



# The European Window Markets

in Cooperation with Prof. Dr. Dirk Hass

- Künzelsauer Institut für Marketing -

Frankfurt on the Main, April 2023

## 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 2022 are presented and there is set a trend for the market development 2023. 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.

For Russia and Ukraine can be made no statements for 2022. In order to keep the model constant, the quantities of 2021 are assumed for the future and adjusted in due course.

The UK remains under EU 28 so that the historical structure of the model can be retained.



## Structure & Explanation

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.

Data related to the European window market should ideally derive from studies carried out by the national window associations. Other than Germany, those studies are often not updated constantly which is why recent figures are collected and continued by designated expert teams from international corporations. Estimates are supported by industry-specific knowledge, current building stock development, number of building applications, overall construction of new buildings and renovation activities, as well as macroeconomic data.

The national window associations deliver own studies on a regular basis which are updated in larger time intervals. Figures from those updates are then incorporated in the latest forecast and lead to subsequent corrections, especially in the market shares by frame material (highlighted at the corresponding location in the forecast).



## Disclaimer - Exclusion of liability

### **Disclaimer - Exclusion of liability**

The information contained in this market study is based on secondary statistical information and, with regard to data on the window market, in particular on self-assessments and estimates by industry professionals. The publishers are not liable, either directly or indirectly, for the information on which the market study is based; a corresponding assurance is not given. It is expressly pointed out that the publishers assume no legal liability or responsibility in connection with the transmission and use of the market study.





Estonia

## Country Profile Estonia

Gross domestic product (nominal) per inhabitant in EUR	23.642	2021
Inhabitants in 1.000	1.329	2022
Building investments per person employed in construction in EUR	70.100	2021
Building investments per inhabitant in EUR	3.016	2021
Home Ownership rate in %	81,6	2021





## Modernization Market Estonia

Building stock total amount of residential buildings		n.v.	n.v.
Dwelling stock total amount of dwellings		718.590	2018
Dwelling stock by construction period total amount of dwellings	before 1919	46.553	2018
	1919 – 1945	82.060	2018
	1946 – 1960	58.956	2018
	1961 – 1980	253.321	2018
	1981 - 2000	150.446	2018
	2001 – 2010	51.847	2018
	after 2011	26.092	2018
	not specified	43.691	2018



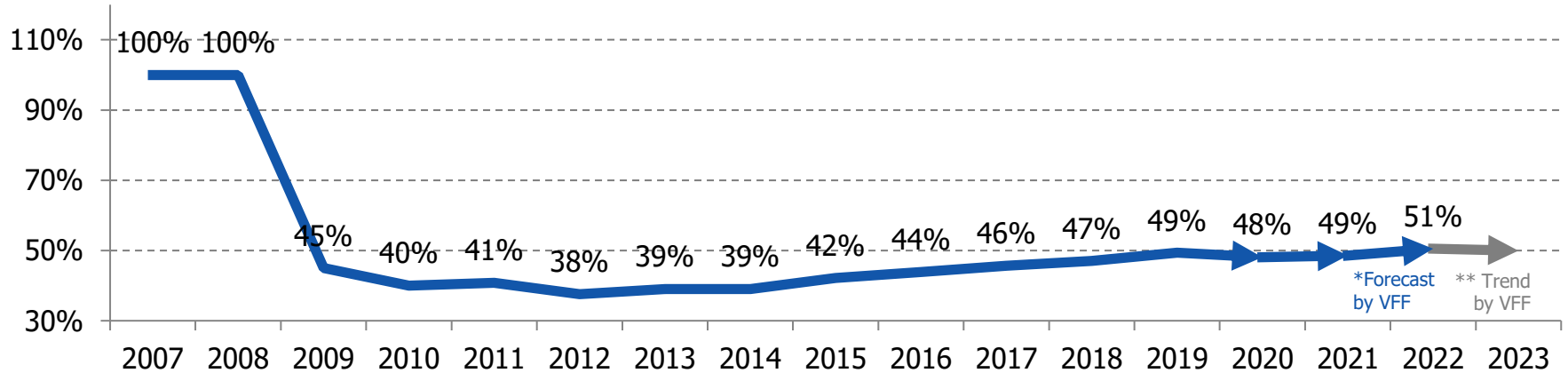
## Building Activity Statistic Estonia

Building permits for new buildings total amount of buildings	total	4.615	2019	5.683	2021
	...residential buildings	2.382	2019	3.072	2021
	...non-residential buildings	2.233	2019	2.611	2021
Building permits for new buildings living + floor space in 1.000 m <sup>2</sup>	total	1.643	2019	2.024	2021
	...residential buildings	695	2019	793	2021
	...non-residential buildings	948	2019	1.231	2021
Building completions for new buildings total amount of buildings	total	3.757	2019	2.496	2021
	...residential buildings	2.347	2019	1.360	2021
	...non-residential buildings	1.410	2019	1.136	2021
Building completions for new buildings living + floor space in 1.000 m <sup>2</sup>	total	1.338	2019	1.251	2021
	...residential buildings	658	2019	613	2021
	...non-residential buildings	680	2019	638	2021



## 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	2021
Activity index market volume / window stock	2,04	2021



## Window Market in Estonia – Market Volume

<b>Market Volume</b> in million window units / percentage change (compared to the previous year)	0,16	+0	2014
	0,17	+8,0	2015
	0,18	+4,0	2016
	0,18	+4,0	2017
	0,19	+3,0	2018
	0,20	+5,0	2019
	0,19	-2,5	2020
	0,19	+1,0	2021
	0,20	+4,0	2022*
<b>Trend 2023</b>	Trend (0)		2023**

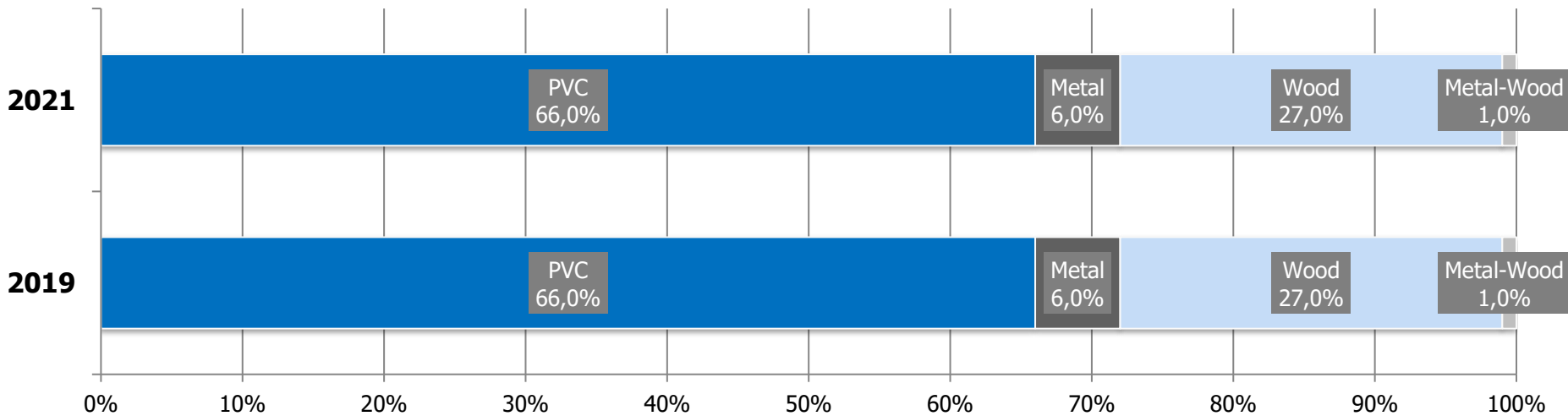
\* Forecast by VFF, \*\* Trend by VFF

<b>Market volume by frame material</b> in million window units and percentage change (Growth 2020-2021)	Segment	2014	2015	2016	2017	2018	2019	2020	2021	Growth in %
	Total Market	0,16	0,17	0,18	0,18	0,19	0,20	0,19	0,19	
PVC	0,10	0,11	0,12	0,12	0,12	0,13	0,13	0,13	+1,0	
Metal	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,01	+1,0	
Wood	0,04	0,05	0,05	0,05	0,05	0,05	0,05	0,05	+1,0	
Metal-Wood	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	+1,0	



## Window Market in Estonia by Frame Materials

Market volume by frame material percentage distribution	Segment	2014	2015	2016	2017	2018	2019	2020	2021
	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, December 2022

Statista, Home ownership rates in selected European countries 2021,

Eurostat, December 2023

as well as country-specific national Statistics Agencies and national member associations of EuroWindow, Date 2023

## 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.

Edited and carried out by:



**Verband Fenster + Fassade**

Walter-Kolb-Straße 1-7  
60594 Frankfurt

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

[www.window.de](http://www.window.de)  
[vff@window.de](mailto:vff@window.de)

Composed by:



Künzelsauer Institut für Marketing  
an der Hochschule Heilbronn

**Prof. Dr. Dirk Hass**  
Daimlerstraße 35  
74653 Künzelsau

[Dirk.Hass@hs-heilbronn.de](mailto:Dirk.Hass@hs-heilbronn.de)

