Dear decision-makers,

Nowadays, information is available at the push of a button, always, and in overwhelming amounts. But what is the best way to find the crucial data?

That is why several thousand companies use the knowledge of our employees. Based on their experience, they provide decisive data for the benefit of their customers.

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Oliver Kutsch, CEO

Our studies - Your benefits

• Gain new customers
• Obtain a more detailed picture of your business segments
• Understand your competitors better
• Locate optimal procurement markets
• Recognize opportunities and risks
• Identify and profit from future markets

Our studies are useful for:

• Manufacturers and traders of windows and doors
• Suppliers of raw materials and additives such as PVC, wood, aluminum, plasticizers
• Manufacturers and traders of fittings, handles, profiles, and closure systems for windows and doors
• Associations and institutes
• Executive board, technology and production, strategic planning, R&D, market research, marketing, sales and distribution, procurement

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Approximately 40% of total energy demand in Europe are consumed in buildings, a majority thereof for heating and warm water. To improve energy efficiency, insulation of house walls or roofs is discussed frequently. However, even the best insulation is useless when thermal bridges are not taken into consideration. Windows and doors are already able to contribute considerably to energy saving, for example, by integrating special insulation cores directly into the window profile. Ceresana analyzed the European market for windows and doors already for the second time: The analysts expect a sales volume of a total of 222 million units for 2024. The current study provides figures on demand, production, import and export (each in units), and sales (in euros). In regard to windows, this study focuses on amount, material, and application (new construction or renovation). Figures given for the market for doors include interior and exterior doors, but not gates.

Funds for Smart Buildings
The market for windows and doors is not only influenced by funding of energy efficient new constructions, but also, to a large extent, by support programs for energetic renovation of existing buildings. The individual country-specific regulations are subject of the corresponding country profiles in this study. There is a Europe-wide framework for this topic: Shortly after the climate summit in Paris in December 2015, the European Parliament adopted a draft with ambitious climate protection goals. The topic energy efficiency of buildings is of high importance in it.

The Bottom Seems to Be Passed
The European market for windows and doors has lost a large share of volume since the economic crisis of 2009. However, the downward trend seems to be stopped for the time being. Demand on the part of the construction industry shows a slight upswing in most countries. In Western Europe, positive development is to be expected in Scandinavia and Germany in particular.

Wood-Aluminum and PVC More and More Popular
In regard to materials used for window frames, considerable regional differences are to be observed. However, wood-aluminum combinations are gaining market shares throughout Europe. PVC windows continue to enjoy a high popularity due to the good price-performance ratio and the low maintenance effort and will raise their overall market volume in the upcoming eight years, despite major declines in Russia. In the segment doors, plastic doors grow the fastest on a percentage basis, however, starting at a relatively low absolute level. Especially in the sector exterior doors, metal or metal composites become increasingly popular. In the segment interior doors, wooden doors continue to rank first even if plastic doors gain market shares in this sector as well.

The Study in Brief:
In chapter 1, demand for windows and doors split by materials (wood, plastics, metal and material combinations), demand split by the segments new construction and renovation, revenues as well as production split by materials are depicted for all of Europe. Furthermore, demand for and production of windows and doors split by materials, revenues, and import and export are provided for 23 countries. Additionally, demand split by the segments new construction and renovation of the eight largest countries (Germany, France, the United Kingdom, Italy, Poland, Russia, Spain, Turkey) and the aggregates of the rest of Western and of Eastern Europe is analyzed. Chapter 2 examines the market for windows and doors split by materials in detail (that is, windows - wood, windows - plastics, windows - metal and material combinations, doors - wood, doors - plastics, and doors - metal and material combinations). Both demand as well as production figures are indicated. Chapter 3 provides profiles of the largest manufacturers of windows and doors, clearly arranged according to contact details, turnover, profit, product range, production sites, profile summary, products, and applications. Extensive profiles of 68 manufacturers are given, including Deceuninck, Hörmann, IFN, Inwido, Jeld-Wen, profine, Rehau, Roto Frank, Schüco, VEKA, and VKR.
1 Market Data

1.1 Europe
1.1.1 Demand
1.1.1.1 Demand for Windows & Doors
1.1.1.2 Demand Split by Materials
1.1.1.3 Demand in New Construction & Renovation
1.1.2 Revenues
1.1.3 Production
1.1.3.1 Production of Windows & Doors
1.1.3.2 Demand Split by Materials
1.2 Austria
1.2.1 Demand & Revenues
1.2.2 Production & Trade
1.3 Belarus
1.3.1 Demand & Revenues
1.3.2 Production & Trade
1.4 Belgium
1.4.1 Demand & Revenues
1.4.2 Production & Trade
1.5 Czechia
1.5.1 Demand & Revenues
1.5.2 Production & Trade
1.6 Denmark
1.6.1 Demand & Revenues
1.6.2 Production & Trade
1.7 Finland
1.7.1 Demand & Revenues
1.7.2 Production & Trade
1.8 France
1.8.1 Demand & Revenues
1.8.1.1 Demand for Windows & Doors
1.8.1.2 Demand Split by Materials
1.8.1.3 Demand in New Construction & Renovation
1.8.1.4 Revenues
1.8.2 Production & Trade
1.8.2.1 Production of Windows & Doors
1.8.2.2 Production Split by Materials
1.8.2.3 Trade of Windows & Doors
1.9 Germany
1.9.1 Demand & Revenues
1.9.2 Production & Trade
1.10 Greece
1.10.1 Demand & Revenues
1.10.2 Production & Trade
1.11 Hungary
1.11.1 Demand & Revenues
1.11.2 Production & Trade
1.12 Italy
1.12.1 Demand & Revenues
1.12.2 Production & Trade
1.13 Norway
1.13.1 Demand & Revenues
1.13.2 Production & Trade
1.14 Poland
1.14.1 Demand & Revenues
1.14.2 Production & Trade
1.15 Portugal
1.15.1 Demand & Revenues
1.15.2 Production & Trade
1.16 Romania
1.16.1 Demand & Revenues
1.16.2 Production & Trade
1.17 Russia
1.17.1 Demand & Revenues
1.17.2 Production & Trade
1.18 Spain
1.18.1 Demand & Revenues
1.18.2 Production & Trade
1.19 Sweden
1.19.1 Demand & Revenues
1.19.2 Production & Trade
1.20 Switzerland
1.20.1 Demand & Revenues
1.20.2 Production & Trade
1.21 The Netherlands
1.21.1 Demand & Revenues
1.21.2 Production & Trade
1.22 Turkey
1.22.1 Demand & Revenues
1.22.2 Production & Trade
1.23 Ukraine
1.23.1 Demand & Revenues
1.23.2 Production & Trade
1.24 United Kingdom
1.24.1 Demand & Revenues
1.24.2 Production & Trade
1.25 Other Europe
1.25.1 Demand & Revenues
1.25.2 Production & Trade

2 Products
2.1 Windows
2.1.1 Windows - Wood
2.1.2 Windows - Plastics
2.1.3 Windows - Metal and Material Combinations
2.2 Doors
2.2.1 Doors - Wood
2.2.2 Doors - Plastics
2.2.3 Doors - Metal and Material Combinations

3 Company Profiles
Austria (6)
Belgium (3)
Denmark (3)
Finland (1)
France (5)
Germany (25)
Italy (3)
Norway (2)
Poland (5)
Sweden (4)
Switzerland (6)
The Netherlands (1)
United Kingdom (4)
1.14 Poland

1.14.1 Demand and Revenues

1.14.1.1 Demand for Windows and Doors

Demand for windows and doors amounted to approx. X million units in 2016. Demand fell by an average of X % p.a. since 2008. We forecast Polish demand for windows and doors to increase by X% p.a. to approx. X million units in 2024.

Graph: Demand for windows and doors in Poland from 2008 to 2024

[...]

1.13.2 Demand Split by Materials

In 2016, a total of about X million windows was consumed. With X million units, plastic windows were the most important product type. In the upcoming eight years, windows made of metal and material combinations will develop at the highest growth rates, however, starting at the lowest absolute values. Overall, demand will increase to X million windows.

Of the total of X million doors that were consumed in 2016, X million units were made of wood. In the upcoming eight years, wooden and plastic doors will increase their demand most significantly at rates of X% p.a. each. Total demand will increase by X% per year to X million units.

Table: Demand for windows and doors in Poland from 2008 to 2024 - split by materials

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1.13.1.3 Demand in New Construction and Renovation

In 2016, windows for new construction were utilized most frequently, followed by doors for new construction. Demand for windows for both new construction and renovation will increase most significantly in the upcoming eight years. Overall, demand in new construction will increase by X% p.a. and demand in the segment renovation by X% p.a. until 2024.

Table: Demand for windows and doors in Poland from 2008 to 2024 – split by the segments new construction and renovation

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Chapter 1: Market data for Europe and 23 countries:

- Revenues
- Production of windows split by materials
- Production of doors split by materials
- Import and export

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1.15.1 Portugal – Demand & Revenues

Revenues generated with windows and doors in Portugal amounted to EUR X million in 2016. Market value is projected to increase at an average rate of X% p.a. until 2024.

Graph: Revenues generated with windows and doors in Portugal from 2008 to 2024, in million EUR

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<th>Doors</th>
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<td>2014</td>
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<td>2016</td>
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Table: Revenues generated with windows and doors in Portugal from 2008 to 2024 in million EUR

1.15.2 Production and Trade

Portuguese production of windows and doors amounted to X million units in 2016. We forecast production volume until 2024.

Chapter 1: Market data for Europe and 23 countries:
- Demand split by materials: Wood, plastics as well as metal and material combinations
- Demand split by new construction and renovation for the 8 largest countries
- List of important manufacturers

Graph: Production of windows and doors in Portugal from 2008 to 2024

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Table: Production of windows and doors in Portugal from 2008 to 2024 – split by materials

Chapter 2: Demand and production split by material for 23 countries:
- Windows - Wood
- Windows - Plastics
- Windows - Metal and material combinations
- Doors - Wood
- Doors - Plastics
- Doors - Metal and material combinations

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Table: European demand for plastic windows from 2008 to 2024 – split by major countries

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- Automotive Coatings - World
- Automotive Plastics - World
- Bags & Sacks - Europe
- Bags & Sacks - World
- Biocides - World
- Bioplastics - World
- Bitumen - Europe
- Butadiene - World
- Butadiene Rubber (BR) - World
- Caps & Closures - Europe
- Carbon Black - World
- Catalysts - World
- Chelating Agents - World
- Composites (CFRP & GFRP) - World
- Construction Plastics - World
- Corrugated/Solid Board/Carton - Europe
- Engineering Plastics - World
- Ethylene - World
- Expandable Polystyrene - World
- Fillers - Europe
- Fillers - World
- Flame Retardants - World
- Flexible Packaging - Europe
- Food Packaging - Europe
- Hydrofluoric Acid & Fluorochem. - World
- Insulation Material - Europe
- Insulation Material - World
- Labels - Europe
- Masterbatches - World
- Paints & Varnishes - World
- Paints & Varnishes - Europe
- Pigments - World
- Pipes - Europe
- Plastic Additives - World
- Plastic Bottles - Europe
- Plastic Caps & Closures - Europe
- Plastic Caps & Closures - World
- Plastic Containers - Europe
- Plastic Extrusion - World
- Plastic Films - Europe
- Plastic Films - World
- Plastic Injection - World
- Plastic Pipes - Europe
- Plastic Pipes - World
- Plastic Windows - World
- Plasticizers - World
- Plastics - Europe
- Plastics - World
- Polyamide (PA6 & PA66) - World
- Polyethylene (HDPE) - World
- Polyethylene (LDPE) - World
- Polyethylene (LLDPE) - World
- Polyethylene (PE) Pipes - World
- Polypropylene - World
- Polystyrene - World
- Polystyrene & Expandable PS - World
- Polyurethanes & Isocyanates - World
- Polyvinyl Chloride (PVC) - World
- Printing Inks - Europe
- Printing Inks - World
- Propylene - World
- PUR - Adhesives & Sealants - World
- PUR - Paints & Coatings - World
- PVC Pipes - World
- Rigid Metal Packaging - Europe
- Rigid Plastic Packaging - World
- Silicones - World
- Solvents - World
- Stabilizers - World
- Styrene - World
- Styrene-Butadiene Rubber (SBR) - World
- Surfactants - World
- Synthetic Rubber - World
- Thermoplastic Elastomers - World
- Titanium Dioxide - World
- Windows & Doors - Europe