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Windows & Doors

US Industry Study with Forecasts for **2016 & 2021**

Study #2949 | September 2012 | \$5300 | 468 pages

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INDUSTRY STRUCTURE

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Growth in US window and door demand through 2016 will be spurred by a rebound in housing completions and gains in building construction spending from a depressed 2011 base.

US demand to rise 10% annually through 2016

Demand for windows and doors in the US is forecast to rise 10 percent per year to \$34.2 billion in 2016. Growth will be spurred by a rebound in housing completions and gains in building construction spending from a depressed 2011 base. From 2006 to 2011, both housing completions and construction expenditures dropped precipitously, causing window and door demand to experience a similar decline.

Residential market to rebound and post double-digit annual gains

Aided by the rebound in construction spending, the residential market is forecast to post double-digit annual advances in demand for windows and doors through 2016. Builders will incorporate such value-added products as windows with triple-pane insulated glazing and doors with insulated cores to promote energy efficiency, boosting value growth. Residential improvement and repair demand for windows and doors is forecast to advance at a more modest pace. Many homeowners concerned with rising energy costs took advantage of tax credits offered between 2009 and 2011 to replace older windows and doors with newer, more energy efficient models. Such homeowners will be unlikely to engage in further window and door renovation projects in the near future.

US Window & Door Demand, 2016 (\$34.2 billion)



Metal
41%

Wood
30%

Plastic
29%

photo: Andersen Corporation

Plastic windows & doors to see the fastest gains

Among material types, plastic windows and doors will see the fastest gains through 2016, advancing nearly 12 percent per year to \$9.8 billion. Growth will be driven by continuing demand for plastic products because consumers perceive them as energy efficient and providing a high degree of value. Plastic windows and doors have taken market share from wood and metal products in recent decades and will continue to do so over the forecast period. Vinyl windows and fiberglass doors are relatively inexpensive, but offer such performance properties as durability and minimal maintenance requirements.

Metal windows and doors accounted for the largest share of window and door demand in 2011, and are expected to continue to lead the market in 2016. Rebounding housing activity will spur gains, especially in the South and West. Increasing nonresidential building construction spending will also boost metal window and door demand. Metal products are often installed in nonresidential structures because of their durability and low cost. Demand for wood windows and doors will grow at a double-digit annual rate, but be checked by competition from plastic windows and doors, which provide superior energy efficiency and durability at lower cost.

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Sample Text, Table & Chart

PLASTIC

Plastic Prime Windows -- Plastic prime windows in window types except storm windows, skylights, roof window decorative windows. Demand for plastic prime windows is dominated by double-hung and casement windows, which combined to 81 percent of demand in 2011. The principal end use for plastic prime is the residential replacement market, where plastic prime windows already hold a majority share in unit terms. However, the residential market is forecast to see the strongest gains through 2016 by rebounding housing completions. Moreover, building codes for homes to be more energy efficient will cause builders to switch to fiberglass windows.

Double-hung windows consist of two vertically moving sashes located in separate grooves in the side jambs. Each sash opens a different part of the window area, allowing a maximum vertical opening of one-half of the total window area. In comparison to casement windows, double-hung types have a more traditional appearance. Double-hung windows accounted for the largest share of plastic prime window demand in 2011. Demand for double-hung windows is forecast to grow nearly 10 percent to \$1.5 billion in 2016. Advances will be spurred by residential building construction activity. Gains will also be driven by consumer preferences for these windows. Double-hung windows are easier to clean, an important consideration for homeowners. Moreover, double-hung windows are more energy efficient than casement windows.

Demand for plastic prime windows is forecast to add 1.5 percent to the total window market in 2016. Demand for these windows, which accounted for the second largest share of the plastic prime window market in 2011, will be supported by increasing consumption in casement windows. Homeowners and designers select these windows because they can be opened to allow more airflow than double-hung windows.

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**SAMPLE
TEXT**

TABLE V-1

WOOD WINDOW & DOOR SUPPLY & DEMAND (million dollars)

Item	2001	2006	2011	2016	2021
Residential Bldg Construction (bil 2005\$)	100	100	100	100	100
\$ window & door/000\$ construction	100	100	100	100	100
Wood Window/Door Demand (mil 2005\$)	100	100	100	100	100
price deflator (2005=100)	100	100	100	100	100
Window & Door Demand % wood	20	20	20	20	20
Wood Window & Door Demand	100	100	100	100	100
Doors	100	100	100	100	100
Windows	100	100	100	100	100
Other Products	100	100	100	100	100
- imports	100	100	100	100	100
+ exports	100	100	100	100	100
Wood Window & Door Shipments	90	90	90	90	90

**SAMPLE
TABLE**

CHART IX-1

US WINDOW & DOOR MARKET SHARE BY COMPANY, 2011 (\$21.3 billion)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VIII-6
NORTHEAST WINDOW & DOOR DEMAND
 (million dollars)

Item	2001	2006	2011	2016	2021
Northeast Construction (bil \$)					
\$ windows & doors/000\$ constructi					
Northeast Window & Door Demand					
By Subregion:					
New England					
Middle Atlantic					
By Market:					
Residential					
Nonresidential					
% Northeast Window & Door Demand					



COMPANY PROFILES

Champion Windows Manufacturing Incorporated
 12121 Champion Way
 Cincinnati, OH 45241
 513-346-
 http://w

Annual S
 Employ

Key Pro and steel patio doors,
 and steel

SAMPLE PROFILE

Champion Windows Manufacturing is a privately held producer and installer of building products, including vinyl replacement windows, vinyl and steel patio doors, fiberglass and stainless steel entry doors, vinyl siding, and patio rooms. These products are sold under the CHAMPION brand name.

The Company is active in the US window and door industry through the production and sale of vinyl replacement windows, vinyl and steel patio doors, and steel and fiberglass entry doors. Champion Windows Manufacturing makes CHAMPION vinyl replacement windows in double-hung, casement, slider, picture, bay, bow, garden, and shaped types. In addition, the company's vinyl replacement windows include COLORBOND colored and TIMBERBOND woodgrain finish windows. The Company's windows feature Champion Windows Manufacturing's COMFORT 365 argon enhanced and insulated glass for thermal efficiency and ultraviolet protection. Additional standard features on CHAMPION windows include stainless steel constant force balances, heavy duty pile weatherstripping, foam enhanced insulated vinyl frames, dual self-storing ventilation latches, and 12 point fusion welded sashes and frames. Moreover, the Company offers optional

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"Window and door demand in new housing is forecast to grow almost 18 percent annually to \$14.3 billion in 2016. Advances will be driven by the rebound in housing completions. The single-family segment will lead gains, as these structures use windows and doors the most intensively. New residential demand for windows and doors will also be boosted by design trends. For instance, homeowners desire such amenities as multiple bathrooms, walk-in closets, and such specialty rooms as home offices and home theaters."
 --Section VII, pg. 215

OTHER STUDIES

World Housing

New housing construction will reach 60.5 million units in 2016, an increase of 3.5 percent per annum. Most new units will be built in developing countries, where population and housing growth will be the strongest. Multifamily housing units will outpace single-family units. This study analyzes the 50.7 million unit world housing industry, with forecasts for 2016 and 2021 by type, world region and for 22 major countries. The study also considers market environment factors such as world economic and demographic trends, and housing construction expenditures.

#2942 September 2012..... \$5500

World Drywall & Building Plaster

Worldwide sales of drywall will rise 8.6 percent annually through 2016 to 10.7 billion square meters, with China and the US claiming most new demand. The residential market will outpace its nonresidential counterpart. Global building plaster demand will rise 5.8 percent annually to 37.4 million metric tons in 2016. This study analyzes the world drywall and building plaster industry, with forecasts for 2016 and 2021 by product, market, world region and for 23 major countries. The study also evaluates company market share and profiles industry participants.

#2924 August 2012..... \$6100

Siding

Demand for siding in the US is forecast to advance 8.4 percent per year through 2016 to 96.5 million squares. Brick, stucco and fiber cement siding will see the most rapid demand gains. The South and West regions -- where these materials are most often installed -- are forecast to see the strongest growth in population and housing activity. This study analyzes the 64.5 million square US siding industry, with forecasts for 2016 and 2021 by siding material, market and US region. The study also evaluates company market share and profiles industry players.

#2875 April 2012 \$5100

Insulation

US demand for insulation is forecast to rise 7.8 percent annually to \$8.9 billion in 2016. The residential market will post the most rapid gains, advancing at a double-digit pace as housing starts rebound. Fiberglass insulation will remain the market leader, while radiant barrier/reflective insulation and cellulose grow the fastest from smaller bases. This study analyzes the \$6.1 billion US insulation industry, with forecasts for 2016 and 2021 by product, market and US geographic region. The study also evaluates company market share and profiles industry players.

#2858 March 2012..... \$5100

World Windows & Doors

Global demand for windows and doors is forecast to rise 6.8 percent annually through 2015. Gains will be exaggerated by an extremely weak 2010 base in the developed world, particularly in the US. The residential building construction market will outpace the nonresidential building construction market. This study analyzes the \$138 billion world window and door industry, with forecasts for 2015 and 2020 by product, market, world region and for 22 major countries. The study also evaluates company market share and profiles industry players.

#2790 October 2011 \$6300

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:

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