News Release

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FGIA Releases 2019/2020 Market Studies, Offers Forecast of Fenestration Industry Trends

SCHAUMBURG, IL – The Fenestration and Glazing Industry Alliance (FGIA) has released the *FGIA 2019/2020 Study of the U.S. Market for Windows, Doors and Skylights*. This bi-annual report delivers timely information on residential and non-residential market trends and product relationships for both residential and non-residential fenestration products. Forecasts are based on projections of construction activity as of May 2020.

**Residential**

Total housing starts continued their growth curve in 2019 but with more modest gains in the single family segment of 1 percent. Going forward, the overall new housing market is expected to continue to contract in 2020 due to the COVID-19 crisis, with a total decline of 16 percent currently forecasted for 2020.

Speaking specifically to residential fenestration, the demand for prime windows fell by 1.1 percent in 2019. The demand for windows in new housing decreased by just under 2 percent in 2019, with a decrease of 10 percent forecasted for 2020 before a recovery with growth of 8 and 6 percent over the following two years. Meanwhile, remodeling and replacement window demand fell in 2019 by 0.5 percent and is expected to decline in 2020 by 5 percent, before a recovery with growth of 2 and 4 percent in 2021 and 2022.

In the residential market, 2019 new construction demand for entry doors grew by 2.3 percent. Meanwhile, entry door remodeling and replacement demand, which continues to represent a significantly larger share of total demand, declined at 4.3 percent. The total market shrank by 2.0 percent versus 2018 and is expected to have a steep drop off in 2020 followed by strong growth in 2021 and 2022.

In 2019, the market for residential-type skylights grew 4 percent in overall unit shipments compared to 2018 and saw an 8 percent increase compared to 2017. The increase in 2019 was driven primarily by strong replacement and remodeling activity with new construction positive but growing at a slightly lower rate.

**Non-residential**

Contract awards reflect activity related to new construction and major additions to existing structures. Actual fenestration demand (shipments) for non-residential building activity typically lags contract awards by up to one year or more. This cycle can shorten or lengthen tremendously depending on the complexity or size of a building and when the specific building product is installed during the construction cycle.

The 2019 contract award total was flat from 2018. The Manufacturing/Warehouse category decreased by 1 percent in 2019, while contract awards in Office/Hotel/Institutional increased by 1 percent and decreased in Store/Mercantile by 1 percent. Contract awards are expected to decline by about 4 percent in 2020, before recovering in 2021.

Storefront windows represent the largest market segment by vision area with 27.3 percent of the overall non-residential glazing in 2019, followed closely by site-fabricated windows representing 26.3 percent. Site-fabricated are most frequently utilized in new construction and major additions whereas shop-fabricated windows are more common in replacement applications.

The 2019 market for non-residential entry doors in the U.S. has continued to experience growth, with 2019 volume up 1 percent over 2018 and up 2 percent since 2017.

The study estimates that the total U.S. market for commercial unit skylights in 2019 saw a 14 percent increase from 2017. Unit sizes commonly average in the range of 22 to 25 square feet but can vary dramatically. Nearly all commercial unit skylights are aluminum framed, and most use some form of plastic glazing (acrylic is most common). In 2019, new construction applications represented approximately 35 percent of the total, up from 31 percent in 2017, reflecting increasing adoption of unitized skylights in commercial buildings.

A session explaining the methodology and forecasting of the study will take place during the [FGIA 2020 Virtual Summer Conference](https://aamanet.org/events/249/2020-fgia-virtual-summer-conference) to be held June 23-25. Additional and more detailed information on the residential and commercial fenestration markets is contained in the *FGIA 2019/2020 Study of the U.S. Market for Windows, Doors and Skylights* (published in May 2020), which includes the items listed below.

* ***FGIA U.S. Industry Channel Distribution Report*** profiles the residential and non-residential market for windows and doors as it flows through the identified distribution channels.
* ***FGIA U.S. Industry Market Size Report*** quantifies residential and non-residential market volumes, both historic and projected.
* ***FGIA U.S. Industry Regional Statistical Review and Forecasts*** details information on trends and product relationships.

These reports are all available for purchase online from the [FGIA Online Store](http://pubstore.aamanet.org/pubstore/ProductResults.asp?cat=1).

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