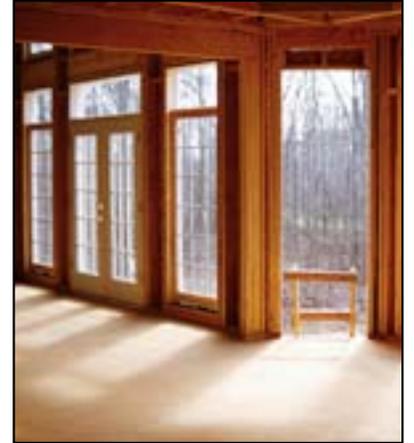


Residential Windows & Doors

US Industry Study with Forecasts for 2020 & 2025

Study #3427 | July 2016 | \$4900



Residential window and door demand in the US saw steep declines following the economic recession and housing construction collapse, but began to recover in 2012. Through 2020, continued growth in new housing construction is projected to drive gains. An expected acceleration in demand for windows and doors in residential improvement and repair applications will also support gains. Rising home values and existing home sales will boost remodeling demand for windows and doors.

Consumers choose plastic

Plastic windows and doors can expect the most rapid growth through 2020. Consumer interest in plastic's performance properties, including high energy efficiency and minimal maintenance requirements, as well as the material's generally low costs, will help it to continue to gain market share over wood and metal products used in exterior applications. In addition to continued expected improvements in performance, efforts by manufacturers to improve the appearance of plastic windows and doors by offering more colors, woodgrain textures, and other design options, will also support plastic demand.

Wood dominant material for interior doors

Despite plastic's gains, wood will continue to account for the largest share of the US residential window and door market. The dominance of the material in interior doors will be the key supporter of its market share. Indeed, demand for wood products saw the best growth between 2010 and 2015, supported by demand for interior doors in

new housing units as housing completions rebounded. Although wood will continue to exhibit significant usage in window and exterior door applications in higher end residences, where consumers prefer its aesthetics, it will lose market share to plastic products, as wood is more costly and more vulnerable to damage from exposure to the elements.

Doors make up the largest share of the residential market, approaching three-fifths of the total, as most residential structures use more doors than windows. Interior doors make up a large share of demand for doors in the new market, but a smaller share of the improvement and repair market, as they are less likely to require replacement because of damage or poor energy performance. The more intensive use of doors than windows is particularly true of multifamily housing units, which saw strong new unit completions in 2014 and 2015.

Study coverage

This study analyzes the US residential window and door market. It provides historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by product (residential windows, residential doors, residential components and accessories), material (wood, plastic, metal), by market (new residential, improvements and repairs) and by housing type (single-family, multifamily, manufactured housing), as well as by region of the US. In addition, this study also assesses market environment factors, analyzes the industry structure, evaluates company market share and profiles US industry competitors.

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PLASTIC

Plastic Window Demand by Market

Residential demand for plastic windows is projected to increase by 1.5 percent annually. The market is projected to grow by 1.5 percent per year. Homebuilders will use plastic windows and metal types of vinyl windows because of their low cost and energy efficiency.

Improvement in residential plastic windows for improvement in economic recession materials. The 2010 recession, and Job Creation and Incentives Act spurred many homeowners to replace old windows with more efficient windows, increasing demand for plastic windows. Applications for plastic windows is projected to increase by 1.5 percent. Recovering residential improvement and repair spending on the large stock of older homes in the US will support demand growth. Homeowners looking to improve the energy efficiency of their homes will continue to replace older windows with those made from vinyl or fiberglass. Additionally, value demand will also be supported by demand of manufacturers to offer plastic windows with enhanced aesthetic appeal to high-end consumers.

The single-family home market accounted for the largest share of plastic window demand, about three-quarters of the total. As with doors, single-family homes tend to have more windows than all other types of

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SAMPLE
TEXT

TABLE IV-7

RESIDENTIAL DOOR DEMAND BY PRODUCT & MATERIAL (million units)

Item	2005	2010	2015	2020	2025
Residential Building Construction (bil 2009\$) doors/mil \$ construction					
Residential Door Demand					
Interior:					
Wood					
Other					
Entry:					
Steel					
Wood					
Fiberglass & Other					
Patio:					
Wood					
Metal					
Plastic					
% wood					
Residential Wood Door Demand					

Source: The Freedonia Group

SAMPLE
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TABLE VI-5

PLASTIC RESIDENTIAL WINDOW DEMAND BY MARKET (million dollars)

Item	2005	2010	2015	2020	2025
Residential Building Construction (bil \$) \$ plastic windows/000\$ construction					
Plastic Residential Window Demand					
By Market:					
New					
Improvements & Repairs					
By Housing Type:					
Single-Family					
Multifamily					
Manufactured Housing					

Source: The Freedonia Group

SAMPLE
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This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Siding

US siding demand is forecast to rise 5.6 percent annually to 100 million squares in 2019, valued at \$10.7 billion. Gains will be driven by a rebound in housing completions and an acceleration in the residential replacement market. Vinyl siding will remain the largest category by volume, but will lose market share to stucco and fiber cement siding. This study analyzes the 76.2 million square US siding industry, with forecasts for 2019 and 2024 by material, market and region. The study also evaluates company market share and profiles industry participants.

#3374..... January 2016 \$5500

Insulation

US insulation demand will rise 6.6 percent annually through 2019 to \$10.3 billion. The residential market will grow the fastest, while the nonresidential market will recover from recent declines. Fiberglass and foamed plastic insulation will continue to claim the vast majority of the market, with foamed plastic growing slightly faster than fiberglass. This study analyzes the \$7.5 billion US insulation industry, with forecasts for 2019 and 2024 by product, market and US region. The study also evaluates company market share and profiles industry participants.

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

World Windows & Doors

Global demand for windows and doors is projected to rise 5.9 percent annually through 2019 to \$233 billion. Growth in the dominant Asia/Pacific market will slow but remain the fastest growing, followed closely by North America. Doors will outpace windows, and nonresidential buildings will outpace the residential market. This study analyzes the \$175 billion world window and door industry, with forecasts for 2019 and 2024 by product, material and market in 6 world regions and 21 major countries. The study also details company market share and profiles industry players.

#3294..... July 2015 \$6500

Hard Surface Flooring

Demand for hard surface flooring in the US is forecast to advance 6.1 percent per year to 11.3 billion square feet in 2019, valued at \$16.7 billion. The key residential market will post the fastest growth, driven by gains in housing completions and a shift toward hard surface flooring in living and dining areas, where carpet has predominated. This study analyzes the 8.4 billion square foot US hard surface flooring industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry competitors.

#3284..... April 2015..... \$5300

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

About The Freedonia Group

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