

The European Window Markets

in Cooperation with Prof. Dr. Dirk Hass

- Künzelsauer Institut für Marketing -

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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 2016 are presented and there is set a trend for the market development 2017. 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.





Estonia

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Country Profile Estonia

Gross domestic product per inhabitant in EUR	15.580	2015
Inhabitants in 1.000	1.316	2016
Building investments per person employed in construction in Euro	41.900	2015
Building investments per inhabitant in EUR	1.974	2015
Home Ownership rate in %	81,5	2015



Modernization Market Estonia

Building stock total amount of residential buildings		n.v.	n.v.
Dwelling stock total amount of dwellings		657.820	2012
Dwelling stock by construction period total amount of dwellings	before 1919	61.880	2012
	1919 – 1945	93.650	2012
	1946 – 1960	67.720	2012
	1961 – 1970	129.750	2012
	1971 - 1980	141.100	2012
	1981 – 1990	128.960	2012
	1991 – 1995	18.510	2012
	after 1996	16.250	2012



Building Activity Statistic Estonia

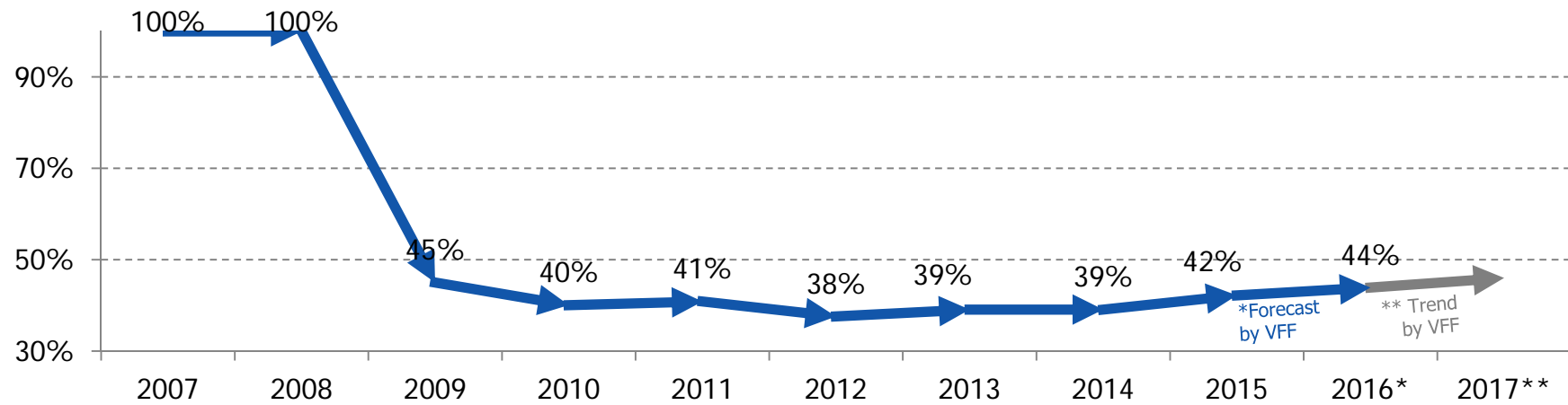
Building permits for new buildings <i>total amount of buildings</i>	total	3.669	2013	5.113	2015
	...residential buildings	1.348	2013	1.692	2015
	...non-residential buildings	2.321	2013	3.421	2015
Building permits for new buildings <i>living + floorspace in 1.000 m²</i>	total	1.177	2013	1.752	2015
	...residential buildings	361	2013	521	2015
	...non-residential buildings	816	2013	1.231	2015
Building completions for new buildings <i>total amount of buildings</i>	total	1.869	2013	2.400	2015
	...residential buildings	982	2013	1.329	2015
	...non-residential buildings	887	2013	1.071	2015
Building completions for new buildings <i>living + floorspace in 1.000 m²</i>	total	857	2013	1.013	2015
	...residential buildings	250	2013	386	2015
	...non-residential buildings	607	2013	627	2015



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Window Market in Estonia – Trend of Market

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



Window stock in million window units	9,3	2015
Activity index market volume / window stock	1,88	2015



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Window Market in Estonia – Market Volume

Market Volume

in million window units / percentage change (compared to the previous year)

* Forecast by VFF, ** Trend by VFF

Trend 2017

0,40	-	2007
0,40	0,0	2008
0,18	-55,0	2009
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*
		2017**



Market Volume by frame material

in million window units and percentage change (Growth 2014-2015)

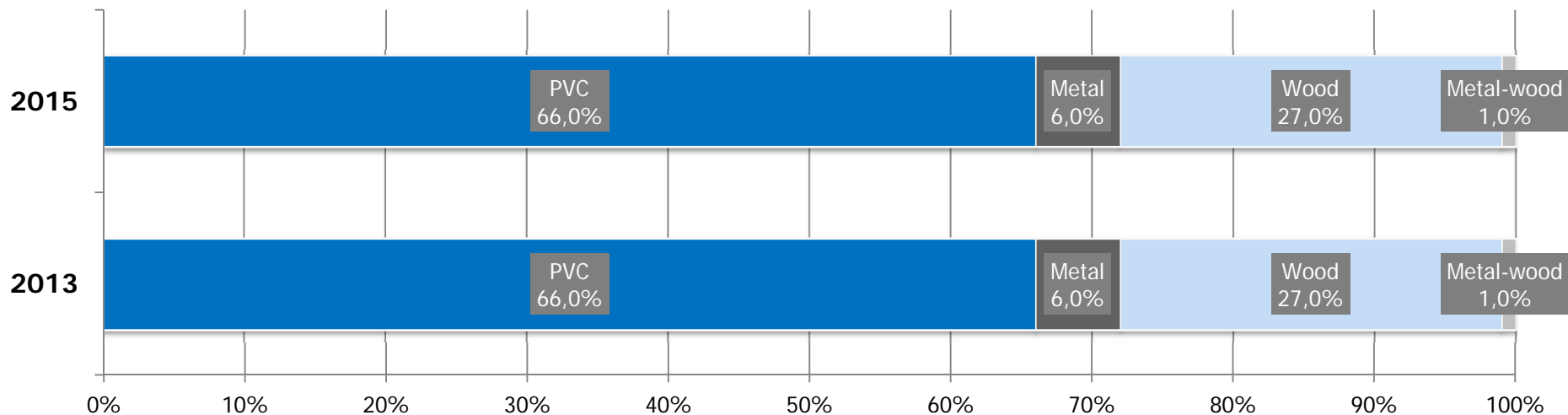
	2008	2009	2010	2011	2012	2013	2014	2015	Growth in %
Total Market	0,40	0,18	0,16	0,16	0,15	0,16	0,16	0,17	
PVC	0,26	0,12	0,11	0,11	0,10	0,10	0,10	0,11	+8,0
Metal	0,02	0,01	0,01	0,01	0,01	0,01	0,01	0,01	+8,0
Wood	0,11	0,05	0,04	0,04	0,04	0,04	0,04	0,05	+8,0
Metal-wood	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	+8,0



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Window Market in Estonia by Frame Materials

		2008	2009	2010	2011	2012	2013	2014	2015
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



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Basic Sources

Basic Sources:

Heinze GmbH, Ländermonitore, Stand Dezember 2016

Eurostat, Date 01.12.2016

Euroconstruct, Country Report 2016

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

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