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World Windows & Doors

Industry Study with Forecasts for **2017 & 2022**

Study #3039 | June 2013 | \$6400 | 376 pages

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Growth will be driven by recoveries in the building construction markets of many developed countries, although gains will be somewhat exaggerated by a weak 2012 base, particularly in the US.

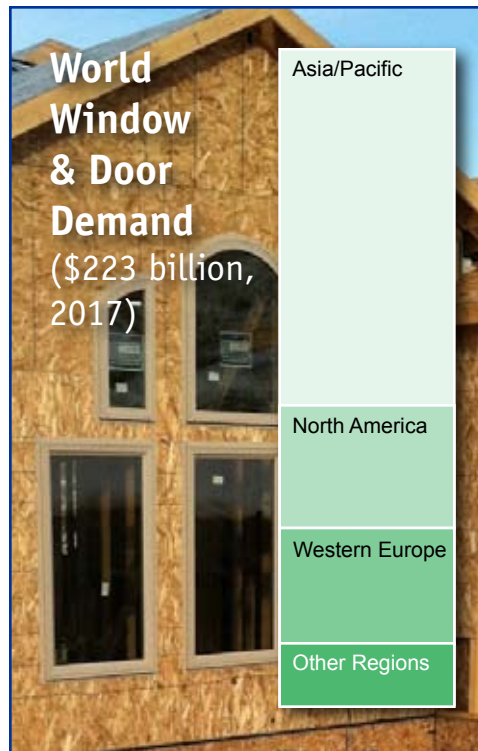
World demand to rise 7.1% annually through 2017

Through 2017, global demand for windows and doors is expected to rise 7.1 percent annually to \$223 billion, significantly exceeding the growth rate of the 2007-2012 period. Growth will be driven by recoveries in the building construction markets of many developed countries, although gains will be somewhat exaggerated by a weak 2012 base, particularly in the US. Additionally, continued strong increases in building construction activity in developing areas will boost demand.

China to expand market share, West to recover

China was the world's largest window and door market in 2012, and will see its share of global demand rise to 36 percent of the total in 2017. Continuing rapid economic growth and industrialization, as well as an increase in the average size of a housing unit in the country, will boost gains. Additionally, as personal incomes rise, households can better afford more expensive, modern fenestration products, thereby increasing the value of demand. As such, China is expected to post robust demand gains of 8.7 percent annually through 2017, slower than the previous decade but still among the highest rates in the world.

Rapid demand gains are also expected in the other developing areas of the world -- particularly in the Africa/Mideast region and South America. However,



gains will be slightly below the world average, as the global financial crisis did not have as strong an impact as in the developed areas, and these regions are starting from a higher 2012 base. Rising personal incomes will lead to the adoption of more Western style building practices, encouraging the use of modern windows and doors and boosting demand gains.

The US market for windows and doors is forecast to post a strong recovery and see gains of over 10 percent per year through 2017, after suffering outright declines between 2007 and 2012. The primary driver of demand will be an expected housing market recovery in the country. Western Europe, another

market that saw declining window and door demand between 2007 and 2012, is also projected to recover through 2017, though not as strongly as the US.

Plastic products to see fastest demand gains

Plastic window and door products are expected to see the fastest demand gains through 2017. Growth will be supported by increasing demand for vinyl windows due to their low cost, durability, minimal maintenance requirements, and superior insulative abilities. In 2017, the Asia/Pacific region will account for the largest portion of plastic window demand. Plastic windows also enjoy popularity in developed areas such as the US and Western Europe, as energy-efficiency is a growing concern for many households. Gains will be further supported by rising demand for plastic materials in the smaller door segment. Improvements in processing techniques have allowed manufacturers to produce fiberglass doors that more closely resemble traditional wood doors.

Study Coverage

This industry study, **World Windows & Doors**, It presents historical demand data (2002, 2007, 2012) and forecasts for 2017 and 2022 by product, material, market, world region, and for 21 countries. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles 37 industry players.

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**Sample Text,
 Table & Chart**

MARKETS

China: Demand by Product, Material & Market

In 2012, windows accounted for 62 percent of fenestration product demand in China. Wood was the most popular material, accounting for 52 percent of window demand, followed by metal at 22 percent and plastic at 26 percent. Wood was the most popular material in 2012, accounting for 52 percent of window demand. After the passage of government mandates requiring the use of wood in new construction, the use of wood in the window market is expected to increase. In effect, wood continues to account for only a small share of the window market in China. Through 2017, plastic windows are expected to post the fastest demand gains. These products benefit from low cost and superior insulating abilities.

Doors represented the remaining 38 percent of fenestration demand in China in 2012. Wood was the most popular choice, accounting for over three-quarters of the door market in 2012. Wood is especially popular in high-end luxury single family homes, which are preferred for aesthetic reasons, and they regained popularity after the mandate on wood products was lifted. Through 2017, wood and metal doors are expected to see the fastest demand gains.

The residential building market accounted for one-half of fenestration product demand in China in 2012. Historically, this percentage has been steadily decreasing as China focuses on improving infrastructure through the construction of schools, hospitals, and other nonresidential structures, a trend expected to continue through 2017 as demand in the nonresidential building market is expected to outpace that in the residential building market. However, demand for windows in the residential building market will benefit from rising personal income and the increasing sales of larger homes that utilize more windows and doors.

140

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**SAMPLE
 TEXT**

TABLE VI-4

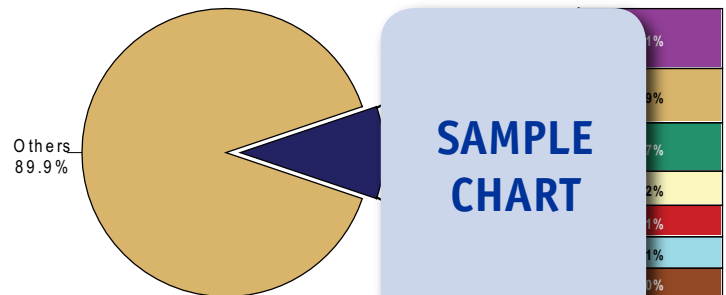
**CHINA: WINDOW & DOOR DEMAND
 BY PRODUCT, MATERIAL, & MARKET
 (million dollars)**

Item	2002	2007	2012	2017	2022
Window & Door Demand	100	100	100	100	100
By Product:					
Windows					
Wood					
Metal					
Plastic					
Doors					
Wood					
Metal					
Plastic					
By Market:					
Residential Building					
New Construction					
Improvement & Repair					
Nonresidential Building					
New Construction					
Improvement & Repair					
% China					
Asia/Pacific Window/Door Demand	200	200	200	200	200

**SAMPLE
 TABLE**

CHART VIII-1

**WORLD WINDOW & DOOR MARKET SHARE BY COMPANY
 (\$158 billion)**



**SAMPLE
 CHART**

**Sample Profile,
 Table & Forecast**

COMPANY PROFILES

GEALAN GmbH

Hofer Straße 80
 95145 Oberkotzau
 Germany
 49-9286-7
 http://www

Sales: \$
 Employe

Key Prod or profiles, sliding doors & windows,
 door thre s

GEALAN is a privately owned producer of vinyl profiles for windows and doors, shutter systems and ventilation products. Halder Beteiligungsberatung GmbH (Germany), a subsidiary of Gimv NV (Belgium), holds a majority stake in the Company.

The Company produces a wide variety of profiles for windows and doors, as well as sliding doors and windows. In 2012, GEALAN manufactured 80,000 metric tons of plastic profiles.

GEALAN sells vinyl profiles under the S 3000, S 7000 IQ, S 8000 IQ, S 7000 IQ PASSIVE HOUSE, and S 9000 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. GEALAN's

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

Item	2002	2007	2012	2017	2022
Population (millions)					
GDP/capita					
Gross Domestic Product (bil 2011\$)					
\$ building construction/000\$ GDP					
Building Constr Expend (bil 2011\$)					
Residential					
Nonresidential					
\$ window & door/capita					
\$ window & door/000\$ GDP					
\$ window & door/000\$ construction					
Window & Door Demand (mil \$)					
- imports					
+ exports					
Window & Door Shipments (mil \$)					

**SAMPLE
 TABLE**

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OTHER STUDIES

Construction Outlook in China

This study analyzes the construction industry in China. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by construction type (residential building, nonresidential building, nonbuilding) and geographic region (e.g., Central-North, Northeast, Central-East). The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry participants.

#3035 July 2013 \$5300

Prefabricated Housing

US demand for prefabricated housing is forecast to expand 15 percent annually through 2017 to 135,000 units. Manufactured housing will remain the most common type, while other prefabricated housing such as modular, precut and panelized housing will grow the fastest. The South will remain the leading US regional market. This study analyzes the 67,000 unit US prefabricated housing industry, with forecasts for 2017 and 2022 by product and US region. The study also evaluates company market share and profiles industry competitors in the US market.

#3001 February 2013 \$4900

Green Building Materials

US green building materials demand is forecast to increase 11 percent annually to \$86.6 billion in 2017. Permeable pavement and structural products (e.g., recycled concrete, FSC-certified lumber) will grow the fastest. Exterior products such as energy-efficient windows and green roofing will remain the largest segment. This study analyzes the \$51.8 billion US green building material industry, with forecasts for 2017 and 2022 by product, market and US region. The study also considers market environment factors and profiles industry participants.

#2995 February 2013 \$5100

World Flat Glass

World demand for flat glass is forecast to rise 7.1 percent per year through 2016 to 9.2 billion square meters. The dominant Asia/Pacific region will continue to post the fastest gains. Fabricated flat glass demand will benefit from rapid growth in sales of energy efficient products such as solar control, insulation and low-E glass. This study analyzes the 6.6 billion square meter world flat glass industry, with forecasts for 2016 and 2021 by product, market, world region and for 21 countries. The study also evaluates company market share and profiles industry players.

#2970 January 2013 \$6400

Windows & Doors

Demand for windows and doors in the US is forecast to rise 9.3 percent per year to \$34.2 billion in 2016. Aided by a rebound in construction spending, the residential market will post double-digit advances in demand. Among material types, plastic windows and doors will see the fastest gains, while metal types remain the largest segment. This study analyzes the \$18.6 billion US window and door industry, with forecasts for 2016 and 2021 by material, product, market and US region. The study also evaluates company market share and profiles industry players.

#2949 September 2012 \$5300

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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