



# The European Window Markets

in Cooperation with Prof. Dr. Dirk Hass

- Künzelsauer Institut für Marketing -

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## 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.



## 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 2020 are presented and there is set a trend for the market development 2021. 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.



## 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).





Estonia

## Country Profile Estonia

Gross domestic product (nominal) per inhabitant in EUR	21.220	2019
Inhabitants in 1.000	1.329	2020
Building investments per person employed in construction in EUR	54.300	2019
Building investments per inhabitant in EUR	2.836	2019
Home Ownership rate in %	81,7	2019



## Modernization Market Estonia

Building stock total amount of 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





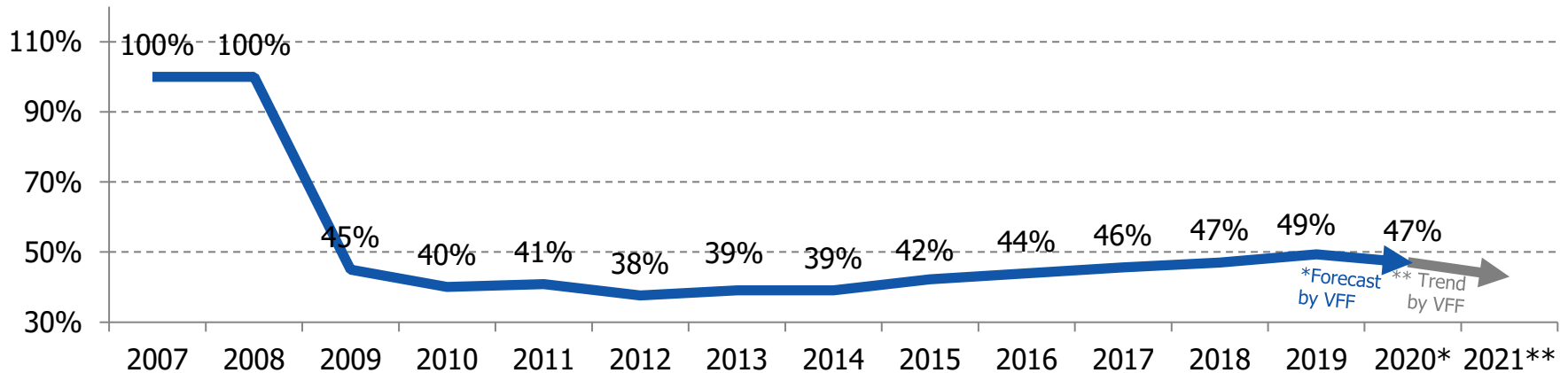
## Building Activity Statistic Estonia

Building permits for new buildings total amount of buildings	total	4.890	2017	4.615	2019
	...residential buildings	2.312	2017	2.382	2019
	...non-residential buildings	2.578	2017	2.233	2019
Building permits for new buildings living + floor space in 1.000 m <sup>2</sup>	total	2.068	2017	1.643	2019
	...residential buildings	697	2017	695	2019
	...non-residential buildings	1.371	2017	948	2019
Building completions for new buildings total amount of buildings	total	2.926	2017	3.757	2019
	...residential buildings	1.675	2017	2.347	2019
	...non-residential buildings	1.251	2017	1.410	2019
Building completions for new buildings living + floor space in 1.000 m <sup>2</sup>	total	1.343	2017	1.338	2019
	...residential buildings	539	2017	658	2019
	...non-residential buildings	804	2017	680	2019



## 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

2019

Activity index  
market volume / window stock

2,07

2019



## Window Market in Estonia – Market Volume

<b>Market Volume</b> in million window units / percentage change (compared to the previous year)	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	+3,0	2018
	0,20	+5,0	2019
	0,19	-5,0	2020*
<b>Trend 2021</b>			2021**



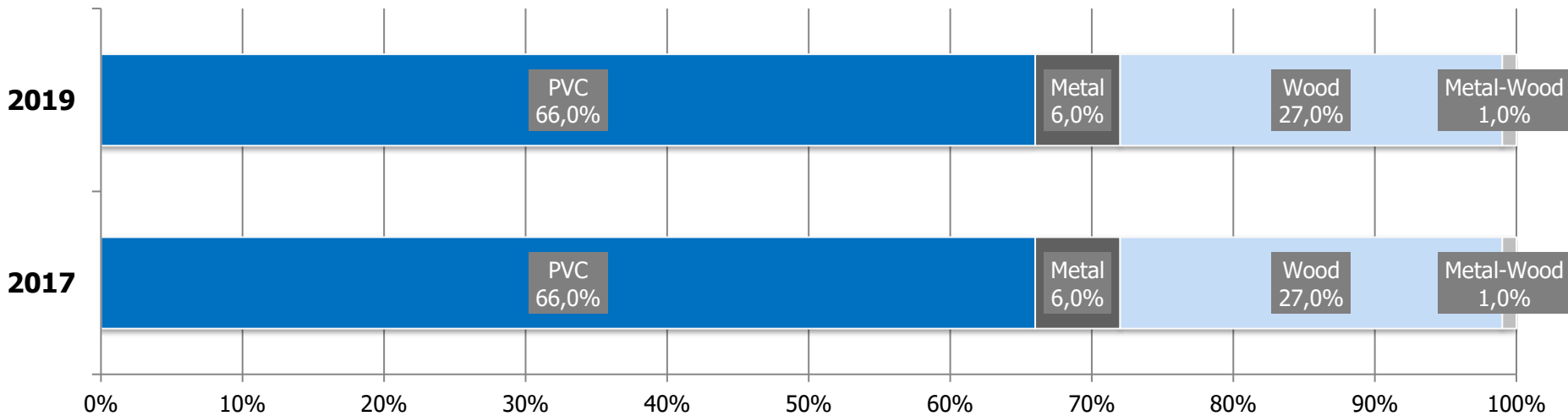
\* Forecast by VFF, \*\* Trend by VFF

<b>Market volume by frame material</b> in million window units and percentage change (Growth 2018-2019)	Segment	2012	2013	2014	2015	2016	2017	2018	2019	Growth in %
	Total Market	0,15	0,16	0,16	0,17	0,18	0,18	0,19	0,20	
PVC	0,10	0,10	0,10	0,11	0,12	0,12	0,12	0,13	+5,0	
Metal	0,01	0,01	0,01	0,01	0,01	0,01	0,01	0,01	+5,0	
Wood	0,04	0,04	0,04	0,05	0,05	0,05	0,05	0,05	+5,0	
Metal-Wood	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	+5,0	



## Window Market in Estonia by Frame Materials

Market volume by frame material percentage distribution	Segment	2012	2013	2014	2015	2016	2017	2018	2019
	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 2020

Statista, Home ownership rates in selected European countries 2019, (Date: Februar 2021)

Eurostat, December 2020

as well as country-specific national Statistics Agencies and national member associations of EuroWindow, 2021

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