The American Architectural Manufacturers Association’s, aamanet.org, annual fenestration market study has been a fixture of its service to the industry over many years, but its scope and rigor have increased over time. Manufacturers and suppliers are interviewed with a participation rate in excess of 50 percent and data from multiple secondary sources is triangulated to support the overall analysis. The AAMA 2017/2018 U.S. Industry Market Studies, compiled by Ducker Research Company, confirmed that the economy as a whole, and the fenestration industry in particular, are currently strong and stable, and are expected to continue that way for at least the next three years.

Residential construction
Conventional housing starts were forecast to grow 8 percent from 2017 to 2018. This comprises a gain in single family housing of 9 percent and in multi-family units of 6 percent. The breakdown of construction activity by region (wherein the West continues to show the strongest growth) is expected to remain essentially the same through 2019. The growth trend is expected to continue by 8.9 percent in 2019, led by the single-family sector. For the renovation sector, the AAMA market study projected 4 percent demand growth in 2018, followed by 3 percent growth in both 2019 and 2020.

Windows
Residential window sales were expected to increase in 2018, comprising vinyl (71.9 percent), wood or clad wood (13.9 percent), aluminum (7.9 percent) and other materials, including fiberglass (6.3 percent). In 2019, 54 percent of the total demand is expected to be for remodeling and replacement, while 46 percent should be for new construction. This overall market should continue to increase by about 3 percent in 2020. The study also notes that the aftermath of the 2017 and 2018 hurricane seasons has shown conclusively that impact-resistant windows and doors reduce structural and windborne debris-related damage.

Note: The full study additionally drills further down into the market. In it, residential windows are broken down by operator type and glass configuration within each framing material category. It also looks at the portion of windows sold by type of energy rating, as well as according to sealed insulating glass spacer and low-emissivity technology used. Wood windows and patio doors are further examined by wood species and by type of exterior finish. Similarly, vinyl windows are broken down by frame fabrication method and extrusion color.

Doors
Overall sales of entry doors were expected to increase by approximately 5 percent for 2018, followed by an additional 2.9 percent growth for 2019. The majority (81.1 percent) will be for residential use, of which about 45 percent will be steel, 43 percent fiberglass and 12 percent wood.

Patio doors
The U.S. market for residential patio doors for 2018 was forecasted to increase 6.6 percent from 2017, followed by additional growth for 2019, broken down by 51.6 percent for new construction and 48.4 percent replacement. Most are vinyl (50.6 percent in new construction and 56.4 percent in replacement), followed by wood (which continues to decrease in share year over year), steel (primarily in replacement), aluminum (primarily in new construction) and fiberglass.

Skylights
In 2018, the market for residential-type unit skylights was expected to increase by 3.7 percent from 2017. For 2019, the study predicts another 2.4 percent in growth, about 77 percent of which should be for replacement and remodeling use.

Duckers trend of drilling down further into product and market variables. Some examples include:
- Residential windows broken down by operator type and glass configuration within each framing material category
- Portion of windows sold by type of energy rating and according to sealed insulating glass spacer and low-E technology used
- Wood windows and patio doors by wood species and by type of exterior finish
- Vinyl windows by frame fabrication method and extrusion color
- Patio door market broken down by number of panels, sliding versus hinged and type of glazing, all according to framing material
- Skylights by framing material and by glazing type and color
- Window and door sales by type of market channel entity (specialty retailers, lumberyards, shortliners, big box outlets and millwork wholesalers)

Note: participation yields value. Responding to interview requests from market research firms helps support efforts to produce an accurate and detailed market study useful to the entire industry.

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