

Market Study: Windows & Doors



Europe Report (5th edition)

This brochure provides further information on the study “Windows & Doors - Europe (5th edition)”

The Market Study in Brief

The end of cheap money is causing problems for the construction industry: Construction projects are being delayed, project developers are giving up. New residential construction is especially affected. However, there are also opposing trends: The latest, already fifth edition shows that while rising energy prices are making building materials more expensive, the desire for better insulation is growing. In various countries, commercial construction and public building construction are also holding up comparatively well. Ceresana expects demand used in buildings to decline slightly by around 2 percent in 2023. From 2025 onwards, the research institute expects a noticeable recovery in this sector.

In addition to previous editions, the expanded new edition also differentiates between the residential and commercial construction segments as well as new construction and renovation for all countries.

New prospects for old buildings

In Europe, the renovation of existing buildings is developing more dynamically than new construction. Energy efficiency is of particular concern: Buildings still account for around 40% of total European energy consumption, mainly for heating, hot water and air conditioning. A mandatory renovation of buildings approved in outline by the EU Parliament is controversial, and the member states have not yet agreed on the details of its implementation. However, the EU wants to provide more than 72 billion euros to ensure that around 35 million private and public buildings are renovated by 2030. The EU's "Green Deal" is expected to benefit not only manufacturers of insulating materials, but also suppliers of building components. Up to now, old, uninsulated windows and doors are often still wasteful thermal bridges - the cost of renovation pays for itself after only a short time.

Plastic frames save heating oil

Compared to window frames made of aluminum or wood, products made of PVC or other plastics are very durable, robust and easy to clean. In Europe, plastic windows continue to gain market share. The new industry analysis records the number of window frames in millions of units with its data on demand, production as well as import and export.

It differentiates not only by material, but also by application: new construction and renovation, residential and commercial construction. The information on the door market combines door leaf, door frame and door sill into one door unit. This includes interior and exterior doors for buildings, but excludes garage doors, garden gates and other doors.

The current market study:

Chapter 1 analyzes the entire European market: production and demand, detailed for the different materials, i.e. wood, plastic, metal and material combinations, such as wood-aluminum. Further, consumption is divided into the segments "new construction" and "renovation" as well as "residential construction" and "commercial construction".

Chapter 2 examines 21 countries: Production and demand broken down by materials, revenues in EUR and USD, as well as imports and exports. Additionally, demand is divided into the construction segments "new construction" and "renovation", as well as "residential construction" and "commercial construction". These segments are further split into separate figures for windows and doors.

Chapter 3 is a directory with 60 company profiles of the most important manufacturers, such as Arbonia, Assa Abloy, Deceuninck, Ernst Schweizer, Hörmann, Inwido, Jeld-Wen, Lindner, REHAU, Schüco, and VKR.

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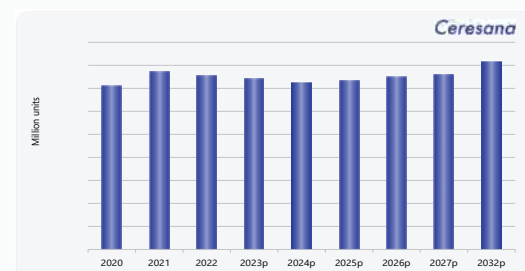
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2.1 Austria

2.1.1 Demand and Revenues

Demand for windows and doors in Austria amounted to X million units in 2022. We expect demand to increase at an average growth rate of X % until 2032, at which point it will be around X million units. Revenues generated with windows and doors amounted to around EUR X billion in 2022. For 2032, we forecast a market value of around EUR X billion.



Graph: Demand in Austria from 2020 to 2032

Building construction investment reached EUR 42.3 billion in 2022, of which 22.2 billion was spent on residential construction (15.3 billion new construction, 6.8 billion renovation) and 20 billion on non-residential construction. Compared with 2021, investment in new residential construction fell by 3.5%; non-residential construction, on the other hand, recorded an increase of 2.1%. In 2022, 50,000 building permits were issued, of which 18,900 were for single-family homes and 31,100 for multifamily units. In 2019, permits were issued for 18,500 single-family homes and 51,100 multifamily homes. Both categories are expected to decline in 2023. Commercial construction is benefiting from the return of tourism after COVID-19.

Since opening the border to Eastern Europe, the population has been growing strongly, especially in Vienna. In 1988, the Austrian capital reached a low of 1.48 million residents. In 2028, this number is expected to exceed the two-million mark for the first time since 1910. Consequently, various new urban districts are being built on industrial and railroad brownfield sites in Vienna, e.g., the "Seestadt Aspern" for more than 25,000 inhabitants on a former airfield and the "Nordbahnhof" on the site of a former freight yard.

Revenues	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
million USD	X	X	X	X	X	X	X	X	X	X % p.a.
million EUR	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Revenues generated in Austria from 2020 to 2032, million USD and million EUR

in million units	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Windows - Wood	X	X	X	X	X	X	X	X	X	X % p.a.
Windows - Plastic	X	X	X	X	X	X	X	X	X	X % p.a.
Windows - Metal & Combination	X	X	X	X	X	X	X	X	X	X % p.a.
Windows - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Doors - Wood	X	X	X	X	X	X	X	X	X	X % p.a.
Doors - Plastic	X	X	X	X	X	X	X	X	X	X % p.a.
Doors - Metal & Combination	X	X	X	X	X	X	X	X	X	X % p.a.
Doors - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand in Austria from 2020 to 2032 – split by material

Market Study: "Windows & Doors - Europe (5th edition)"

21 Countries, 60 Producers, 210 Pages, 50 Graphs, 163 Tables, 10/2023

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2 Market Data: Country Profiles

(For each country: Revenues, production and demand broken down by materials, as well as demand broken down by segments new construction and renovation as well as residential and commercial construction)

- 2.1 Austria
- 2.2 Belgium
- 2.3 Czechia
- 2.4 Denmark
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- 2.9 Hungary
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- 2.12 Poland
- 2.13 Portugal
- 2.14 Romania
- 2.15 Russia
- 2.16 Spain
- 2.17 Sweden
- 2.18 Switzerland
- 2.19 The Netherlands
- 2.20 Turkey
- 2.21 United Kingdom
- 2.22 Rest of Europe

in million units	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Residential - Windows	X	X	X	X	X	X	X	X	X	X % p.a.
Residential - Doors	X	X	X	X	X	X	X	X	X	X % p.a.
Residential - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Commercial - Windows	X	X	X	X	X	X	X	X	X	X % p.a.
Commercial - Doors	X	X	X	X	X	X	X	X	X	X % p.a.
Commercial - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand in Austria from 2020 to 2032 – split by residential and commercial construction

in million units	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
New Construction - Windows	X	X	X	X	X	X	X	X	X	X % p.a.
New Construction - Doors	X	X	X	X	X	X	X	X	X	X % p.a.
New Construction - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Renovation - Windows	X	X	X	X	X	X	X	X	X	X % p.a.
Renovation - Doors	X	X	X	X	X	X	X	X	X	X % p.a.
Renovation - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

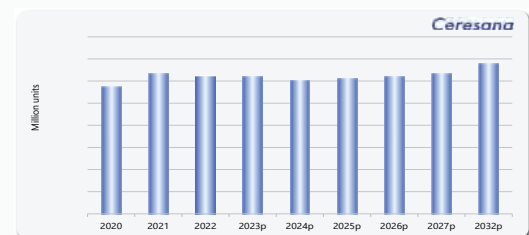
Table: Demand in Austria from 2020 to 2032 – split by new construction and renovation

2.1.2 Production and Trade

The Austrian production of windows and doors amounted to approx. X million units in 2022. Production volume is expected to rise to around X million units by 2032, with growth rates of X % p.a.

in million units	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Production	X	X	X	X	X	X	X	X	X	X % p.a.
Import	X	X	X	X	X	X	X	X	X	X % p.a.
Export	X	X	X	X	X	X	X	X	X	X % p.a.
Demand	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Production, import, export, and demand in Austria from 2020 to 2032



Graph: Production in Austria from 2020 to 2032

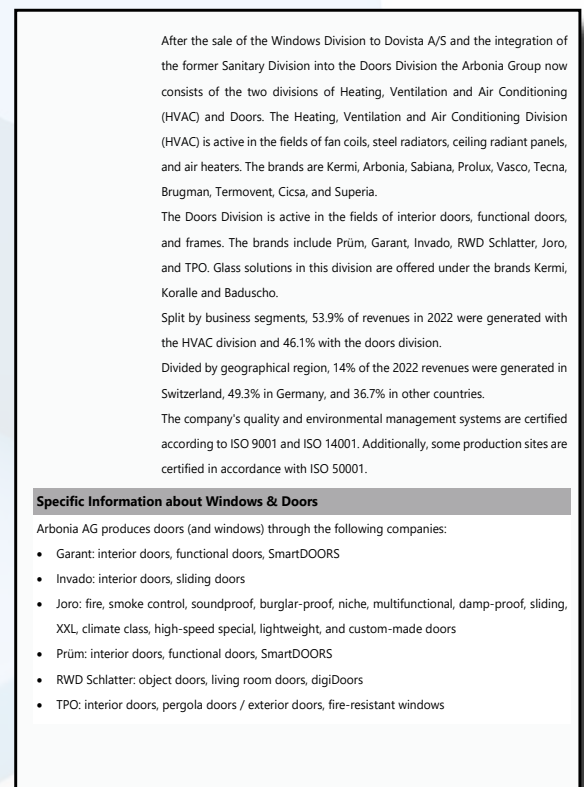
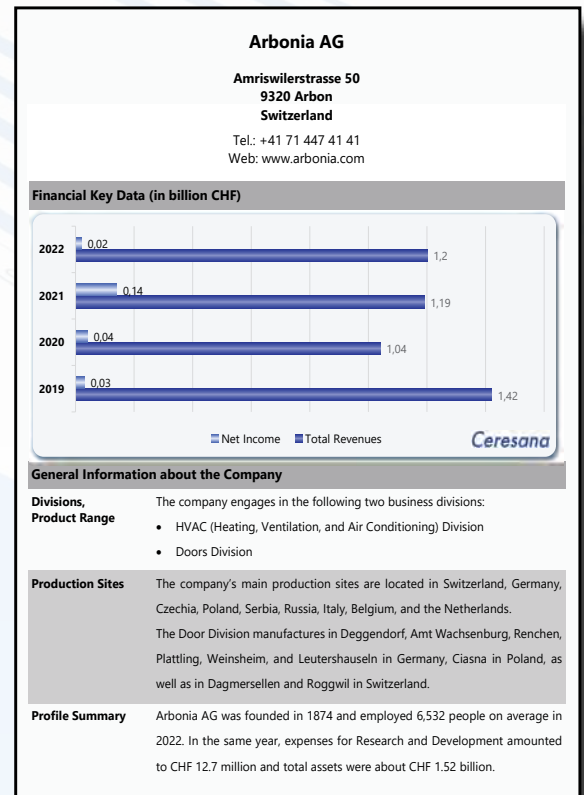
in million units	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Windows - Wood	X	X	X	X	X	X	X	X	X	X % p.a.
Windows - Plastic	X	X	X	X	X	X	X	X	X	X % p.a.
Windows - Metal & Combination	X	X	X	X	X	X	X	X	X	X % p.a.
Windows - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Doors - Wood	X	X	X	X	X	X	X	X	X	X % p.a.
Doors - Plastic	X	X	X	X	X	X	X	X	X	X % p.a.
Doors - Metal & Combination	X	X	X	X	X	X	X	X	X	X % p.a.
Doors - Total	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Production in Austria from 2020 to 2032 – split by material

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Norway (2)
Poland (6)
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Switzerland (3)
The Netherlands (2)
United Kingdom (3)

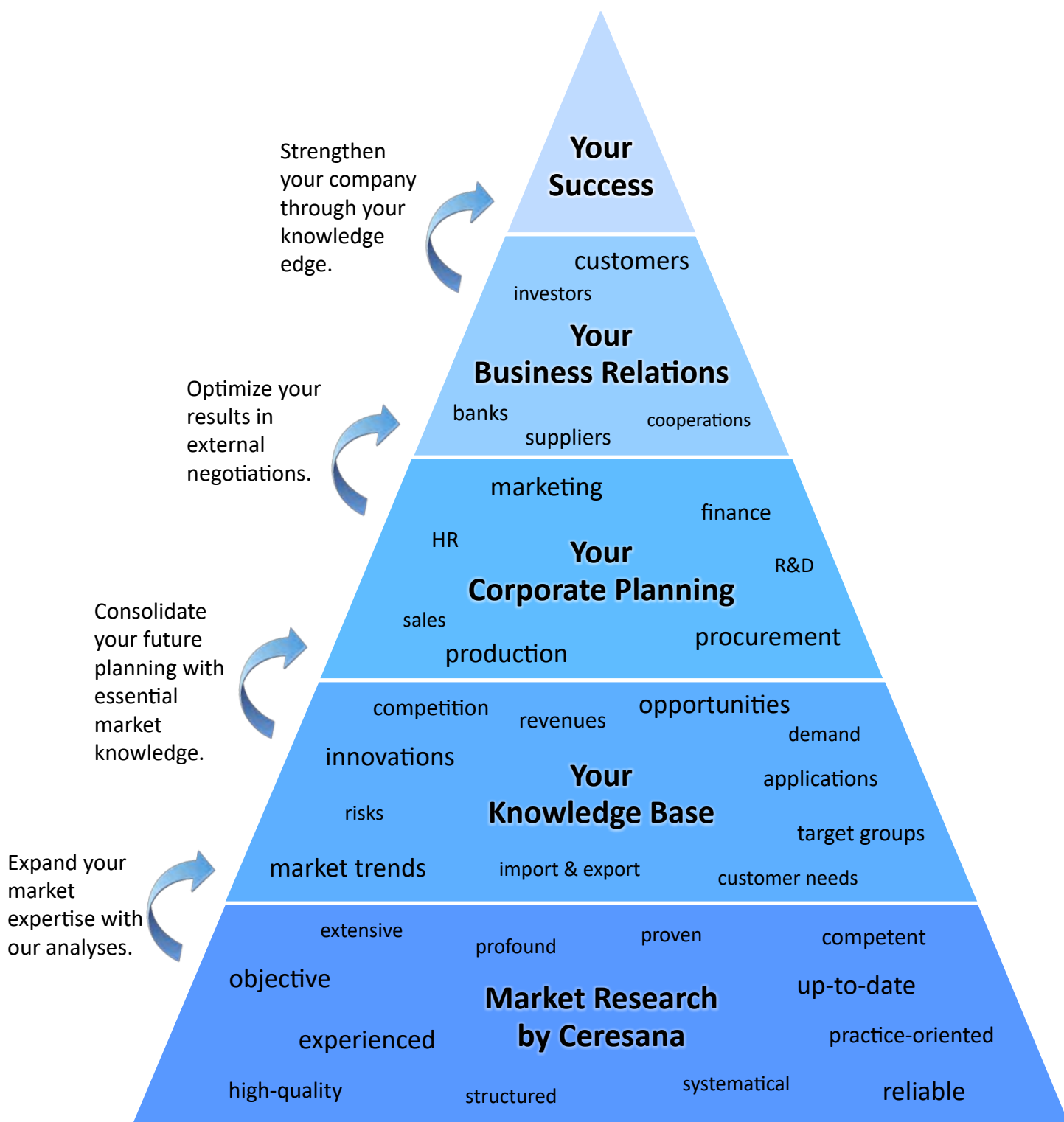


*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

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Ceresana



Mainaustr. 34
78464 Konstanz
Germany



+49 7531 94297 0



info@ceresana.com



www.ceresana.com



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