will outpace nonresidential demand as in most developed countries residential demand was far more adversely impacted by the 2009-2010 recession.

World demand to rise 6.8% annually through 2015

Global demand for windows and doors is forecast to rise 6.8 percent per year through 2015 to \$192 billion, significantly exceeding the pace of growth registered between 2005 and 2010. Gains will be exaggerated by an extremely weak 2010 base in the developed world, particularly in the US. Demand for windows and doors in the residential building construction market will outpace demand in the nonresidential building construction market as in most developed countries the residential market was far more adversely impacted by the recession in 2009 and 2010.

China to expand position as largest market, but at a slower pace

China, the world's largest national window and door market, will expand its share of global demand from 27 percent in 2010 to 30 percent in 2015. Continuing rapid economic growth and industrialization, as well as an increase in the average size of a housing unit in the country, will bolster gains. Although demand for windows and doors in China will expand at a robust 9.2 percent per year, this will represent a major slow-down in comparison to the performance of the past decade.

The US market for windows and doors will post a strong recovery and expand 7.7 percent per year through 2015, after

World Window & Door Demand (\$138 billion, 2010)



Asia/Pacific
45%

Western Europe
23%

North America
20%

Other Regions
12%

photo: Just UPVC Doors, Ltd.

declining by around 25 percent between 2008 and 2010 when the country experienced a major economic recession that was spurred by the downturn in the housing sector. Demand in Japan and Western Europe will also post solid recoveries after declines in 2009 and 2010, although neither experienced problems as significant as the US did in those years.

Plastic to be fastest growing material

Plastic is projected to be the fastest growing material for window and door products through 2015. 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. Plastic windows will account for 37 percent of global window demand in 2015. Further gains will be spurred by rising demand for plastic materials in the smaller door segment. In particular, fiberglass entry doors will capture market share from wood and steel entry doors. Fiberglass doors are less expensive, more aesthetically pleasing and more energy-efficient than steel doors. Traditionally, wood doors were seen to be more attractive than fiberglass doors; however, improvements in processing techniques have enabled manufacturers to make fiberglass that more closely resembles wood.

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**Sample Text,
 Table & Chart**

ASIA/PACIFIC

China: Demand by Product & Market

New construction activity accounts for a sizable majority of window and door demand in China in both the residential and nonresidential markets. This reflects the Chinese government's focus in improving infrastructure through the construction of schools, hospitals and roads, as well as increasing urbanization and income growth necessitating expansion in new housing construction. Through 2015, the residential sector will outpace the nonresidential sector, although both sectors are expected to do very well in comparison to the world average. Besides new construction, window and door demand will also be supported by replacement activity that utilize more windows and doors. Replacement activity is expected to be supported by concerns over energy efficiency in buildings and building codes which will require the use of more technologically-advanced products.

**SAMPLE
 TEXT**

Wood is the traditional type for windows and doors in both residential and nonresidential applications in China. Although traditionally dominated window and door applications, metal (steel and then aluminum) has become the leading material (especially for windows and entrance doors) over the last three decades, primarily due to a government mandate enacted in the early 1980s that required the use of wood in building construction. Metal windows and doors now also account for the majority of the existing window and door stock in China.

After largely disappearing from the market between the 1980s and the 1990s, wood products are starting to once again penetrate the market, primarily benefiting from rising demand for high-end luxury residential homes where wood windows are often preferred for aesthetic reasons. Wood still maintains a strong foothold in the higher-value end of the market segment.

140

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TABLE VI-4

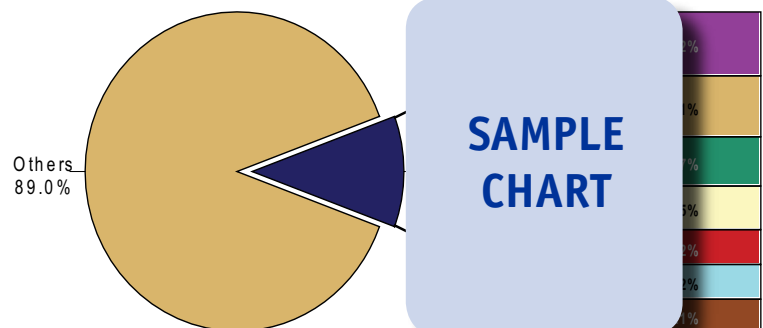
**CHINA: WINDOW & DOOR DEMAND BY PRODUCT & MARKET
 (million dollars)**

Item	2000	2005	2010	2015	2020
Building Construction Expend (bil 2009\$)	1,570	2,000	2,500	3,000	3,500
\$ demand/000\$ building construction	0.04	0.05	0.06	0.07	0.08
Window & Door Demand	0	0	0	0	0
By Product:					
Windows	0	0	0	0	0
Wood	0	0	0	0	0
Metal	0	0	0	0	0
Plastic	0	0	0	0	0
Doors	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
New Construction	0	0	0	0	0
Improvement & Repair	0	0	0	0	0
Nonresidential Building	0	0	0	0	0
New Construction	0	0	0	0	0
Improvement & Repair	0	0	0	0	0
% China	0.04	0.05	0.06	0.07	0.08
Asia/Pacific Window & Door Demand2000	1,570	2,000	2,500	3,000	3,500

**SAMPLE
 TABLE**

CHART VIII-1

**WORLD WINDOW & DOOR MARKET SHARE BY COMPANY
 (\$138 billion, 2010)**



**SAMPLE
 CHART**

**Sample Profile,
 Table & Forecast**

**TABLE VI-3
 CHINA: WINDOW & DOOR
 SUPPLY & DEMAND**

Item	2000	2005	2010	2015	2020
Population (millions)					1.37
GDP/capita					1,000
Gross Domestic Product (bil 2009\$)					5,000
\$ bldg constr/000\$ GDP					0.09
Bldg Construction Expend (bil 2009\$)					450
Residential					300
Nonresidential					150
\$ windows & doors/capita					0.02
\$ windows & doors/000\$ GDP					0.00
\$ windows & doors/000\$ bldg constr					0.04
Window & Door Demand (mil \$)					900
- imports					0
+ exports					0
Window & Door Shipments (mil \$)					900

**SAMPLE
 PROFILE**

**SAMPLE
 TABLE**

COMPANY PROFILES

GEALAN Fenster-Systeme GmbH

Hofer Straße 80
 95145 Oberkotzau
 Germany
 49-9286
 http://www

Sales: \$ (y)
 Employe (y)

Key Products: Sliding doors and windows, and

GEALAN is a privately owned producer of vinyl profiles for windows and doors, shutter systems and ventilation products. In February 2011, AXA Private Equity (France), a subsidiary of AXA Funds Management SA (Luxembourg), sold its majority stake in the Company to Halder Beteiligungsberatung GmbH (Germany), a subsidiary of Gimv NV (Belgium).

The Company produces 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 IQ PASSIVE HOUSE brand names 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 five-, 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. In December 2010, the Company introduced the GECCO 5 ventilation system, which is intended to regulate the exchange

"... per capita window and door demand in China is only one-third the size of Western Europe's per capita window and door demand, reflecting China's relatively low average income levels. Rising incomes and continuing industrialization efforts will drive gains in the future. Demand for windows and doors in China is forecast to grow 9.2 percent per year through 2015 to \$58 billion."

--Section VI, pg. 138

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OTHER STUDIES

Wall Coverings

US demand for wall coverings is projected to advance 8.2 percent annually through 2015, from a weak 2010 base. Wall panels will remain the dominant product type and grow the fastest, with finished gypsum board panels and solid wood panels seeing the best gains. The residential market will outpace the nonresidential sector. This study analyzes the \$1.4 billion US wall covering industry, with forecasts for 2015 and 2020 by product, market and US region. The study also evaluates company market share and profiles industry players.

#2759 July 2011 \$4800

Windows & Doors in China

Demand for windows and doors in China is forecast to rise 7.7 percent annually through 2014. Doors, the smaller segment, will slightly outpace windows; among materials, plastic and wood will outpace metal. The nonresidential market will grow faster than the residential. This study analyzes the 251 billion yuan window and door industry in China. It presents historical demand data and forecasts for 2014 and 2019 by window and door material, market and region. The study also evaluates company market share and profiles industry participants.

#2760 June 2011 \$5300

Molding & Trim

US demand for molding and trim is forecast to grow ten percent annually through 2014, driven by a rebound in new residential construction expenditures. Despite competition from plastics and wood-plastic composites, wood will remain the leading material. Other products such as exterior trim will outpace molding and stairwork. This study analyzes the \$6.3 billion US molding and trim industry, with forecasts for 2014 and 2019 by material, product and market. It also evaluates company market share and profiles industry players.

#2729 February 2011 \$4900

World Flat Glass

Global flat glass demand will rise six percent yearly through 2014. Gains will be spurred by ongoing robust growth in the Asia/Pacific region, and by recovery in the building construction and motor vehicle industries of North America and Western Europe. Fabricated flat glass will benefit from rapid growth in more expensive products. This study analyzes the 6.1 billion square meter world flat glass industry. It presents forecasts for 2014 and 2019 by market, world region and for 21 major countries. It also evaluates company market share and profiles industry players.

#2715 January 2011 \$6200

Windows & Doors

US window and door demand will rise 6.6 percent yearly through 2014. Plastic products will grow the fastest, driven by fiberglass entry doors and vinyl windows. Metal windows and doors will remain the top segment, supported by population growth in the South and West and by efforts in coastal regions to prevent storm damage. This study analyzes the \$22.7 billion US window and door industry with forecasts for 2014 and 2019 by material, market and region. It also evaluates company market share and profiles industry players.

#2699 November 2010 \$5100

About The Freedonia Group

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