



## Summary for Free



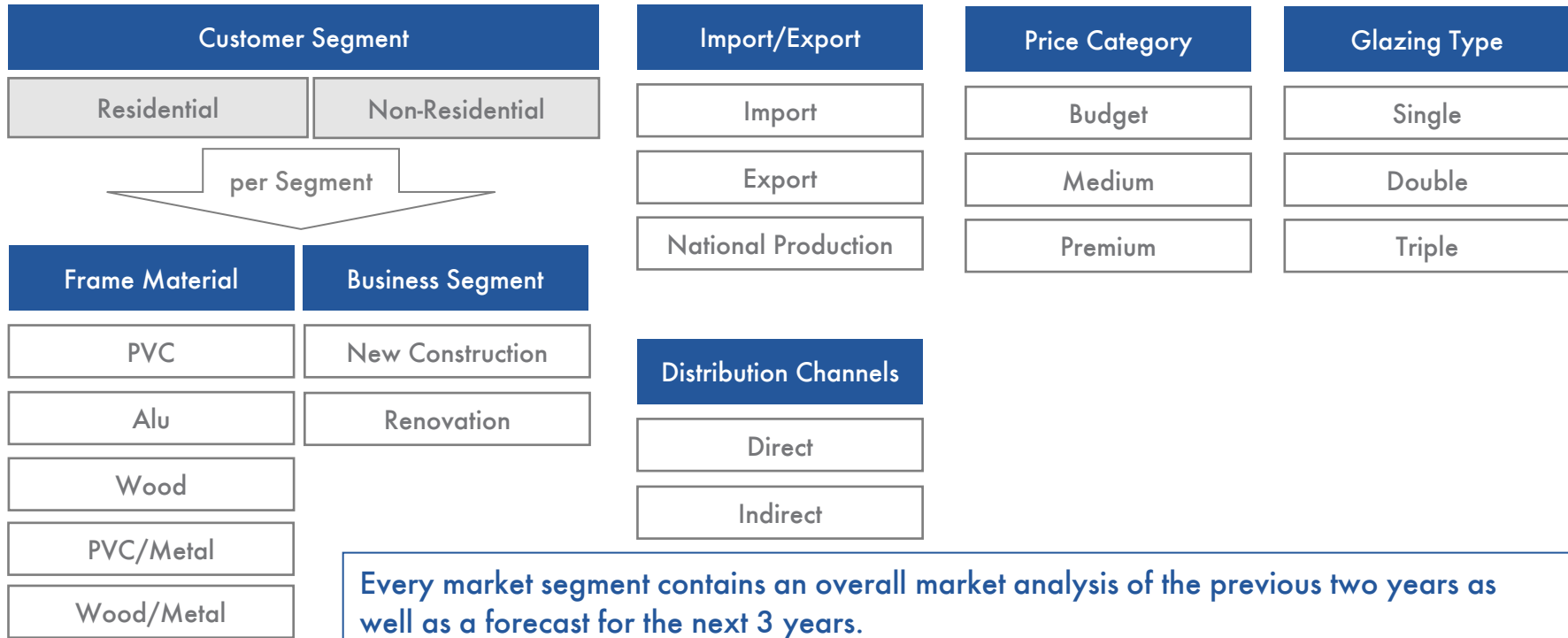
### IC Market Forecast Windows in Central and Eastern Europe 2019

Bucharest, 14th May 2019

[www.interconnectionconsulting.com](http://www.interconnectionconsulting.com)

## IC Market Forecast® Windows in Europe

Market per Country



## Central and Eastern European Windows Market

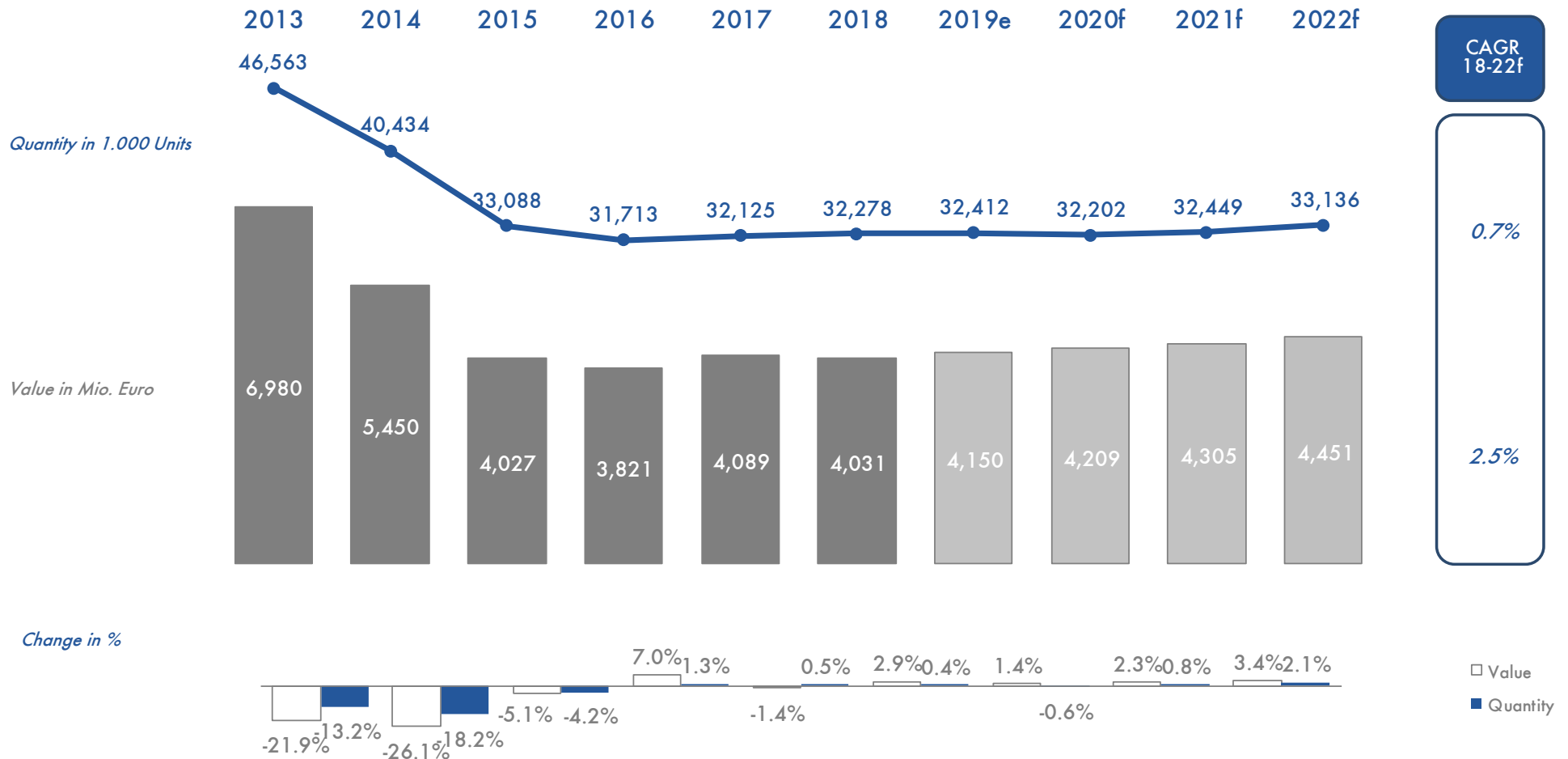
1. Regional Market Development

2. Frame Materials

# The Window Market to See Steady Growth in Terms of Value

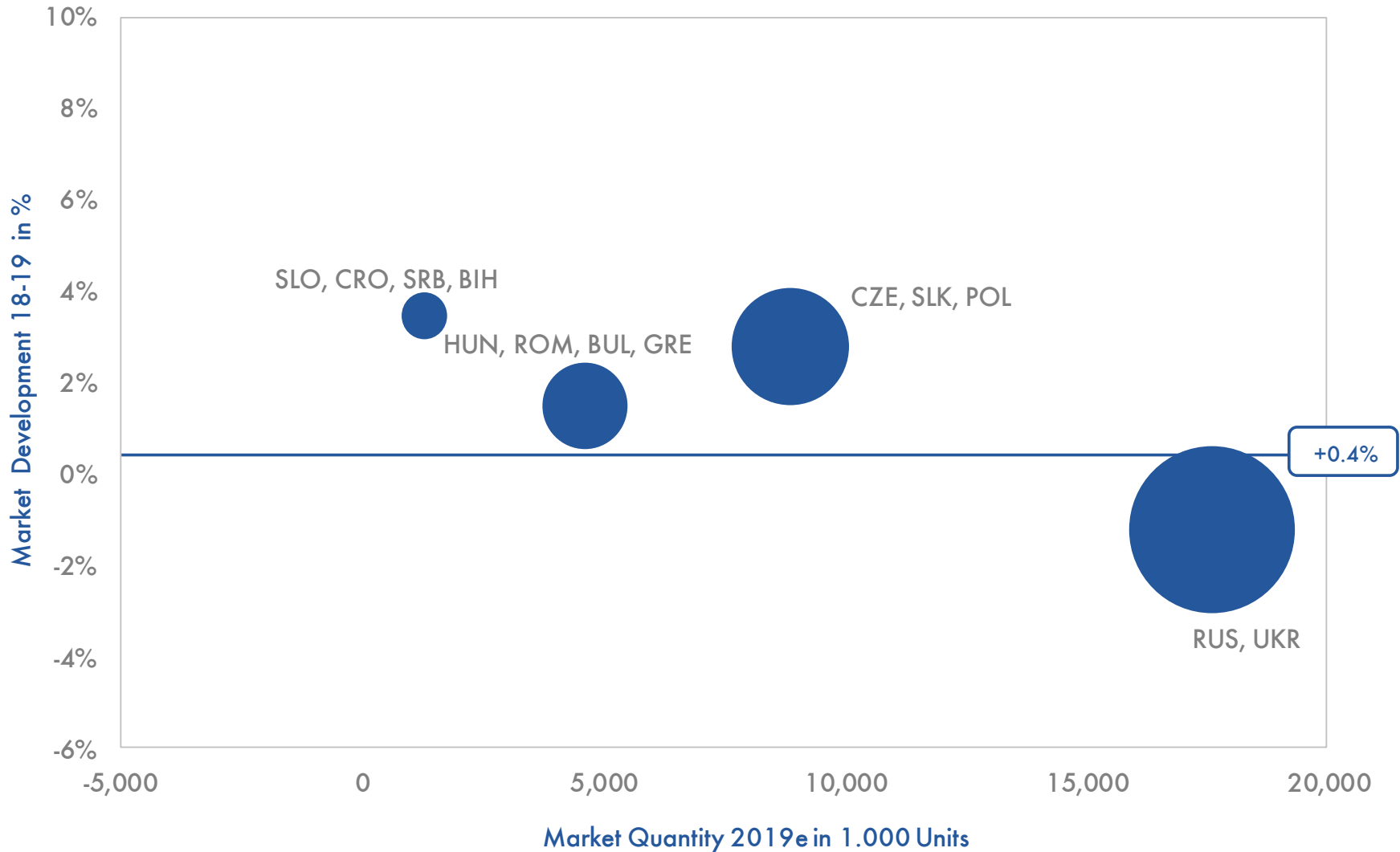
CEE incl Russia/Ukraine: Windows Market 2013 – 2022f, Quantity in 1.000 Window Units, Value in Mio. Euro

Market Analysis



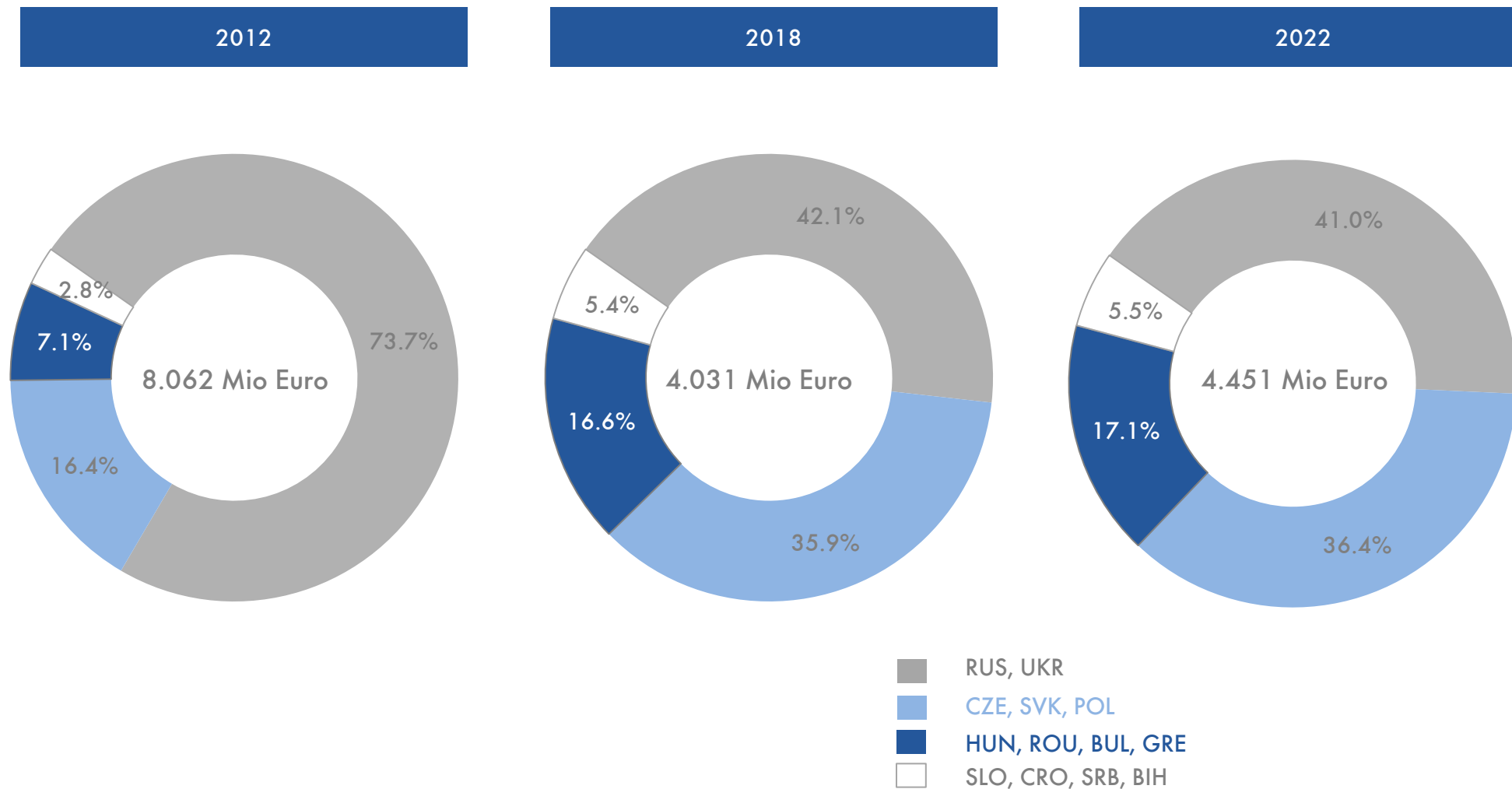
# Russia & Ukraine Remain Behind

TIC Dynamic Portfolio: IC-Market Shares / Market Development Portfolio by Regions, according to Quantity



# Despite Decrease, Russia&Ukraine Still Represent the Biggest Market

CEE: Windows Market 2012 - 2018 - 2022, Market shares, Value in%



## Central and Eastern European Windows Market

1. Regional Market Development

2. Frame Materials

# Frame Materials at a Glance

CEE without Russia/Ukraine : Segmentation by Frame Materials and Business/Customer Segments, Market Shares Quantity in % in 2019e

Market at a Glance

## Windows in Central and Eastern Europe 2019e

### Residential

#### Frame Materials

#### Business Segments

14.4%

9.0%

73.2%

2.4%

1.0%

44.7%

55.3%

Wood

Metal

PVC

Wood/Metal

PVC/Metal

Renovation

New Construction

### Non-Residential

#### Frame Materials

#### Business Segments

6.1%

34.6%

56.4%

1.6%

1.3%

65.9%

34.1%

Wood

Metal

PVC

Wood/Metal

PVC/Metal

Renovation

New Construction





- Window market in Central and Eastern Europe without Russia / Ukraine continues in recovery and rose by 5.9% in terms of value in 2018. However, the market value has not reached its pre-crisis level yet.
- PVC windows continue to dominate on the CEE market, with the strongest position on the Russian and Ukrainian market, where they cover over 79% of the total volume sales. The especially strong position they have in the residential segment. In 2018, PVC windows accounted for 79.9% of the total volume sales in the residential segment in CEE and for 60.5% in the non-residential segment.
- Just like in other European countries, indirect distribution channel continues to gain importance.
- Interconnection Consulting expects Balkan Region to grow the fastest. Balkan is forecasted to show CAGR of 2.7% in terms of quantity by 2022f.

Thank you for your attention!

If there are any questions please  
do not hesitate to contact us!

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