

## **European window market study: Aluminium defends position as frame material**

Of the some 125 million window units that were installed in Europe in 2010, aluminium maintained its position as a frame material with a 22 per cent market share, the same as in the previous year. Aluminium thus defended its position behind PVC, whose share declined from 58 to 56 per cent. Timber improved from 17 to 18 per cent and timber–metal rose from three to four per cent. These are the results of a study carried out by the Fenster + Fassade trade association (VFF) with the support of Professor Dirk Hass of the Künzelsauer Institut für Marketing (KIM), which was presented at BAU 2011 in Munich.

The study differentiated between three different groups of European countries: the 27 member countries of the European Union (EU), the EU's eastern neighbours Russia and the Ukraine, and the EU's other neighbours Norway, Switzerland and Turkey. Of the 125.8 million window units forecast for Europe in 2010, 75 million were for the 27 EU member countries, 19.8 million for Norway, Switzerland and Turkey and 31 million for Russia and the Ukraine. The EU countries thus account for 59.6 per cent of the European window market, the group comprising Norway, Switzerland and Turkey for 15.7 per cent and the Russia and Ukraine group for 24.7 per cent.

The frame materials used clearly reflect different national cultures when it comes to windows. Timber continues to dominate in the Scandinavian countries, whereas the same is true for PVC in western, central and eastern Europe; aluminium has an unusually high market share in Italy, especially in the south of the country, as well as in the Iberian Peninsula. Timber's share is over 70 per cent in Norway, Sweden and Finland. By contrast, PVC's share is over 70 per cent in Russia, Poland and Turkey. And aluminium's share of the window market is 70 per cent in Spain and 37 per cent in Italy. Also noteworthy: timber–aluminium's share of the market in Switzerland is 27 per cent. For Europe as a whole, aluminium's share is on average less 'culturally' influenced than the other materials' shares. This is because the market for aluminium windows and facades reflects the strength of commercial and public building in the window market as a whole.

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