



# Production analysis 2024 windows | exterior doors

DE

April, 2025

Since 2005, B+L has been regularly investigating the markets for windows and exterior doors in all world markets relevant to German companies. The basis of the market forecasts is formed by a comprehensive analysis of indicators, combined with findings from ongoing B+L target group surveys, which in particular provide information on product trends and renovation behaviour.

The aim of the study is to determine the production volume for windows and its most important frame materials. Against the background of partly strongly increasing imports, the study leads to a basic determination of size. In terms of its approach, the model allows for regular updating. In addition to windows, the production volume of exterior doors is also presented.

| Delimitation of the window products studied:   | Delineation of the exterior door products studied:            | Production, import, export, sales   |
|--|---|---|
| a. PVC windows<br>b. Wooden windows<br>c. Wood-aluminium windows<br>d. Metal windows | a. PVC doors<br>b. Wooden doors<br>c. Metal doors<br>d. Other | for foreign trade, the TOP5 import and export countries are shown<br>Base year: 2021 (initial survey 2014)<br>All data for windows in window units, external doors in units |

Method

The triangulation approach is used to determine the production and foreign trade data in the German market. This means that a market size is determined in different ways and reconciled in the financial statements. In this case, the following approaches are chosen in combination:

Individual assessment of the manufacturers (cross-questioning of all market participants; sample); identification of the relevant foreign manufacturers and their export shares to Germany or their development to verify the German import volume.

Number of interviews: 61

Interviews with industry experts and relevant importers/traders of windows for practical testing

Number of interviews: 21

Domestic availability calculation of production statistics + import - export (with sample check of the reporting numbers in the reporting companies) The result is a corrected "official" statistic that allows comparisons and cross-checks in submarkets.

Sales volume calculation: The sales are based on the development of demand for frame materials in the various building types and in the segments new construction/renovation. (Comparison with existing VFF studies/ B+L Outlook Fenster DE)

Total number of interviews with manufacturers + dealers: N=82

Legend:

WoAlu = wood-aluminium windows



# Windows







## Exterior doors





# Summary



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### B+L Marktdaten GmbH



Markt 26

53111 Bonn (Germany)



[www.BL2020.com](http://www.BL2020.com)

Photos: S. Hille, B+L GmbH

## YOUR CONTACT:



**Robin Huth**  
[rh@bl2020.com](mailto:rh@bl2020.com)



**Jens Wehenkel**  
[jw@bl2020.com](mailto:jw@bl2020.com)