



The European Window Markets

in Cooperation with Prof. Dr. Dirk Hass

- Künzelsauer Institut für Marketing -

Frankfurt on the Main, March 2019

The European Window Markets

Content of the Study

In the focus of the study is the building development – in particular the window market – within the member state of the European Union and the neighbouring countries.

	Belgium		Italy		Romania		Russia
	Bulgaria		Croatia		Sweden		Ukraine
	Denmark		Latvia		Slovakia		Turkey
	Germany		Lithuania		Slovenia		Switzerland
	Estonia		Luxembourg		Spain		Norway
	Finland		Malta		Czech Republic		
	France		Netherlands		Hungary		
	Greece		Austria		United Kingdom		
	Ireland		Poland		Portugal		



Structure & Explanation

The study comprises the core data of the national window markets of the EU member states as well as the neighbouring countries. In addition to this – if available – relevant general specifications for the development of the window market are preposed, in particular there are:

(1) Country Profile

The country profile includes the cross domestic product, inhabitants, building investments and the Home Ownership rate of the specific countries.

(2) Modernization Market

The Modernization market gives an overview of the total amount of dwellings and buildings as well as a deepening analysis of the distribution of buildings or dwellings by construction period in particular. Building and dwelling stock are measured differently by the considered countries. On the one hand the distribution of the construction period is concerned. On the other hand the countries define the building and dwelling stock differently, in particular regarding the integration of similar residential buildings and the non-residential buildings, which will be pointed out accordingly. In case that the non-residential buildings are listed and published separately with regard to the building stocks, the figures are marked here as well.



Structure & Explanation

(3) Building Activity Statistic

Within the scope of the building activity statistic the building permits and building completions for new buildings are presented in total amount as well as divided into residential and non-residential buildings. It has to be considered that the regarded countries use very different measures for the recording of the building activity (buildings, dwellings, living space, floor space, volume etc.)

(4) Window Market

For the window market the quantities of sales in the countries between 2007 and 2018 are presented and there is set a trend for the market development 2019. In addition the market volume is separately considered by dateard frame materials. With regard to the quantitative market volume a window unit of 1.3 m x 1.3 m is assumed.

The specifications about the window market are based on second research (conversations with associations, publications, international statistics of the window and facing industry, expert conversations) and are to be understood as approximate values in terms of expert opinions. The estimates are based on data from the national window inventory (window stock). This database was updated in 2018.





Estonia

Country Profile Estonia

Gross domestic product per inhabitant in EUR	17.484	2017
Inhabitants in 1.000	1.319	2018
Building investments per person employed in construction in EUR	51.200	2017
Building investments per inhabitant in EUR	2.216	2017
Home Ownership rate in %	81,5	2015



Modernization Market Estonia

Building stock total amount of dwellings		n.v.	n.v.
Dwelling stock total amount of dwellings		706.244	2017
Dwelling stock by construction period total amount of dwellings	before 1919	43.939	2017
	1919 – 1945	78.774	2017
	1946 – 1960	58.154	2017
	1961 – 1980	255.309	2017
	1981 - 2000	151.464	2017
	2001 – 2010	51.404	2017
	after 2011	17.133	2017
	not specified	44.335	2017



Building Activity Statistic Estonia

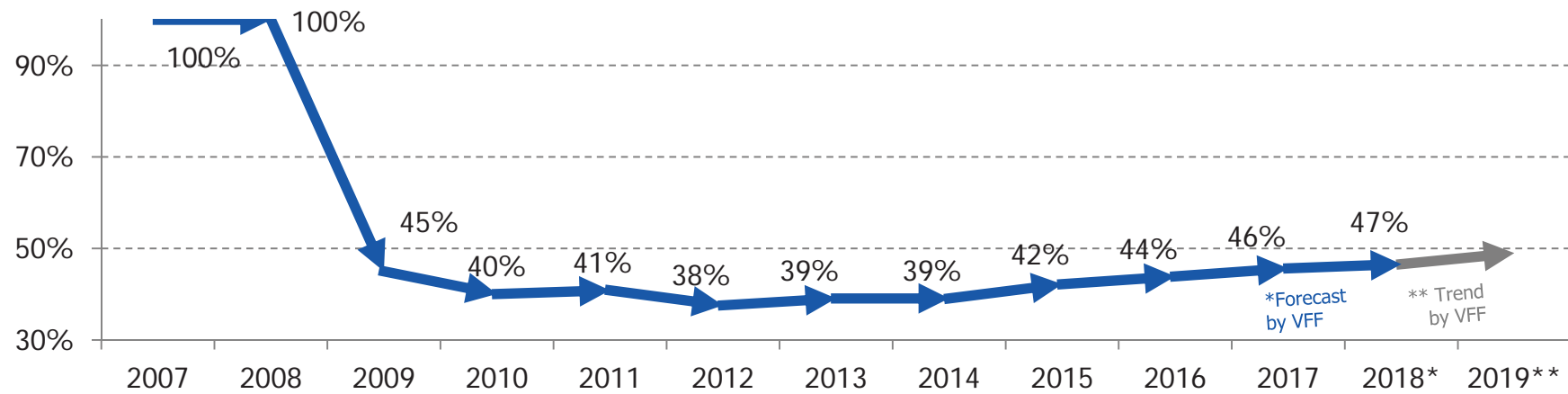
Building permits for new buildings total amount of buildings	total	5.113	2015	4.890	2017
	...residential buildings	1.692	2015	2.312	2017
	...non-residential buildings	3.421	2015	2.578	2017
Building permits for new buildings living + floorspace in 1.000 m ²	total	1.752	2015	2.068	2017
	...residential buildings	521	2015	697	2017
	...non-residential buildings	1.231	2015	1.371	2017
Building completions for new buildings total amount of buildings	total	2.400	2015	2.926	2017
	...residential buildings	1.329	2015	1.675	2017
	...non-residential buildings	1.071	2015	1.251	2017
Building completions for new buildings living + floorspace in 1.000 m ²	total	1.013	2015	1.343	2017
	...residential buildings	386	2015	539	2017
	...non-residential buildings	627	2015	804	2017



The European Window Markets

Window Market in Estonia – Trend of Market

Trend of Market Volume (market development in %: base year 2007)




Window stock in million window units	9,6	2017
Activity index market volume / window stock	1,95	2017



The European Window Markets

Window Market in Estonia – Market Volume

Market Volume in million window units / percentage change (compared to the previous year)	0,16	-11,0	2010
	0,16	+2,0	2011
	0,15	-8,0	2012
	0,16	+4,0	2013
	0,16	0,0	2014
	0,17	+8,0	2015
	0,18	+4,0	2016
	0,18	+4,0	2017
	0,19	+2,0	2018*
Trend 2019			2019**

* Forecast by VFF, ** Trend by VFF

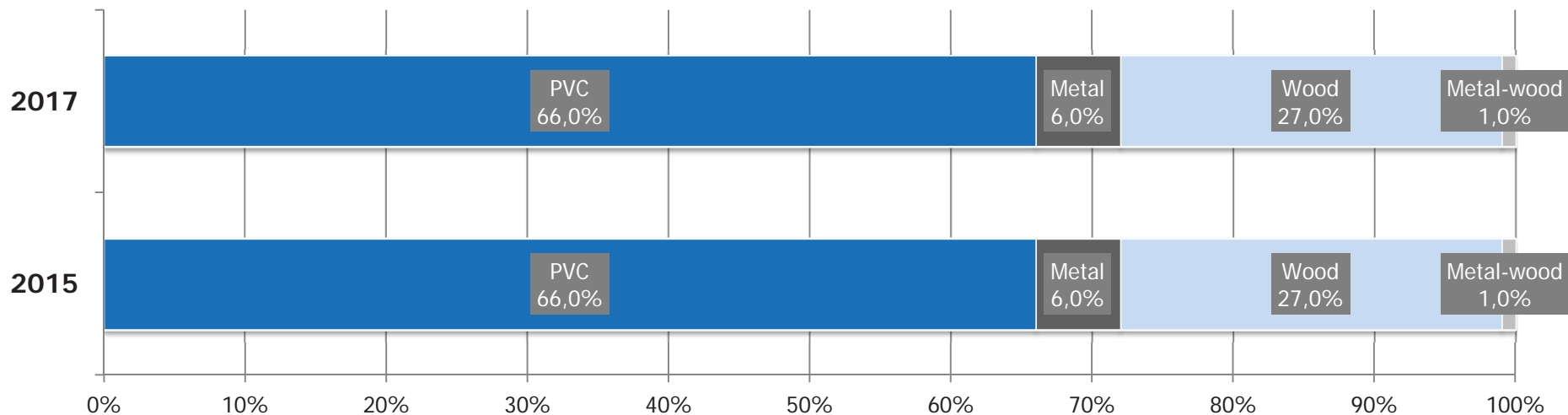
	2010	2011	2012	2013	2014	2015	2016	2017	Growth in %
Market Volume by frame material in million window units and percentage change (Growth 2016-2017)									
Total market	0,16	0,16	0,15	0,16	0,16	0,17	0,18	0,18	
PVC	0,11	0,11	0,10	0,10	0,10	0,11	0,12	0,12	+4,0
Metal	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,01	+4,0
Wood	0,04	0,04	0,04	0,04	0,04	0,05	0,05	0,05	+4,0
Metal-wood	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	+4,0



The European Window Markets

Window Market in Estonia by Frame Materials

		2010	2011	2012	2013	2014	2015	2016	2017
Market Volume by frame material percentage distribution	PVC	66	66	66	66	66	66	66	66
	Metal	6	6	6	6	6	6	6	6
	Wood	27	27	27	27	27	27	27	27
	Metal-wood	1	1	1	1	1	1	1	1



Basic Sources

Basic Sources:

Heinze GmbH, Ländermonitore, Stand Dezember 2018

Eurostat, Date 31.12.2018

Euroconstruct, Country Report 2016

as well as country-specific national Statistics Agencies, Date 01.12.2016

Nutzungsbedingungen

Basic and Specific Terms of Use of the Association of Windows and Facades (VFF)

Basic Terms of Use for Publications

All publications by the Windows and Façades Association (VFF) including all of their parts are protected by copyright.

Any use not expressly permitted by copyright law, specifically the reproduction, dissemination, exhibition, editing, translation and recording on microfilm and storage and processing in electronic systems will require the publisher's consent.

Any use outside of the strict limits of copyright law without the publisher's consent is illegal and may be prosecuted. In this context, the publishers expressly reserve all possible claims, in particular to cease and desist orders and damage compensation.

Special Terms of Use for Documents in Electronic Form

Documents in electronic Form (e.g. DOC or PDF format) are subject to copyright protection in the same form as printed versions.

The acquirer specified in these documents or bearing a form of identification (hereinafter referred to as "Acquirer") must comply with the following in addition to the basic terms of use (see above):

The Acquirer may only use documents for his own, company internal use at an individual place or on the company Intranet. The publication of excerpts, e.g. as annexes to individual letters, is permitted if the source is specified. The publication of the documents with or as "chain letters" is not permitted. The Acquirer must ensure that the recipient does not disclose the documents received. In the case of disclosure the Acquirer will be liable toward the publisher in particular for the damage caused.

Providing third parties with access to the documents, the placement of all or parts of the document on the Internet and/or on local Intranet systems (e.g. customer databases) is not permitted.

Any transformation of the documents is not permitted. The Acquirer will be obligated to only use them in the proper manner. He will be obligated not to abuse the access possibilities and to take into account the principles on the protection of data security; moreover, he will inform the publishers immediately of any indications of misuse.

In other respects, the Acquirer will ensure that unauthorized parties do not gain access to the documents or gain possession of the work reproduced by the Acquirer or gain knowledge of the contents of the data.

The European Window Markets

Published by:



Verband Fenster + Fassade

Walter-Kolb-Straße 1-7
D-60594 Frankfurt

Tel. 069 - 955 054-0
Fax. 069 - 955 054-11

www.window.de
vff@window.de

Designed and written by:



Künzelsauer Institut für Marketing
an der Hochschule Heilbronn

Prof. Dr. Dirk Hass
Daimlerstraße 35
D-74653 Künzelsau

Dr. Moning-Str. 2
D-57271 Hilchenbach

Tel. 0 27 33 - 813 346
Fax. 0 27 33 - 813 347

hass@hs-heilbronn.de

