

Windows And Doors - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 150 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Windows And Doors Market Analysis

The windows and doors market was valued at USD 216.04 billion in 2025 and is forecast to reach USD 270.39 billion by 2030, posting a 4.59% CAGR. Strong demand for energy-efficient building envelopes, tighter performance codes, and steady renovation spend underpin this growth. The ENERGY STAR Version 7.0 update is already pushing U-factor limits toward 0.22 in colder U.S. zones, motivating triple-pane glazing and advanced framing. Parallel momentum in the EU's Energy Performance of Buildings Directive (EPBD) is steering specifications toward zero-emission buildings by 2030, accelerating adoption of high-performance fenestration across both residential and commercial projects. Supply-side shifts—especially light-weight framing options, modular construction, and smart-glass upgrades—continue to widen design choices and shorten lead times, even as aluminum and labor shortages remain persistent headwinds. Manufacturers able to combine material innovation, automated fabrication, and regional fulfillment are positioned to capture the next wave of specification-driven demand in the windows and doors market.

Global Windows And Doors Market Trends and Insights

Residential renovation boom and aging housing stock

Elevated borrowing costs have locked most homeowners into favorable rates, channeling discretionary capital toward upgrades rather than relocation. Remodel spending grew sharply in 2024 and is projected to maintain 5% growth in 2025, supported by an aging North American and European housing base, much of which crosses the 20- to 39-year prime replacement window for

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

fenestration. Nearly half of hurricane recovery projects in coastal U.S. counties now include window or door upgrades, highlighting the dual value of protective and energy-saving features. Remodeling professionals also note a surge in "aging-in-place" requests that favor wider clear openings, lower sill heights, and ergonomic hardware. These usage patterns keep the windows and doors market firmly aligned with consumer wellness and resilience priorities.

Energy-efficiency regulations (ENERGY STAR V7.0, EU EPBD)

Performance codes are tightening in a coordinated fashion across major economies. In the United States, ENERGY STAR V7.0 pushes U-factors down 15% from the previous cycle, practically standardizing triple-pane construction in cold climates. The 2024 International Energy Conservation Code now caps air leakage at 0.35 cfm/ft², demanding improved weather-stripping and frame design. Europe's revised EPBD locks in zero-emission requirements for new buildings starting 2030, along with staged renovation targets for the existing stock. Attractive tax credits and utility rebates offset part of the upfront cost, fostering faster payback and heightening product differentiation within the windows and doors market.

Raw-material price volatility (aluminum, PVC)

Energy cost spikes and smelter curtailments have trimmed aluminum supply just as post-pandemic demand recovered, lifting average premiums and lengthening lead times. PVC producers also struggle with higher input costs and stricter chlorine-production rules, especially in Europe, where environmental scrutiny is intense. To hedge volatility, manufacturers are pivoting toward recycled billet, thermoplastic-reinforced profiles, and regional sourcing agreements. Lightweight composite frames, which reduce metal use without sacrificing strength, continue to gain share. Nonetheless, price swings squeeze smaller fabricators' margins, slowing project awards and tempering growth in parts of the windows and doors market.

Other drivers and restraints analyzed in the detailed report include:

Rapid urbanization and infrastructure spend in Asia-Pacific / Modular construction driving unitized facades / Skilled-labor shortage for installation /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Doors generated the majority of 2024 revenue at 58.56%, confirming their foundational role in every building type. Security doors, fire-rated assemblies, and smart locks sustain a replacement cadence that keeps demand relatively stable even during cyclical slowdowns. Conversely, windows outpace in growth at a 7.49% CAGR thanks to stringent heat-gain limits and the rise of building-integrated photovoltaics, which capture solar energy directly through glass. This pull-through effect positions windows as the technological spearhead of the windows and doors market.

Door makers invest in multi-point locking, impact-rated panels, and seamless smart-home integration; however, the highest margins are migrating to advanced window solutions that fuse electro-chromic coatings with solar-harvesting interlayers. Lawrence Berkeley National Laboratory recorded up to 15.9% whole-building energy savings from such installations, a metric that drives premium pricing and short paybacks. As a result, the windows and doors market size for the window segment is projected to rise from USD 89 billion in 2025 to USD 123 billion by 2030, even though the door segment will still dominate on volume.

Metal frames, particularly aluminum, held 46.62% revenue in 2024 because of their favorable strength-to-weight ratio, slim sightlines, and recyclability. Curtain-wall high-rises, hospitals, and transport hubs nearly always specify aluminum frames for both doors and glazed facades. Yet plastic/uPVC profiles are capturing the fastest gains-8.73% CAGR-inside fast-growing suburban and

peri-urban housing corridors where budget sensitivity and quick installation matter most. Updated formulations featuring embedded fiberglass or steel micro-reinforcements deliver thermal performance without compromising rigidity, answering earlier criticisms of PVC's structural limits.

Lifecycle scrutiny is pushing producers toward phthalate-free, lead-free stabilizers and closed-loop recycling commitments that turn profile off-cuts into new extrusions. Meanwhile, emerging wood-plastic composites and fiberglass frames offer a middle ground between aluminum's stiffness and vinyl's insulative edge. Against this backdrop, the windows and doors market size for PVC systems is projected to add USD 14 billion between 2025 and 2030, while metal growth moderates in line with primary-aluminum capacity constraints. Regulatory debates in the EU about potential PVC phase-downs beyond 2030 create strategic risk but also encourage innovation in recyclable and bio-based polymer blends.

The Windows and Doors Market is Segmented by Product Type (Doors, Windows), Material Type (Wood, Metal, Plastic / UPVC / Composite), Application (Swinging, Sliding, and More), End User (Residential and Non-Residential (Commercial, Industrial, Institutional)), Installation Type (New Construction, Replacement / Retrofit), Geography. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

Geography Analysis

Asia-Pacific held 42.13% of 2024 revenue, anchored by rapid urban build-outs and policy incentives for energy-conserving, climate-resilient construction. National building codes in China, India, and Indonesia have progressively lowered allowable U-values, setting a lucrative baseline for thermally broken frames and low-e insulated glass. Indigenous fabricators increasingly export unitised facades to neighboring markets, strengthening intra-regional supply chains and shaving logistics costs for the windows and doors market.

North America ranks second in size, propelled by strong renovation expenditure and a maturing off-site housing segment. ENERGY STAR tax credits and state-level storm hardening grants keep demand solid despite fluctuating housing starts. Skilled-labor scarcity remains the main growth bottleneck; however, rising automation rates at major plants, plus integrated installation programs, are mitigating cycle delays. Across Canada and the northern United States, triple glazing is fast becoming the baseline for multi-family projects seeking lower heating loads.

Europe commands a smaller absolute slice but offers high margin potential because the EPBD mandates zero-emission targets for new builds from 2030. Minimum energy performance standards also force upgrades of the worst 16% of non-residential stock by that same year, ensuring a steady retrofit pipeline. Manufacturers with verifiable environmental product declarations and circular-economy frameworks stand to gain preferential procurement scores. The windows and doors market sees premium demand for noise-attenuating units in dense cities such as Paris and Berlin, while adaptive shading packages become standard in Mediterranean resorts.

Middle East & Africa records the fastest CAGR at 7.10% through 2030, underpinned by large-scale hospitality, healthcare, and education projects. Extreme heat zones require solar-control glazing paired with wide-swing door systems that accommodate mixed indoor-outdoor occupancy patterns. Government mandates for green-building certifications, plus rising energy tariffs, hasten the shift to low-emissivity coatings. Local assembly hubs in the Gulf are beginning to serve East African corridors, reducing lead times and bolstering regional resilience within the windows and doors market.

South America shows a steadier climb, supported by urban densification in Brazil, Colombia, and Chile. High inflation limits short-term discretionary spend, yet long-term infrastructure concessions keep institutional projects moving forward. Revised performance codes in Chile and Peru now prescribe double-glazing for new high-altitude construction, further enlarging the addressable market for energy-conscious fenestration.

List of Companies Covered in this Report:

Andersen Corporation / JELD-WEN Holding Inc. / Pella Corporation / YKK AP Inc. / Marvin Windows & Doors / Masonite International / Cornerstone Building Brands / Ply Gem / MI Windows and Doors / LIXIL Corporation / ASSA ABLOY Group / Rehau Group / VEKA AG / Deceuninck NV / Profine GmbH (Kommerling) / Saint-Gobain Building Glass & Solutions / Schuco International / Aluplast GmbH / Fenesta Building Systems (DCM Shriram) / PGT Innovations / Atrium Corporation /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

1 Introduction

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Residential renovation boom and aging housing stock

4.2.2 Energy-efficiency regulations (ENERGY STAR V7.0, EU EPBD)

4.2.3 Rapid urbanisation and infra spend in APAC

4.2.4 Modular construction driving unitised facades

4.2.5 Insurance incentives for impact-rated fenestration

4.2.6 Building-integrated PV (BIPV) window uptake

4.3 Market Restraints

4.3.1 Raw-material price volatility (aluminium, PVC)

4.3.2 Skilled-labour shortage for installation

4.3.3 ESG scrutiny on vinyl lifecycle emissions

4.3.4 Smart-glass shift in high-end commercial builds

4.4 Value / Supply-Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces

4.7.1 Threat of New Entrants

4.7.2 Bargaining Power of Suppliers

4.7.3 Bargaining Power of Buyers

4.7.4 Threat of Substitutes

4.7.5 Industry Rivalry

5 Market Size and Growth Forecasts

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.1 By Product Type
 - 5.1.1 Doors
 - 5.1.2 Windows
- 5.2 By Material
 - 5.2.1 Wood
 - 5.2.2 Metal
 - 5.2.3 Plastic / uPVC / Composite
- 5.3 By Application
 - 5.3.1 Swinging
 - 5.3.2 Sliding
 - 5.3.3 Folding
 - 5.3.4 Revolving and Others
- 5.4 By End-User
 - 5.4.1 Residential
 - 5.4.2 Non-Residential (Commercial, Industrial, Institutional)
- 5.5 By Installation Type
 - 5.5.1 New Construction
 - 5.5.2 Replacement / Retrofit
- 5.6 By Geography
 - 5.6.1 North America
 - 5.6.1.1 Canada
 - 5.6.1.2 United States
 - 5.6.1.3 Mexico
 - 5.6.2 South America
 - 5.6.2.1 Brazil
 - 5.6.2.2 Peru
 - 5.6.2.3 Chile
 - 5.6.2.4 Argentina
 - 5.6.2.5 Rest of South America
 - 5.6.3 Europe
 - 5.6.3.1 United Kingdom
 - 5.6.3.2 Germany
 - 5.6.3.3 France
 - 5.6.3.4 Spain
 - 5.6.3.5 Italy
 - 5.6.3.6 BENELUX (Belgium, Netherlands, Luxembourg)
 - 5.6.3.7 NORDICS (Denmark, Finland, Iceland, Norway, Sweden)
 - 5.6.3.8 Rest of Europe
 - 5.6.4 Asia-Pacific
 - 5.6.4.1 India
 - 5.6.4.2 China
 - 5.6.4.3 Japan
 - 5.6.4.4 Australia
 - 5.6.4.5 South Korea
 - 5.6.4.6 South East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, Philippines)
 - 5.6.4.7 Rest of Asia Pacific
 - 5.6.5 Middle East and Africa

5.6.5.1 United Arab Emirates

5.6.5.2 Saudi Arabia

5.6.5.3 South Africa

5.6.5.4 Nigeria

5.6.5.5 Rest of Middle East and Africa

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)

6.4.1 Andersen Corporation

6.4.2 JELD-WEN Holding Inc.

6.4.3 Pella Corporation

6.4.4 YKK AP Inc.

6.4.5 Marvin Windows & Doors

6.4.6 Masonite International

6.4.7 Cornerstone Building Brands / Ply Gem

6.4.8 MI Windows and Doors

6.4.9 LIXIL Corporation

6.4.10 ASSA ABLOY Group

6.4.11 Rehau Group

6.4.12 VEKA AG

6.4.13 Deceuninck NV

6.4.14 Profine GmbH (Kommerling)

6.4.15 Saint-Gobain Building Glass & Solutions

6.4.16 Schuco International

6.4.17 Aluplast GmbH

6.4.18 Fenesta Building Systems (DCM Shriram)

6.4.19 PGT Innovations

6.4.20 Atrium Corporation

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-need Assessment

Windows And Doors - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 150 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-09"/>

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com