

1 INTRODUCTION

Several characteristics of present day Japan combine to create a significant opportunity for Canadian manufacturers of quality door and window products. These are the rapid growth in the demand for Western-style housing, the strength of the yen and the traditional Japanese concern for quality and value.

The objective of this study is to provide Canadian door and window manufacturers with a basis on which to decide if they should invest the time required to develop markets in Japan and to then plan how to approach the market.

This report covers doors and windows of all materials for residential housing, with an emphasis on wooden products. The non-residential market is excluded from this study.

The time frame for the statistical data presented in the study is from 1982 to 1988 inclusively.

K. F. International in Tokyo, a member of the Strategy Analysis International (SAI) consulting group, began this study in collaboration with the Montreal office of SAI, Saican Consultants Inc., in January 1989. The study proceeded from the collection of statistical data through analysis of industry structure to meetings with selected key participants and industry observers.

Information on Canadian-made products was obtained from representative Canadian manufacturers with the assistance of the Canadian Door and Window Manufacturers Association. This information was used in discussions concerning the potential for Canadian products and know-how. The pertinent Canadian standards were also obtained for comparison with Japanese standards and testing procedures.

2 OVERVIEW OF THE MARKET

Key Design Influences

The characteristics of traditional doors and windows in Japan are very different from those used in the West.

Since the Japanese islands are located quite far south compared with Europe and North America, traditional Japanese houses are designed to allow free flow of air through the entire house. This enables people to live comfortably in the hot and humid summer season.

In contrast to this, the design of Western houses is primarily based on the need to live comfortably in winter. As a result, houses are designed to shut out wind and cold.

At present, Japanese technology and know-how in windows and doors, other than aluminum and steel, is behind that of Europe and North America.