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of the report

# EUROPEAN WINDOW AND DOOR MARKET

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# 2025



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Over the last two years, demand for joinery in Europe has declined sharply. In quantitative terms, the production and sales of windows shrank by as much as 14%. The decline in value was smaller, but mainly because the prices of windows and doors were rising until the end of 2023.

A deeper decline was visible in 2023, but 2024 – when the decline in demand for joinery was expected to slow down or even increase – was not successful, either. Window and door manufacturing has declined again, especially in Western European countries. In Germany and France, window and door manufacturing shrank by 8-9% in 2024 alone, and in the UK it decreased by a dozen or so per cent.

The results from Northern European countries are not much better. The decline in production there is not as deep as in 2023, but the production volume, approximately 8% lower compared to the very weak 2023, does not inspire optimism. Against this background, improvement can be seen in the countries of Central and Eastern Europe (slowing down the 2023 decline) and in some Southern European countries.

This edition of the report summarizes the sales performance of the European window and door joinery sector in 2024 and in H1 2025, and attempts to assess whether sales in Europe have a chance to return to the growth path in 2026.

## About the report

In this study, we present the results of the window and door industry in 33 European countries in 2024, preliminary manufacturing results for the first half of 2025, as well as a window sales forecast in Europe until 2026.

In the report, you will also find information on production dynamics across individual regions, the market shares of PVC, wooden, aluminum, and steel windows and doors in leading countries, as well as the sales figures for 2024 generated by several dozen of the largest joinery manufacturers in Europe.

The most important issues we have covered are:



window and door manufacturing in individual European countries



structure of window and door manufacturing by individual materials: PVC, wood, aluminum, steel



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



turnover of leading European manufacturers



average sales prices of windows by European manufacturers



the size, dynamics and structure of exports outside Europe and the activity of companies from other continents



Preliminary manufacturing results in Europe in H1 2025  
Window sales forecast until 2026.

The report presents data about the door and window and door joinery in general and divided into:

- wood windows
- wood doors
- PVC windows and doors
- steel joinery
- aluminium joinery

The analysis covers the results of 33 European countries divided 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, Czech Republic, Estonia, Lithuania, Latvia, Poland, Romania, Slovakia, Hungary

Southern Europe – Albania, Croatia, Cyprus, Montenegro, Greece, Spain, Malta, Portugal, Italy, Serbia, Bosnia and Herzegovina



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## Definitions, data sources

## 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 according to the following classifications:

- **Wood windows** – NACE Rev. 2 classification: 16.23.11-10 (windows, French windows and their frames, of wood); CN classification: 441811 (windows, French windows and their frames, of tropical wood), 441819 (windows, French windows and their frames, of other than tropical wood),
- **Wood doors** – NACE Rev. 2 classification: 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 other than tropical wood),
- **PVC joinery** – classification NACE Rev. 2. 22.23.14-50 (windows, doors and their frames and door thresholds made of plastics); CN classification 39252000 (doors, windows and their frames and door thresholds made of plastics),
- **Steel joinery** – NACE Rev. 2 classification: 25.12.10-30 (doors, windows and their frames and door thresholds, of cast iron or steel); CN classification 73083000 (doors, windows and their frames and door thresholds, of cast iron or steel),
- **Aluminium joinery** – NACE Rev. 2 classification: 25.12.10-50 (doors, windows and their frames and door thresholds, of aluminium); CN classification 76101000 (doors, windows and their frames and door thresholds, 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 sales prices calculated as the ratio of the total value of window sales by manufacturers in a given country to the total number of windows produced in that country.

## Data sources

The study was based on various secondary sources (desk research), such as: business intelligence agencies, industry associations, international organizations, statistical offices, press materials, company presentations, stock exchange quotations, manufacturers' websites, etc., including:

- 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 the Environment 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),
- 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)
- Unione Nazionale delle Industrie delle Costruzioni Metalliche dell'Involucro e dei serramenti (UNICMI)
- United Nations.

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