

# Window Market Reveals Opportunity

*Latest market study shows continued growth*



By  
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The current edition of the AAMA U.S. Industry Statistical Review and Forecast, focused exclusively on the fenestration market, shows that total housing starts continued their growth curve in 2018. Total housing starts growth included gains in the single-family segment of 3 percent. New housing is expected to grow by 1.4 percent in 2019, led by single-family housing starts.

The overall new housing market is expected to continue to grow through 2021.

While not as high as predicted a year ago, housing

starts are doing well. The multi-family sector experienced more growth than expected, somewhat offsetting the less-than-predicted performance in single-family home construction. In terms of remodeling, total expenditures grew by 4.8 percent over 2018 (higher than previously predicted) and are expected to increase by 3.5 percent in 2019 and 3 percent in 2020.

The residential prime window market, broken down by framing material, grew by 2.6 percent in 2018 compared to 2017. New construction window

## Shipments of Prime Windows (millions of units) 2012 – 2021<sup>F</sup>

Wood segment includes vinyl clad wood and metal clad wood units. Due to rounding, totals may not equal the sums of individual values. Source: Ducker Worldwide

<b>New Construction</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019<sup>F</sup></b>	<b>2020<sup>F</sup></b>	<b>2021<sup>F</sup></b>
Wood	2.7	3.0	3.1	2.9	3.0	3.1	3.1	3.1	3.2	3.2
Aluminum	2.5	3.1	3.5	3.5	3.4	3.5	3.5	3.3	3.5	3.5
Vinyl	8.6	10.6	11.7	12.9	13.7	14.6	15.4	15.7	16.6	17.0
Fiberglass	0.6	0.7	0.7	0.8	0.9	1.0	1.0	1.0	1.1	1.2
Other	0.2	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4
<b>Sub Total</b>	<b>14.7</b>	<b>17.6</b>	<b>19.2</b>	<b>20.5</b>	<b>21.4</b>	<b>22.7</b>	<b>23.4</b>	<b>23.5</b>	<b>24.8</b>	<b>25.3</b>
<b>"Remodeling &amp; Replacement"</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019<sup>F</sup></b>	<b>2020<sup>F</sup></b>	<b>2021<sup>F</sup></b>
Wood	4.6	4.7	4.7	4.3	4.2	4.1	4.1	4.1	4.1	4.1
Aluminum	0.7	0.7	0.7	0.6	0.6	0.6	0.6	0.6	0.5	0.5
Vinyl	18.9	19.6	20.0	20.7	21.3	21.7	22.3	22.7	23.2	23.6
Fiberglass	0.7	0.7	0.7	0.8	0.8	0.8	0.8	0.9	0.9	0.9
Other	0.6	0.7	0.7	0.7	0.8	1.0	1.0	1.1	1.1	1.2
<b>Sub Total</b>	<b>25.4</b>	<b>26.3</b>	<b>26.8</b>	<b>27.1</b>	<b>27.6</b>	<b>28.2</b>	<b>28.7</b>	<b>29.3</b>	<b>29.8</b>	<b>30.3</b>
<b>Total Construction</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019<sup>F</sup></b>	<b>2020<sup>F</sup></b>	<b>2021<sup>F</sup></b>
Wood	7.3	7.7	7.8	7.2	7.3	7.2	7.2	7.2	7.3	7.3
Aluminum	3.2	3.7	4.2	4.0	4.0	4.1	4.1	3.9	4.0	4.1
Vinyl	27.5	30.2	31.6	33.7	35.0	36.4	37.6	38.5	39.8	40.5
Fiberglass	1.2	1.4	1.4	1.6	1.7	1.8	1.8	1.9	2.0	2.1
Other	0.8	0.9	1.0	1.1	1.1	1.3	1.5	1.5	1.5	1.6
<b>Total</b>	<b>40.1</b>	<b>43.9</b>	<b>46.0</b>	<b>47.6</b>	<b>49.1</b>	<b>50.8</b>	<b>52.2</b>	<b>52.8</b>	<b>54.7</b>	<b>55.6</b>

## ➔ Eye on Fenestration

demand increased by 3.4 percent while remodeling and replacement demand increased by 2 percent.

Expectations for 2019 are a 1.3 percent increase followed by a 3.5 percent increase in 2020, as new-housing starts soften somewhat but are still expected to realize the full potential of the current growth cycle. Meanwhile, remodeling and replacement window demand increased modestly again, by 2 percent in 2018, with similar growth in this segment forecasted for 2019.

### Material and product trends

Vinyl continues to maintain its position as the leading frame material, increasing to just over 72 percent share overall, offset primarily by continued decline in wood products, the overall share for which has slipped to 13.8 percent.

The use of sealed insulating glass has become a standard offering in residential window units in south

Texas, other regions in the Southwestern U.S., and all but parts of southern Florida, reaching a near-saturation market penetration of 97 percent. The use of triple glazing is also expected to continue to grow, but it is still only a small single-digit share of the market.

Residential skylights registered a growth rate of 4 percent over 2017 volume. New construction and remodeling/replacement skylight market segments saw similar levels of growth.

The overall patio door market increased in 2018 by 5.2 percent. New construction units increased by 6.4 percent, while remodeling and replacement units increased by 4 percent. The 2019 market is expected to increase by 1 percent.

For entry doors, 2018 residential new construction demand grew by 3.8 percent. Meanwhile, entry door remodeling and replacement demand, which continues to represent a significantly larger share of total demand, grew at 1.9

percent. The total market is expected to grow by 1.5 percent in 2019.

### Need more?

The complete market study can be purchased from AAMA's Online Store. It covers residential construction activity, residential product statistics for windows, entry doors and skylights, as well as nonresidential construction and window and door usage. Detailed tables break down numbers of fenestration products sold and expected to be sold from 2011 or 2012 (2014 for non-residential) through 2021. The study has been conducted every year since 1982 in partnership with Ducker Worldwide. ■

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