



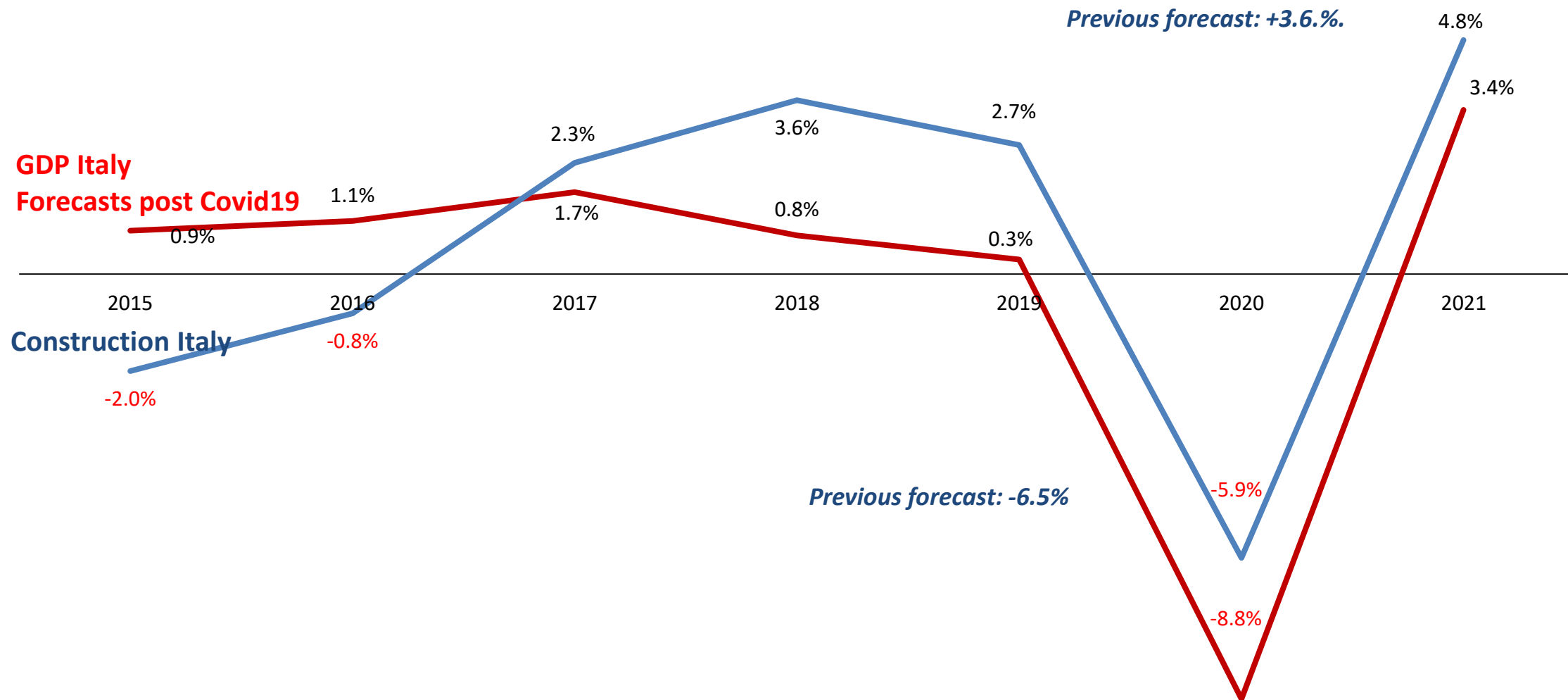
The Italian market for windows and curtain walls in 2020 and 2021

Prof. Carmine Garzia

UNICMI Economic Studies Office

June 25, 2021

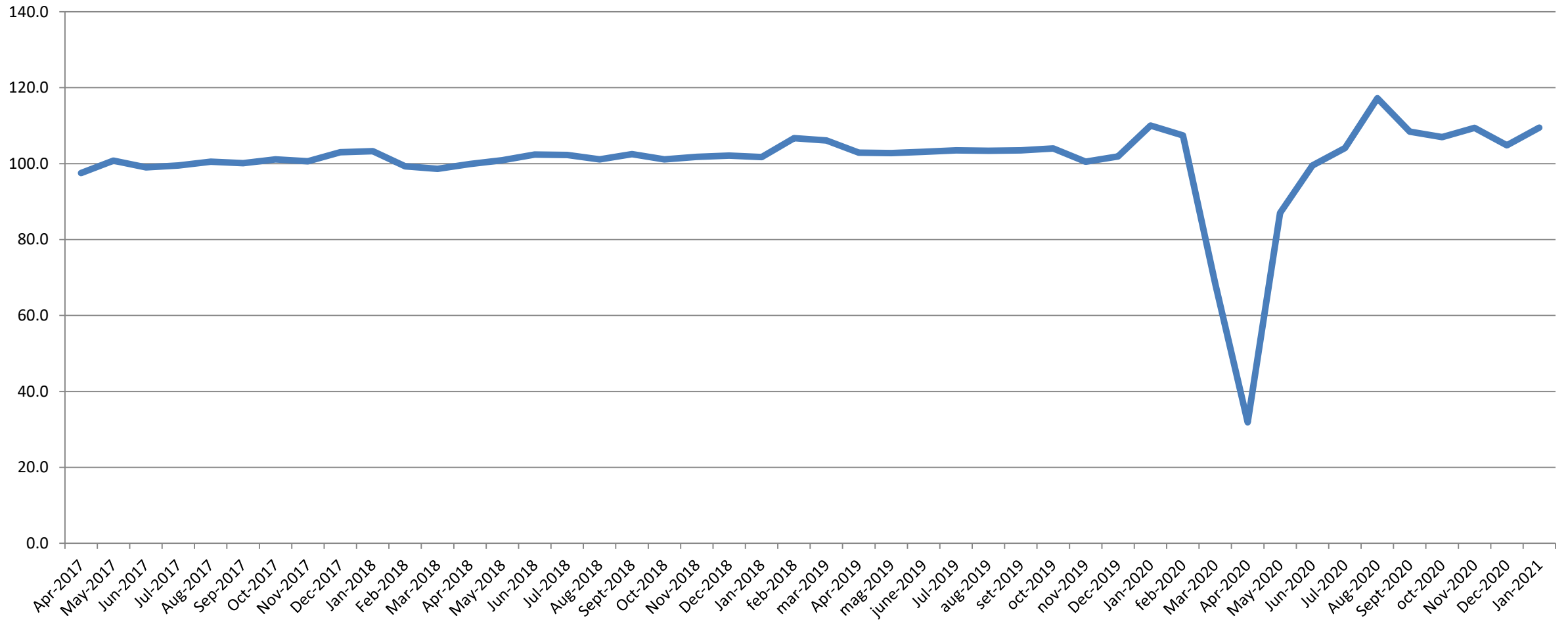
Investment trends in the construction sector



Scenario assumptions: no COVID third wave,
no financial shocks

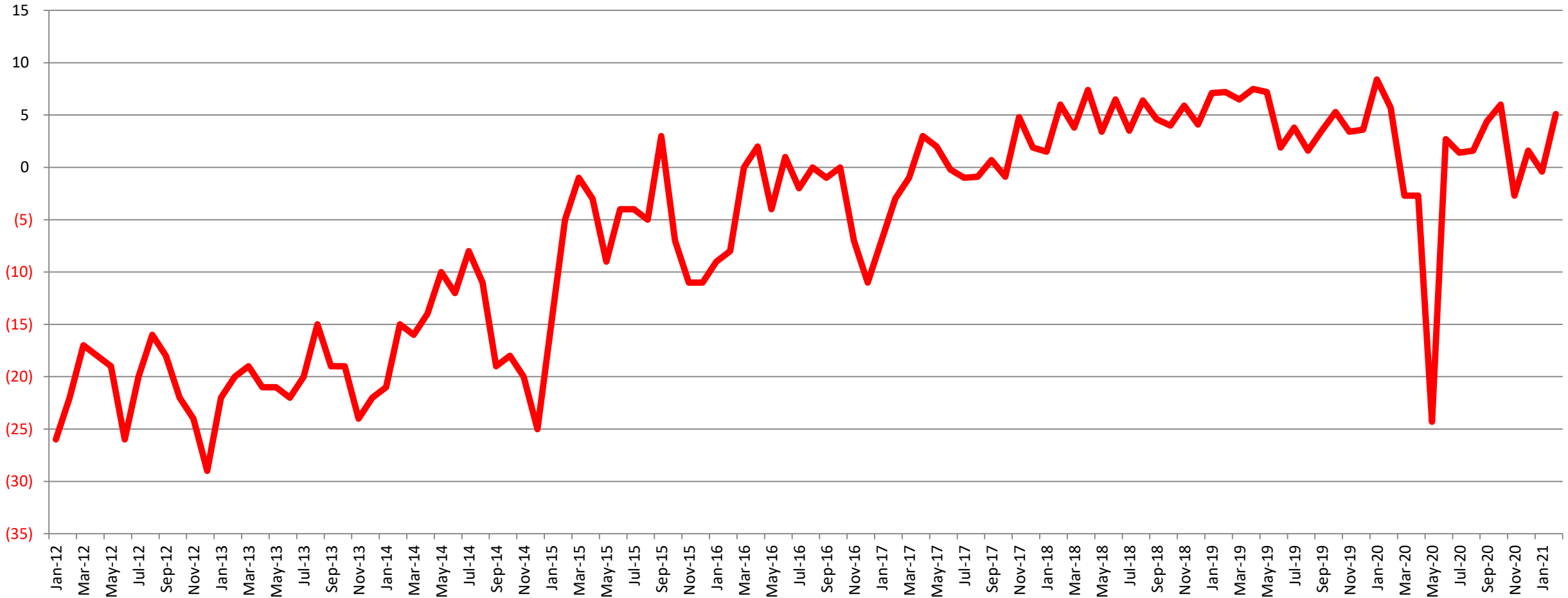
Construction market statistics are updated with each new ISTAT data release, this results in changes that also affect data from years prior to 2020

PRODUCTION IN CONSTRUCTION INDEX

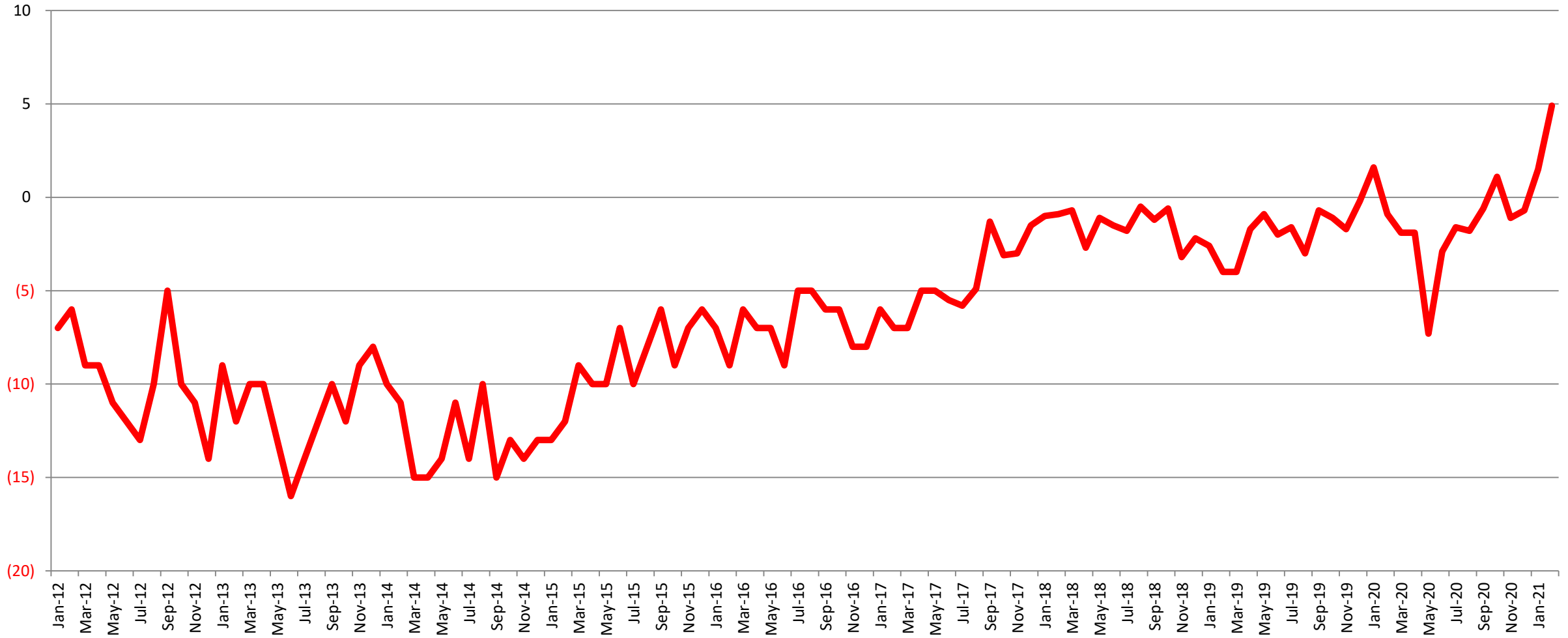


Elaborations on ISTAT data

Order trend over the next three months



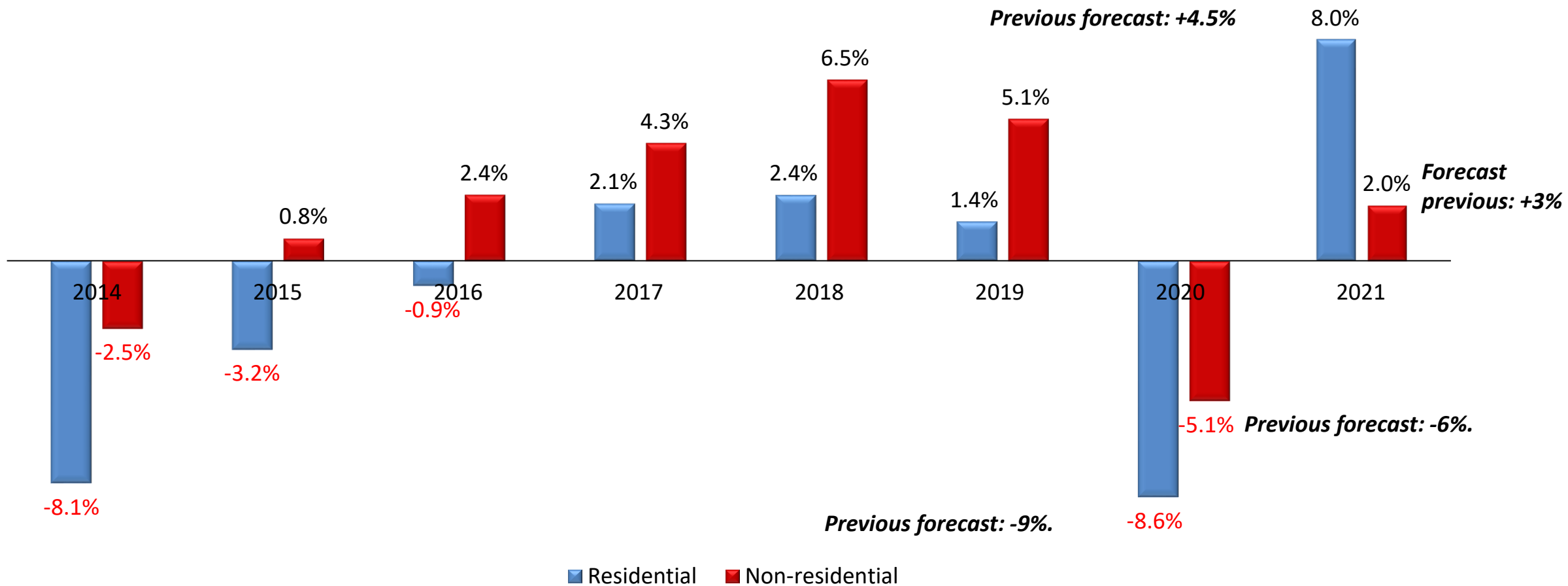
Trend in prices charged by the company over the next three months



Elaborations on ISTAT data

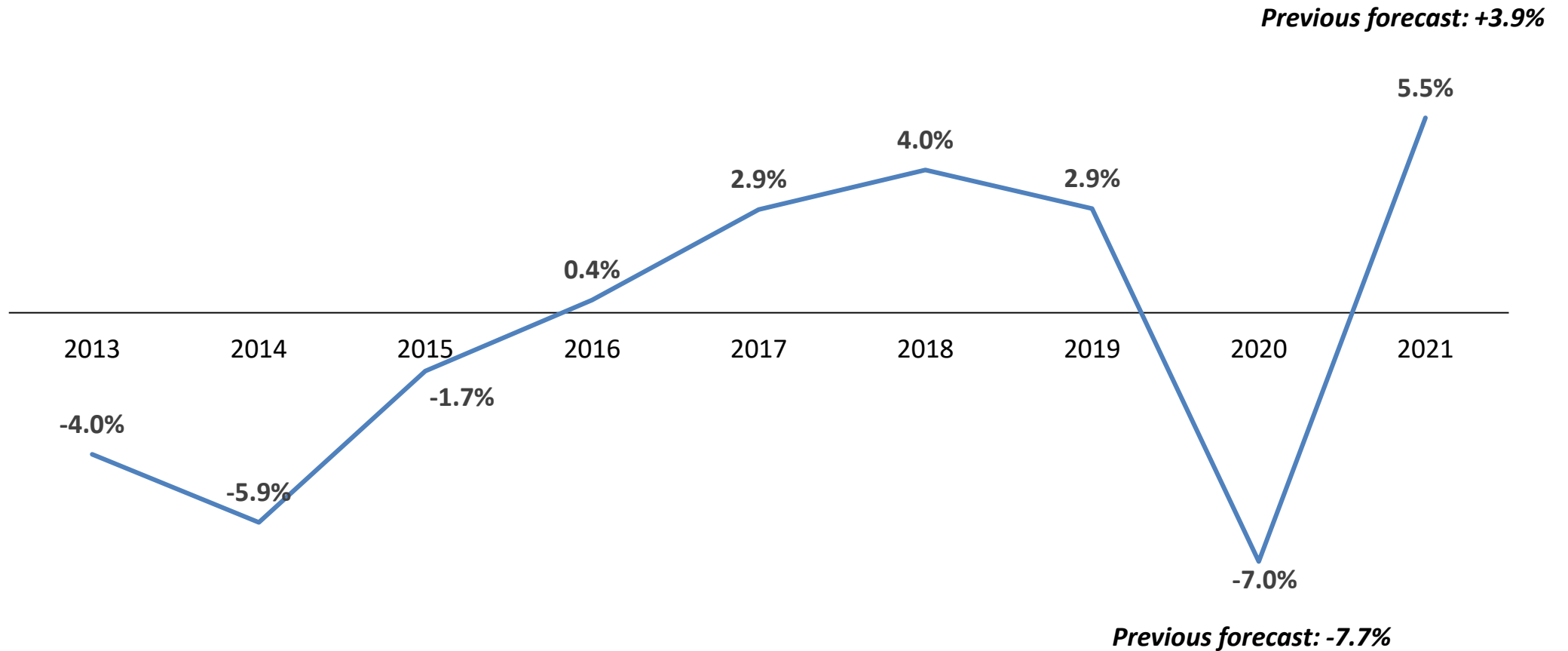
Investment trends in the construction sector

Investments in construction



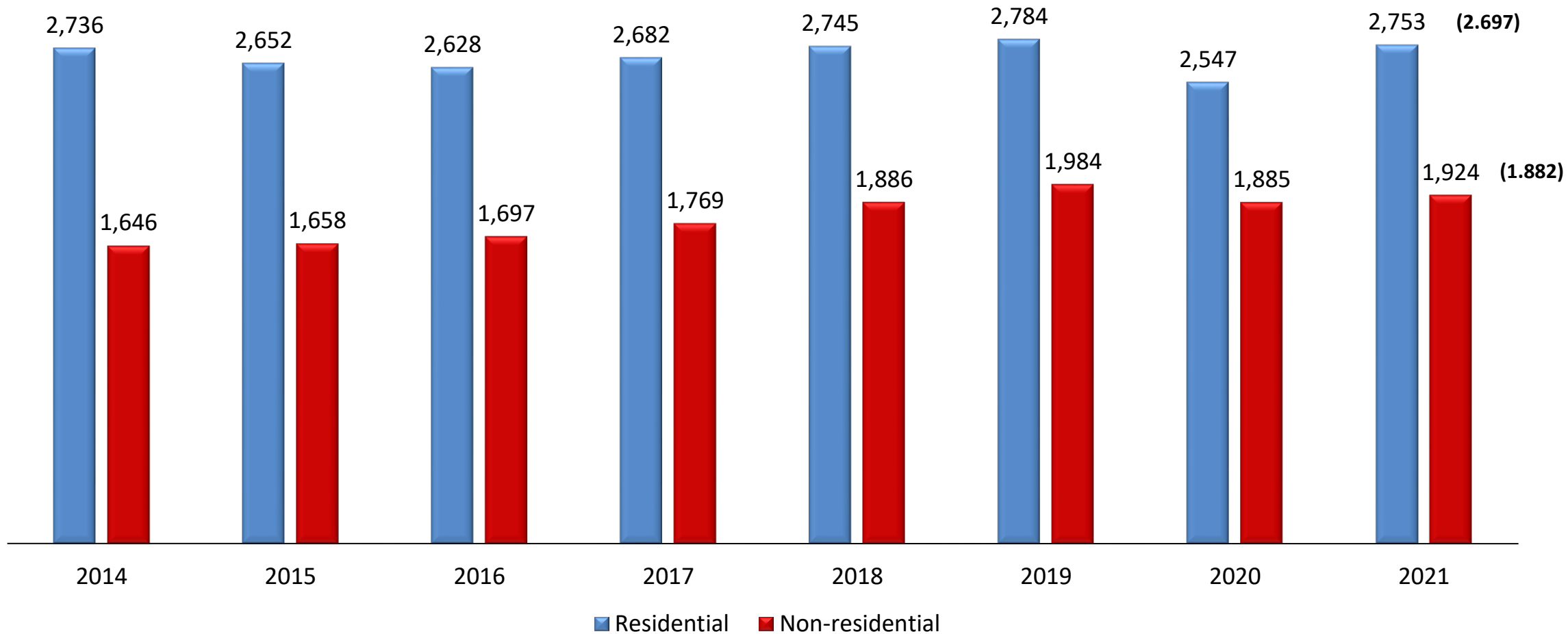
Construction market statistics are updated with each new ISTAT data release, this results in changes that also affect data from years prior to 2020

Revenue growth rate in the windows and doors and curtain walls sector



Demand for windows and facades

Demand for windows and facades (million Euros)

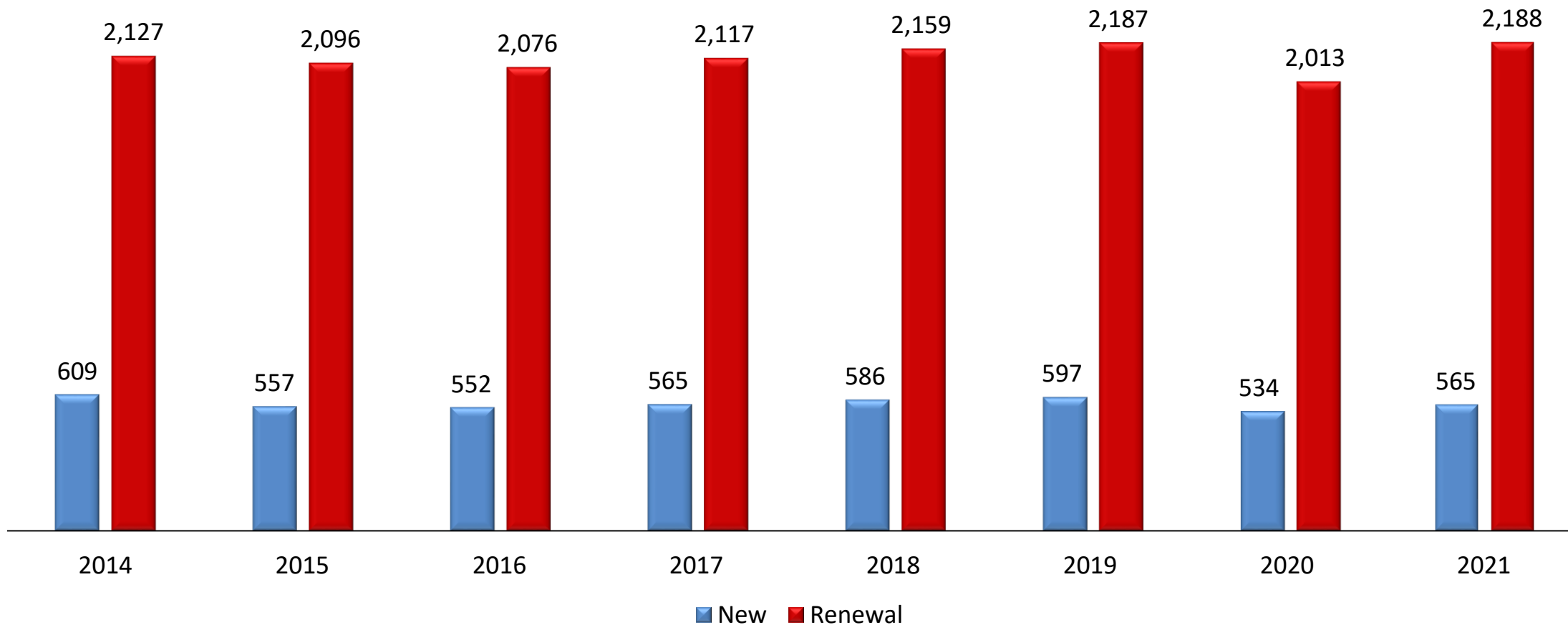


Construction market statistics are updated with each new ISTAT data release, this results in changes that also affect data from years prior to 2020

Elaborations on ISTAT data; 2019, 2020, 2021 projections

Demand for windows and facades

Windows sold Residential New vs Refurbished (million Euro)

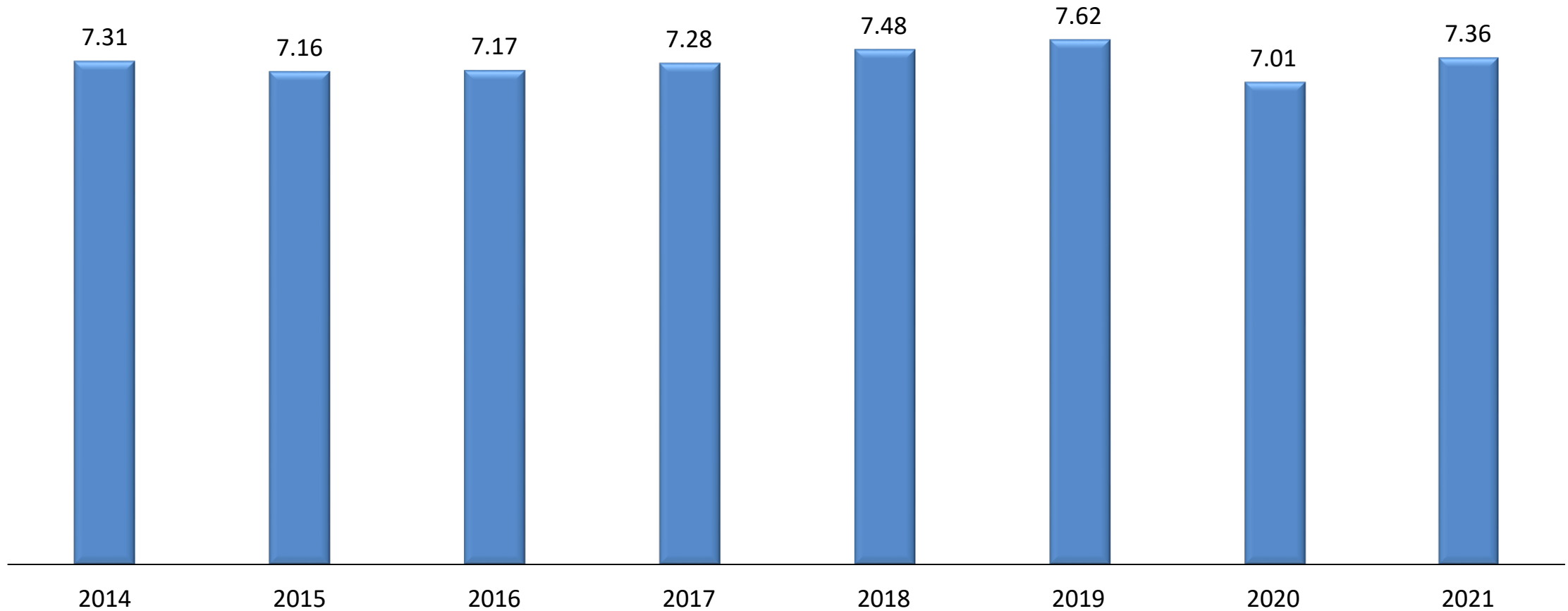


Construction market statistics are updated with each new ISTAT data release, this results in changes that also affect data from years prior to 2020

Elaborations on ISTAT data; 2019, 2020, 2021 projections

Evolution of demand. Windows and facades

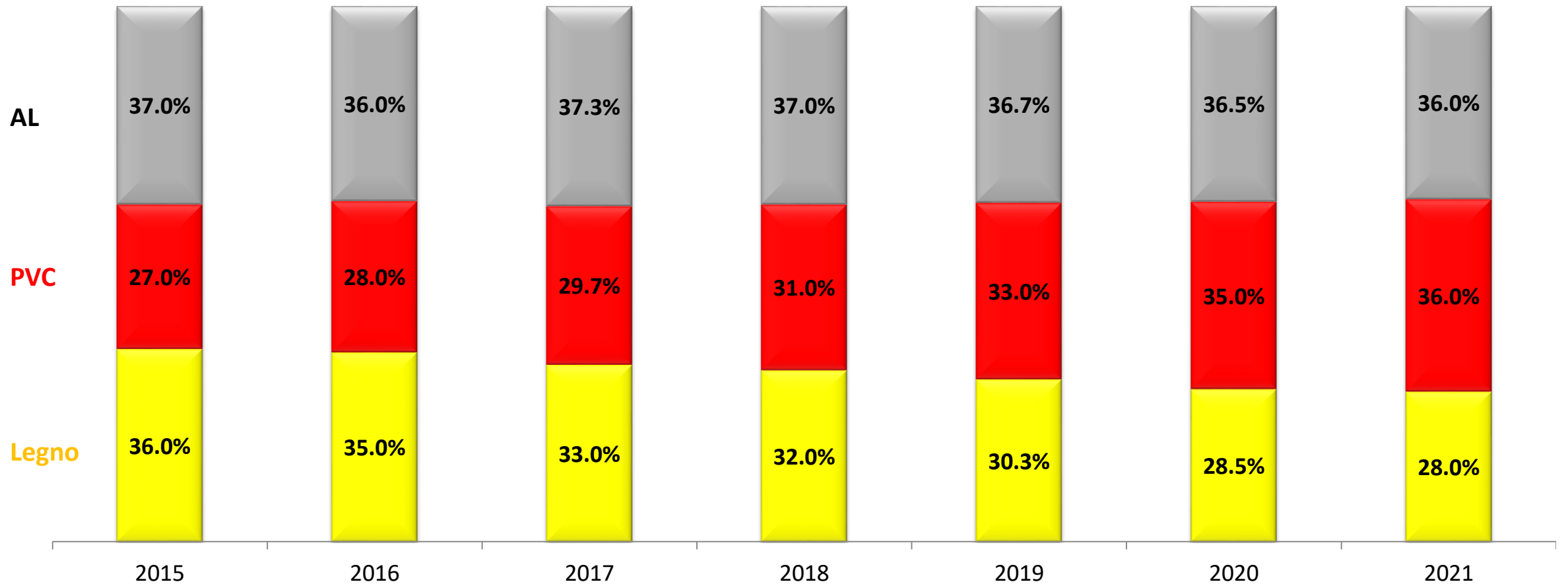
Total windows sold , million unit (residential and non-residential)



Elaborations on ISTAT data. 2020, 2021 projections
Window unit: 1,300mm X 900mm, one casement

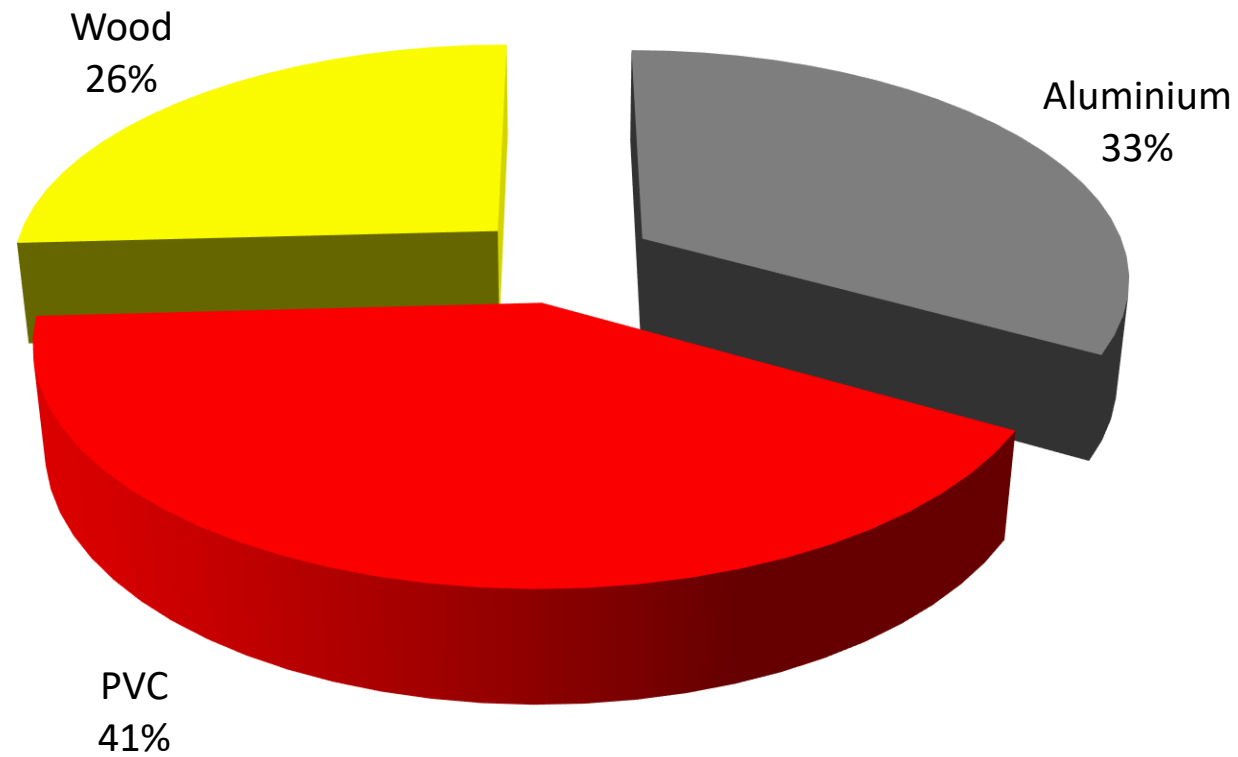
Evolution of demand. Market shares in windows and doors

Market shares in value



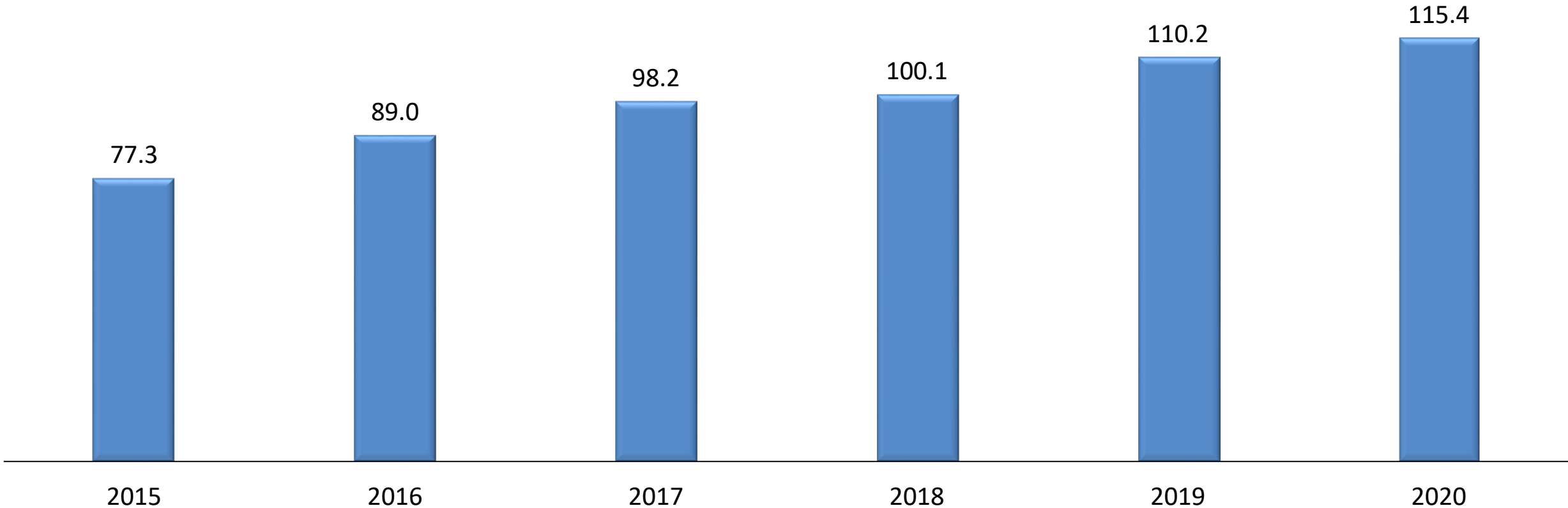
Evolution of demand. Market shares in windows and doors

Market shares in volume (2020)



Imports of PVC windows and doors

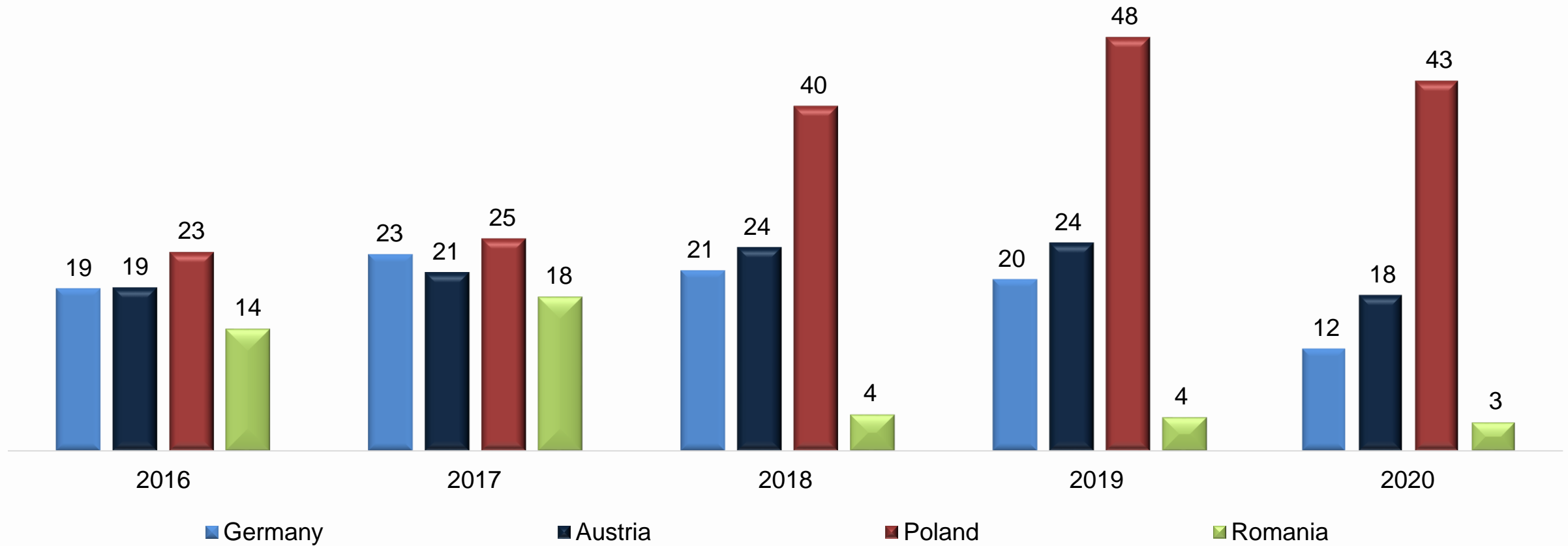
PVC window and door imports (million Euros - market entry value)



UNICMI elaborations on ISTAT data. Estimated 2020 data

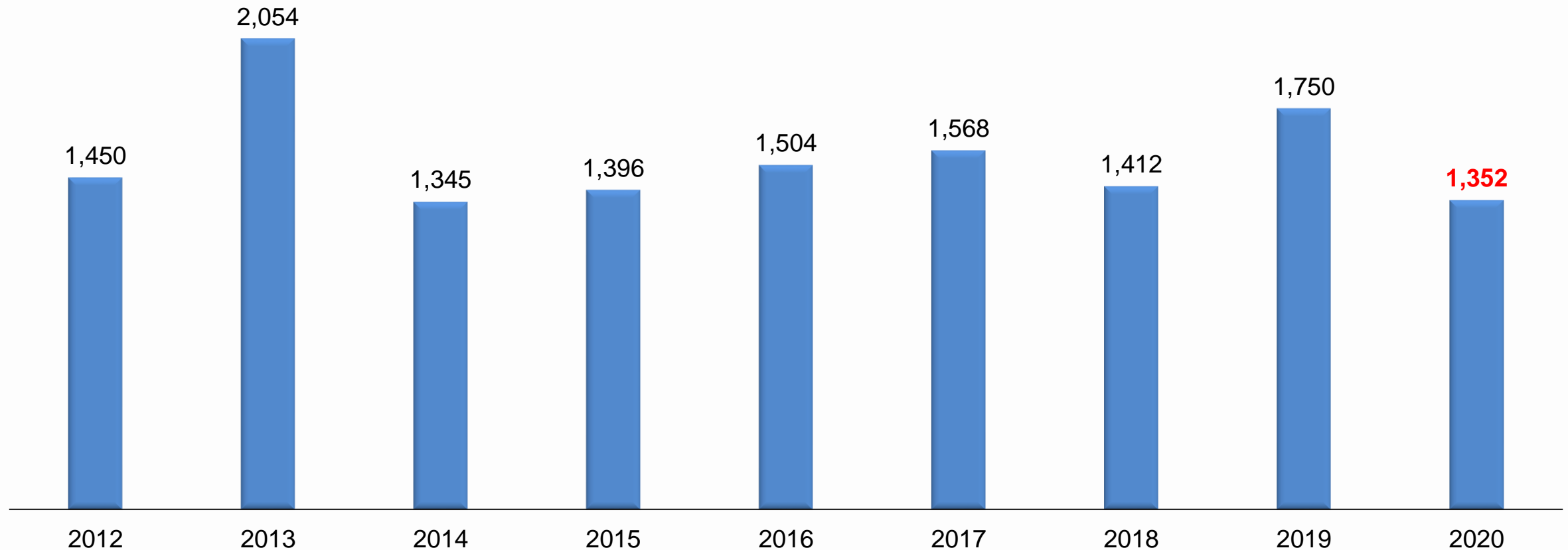
Imports of PVC windows and doors. Main importers

PVC windows and doors import , million Euros(2008-2020)



UNICMI elaborations on ISTAT data. Estimated 2020 data

Demand for windows and doors generated by tax incentives (million Euros)



UNICMI estimate of interventions carried out with «Bonus casa»: 212 million euros in 2018 and 312 million euros in 2019
Elaborations on ENEA data. Estimated 2020 data

Share of turnover of manufacturers of metal frames achieved with the fiscal bonus

