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World Windows & Doors

Industry Study with Forecasts for **2019 & 2024**

Study #3294 | July 2015 | $6500 | 403 pages

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SUPPLY & DEMAND

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

World Windows & Doors

Industry Study with Forecasts for ***2019 & 2024***

The Asia/Pacific market will offer the best growth opportunities, spurred by continuing rapid economic growth and industrialization, as well as by an increase in the average size of housing units in the region.

World demand to rise 5.9% annually through 2019

Global demand for windows and doors is projected to rise 5.9 percent annually through 2019 to $232.8 billion. Slowing growth in building construction spending in the Asia/Pacific region (the largest regional market for these products) will restrain demand gains. However, window and door demand will accelerate in higher income areas such as the US and Western Europe because of rebounds in housing construction.

Even with its deceleration, window and door demand in the Asia/Pacific region is forecast to expand 6.8 percent per annum through 2019, a faster pace than that in any other region. Rising personal income levels in the developing countries of the region will allow consumers to purchase more modern windows and doors. China was the largest national market for fenestration products in the world in 2014 and will see its share of global demand rise from 36 percent in 2014 to 39 percent in 2019. Demand will be spurred by continuing rapid economic growth and industrialization, as well as by an increase in the average size of housing units in the country. Fenestration products demand in China is expected to decelerate from the double-digit annual gains of the 2009-2014 period, but it will still be among the fastest in the world.

North America will enjoy the second fastest demand growth of any region through 2019, boosted by gains in the US and Mexico. The large US market for windows and doors is expected to advance 7.3 percent per year through 2019 as housing construction in the country continues to rebound from the sharp contraction it suffered between 2006 and 2011. The Africa/Mideast region is also expected to post rapid window and door demand gains through 2019. Growth will be above the global average due to strong increases in building construction spending as well as rising personal income levels that will allow adoption of more advanced building practices, encouraging the use of modern fenestration products. Western Europe and Japan are also projected to see an acceleration in demand through 2019, though growth will still remain below the global average.

Plastic windows to be fastest growing products

Through 2019, the fastest demand gains are expected in plastic windows. These products have been steadily gaining market share since 2004, a trend that is expected to continue. Demand for plastic windows will benefit from the products' low cost, durability, minimal maintenance requirements, and superior insulative abilities. Additionally, plastic windows will continue to gain in popularity in developed areas such as the US and Western Europe, as energy efficiency is a growing concern for many households. Demand for metal doors will benefit from growth in nonresidential construction spending in China and the US.

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Industry Study with Forecasts for ***2019 & 2024***

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Sample Text, Table & Chart

TABLE VI-12

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

Item	2004	2009	2014	2019	2024
Window & Door Demand					
By Product & Material:					
Windows					
Wood					
Metal					
Plastic					
Doors					
Wood					
Metal					
Plastic					
By Market:					
Residential Building					
New Construction					
Improvement & Repair					
Nonresidential Building					
New Construction					
Improvement & Repair					
% Australia					
Asia/Pacific Window & Door Demand					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

ASIA/PACIFIC

Australia: Supply & Demand

Demand for windows and doors in Australia totaled US
in 2014. As a high income country, per capita demand in Au
well above the regional average, but in 2014 fenestration pro
mand in the country accounted for only three percent of the A
total. Through 2019, demand for windows and doors in Aust
cast to expand 3.8 percent per annum to US$3.1 billion, a de
from the rate of the 2009-2014 period. Both residential cons
nonresidential construction expenditures are expected to slov
demand gains.

Australia was a net importer of windows and doors in 2
majority of the country's imports originate in other countries
Asia/Pacific region, including China, Indonesia, and Malaysi
portion of Australia's exports are to New Zealand. Going fo
Australia's trade deficit is expected to expand as local produc
creasing competition from foreign suppliers, thus limiting ex

Shipments of fenestration products from factories in Au
totaled US$2.5 billion in 2014. Between 2009 and 2014, shi
grew at a pace just below demand gains, as local producers faced strong
competition from other suppliers based in countries with lower produc-
tion costs. Through 2019, window and door shipments from plants in
Australia are projected to rise 9 billion, a
rate in line with expected dem

Manufacturers based in
G James Glass & Aluminium,
ABLOY (Sweden), JELD-WE
Holdings (China) are among t

SAMPLE TEXT

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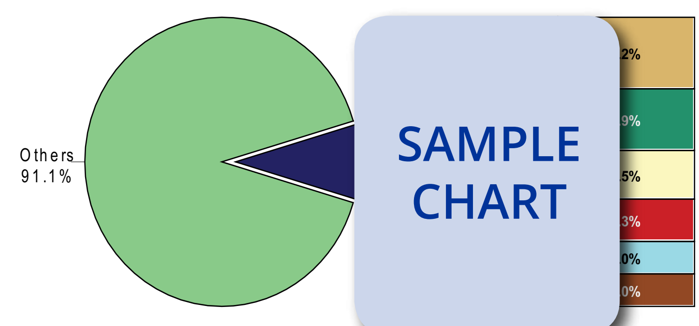
CHART VIII-1

**WORLD WINDOW & DOOR MARKET SHARE, 2014
($175 billion)**



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Sample Profile & Table, & Study Coverage

TABLE VI-11

AUSTRALIA: WINDOW & DOOR SUPPLY & DEMAND

Item	2004	2009	2014	2019	2024
Population (millions)					
GDP/capita					
Gross Domestic Product (bil 2013 US$)					
$ building construction/000$ GDP					
Building Construction (bil 2013 US$)					
Residential					
Nonresidential					
$ window & door/capita					
$ window & door/000$ GDP					
$ window & door/000$ construction					
Window & Door Demand (mil US$)					
- imports					
+ exports					
Window & Door Shipments (mil US$)					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

COMPANY PROFILES

HENCE DO BRASIL Limitada
Avenida 25 de Julho, 1338 - Bairro Vila Lurdes
Forquilhinha, Santa Catarina 88850
Brazil
55-48-3463-3
http://www.he

Annual Sales:
Employment:

Key Products

SAMPLE PROFILE

HENCE DO BRASIL is a privately held producer of residential wood interior doors. The Company operates a 36,000-square-meter manufacturing center in Forquilhinha, Brazil.

The Company's doors are produced from pine and are available in knotty and clean versions. These doors are manufactured in 35- and 40-millimeter thicknesses. Knotty and clean pine doors include the COLONIAL, VICTORIAN, SANTIAGO, GEORGIA, HAVANA, DAKOTA, and COTTAGE series, as well as French doors. HENCE DO BRASIL's GEORGIA, HAVANA, DAKOTA, COTTAGE, and French doors can have optional glass sections installed.

In addition to marketing its products in South America, HENCE DO BRASIL ships doors worldwide on ships via ports in São Francisco do Sul and Itajaí, Brazil. The Company exports products to such countries as the US, the United Kingdom, Spain, and Israel, as well as to the Caribbean.

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STUDY COVERAGE

World Windows & Doors is a Freedonia study that presents historical data (2004, 2009, 2014) plus forecasts (2019, 2024) for supply and demand, as well as demand by product, material and market, in 6 regions and 21 countries. The study also details key market environment factors, assesses the industry structure, analyzes company market share and profiles 40 industry players.

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Related Studies

World Siding (Cladding)

This study analyzes the world siding industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., brick and tile, stucco and EIFS, concrete and stone, fiber cement, metal, vinyl, wood), market/application (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.

#3327........... September 2015..............$6500

Outdoor Noise Barriers

This study analyzes the US outdoor noise barrier industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by material (e.g., concrete, wood, metal), product (e.g., highway sound barriers, airport blast deflectors), market (e.g., highway, aviation, other nonbuilding, building construction) and US geographic region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3334........... September 2015..............$5200

Insulation

This study analyzes the US insulation industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., fiberglass, foamed plastics, cellulose, mineral wool, reflective insulation and radiant barriers), market (e.g., residential buildings, nonresidential buildings, industrial and HVAC equipment) and US region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#3332........... September 2015..............$5400

World Housing

Worldwide construction of new housing units is forecast to increase 3.0 percent annually to 2.3 billion units in 2019. North America and Western Europe will see the fastest growth from a depressed 2014 base. On a global basis, new construction of multifamily units will outpace single-family units. This study analyzes the 2.1 billion unit world housing industry, with existing stock and new unit forecasts presented for 2019 and 2024 by type in six world regions and 22 major countries. The study also considers economic trends, demographics, and other market factors.

#3312..................July 2015....................$5900

Roofing

US demand for roofing is projected to advance 3.9 percent annually to 252 million squares in 2019, valued at $21.4 billion. Asphalt shingles will remain dominant while roofing tiles, metal roofing, and plastic roofing will grow the fastest. The new building construction market will outpace reroofing, and residential roofing demand will outpace nonresidential. This study analyzes the 208 million square US roofing industry, with forecasts for 2019 and 2024 by product, market and US region. The study also evaluates company market share and profiles industry players.

#3293.................June 2015....................$5500

About The Freedonia Group

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