

Doors and Windows Market in North America - Industry Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this North America Doors and Windows Market Report

The North American doors and windows market by revenue is expected to grow at a CAGR of approx. 4% during 2021–2026.

The demand for doors and windows is majorly driven by residential construction buildings and the growing investments in renovation, replacement, retrofit, and home improvement projects. North America is the largest market for infrastructure construction, expecting high opportunities for the doors and windows market during the forecast period. Over 60% of homeowners in the US consider their financial position before investing in renovation activities. Most homeowners in the region focus on renovating homes once annually; the improvement in homes is initiated to improve life quality. Besides, millennials and baby boomers share the same perspective toward home renovation. The rise in investments and the resumption of construction projects after the relaxation in COVID-19 regulations are expected to propel the market. Home renovation is a significant trend driving the market for doors and windows in the residential sector. In Canada, the demand for residential space is high due to the rise in immigration. The market is further driven by the growth of fenestration installations in new industrial buildings and the increased demand for renovations and retrofit activities.

The following factors are likely to contribute to the growth of the North American doors and windows market during the forecast period:

Growth in Commercial Infrastructural Investments

Rise of US Home Improvement Industry

High Demand for Single-homes in North America

Increased Focus on Energy-efficient Buildings

The study considers the North American doors and windows market present scenario and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

North America Doors and Windows Market Segmentation

The North America research report includes a detailed segmentation by product, types, material, end-user, installation, operation, geography. Wood and plastic are the preferred materials for internal doors in North America, increasing their market shares. Hardwood and metals are majorly used for exterior doors. The rise in reconstruction and renovation activities in the region is expected to influence the doors and windows market growth. In terms of revenue, the residential segment contributed 75% of the North American doors market by end-user in 2020. The increase in apartment buildings and gated communities have helped wooden to gain traction over metal. However, the growing concern over wood used as raw material and advances in plastic and aluminum manufacturing is likely to decline the market share by 2030. The metal segment is likely to gain market share due to increased demand from commercial and non-residential sectors, innovations in design and manufacturing, and public building projects. Advances in uPVC and thermoplastics are expected to accelerate the demand for plastic.

Interior doors and windows accounted for over 13% and 11% shares in revenue and unit shipments, respectively, in 2020. The increasing popularity of home improvement projects is one of the major factors accelerating the market's growth. While the US is one of the largest markets for interior doors and windows, the rise in disposable incomes and increased home renovation projects are likely to aid the market's growth. In the US, the Midwest region witnessed a high increase in single-family houses, majorly in Chicago, benefiting the interior door manufacturers in the region.

Based on material, the plastic segment led the major North America doors and windows

market share of over 43%, followed by metal with over 32%, and wood by 20% in 2020. The housing sector is likely to witness several renovation projects, and the consumer sentiment is skewed toward quality and affordable options, making plastic a preferred material choice. With the housing sector's growth and subsequent demand for housing materials, plastic materials continue to observe high adoption. Plastic doors and windows continue to gain traction due to innovations in material and manufacturing techniques. uPVC is commonly used as an effective replacement material for wood.

Renovation and retrofitting activities in residential structures are expected to drive doors and windows adoption in North America. New government-funded housing projects, especially due to the rising immigrant population, are currently operated by new residential construction demand. Government-funded projects are focused on high-cost efficiency, thus increasing the demand for plastic windows and doors. A significant shift toward energy-efficient fenestration products in new housing and renovation sectors is also aiding the market growth. uPVC materials are finding increasing application in energy-efficient residential buildings.

In North America, rapid infrastructural development and construction projects are primarily driving the demand for doors and windows in new constructions. Investments in the standardization of IT infrastructure and product innovations also drive the market for new construction. The need to upgrade the traditional door's thermal efficiency and functional operations boosts the demand for replacement doors and windows. The replacement demand is currently driving the demand for sliding and insulated profiles, largely due to their enhanced insulating properties, easier operations, and efficient space use.

Manual doors are gaining traction in developed economies as they allow better and regulated control of the airflow. They are also used in spaces where doors need to be kept open to handle a heavy footfall for a small duration, such as movie theaters and schools. They are widely used in residential buildings and small businesses for two major factors – low price and easy regulation of airflow, thereby maintaining HVAC temperatures in building premises. Low maintenance and operational costs are supporting the growth of the manual segment.

Product

Doors

Windows

Type

Interior

Exterior

Material

Metal

Plastic

Wood

Glass

End-User

Residential

Non-residential

Installation

New Construction

Replacement

Operation

Manual

Automatic

INSIGHTS BY GEOGRAPHY

The US construction activities continue to rise with the growth in the population and urbanization. The demand for single-family and multi-family house construction is increased significantly in recent years; however, after the outbreak of COVID-19, the market demand declined in 2020, which is likely to rebound during 2021 –2022. The US is witnessing high traction in commercial building construction. Vinyl windows have witnessed high growth in recent years and reached the sale of over 37 million units in 2019. Fiber-based windows are likely to witness significant growth in the market. New construction activities continue to rise; however, the COVID-19 outbreak has led to a short-term decline. New residential construction in the US has become stagnant; however, home renovation and reconstruction projects witness growth. Besides, the demand for home improvement increased after the COVID-19 outbreak.

North America

US

Canada

INSIGHTS BY VENDORS

Vendors in North America are focusing on developing energy-efficient buildings, which improve thermal efficiency. They integrate high-efficiency doors and windows in the product portfolio, enabling consumers to adopt innovative and energy-efficient solutions in their dwellings, thereby saving on energy expenses. Vendors are also focusing on double and triple glazing on windows and improving insulating capabilities of internal and external doors during the forecast period. JELD-WEN, Anderson Windows and Doors, Pella, and Cornerstone Building Brands are leading vendors in the windows and doors market. Moreover, vendors can boost their profitability by practicing efficient production with respect to the raw material purchase.

Prominent Vendors

JELD-WEN

Anderson Windows and Doors

Pella

Cornerstone Building Brands

Other Prominent Vendors

Crystal Window & Door System

Masco Corporation

Optimum Window

All Seasons Window and Door Systems

Extech

Bear Wood Windows

Protective Structures Ltd.

St. Cloud Window

Fyre-Tec

Harbor All Glass and Mirror

ASSA ABLOY

Dormakaba

Velux

Alside

Harvey Building Products

MI Windows and Doors

Woodgrain

Champion Windows

KP Building Products (Farley)

Hurd Windows & Doors

Kohltech

ProVia

Quaker Windows Products

Simpson Door

KEY QUESTIONS ANSWERED

1. What is the market size of the North America doors and windows market during the period 2021-2026?
2. What are some of the technological innovations in the North America windows industry?
3. What is the impact of COVID-19 on the North America construction industry?
4. What are the factors impacting the growth of the windows and doors market?
5. What government initiatives are enabling the growth of doors and windows?
6. What are the significant market opportunities in the North America doors and windows market?

Contents

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 SCOPE & COVERAGE

4.1 Market Definition

4.1.1 Inclusions

4.1.2 Exclusions

4.2 Base Year

4.3 Scope of The Study

4.3.1 Market Segmentation by Product

4.3.2 Market Segmentation by End-Users

4.3.3 Market Segmentation by Type

4.3.4 Market Segmentation by Installation

4.3.5 Market Segmentation by Operation

4.3.6 Market Segmentation by Material

4.3.7 Market Segmentation by Geography

5 REPORT ASSUMPTIONS & CAVEATS

5.1 Key Caveats

5.2 Currency Conversion

5.3 Market Derivation

6 MARKET AT A GLANCE

7 INTRODUCTION

7.1 Overview

7.2 Impact Of COVID-19

8 MARKET OPPORTUNITIES & TRENDS

8.1 Rising Commercial Infrastructural Investments

8.2 Rising Home Improvement Industries In US

9 MARKET GROWTH ENABLERS

9.1 Rising Demand for Single Homes

9.2 Rising Focus on Energy-Efficient Buildings

9.3 Increasing Innovation in Doors & Windows

10 MARKET RESTRAINTS

10.1 Political Disturbance on Supply Of Raw Materials

11 MARKET LANDSCAPE

11.1 Market Size & Forecast

11.2 Five Forces Analysis

11.2.1 Threat of New Entrants

11.2.2 Bargaining Power of Suppliers

11.2.3 Bargaining Power of Buyers

11.2.4 Threat of Substitutes

11.2.5 Competitive Rivalry

12 PRODUCT

12.1 Market Snapshot & Growth Engine (Revenue)

12.2 Market Snapshot & Growth Engine (Units)

12.3 Market Overview

12.4 Doors

12.4.1 Market Size & Forecast

12.4.2 Doors Market by End-user

12.4.3 Doors Market by Type

12.4.4 Doors Market by Material

12.4.5 Doors Market by Installation

12.4.6 Doors Market by Operation

12.5 Windows

12.5.1 Market Size & Forecast

12.5.2 Windows Market by End-user

12.5.3 Windows Market by Type

12.5.4 Windows Market by Material

12.5.5 Windows Market by Installation

12.5.6 Windows Market by Operation

13 END-USER

13.1 Market Snapshot & Growth Engine (Revenue)

13.2 Market Snapshot & Growth Engine (Units)

13.3 Market Overview

13.4 Residential

13.4.1 Market Size & Forecast

13.4.2 Residential Doors & Windows Market by Country – Revenue

13.4.3 Residential Doors and Windows Market by Country – Units

13.5 Non-Residential

13.5.1 Market Size & Forecast

13.5.2 Non-Residential Doors and Windows Market by Country – Revenue

13.5.3 Non-Residential Doors and Windows Market by Country – Units

14 TYPE

14.1 Market Snapshot & Growth Engine (Revenue)

14.2 Market Snapshot & Growth Engine (Units)

14.3 Market Overview

14.4 Interior

14.4.1 Market Size & Forecast

14.4.2 Interior Doors & Windows Market By Country – Revenue

14.4.3 Interior Doors & Windows Market By Country – Units

14.5 Exterior

14.5.1 Market Size & Forecast

14.5.2 Exterior Doors & Windows Market by Country – Revenue

14.5.3 Exterior Doors & Windows Market by Country – Units

15 MATERIAL

15.1 Market Snapshot & Growth Engine (Revenue)

15.2 Market Snapshot & Growth Engine (Units)

15.3 Market Overview

15.4 Plastic

15.4.1 Market Size & Forecast

15.4.2 Plastic Doors & Windows Market by Country – Revenue

15.4.3 Plastic Doors & Windows Market by Country – Units

15.5 Glass

15.5.1 Market Size & Forecast

15.5.2 Glass Doors & Windows Market By Country – Revenue

15.5.3 Glass Doors & Windows Market By Country – Units

15.6 Wood

15.6.1 Market Size & Forecast

15.6.2 Wood Doors & Windows Market by Country – Revenue

15.6.3 Wood Doors & Windows Market by Country – Units

15.7 Metal

15.7.1 Market Size & Forecast

15.7.2 Metal Doors & Windows Market by Country – Revenue

15.7.3 Metal Doors & Windows Market by Country – Units

16 INSTALLATION

16.1 Market Snapshot & Growth Engine (Revenue)

16.2 Market Snapshot & Growth Engine (Units)

16.3 Market Overview

16.4 New Construction

16.4.1 Market Size & Forecast

16.4.2 New Construction Doors Market by Country – Revenue

16.4.3 New Construction Doors Market by Country – Units

16.5 Replacement

16.5.1 Market Size & Forecast

16.5.2 Replacement Doors & Windows Market by Country – Revenue

16.5.3 Replacement Doors & Windows Market by Country – Units

17 OPERATION

17.1 Market Snapshot & Growth Engine (Revenue)

17.2 Market Snapshot & Growth Engine (Units)

17.3 Market Overview

17.4 Manual

17.4.1 Market Size & Forecast

17.4.2 Manual Doors & Windows Market by Country – Revenue

17.4.3 Manual Doors & Windows Market by Country – Units

17.5 Automatic

17.5.1 Market Size & Forecast

17.5.2 Automatic Doors & Windows Market by Country – Revenue

17.5.3 Automatic Doors & Windows Market by Country – Units

18 COUNTRY

18.1 Market Snapshot & Growth Engine (Revenue)

18.2 Market Snapshot & Growth Engine (Unit Shipments)

19 US

19.1 Market Size & Forecast

19.2 Product

19.2.1 Market Size & Forecast - Revenue

19.2.2 Market Size & Forecast - Units

19.3 US Doors Market By Segment

19.3.1 Door Market By End-User

19.3.2 Doors Market By Type

19.3.3 Doors Market By Material

19.3.4 Doors Market By Installation

19.3.5 Doors Market By Operation

19.4 US Windows Market By Segment

19.4.1 Windows Market by End-user

19.4.2 Windows Market by Type

19.4.3 Windows Market by Material

19.4.4 Windows Market by Installation

19.4.5 Windows Market by Operation

20 CANADA

20.1 Market Size & Forecast

20.2 Product

20.2.1 Market Size & Forecast - Revenue

20.2.2 Market Size & Forecast - Units

20.3 Canada Doors Market By Segment

20.3.1 Door Market by End-user

20.3.2 Doors Market by Type

20.3.3 Doors Market by Material

20.3.4 Doors Market by Installation

20.3.5 Doors Market by Operation

20.4 Canada Windows Market By Segment

- 20.4.1 Windows Market by End-user
- 20.4.2 Windows Market by Type
- 20.4.3 Windows Market by Material
- 20.4.4 Windows Market by Installation
- 20.4.5 Windows Market by Operation

21 COMPETITIVE LANDSCAPE

21.1 Competition Overview

22 KEY COMPANY PROFILES

22.1 JELD-WEN

- 22.1.1 Business Overview
- 22.1.2 Major Product Offerings
- 22.1.3 Key Strengths
- 22.1.4 Key Strategies
- 22.1.5 Key Opportunities

22.2 Andersen Windows & Doors

- 22.2.1 Business Overview
- 22.2.2 Product Offerings
- 22.2.3 Key Strategies
- 22.2.4 Key Strengths
- 22.2.5 Key Opportunities

22.3 PELLA

- 22.3.1 Business Overview
- 22.3.2 Product Offerings
- 22.3.3 Key Strategies
- 22.3.4 Key Strengths
- 22.3.5 Key Opportunities

22.4 Cornerstone Building Brands

- 22.4.1 Business Overview
- 22.4.2 Product Offerings
- 22.4.3 Key Strategies
- 22.4.4 Key Strengths
- 22.4.5 Key Opportunities

23 OTHER PROMINENT VENDORS

- 23.1 Crystal Windows
 - 23.1.1 Business Overview
 - 23.1.2 Product Offerings
- 23.2 Masco Corporation
 - 23.2.1 Business Overview
 - 23.2.2 Product Offerings
- 23.3 Optimum Window
 - 23.3.1 Business Overview
 - 23.3.2 Product Offerings
- 23.4 All Seasons Window And Door Systems
 - 23.4.1 Business Overview
- 23.5 Extech
 - 23.5.1 Business Overview
 - 23.5.2 Product Offerings
- 23.6 Bear Wood Windows
 - 23.6.1 Business Overview
 - 23.6.2 Product Offerings
- 23.7 Protective Structures
 - 23.7.1 Business Overview
 - 23.7.2 Product Offerings
- 23.8 St. Cloud Window
 - 23.8.1 Business Overview
 - 23.8.2 Product Offerings
- 23.9 Fyre-Tec
 - 23.9.1 Business Overview
 - 23.9.2 Product Offerings
- 23.10 Harbor All Glass & Mirror
 - 23.10.1 Business Overview
 - 23.10.2 Product Offerings
- 23.11 Assa Abloy
 - 23.11.1 Business Overview
 - 23.11.2 Product Offerings
- 23.12 Dormakaba
 - 23.12.1 Business Overview
 - 23.12.2 Product Offerings
- 23.13 Velux
 - 23.13.1 Business Overview
 - 23.13.2 Product Offerings

23.14 Alside

23.14.1 Business Overview

23.14.2 Product Offerings

23.15 Harvey Building Products

23.15.1 Business Overview

23.15.2 Product Offerings

23.16 MI Windows and Doors

23.16.1 Business Overview

23.16.2 Product Offerings

23.17 Woodgrain

23.17.1 Business Overview

23.17.2 Product Offerings

23.18 Champion Windows

23.18.1 Business Overview

23.18.2 Product Offerings

23.19 KP Building Products (FARLEY)

23.19.1 Business overview

23.19.2 Product Offerings

23.20 Hurd Windows & Doors

23.20.1 Business Overview

23.20.2 Product Offerings

23.21 Kohltech

23.21.1 Business Overview

23.21.2 Product Offerings

23.22 Provia

23.22.1 Business Overview

23.22.2 Product Offerings

23.23 Quaker Window Products

23.23.1 Business Overview

23.23.2 Product Offerings

23.24 Simpson Door

23.24.1 Business Overview

23.24.2 Product Offerings

24 QUANTITATIVE SUMMARY

24.1 Market by Country

24.2 Product

24.3 Doors Market

24.3.1 Door Market by End-user

24.3.2 Doors Market by Type

24.3.3 Doors Market by Material

24.3.4 Doors Market by Installation

24.3.5 Doors Market by Operation

24.4 Windows Market

24.4.1 Windows Market By End-User

24.4.2 Windows Market By Type

24.4.3 Windows Market By Material

24.4.4 Windows Market By Installation

24.4.5 Windows Market By Operation

24.5 End-User

24.5.1 Residential Doors & Windows Market By Country – Revenue

24.5.2 Residential Doors & Windows Market By Country – Units

24.5.3 Non-Residential Doors & Windows Market By Country – Revenue

24.5.4 Non-Residential Doors & Windows Market By Country – Units

24.6 Type

24.6.1 Interior Doors & Windows Market by Country – Revenue

24.6.2 Interior Doors & Windows Market by Country – Units

24.6.3 Exterior Doors & Windows Market by Country – Revenue

24.6.4 Exterior Doors & Windows Market by Country – Units

24.7 Material

24.7.1 Plastic Doors & Windows Market By Country – Revenue

24.7.2 Plastic Doors & Windows Market By Country – Units

24.7.3 Glass Doors & Windows Market By Country – Revenue

24.7.4 Glass Doors & Windows Market By Country – Units

24.7.5 Wood Doors & Windows Market By Country – Revenue

24.7.6 Wood Doors & Windows Market By Country – Units

24.7.7 Metal Doors & Windows Market By Country – Revenue

24.7.8 Metal Doors & Windows Market By Country – Units

24.8 Installation

24.8.1 New Construction Doors Market By Country – Revenue

24.8.2 New Construction Doors Market By Country – Units

24.8.3 Replacement Doors & Windows Market By Country – Revenue

24.8.4 Replacement Doors & Windows Market By Country – Units

24.9 Operation

24.9.1 Manual Doors & Windows Market by Country – Revenue

24.9.2 Manual Doors & Windows Market by Country – Units

24.9.3 Automatic Doors & Windows Market by Country – Revenue

24.9.4 Automatic Doors & Windows Market by Country – Units

24.10 US

24.10.1 Market Size & Forecast by Product - Revenue

24.10.2 Market Size & Forecast by Product - Units

24.10.3 Doors Market by End-user - Revenue

24.10.4 Door Market by End-user – Unit Shipments

24.10.5 Doors Market by Type - Revenue

24.10.6 Doors Market by Type – Unit Shipments

24.10.7 Doors Market by Material - Revenue

24.10.8 Doors Market by Material – Unit Shipments

24.10.9 Doors Market by Installation - Revenue

24.10.10 Doors Market by Installation – Unit Shipments

24.10.11 Doors Market by Operation - Revenue

24.10.12 Doors Market by Operation – Unit Shipments

24.10.13 Windows Market by End-user - Revenue

24.10.14 Windows Market by End-user – Unit Shipments

24.10.15 Windows Market by Type - Revenue

24.10.16 Windows Market by Type – Unit Shipments

24.10.17 Windows Market by Material - Revenue

24.10.18 Windows Market by Material – Unit Shipments

24.10.19 Windows Market by Installation - Revenue

24.10.20 Windows Market by Installation – Unit Shipments

24.10.21 Windows Market by Operation - Revenue

24.10.22 Windows Market by Operation – Unit Shipments

24.11 Canada

24.11.1 Market Size & Forecast by Product - Revenue

24.11.2 Market Size & Forecast by Product – Unit Shipments

24.11.3 Door Market by End-user - Revenue

24.11.4 Door Market by End-user – Unit Shipments

24.11.5 Doors Market by Type – Revenue

24.11.6 Doors Market by Type – Unit Shipments

24.11.7 Doors Market by Material – Revenue

24.11.8 Doors Market by Material – Unit Shipments

24.11.9 Doors Market by Installation – Revenue

24.11.10 Doors Market by Installation – Unit Shipments

24.11.11 Doors Market by Operation – Revenue

24.11.12 Doors Market by Operation – Unit Shipments

24.11.13 Windows Market by End-user – Revenue

24.11.14 Windows Market by End-user – Unit Shipments

- 24.11.15 Windows Market by Type – Revenue
- 24.11.16 Windows Market by Type – Unit Shipments
- 24.11.17 Windows Market by Material – Revenue
- 24.11.18 Windows Market by Material – Unit Shipments
- 24.11.19 Windows Market by Installation – Revenue
- 24.11.20 Windows Market by Installation – Unit Shipments
- 24.11.21 Windows Market by Operation – Revenue
- 24.11.22 Windows Market by Operation – Unit Shipments

25 REPORT SUMMARY

- 25.1 Key Takeaways
- 25.2 Strategic Recommendations

26 APPENDIX

- 26.1 Abbreviations

List Of Exhibits

LIST OF EXHIBITS

- Exhibit 1 Segmentation of North America Doors & Windows Market
- Exhibit 2 Market Size Calculation Approach 2020
- Exhibit 3 Incremental Growth Analysis of North America Doors & Windows Market (Revenue)
- Exhibit 4 Incremental Growth Analysis of North America Doors and Windows Market (Unit Shipments)
- Exhibit 5 Impact of Rising Commercial Infrastructural Investments
- Exhibit 6 Non-residential Construction Value in US in 2019 (\$ million)
- Exhibit 7 Impact of Rising Home Improvement Industries in US
- Exhibit 8 Spending on Interior Room Renovations by Homeowners in 2019 (\$)
- Exhibit 9 Rising Demand of Single Homes
- Exhibit 10 Single Family Homes Constructed in US in 2020 (thousand units)
- Exhibit 11 Impact of Rising Focus on Energy-efficient Buildings
- Exhibit 12 Energy Saving Efforts for Housing and Construction Products in Canada
- Exhibit 13 Roadmap for Zero Energy Buildings
- Exhibit 14 Impact of Increasing Innovation in Doors & Windows
- Exhibit 15 Impact of Political Disturbance on Supply of Raw Materials
- Exhibit 16 Contribution of Non-residential Segments in North America 2015 & 2020
- Exhibit 17 Doors & Windows Market in North America 2020–2026 (\$ billion)
- Exhibit 18 US Doors & Windows Demographics
- Exhibit 19 Doors & Windows Market in North America 2020–2026 (million units)
- Exhibit 20 Five Forces Analysis 2020
- Exhibit 21 Incremental Growth by Product 2020 & 2026
- Exhibit 22 Incremental Growth by Product 2020 & 2026
- Exhibit 23 North America Doors & Windows Market Share by Product (Revenue)
- Exhibit 24 North America Doors & Windows Market Share by Product (Unit Shipments)
- Exhibit 25 Features of Energy-efficient Doors
- Exhibit 26 Doors Market in North America 2020–2026 (\$ billion)
- Exhibit 27 Doors Market in North America 2020–2026 (million units)
- Exhibit 28 Windows Market in North America 2020–2026 (\$ billion)
- Exhibit 29 Features of Energy Efficient Windows
- Exhibit 30 Windows Market in North America 2020–2026 (million units)
- Exhibit 31 Incremental Growth by End-user 2020 & 2026
- Exhibit 32 Incremental Growth by End-user 2020 & 2026
- Exhibit 33 North America Doors & Windows Market Share by End-user (Revenue)

- Exhibit 34 North America Doors & Windows Market Share by End-user (Unit Shipments)
- Exhibit 35 Benefits of UPVC Doors & Windows
- Exhibit 36 Residential Doors & Windows Market in North America 2020–2026 (\$ billion)
- Exhibit 37 Residential Doors & Windows Market in North America 2020–2026 (million units)
- Exhibit 38 Non-Residential Doors & Windows Market in North America 2020–2026 (\$ billion)
- Exhibit 39 Non-Residential Doors & Windows Market in North America 2020–2026 (million units)
- Exhibit 40 Incremental Growth by Type 2020 & 2026
- Exhibit 41 Incremental Growth by Type 2020 & 2026
- Exhibit 42 Doors & Windows Market Share in North America by Type 2020–2026 (\$ billion)
- Exhibit 43 Doors & Windows Market Share in North America by Type 2020–2026 (unit shipments)
- Exhibit 44 Interior Doors & Windows Market in North America 2020–2026 (\$ billion)
- Exhibit 45 Interior Doors & Windows Market in North America 2020–2026 (million units)
- Exhibit 46 Exterior Doors & Windows Market in North America 2020–2026 (\$ billion)
- Exhibit 47 Exterior Doors & Windows Market in North America 2020–2026 (million units)
- Exhibit 48 Incremental Growth by Material 2020 & 2026
- Exhibit 49 Incremental Growth by Material 2020 & 2026
- Exhibit 50 Doors & Windows Market Share in North America by Material 2020–2026 (revenue)
- Exhibit 51 Doors & Windows Market Share in North America by Material 2020–2026 (Unit Shipments)
- Exhibit 52 Plastic Doors & Windows Market in North America 2020–2026 (\$ billion)
- Exhibit 53 Plastic Doors & Windows Market in North America 2020–2026 (million units)
- Exhibit 54 Glass Doors & Windows Market in North America 2020–2026 (\$ billion)
- Exhibit 55 Glass Doors & Windows Market in North America 2020–2026 (million units)
- Exhibit 56 Wood Doors & Windows Market in North America 2020–2026 (\$ billion)
- Exhibit 57 Wood Doors & Windows Market in North America 2020–2026 (million units)
- Exhibit 58 Metal Doors & Windows Market in North America 2020–2026 (\$ billion)
- Exhibit 59 Metal Doors & Windows Market in North America 2020–2026 (million units)
- Exhibit 60 Incremental Growth by Installation 2020 & 2026
- Exhibit 61 Incremental Growth by Installation 2020 & 2026
- Exhibit 62 Doors & Windows Market Share by Installation in North America (Revenue)
- Exhibit 63 Doors & Windows Market Share by Installation in North America (Unit Shipments)
- Exhibit 64 New Construction Doors & Windows Market in North America 2020–2026 (\$

billion)

Exhibit 65 New Construction Doors & Windows Market in North America 2020–2026
(million units)

Exhibit 66 Replacement Doors & Windows Market in North America 2020–2026 (\$
billion)

Exhibit 67 Replacement Doors & Windows Market in North America 2020–2026 (million
units)

Exhibit 68 Incremental Growth by Operation 2020 & 2026

Exhibit 69 Incremental Growth by Operation 2020 & 2026

Exhibit 70 Doors & Windows Market Share in North America by Operation (Revenue)

Exhibit 71 Doors & Windows Market Share in North America by Operation (Unit
Shipments)

Exhibit 72 Manual Doors & Windows Market in North America 2020–2026 (\$ billion)

Exhibit 73 Manual Doors & Windows Market in North America 2020–2026 (million units)

Exhibit 74 Automatic Doors & Windows Market in North America 2020–2026 (\$ billion)

Exhibit 75 Automatic Doors & Windows Market in North America 2020–2026 (million
units)

Exhibit 76 Incremental Growth in North America 2020 & 2026

Exhibit 77 Incremental Growth in North America 2020 & 2026

Exhibit 78 Non-residential Construction in US (Floor area- million square feet)

Exhibit 79 Doors & Windows Market in US 2020–2026 (\$ billion)

Exhibit 80 Doors & Windows Market in US 2020–2026 (million units)

Exhibit 81 Doors & Windows Market in US by Product (\$ billion)

Exhibit 82 Doors & Windows Market in US by Product (million units)

Exhibit 83 Investment in Residential Building Construction (\$ million)

Exhibit 84 Investment in Non-residential Building Construction in Canada November
2015–November 2020

Exhibit 85 Doors & Windows Market in Canada 2020–2026 (\$ billion)

Exhibit 86 Doors & Windows Market in Canada 2020–2026 (million units)

Exhibit 87 Doors & Windows Market in Canada by Product (\$ billion)

Exhibit 88 Doors & Windows Market in Canada by Product (million units)

Exhibit 89 Doors & Windows Market in US by Product (\$ billion)

Exhibit 90 Doors & Windows Market in US by Product (million units)

List Of Tables

LIST OF TABLES

Table 1 Key Caveats

Table 2 Currency Conversion 2013?2020

Table 3 New Residential Construction Data for Metro Locations in US 2020

Table 4 Incremental Growth Analysis of Segments by Unit Shipments in North America

Table 5 Doors Market in North America by End-user 2020?2026 (\$ billion)

Table 6 Doors Market in North America by End-user 2020?2026 (million units)

Table 7 Doors Market in North America by Type 2020–2026 (\$ billion)

Table 8 Doors Market in North America by Type 2020–2026 (million units)

Table 9 Doors Market in North America by Material 2020–2026 (\$ billion)

Table 10 Doors Market in North America by Material 2020–2026 (million units)

Table 11 Doors Market in North America by Installation 2020–2026 (\$ billion)

Table 12 Doors Market in North America by Installation 2020–2026 (million units)

Table 13 Doors Market in North America by Operation 2020–2026 (\$ billion)

Table 14 Doors Market in North America by Operation 2020–2026 (million units)

Table 15 Windows Market in North America by End-user 2020?2026 (\$ billion)

Table 16 Windows Market in North America by End-user 2020?2026 (million units)

Table 17 Windows Market in North America by Type 2020–2026 (\$ billion)

Table 18 Windows Market in North America by Type 2020–2026 (million units)

Table 19 Windows Market in North America by Material 2020–2026 (\$ billion)

Table 20 Windows Market in North America by Material 2020–2026 (million units)

Table 21 Windows Market in North America by Installation 2020–2026 (\$ billion)

Table 22 Windows Market in North America by Installation 2020–2026 (million units)

Table 23 Windows Market in North America by Operation 2020–2026 (\$ billion)

Table 24 Windows Market in North America by Operation 2020–2026 (million units)

Table 25 Residential Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 26 Residential Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 27 Non-Residential Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 28 Non-Residential Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 29 Interior Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 30 Interior Doors & Windows Market in North America by Country 2020?2026

(million units)

Table 31 Exterior Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 32 Exterior Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 33 Plastic Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 34 Plastic Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 35 Glass Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 36 Glass Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 37 Wood Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 38 Wood Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 39 Metal Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 40 Metal Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 41 New Construction Doors Market in North America by Country 2020?2026 (\$ billion)

Table 42 Interior Doors Market in North America by Country 2020?2026 (million units)

Table 43 Replacement Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 44 Replacement Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 45 Manual Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 46 Manual Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 47 Automatic Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 48 Automatic Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 49 Doors Market in US by End-user 2020?2026 (\$ billion)

Table 50 Doors Market in US by End-user 2020?2026 (million units)

Table 51 Doors Market in US by Type 2020–2026 (\$ billion)

Table 52 Doors Market in US by Type 2020–2026 (million units)
Table 53 Doors Market in US by Material 2020–2026 (\$ billion)
Table 54 Doors Market in US by Material 2020–2026 (million units)
Table 55 Doors Market in US by Installation 2020–2026 (\$ billion)
Table 56 Doors Market in US by Installation 2020–2026 (million units)
Table 57 Doors Market in US by Operation 2020–2026 (\$ billion)
Table 58 Doors Market in US by Operation 2020–2026 (million units)
Table 59 Windows Market in US by End-user 2020–2026 (\$ billion)
Table 60 Windows Market in US by End-user 2020–2026 (million units)
Table 61 Windows Market in US by Type 2020–2026 (\$ billion)
Table 62 Windows Market in US by Type 2020–2026 (million units)
Table 63 Windows Market in US by Material 2020–2026 (\$ billion)
Table 64 Windows Market in US by Material 2020–2026 (million units)
Table 65 Windows Market in US by Installation 2020–2026 (\$ billion)
Table 66 Windows Market in US by Installation 2020–2026 (million units)
Table 67 Windows Market in US by Operation 2020–2026 (\$ billion)
Table 68 Windows Market in US by Operation 2020–2026 (million units)
Table 69 Doors Market in Canada by End-user 2020–2026 (\$ billion)
Table 70 Doors Market in Canada by End-user 2020–2026 (million units)
Table 71 Doors Market in Canada by Type 2020–2026 (\$ billion)
Table 72 Doors Market in Canada by Type 2020–2026 (million units)
Table 73 Doors Market in Canada by Material 2020–2026 (\$ billion)
Table 74 Doors Market in Canada by Material 2020–2026 (million units)
Table 75 Doors Market in Canada by Installation 2020–2026 (\$ billion)
Table 76 Doors Market in Canada by Installation 2020–2026 (million units)
Table 77 Doors Market in Canada by Operation 2020–2026 (\$ billion)
Table 78 Doors Market in Canada by Operation 2020–2026 (million units)
Table 79 Windows Market in Canada by End-user 2020–2026 (\$ billion)
Table 80 Windows Market in Canada by End-user 2020–2026 (million units)
Table 81 Windows Market in Canada by Type 2020–2026 (\$ billion)
Table 82 Windows Market in Canada by Type 2020–2026 (million units)
Table 83 Windows Market in Canada by Material 2020–2026 (\$ billion)
Table 84 Windows Market in Canada by Material 2020–2026 (million units)
Table 85 Windows Market in Canada by Installation 2020–2026 (\$ billion)
Table 86 Windows Market in Canada by Installation 2020–2026 (million units)
Table 87 Windows Market in Canada by Operation 2020–2026 (\$ billion)
Table 88 Windows Market in Canada by Operation 2020–2026 (million units)
Table 89 JELD-WEN: Product Offerings
Table 90 Andersen Windows & Doors: Major Product Offerings

Table 91 Pella: Major Product Offerings
Table 92 Cornerstone Building Brands: Major Product Offerings
Table 93 Crystal Window & Door System: Major Product Offerings
Table 94 Masco Corporation: Major Product Offerings
Table 95 Optimum Window: Major Product Offerings
Table 96 Masco Corporation: Major Product Offerings
Table 97 Bear Wood Windows: Major Product Offerings
Table 98 Protective Structures: Major Product Offerings
Table 99 St. Cloud Window: Major Product Offerings
Table 100 Fyre-Tec: Major Product Offerings
Table 101 Harbor All Glass and Mirror: Major Product Offerings
Table 102 ASSA ABLOY: Major Product Offerings
Table 103 Dormakaba: Major Product Offerings
Table 104 Velux: Major Product Offerings
Table 105 Alside: Major Product Offerings
Table 106 Harvey Building Products: Major Product Offerings
Table 107 MI Windows and Doors: Major Product Offerings
Table 108 Woodgrain: Major Product Offerings
Table 109 Champion Windows: Major Product Offerings
Table 110 KP Building Products: Major Product Offerings
Table 111 Hurd Windows & Doors: Major Product Offerings
Table 112 Kohltech: Major Product Offerings
Table 113 ProVia Corporation: Major Product Offerings
Table 114 Quaker Corporation: Major Product Offerings
Table 115 Simpson Door Co.: Major Product Offerings
Table 116 Doors & Windows Market in North America by Country 2020-2026 (\$ billion)
Table 117 Doors & Windows Market in North America by Country 2020-2026 (million units)
Table 118 Doors & Windows Market in North America by Product 2019-2025 (\$ billion)
Table 119 Doors & Windows Market in North America by Product 2019-2025 (million units)
Table 120 Doors Market in North America by End-user 2020-2026 (\$ billion)
Table 121 Doors Market in North America by End-user 2020-2026 (million units)
Table 122 Doors Market in North America by Type 2020-2026 (\$ billion)
Table 123 Doors Market in North America by Type 2020-2026 (million units)
Table 124 Doors Market in North America by Material 2020-2026 (\$ billion)
Table 125 Doors Market in North America by Material 2020-2026 (million units)
Table 126 Doors Market in North America by Installation 2020-2026 (\$ billion)
Table 127 Doors Market in North America by Installation 2020 – 2026 (million units)

Table 128 Doors Market in North America by Operation 2020–2026 (\$ billion)
Table 129 Doors Market in North America by Operation 2020–2026 (million units)
Table 130 Windows Market in North America by End-user 2020–2026 (\$ billion)
Table 131 Windows Market in North America by End-user 2020–2026 (million units)
Table 132 Windows Market in North America by Type 2020–2026 (\$ billion)
Table 133 Windows Market in North America by Type 2020–2026 (million units)
Table 134 Windows Market in North America by Material 2020–2026 (\$ billion)
Table 135 Windows Market in North America by Material 2020–2026 (million units)
Table 136 Windows Market in North America by Installation 2020–2026 (\$ billion)
Table 137 Windows Market in North America by Installation 2020–2026 (million units)
Table 138 Windows Market in North America by Operation 2020–2026 (\$ billion)
Table 139 Windows Market in North America by Operation 2020–2026 (million units)
Table 140 Residential Doors & Windows Market in North America by Country 2020–2026 (\$ billion)
Table 141 Residential Doors & Windows Market in North America by Country 2020–2026 (million units)
Table 142 Non-Residential Doors & Windows Market in North America by Country 2020–2026 (\$ billion)
Table 143 Non-Residential Doors & Windows Market in North America by Country 2020–2026 (million units)
Table 144 Interior Doors & Windows Market in North America by Country 2020–2026 (\$ billion)
Table 145 Interior Doors & Windows Market in North America by Country 2020–2026 (million units)
Table 146 Exterior Doors & Windows Market in North America by Country 2020–2026 (\$ billion)
Table 147 Exterior Doors & Windows Market in North America by Country 2020–2026 (million units)
Table 148 Plastic Doors & Windows Market in North America by Country 2020–2026 (\$ billion)
Table 149 Plastic Doors & Windows Market in North America by Country 2020–2026 (million units)
Table 150 Glass Doors & Windows Market in North America by Country 2020–2026 (\$ billion)
Table 151 Glass Doors & Windows Market in North America by Country 2020–2026 (million units)
Table 152 Wood Doors & Windows Market in North America by Country 2020–2026 (\$ billion)
Table 153 Wood Doors & Windows Market in North America by Country 2020–2026

(million units)

Table 154 Metal Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 155 Metal Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 156 New Construction Market in North America by Country 2020?2026 (\$ billion)

Table 157 Interior Doors Market in North America by Country 2020?2026 (million units)

Table 158 Replacement Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 159 Replacement Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 160 Manual Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 161 Manual Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 162 Automatic Doors & Windows Market in North America by Country 2020?2026 (\$ billion)

Table 163 Automatic Doors & Windows Market in North America by Country 2020?2026 (million units)

Table 164 Doors Market in US by End-user 2020?2026 (\$ billion)

Table 165 Doors Market in US by End-user 2020?2026 (million units)

Table 166 Doors Market in US by Type 2020–2026 (\$ billion)

Table 167 Doors Market in US by Type 2020–2026 (million units)

Table 168 Doors Market in US by Material 2020–2026 (\$ billion)

Table 169 Doors Market in US by Material 2020–2026 (million units)

Table 170 Doors Market in US by Installation 2020–2026 (\$ billion)

Table 171 Doors Market in US by Installation 2020–2026 (million units)

Table 172 Doors Market in US by Operation 2020–2026 (\$ billion)

Table 173 Doors Market in US by Operation 2020–2026 (million units)

Table 174 Windows Market in US by End-user 2020?2026 (\$ billion)

Table 175 Windows Market in US by End-user 2020?2026 (million units)

Table 176 Windows Market in US by Type 2020–2026 (\$ billion)

Table 177 Windows Market in US by Type 2020–2026 (million units)

Table 178 Windows Market in US by Material 2020–2026 (\$ billion)

Table 179 Windows Market in US by Material 2020–2026 (million units)

Table 180 Windows Market in US by Installation 2020–2026 (\$ billion)

Table 181 Windows Market in US by Installation 2020–2026 (million units)

Table 182 Windows Market in US by Operation 2020–2026 (\$ billion)

Table 183 Windows Market in US by Operation 2020–2026 (million units)

Table 184 Doors & Windows Market in Canada by Product (\$ billion)
Table 185 Doors & Windows Market in Canada by Product (million units)
Table 186 Doors Market in Canada by End-user 2020?2026 (\$ billion)
Table 187 Doors Market in Canada by End-user 2020?2026 (million units)
Table 188 Doors Market in Canada by Type 2020–2026 (\$ billion)
Table 189 Doors Market in Canada by Type 2020–2026 (million units)
Table 190 Doors Market in Canada by Material 2020–2026 (\$ billion)
Table 191 Doors Market in Canada by Material 2020–2026 (million units)
Table 192 Doors Market in Canada by Installation 2020–2026 (\$ billion)
Table 193 Doors Market in Canada by Installation 2020–2026 (million units)
Table 194 Doors Market in Canada by Operation 2020–2026 (\$ billion)
Table 195 Doors Market in Canada by Operation 2020–2026 (million units)
Table 196 Windows Market in Canada by End-user 2020?2026 (\$ billion)
Table 197 Windows Market in Canada by End-user 2020?2026 (million units)
Table 198 Windows Market in Canada by Type 2020–2026 (\$ billion)
Table 199 Windows Market in Canada by Type 2020–2026 (million units)
Table 200 Windows Market in Canada by Material 2020–2026 (\$ billion)
Table 201 Windows Market in Canada by Material 2020–2026 (million units)
Table 202 Windows Market in Canada by Installation 2020–2026 (\$ billion)
Table 203 Windows Market in Canada by Installation 2020–2026 (million units)
Table 204 Windows Market in Canada by Operation 2020–2026 (\$ billion)
Table 205 Windows Market in Canada by Operation 2020–2026 (million units)

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