

description of the report

# EUROPEAN WINDOW AND DOOR MARKET

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# 2023





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Following six successive years of stable growth in window and door sales in Europe, the last four seasons were extremely volatile for component manufacturers and suppliers. After the 2020 sales drops caused by the outbreak of the pandemic, the 2021 season brought such a high demand for windows and doors that manufacturers were unable to meet it.

However, another, even greater, slowdown has been noticeable since mid-2022. Russia's aggression against Ukraine not only resulted in a series of military-induced devastations, but also shattered the sense of security and economic stability in Europe.

This factor, along with the high inflation rate and poor economic situation, exerted a negative impact on the demand for windows and doors in Europe in H2 2022 and in 2023.

This edition of the report summarises the sales performance of the European window and door joinery sector in 2022 and in H1 2023 and attempts to answer some of the most commonly asked questions in this industry: Will the economic situation improve in Europe in 2024 and will window and door sales be higher than they were in 2023? Or will they perhaps return to the record-breaking levels of 2021–2022? We have asked these questions to managers of leading European manufacturers and component suppliers, and present the conclusions from the interviews in this report.

## About the report

This study presents the performance of the window and door sector in 31 European countries until the end of 2022, the preliminary manufacturing results in H1 2023 and the window sales forecast in Europe until 2025.

The report tells also what manufacturing dynamics were recorded in individual regions, what shares in the output of the leading countries belong to PVC, wood, aluminium, and steel windows and doors, as well as what sales were generated by a few dozen top joinery manufacturers in Europe in 2022.

The most important issues described here include:



**window and door manufacturing** in individual European countries



**manufacturing structure** of windows and doors made of individual materials: **PVC, wood, aluminium, steel**



**manufacturing results: windows in EUR and in pieces, doors in EUR**



turnover of the **leading manufacturers** in Europe



European manufacturers' average **selling prices of windows**



volume, dynamics, and structure of **export outside Europe** and **activity of enterprises from other continents**



**Preliminary manufacturing results in Europe in H1 2023. Forecast for window sales until 2025**



The study contains data on window and door joinery in general and broken down into:

**wood windows**

**wood doors**

**PVC windows and doors**

**steel joinery**

**aluminium joinery**

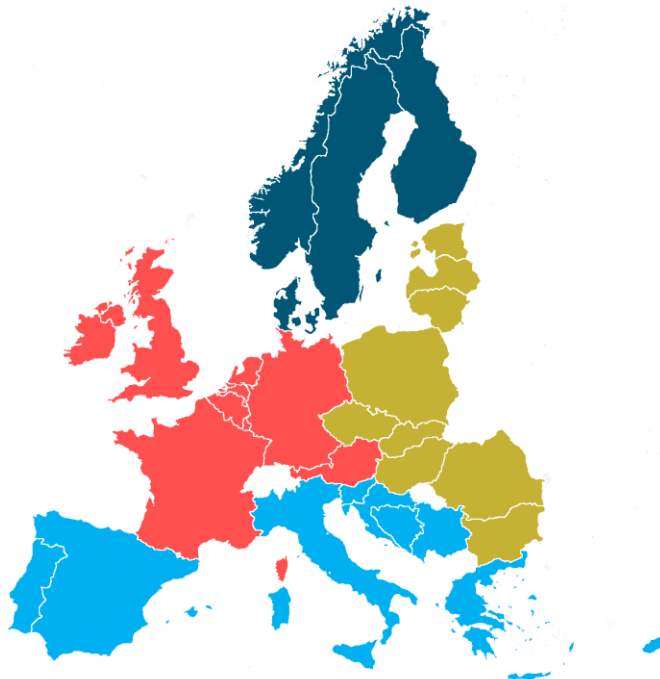
The analysis covers the performance of 31 European countries classified into 4 regions:

**Northern Europe:** Denmark, Finland, Norway, Sweden

**Western Europe:** Austria, Belgium, France, Germany, Ireland, Luxembourg, the Netherlands, the United Kingdom

**Central and Eastern Europe:** Bulgaria, Czechia, Estonia, Lithuania, Latvia, Poland, Romania, Slovakia, Hungary

**Southern Europe:** Croatia, Cyprus, Greece, Spain, Malta, Portugal, Italy, Serbia, Bosnia and Herzegovina



## Key findings

### Chapter 1.

#### Window and door manufacturing and sales in Europe. 2020–2022 performance

- 1.1 Description of the situation in the European joinery sector
- 1.2 Manufacturing of window and door joinery in Europe
- 1.3 Market structure: wood, PVC, steel, aluminium
- 1.4 Market structure: windows vs doors
- 1.5 Market structure: new construction projects vs renovations
- 1.6 Trade with countries from outside the region
- 1.7 Largest manufacturers (countries) in Europe

### Chapter 2.

#### Leading joinery manufacturers in Europe in 2022

- 2.1 Fragmentation level of the European sector
- 2.2 Leading manufacturers of window and door joinery in Europe
- 2.3 Leading façade window manufacturers in Europe

### Chapter 3.

#### Regional development of the European window and door sector in 2022

- 3.1 Market structure: manufacturing in regions
- 3.2 Northern Europe: joinery manufacturing volume and structure
- 3.3 Central and Eastern Europe: joinery manufacturing volume and structure
- 3.4 Western Europe: joinery manufacturing volume and structure
- 3.5 Southern Europe: joinery manufacturing volume and structure

### Chapter 4.

#### Material development of the European window and door sector in 2022

- 4.1 Wood windows: manufacturing, leading countries, trade with non-European countries
- 4.2 Wood doors: manufacturing, leading countries, trade with non-European countries
- 4.3 PVC windows and doors: manufacturing, leading countries, trade with non-European countries
- 4.4 Steel joinery: manufacturing, leading countries, trade with non-European countries
- 4.5 Aluminium joinery: manufacturing, leading countries, trade with non-European countries

### Chapter 5.

#### Outlook for the European joinery market until 2025

- 5.1 Economy and construction industry in H1 2023. Outlook for the period 2023–2025
- 5.2 Window and door joinery sector in H1 2023
- 5.3 Demand for windows in Europe. Outlook for the period 2023–2025

## Definitions, data sources



## Data sources

The study has been prepared based on a range of sources, both Centrum Analiz Branżowych's own research and desk research.

The report uses the following data:

1. CAB's surveys among component suppliers and joinery manufacturers in selected countries, including:
  - interviews (IDI and CATI) among representatives of a dozen or so leading window manufacturers and component suppliers in Europe (the survey carried out in August and September 2023)
2. external sources, such as credit agencies, trade associations, international organisations, statistical offices, press releases, corporate presentations, stock exchange quotations, manufacturers' websites, etc., including:
  - Central Statistical Bureau,
  - Central Statistical Office,
  - Statistics Poland,
  - Creditreform,
  - Croatian Bureau of Statistics,
  - Czech Statistical Office,
  - Department of Statistics and Research,
  - Dun & Bradstreet,
  - EPPA (the European PVC Windows Profiles and related Building Products Association),
  - Eurostat,
  - Foreign Trade Office Milan,
  - Hungarian Central Statistical Office,
  - Statistics Portugal,
  - International Monetary Fund,
  - Koalicja Termomodernizacji [Coalition for Deep Energy Retrofit],
  - Ministry of Justice of Poland,
  - National Fund for Environmental Protection and Water Management (Poland)
  - National Institute of Statistics,
  - National Statistical Institute of the Republic of Bulgaria,
  - National Institute of Statistics,
  - National Statistics Office,
  - Office for National Statistics,
  - Statec,
  - Statistics Austria,
  - Statistics Belgium,
  - Statistics Belgium,
  - Statistics Belgium,
  - Statistics Lithuania,
  - Statistics Netherlands,
  - Statistics Norway,
  - Statistics Sweden,
  - Statistical Office of Estonia,
  - Statistical Office of the Slovak Republic,
  - Statistical Office of the Republic of Slovenia,
  - Federal Statistical Office of Germany,
  - Stowarzyszenie Fala Renowacji [Renovation Wave Association],
  - The National Institute of Statistics and Economic Studies,
  - United Nations.



## Definitions

- This analysis covers the window and door joinery market in 31 European countries, including divided into wood windows, wood doors, PVC joinery, steel joinery and aluminium joinery.
- The above product groups are defined in accordance with the following classifications:
- **Wood windows** – NACE classification Rev. 2: 16.23.11-10 (windows, French-windows and their frames, of wood); CN classification: 44181010 (windows and French windows and their frames, of tropical wood), 44181050 (windows and French windows and their frames, of coniferous wood), 44181090 (windows and French windows and their frames, of other tropical and deciduous wood),
- **Wood doors** – NACE classification Rev. 2: 16.23.11-50 (doors and their frames and thresholds, of wood); CN classification: 44182010 (doors and their frames and thresholds, of tropical wood), 44182050 (doors and their frames and thresholds, of coniferous wood), 44182080 (doors and their frames and thresholds, of other tropical and deciduous wood),
- **PVC joinery** – NACE classification Rev. 2: 22.23.14-50 (plastic doors, windows and their frames and thresholds); CN classification: 39252000 (doors, windows and their frames and thresholds for doors, of plastics),
- **Steel joinery** – NACE classification Rev. 2: 25.12.10-30 (iron or steel doors, thresholds for doors, windows and their frames); CN classification: 73083000 (doors, windows and their frames and thresholds for doors, of iron or steel),
- **Aluminium joinery** – NACE classification Rev. 2: 25.12.10-50 (aluminium doors, thresholds for doors, windows and their frames); CN classification: 76101000 (doors, windows and their frames and thresholds for door, of aluminium).

Quantitative data on manufacturing and foreign trade of windows and materials for window manufacturing are collected in various units (pieces, m<sup>2</sup>, kg). The basic window unit adopted is the O32 window; the data are converted to this window size.

Average selling prices calculated as a ratio of the total value of window sales by manufacturers in a given country to the total number of windows manufactured in this country.

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