

description of the report

EUROPEAN WINDOW AND DOOR MARKET

2024



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2023 will be remembered as one of the most difficult years for the European joinery manufacturers. The decreased demand was experienced particularly strongly by companies from Northern Europe and German manufacturers, as well as those enterprises from Central and Eastern European countries that sell the major portion of its manufacturing output in Germany and Sweden. Moreover, the internal demand in Central European countries, where the inflation rate and the sense of threat due to the war in Ukraine were higher than in the West, was much weaker than in the period 2021–2022.

2023 is rated better by the companies that operate in Southern European countries, but also for example in France, where sales were

similar to or even higher than those recorded in 2022.

The season 2024 is not a breakthrough. A slight sales growth is observable in H1 in certain markets, but in other ones the downturn has become dangerously prolonged. This situation is felt most strongly in Germany, which is not only the largest joinery manufacturer in Europe but also the largest consumer of windows and doors from Central and Eastern Europe. This is why the generally anticipated return of the European industry to the path of growth is not that obvious.

This edition of the report summarises the sales performance of the European window and door joinery sector in 2023 and in H1 2024, and attempts to answer one of the crucial questions in this industry: Will the sales in Europe soar at last in 2025?

About the report

This study presents the performance of the window and door sector in 33 European countries until the end of 2023, the preliminary manufacturing results in H1 2024 and the window sales forecast in Europe until 2026.

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 2023.

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 2024. Forecast for window sales until 2026

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 33 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: Albania, Croatia, Cyprus, Greece, Spain, Malta, Montenegro, Portugal, Italy, Serbia, Bosnia and Herzegovina



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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 (CATI) among representatives of approximately 60 window manufacturers and component suppliers
2. external sources, such as credit agencies, trade associations, international organisations, statistical offices, press releases, corporate presentations, stock exchange quotations, manufacturers' websites, etc., including:

<ul style="list-style-type: none"> ▪ Agency for Statistics of Bosnia and Herzegovina ▪ Central Statistical Bureau (Latvia), ▪ Central Statistical Office (Ireland), ▪ Croatian Bureau of Statistics, ▪ Czech Statistical Office, ▪ Dun & Bradstreet, ▪ EPPA (The European PVC Windows Profiles and related Building Products Associations), ▪ Eurostat, ▪ Heinze (Germany) ▪ Hellenic Statistical Authority (Greece) ▪ Hungarian Central Statistical Office, ▪ Institute of Statistics (Albania) ▪ Instituto Nacional de Estatística (Portugal), ▪ International Monetary Fund, ▪ National Fund for Environmental Protection and Water Management (Poland) ▪ National Institute of Statistics (Romania), ▪ National Statistical Institute of the Republic of Bulgaria, ▪ Office for National Statistics (UK), ▪ Statbel (Statistics Belgium), ▪ Statec (Luxemburg), 	<ul style="list-style-type: none"> ▪ Statistics Austria, ▪ Statistics Denmark, ▪ Statistics Finland, ▪ Statistics Lithuania, ▪ Statistics Netherlands, ▪ Statistics Norway, ▪ Statistics Poland, ▪ Statistics Sweden, ▪ Statistical Office of Estonia, ▪ Statistical office of Montenegro – MONSTAT ▪ Statistical Office of the Republic of Serbia ▪ Statistical Office of the Slovak Republic, ▪ Statistical Office of the Republic of Slovenia, ▪ Statistical Service of Cyprus, ▪ Statistisches Bundesamt Deutschland, ▪ The Italian National Institute of Statistics, ▪ The National Statistics Institute (Spain), ▪ The National Statistics Office (Malta) ▪ The National Institute of Statistics and Economic Studies (France), ▪ Union des Fabricants de Menuiseries (UFME) ▪ United Nations.
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Definitions

This analysis covers the window and door joinery market in 33 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: 441811 (windows and French windows and their frames, of tropical wood), 441819 (Windows, French windows and their frames, of wood, excl. of tropical wood),
- Wood doors – NACE classification Rev. 2: 16.23.11-50 (doors and their frames and thresholds, of wood); CN classification: 441821 (doors and their frames and thresholds, of tropical wood), 441829 (Doors and their frames and thresholds, of wood, excl. of tropical 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, m², 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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