Glass and Glazing Quarterly Review

First Quarter – 2025

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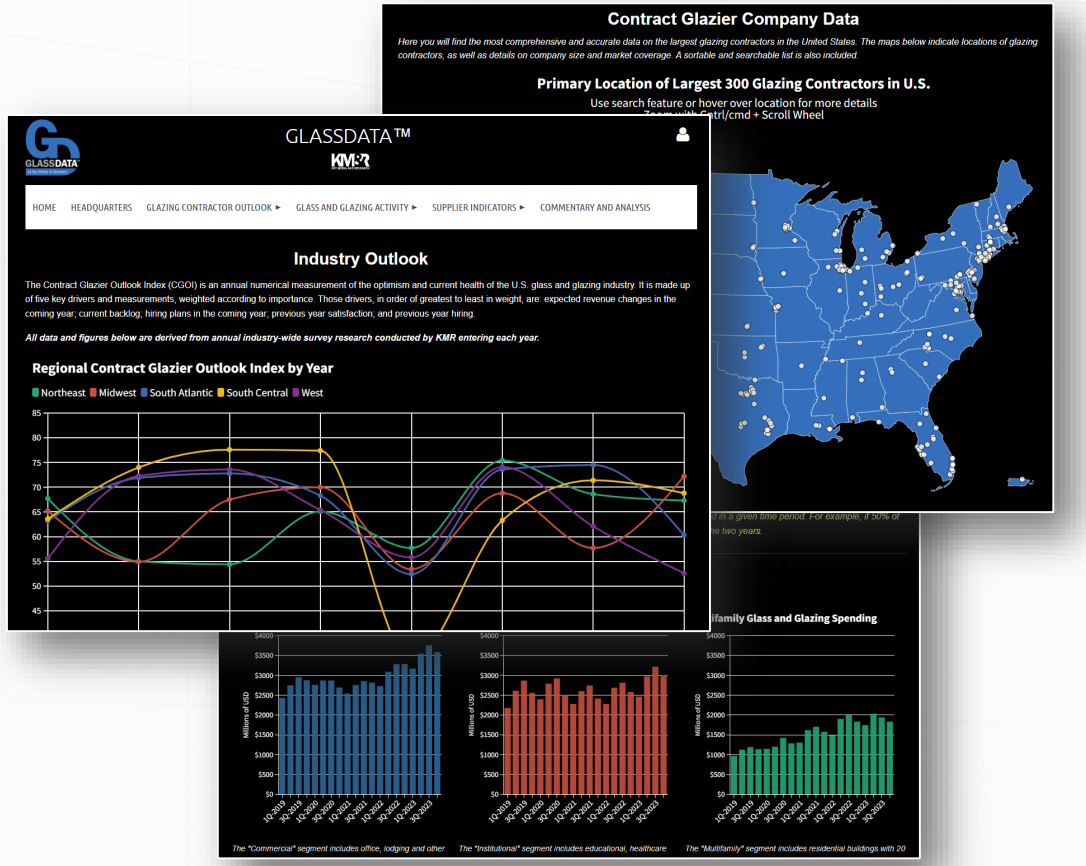
- Proprietary glass and glazing construction spending figures—historical and 3- to 4-year forecasting for commercial, institutional and multifamily sectors
- Inflation adjusted industry growth metrics
- Key indicators on the outlook of the architectural glass industry on a national and regional basis
- National average quarterly lead times on fabricated glass products
- Expanded list and information on top-300 contract glazier market
- Other notable economic and industry-wide aggregated data



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KEY MEDIA AND RESEARCH

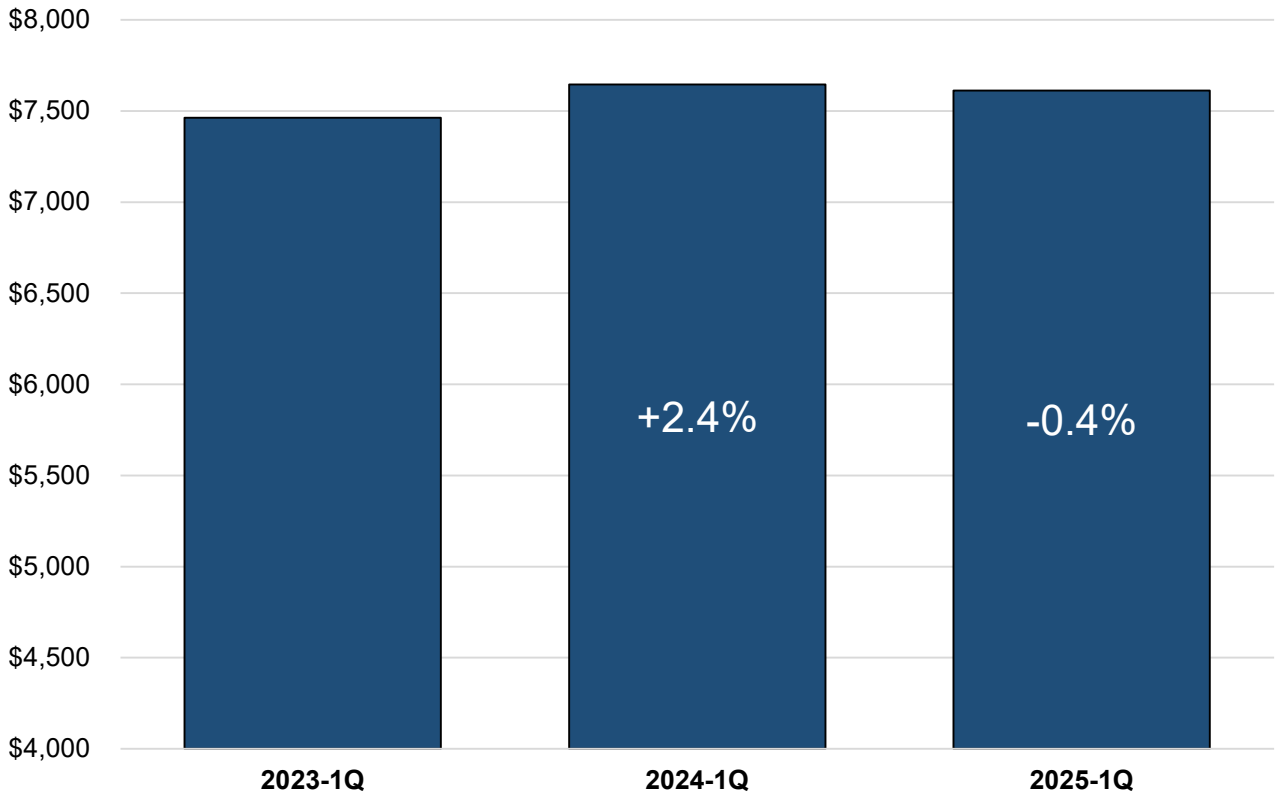
Architectural Glass and Glazing Construction Dips Marginally to Start 2025

The estimated value of ongoing U.S. glass- and glazing-related construction, including work on nonresidential and multifamily projects, edged down by nearly a half-percent in the first quarter of 2025 compared to the same period a year ago.

Year-over-year growth has been below 2% in each of the past four quarters, and this quarter marks second decrease during that period.

METHODOLOGY: Key Media & Research's (KMR) quarterly glass and glazing dollar value figures are calculated using proprietary models that take into account several secondary inputs, including private and public data, and adjusted for estimated glass and glazing activity. This includes ongoing new construction and major renovation activity during a given period, and accounts for materials, labor and other associated costs. Individual models designed by KMR are applied to 17 different construction subsectors, which are then aggregated into their respective categories (Nonresidential-Commercial, Nonresidential-Institutional, Multifamily).
Figures are in current U.S. dollars/nominal terms, so unusual spikes in costs/prices can periodically drive larger year-over-year value of activity increases than would otherwise be expected. **Inflation-adjusted estimated growth rates can be found in the subscription-based portal GlassData™. See previous page for more information.**

Value of Glass and Glazing Work in U.S. Nonresidential and Multifamily Construction During First Quarter: Year-Over-Year
(in Millions of Dollars, Not Seasonally Adjusted)



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Commercial and Multifamily Glazing Decline as Institutional Sector Gains

- The commercial sector of nonresidential glass and glazing dipped 4% in the first quarter compared to a year ago. Lodging was flat, and all other subsectors declined

Commercial includes: office, hotel/lodging, retail, manufacturing, etc.

- Institutional glass and glazing activity improved 4%, with most relevant subsectors showing moderate increases.

Institutional includes: education, healthcare, government, transportation, amusement/recreation, etc.

- Multifamily residential glass and glazing construction retreated 3% after showing some positivity the past two quarters.

Multifamily includes: residential buildings with at least 20 units.

Year-Over-Year Percentage Change in Value of Glass and Glazing Activity in U.S.
(By Subsector)

Glass and Glazing Construction Sector	Q1-2023 to Q1-2024	Q1-2024 to Q1-2025
Commercial	-3% (negative)	-4% (negative)
Institutional	+12% (very positive)	+4% (positive)
Multifamily	-2% (negative)	-3% (negative)

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Glass and Glazing Quarterly Review [First Quarter, 2025]

A quarterly update from Nick St. Denis, Vice President of Research and Data at Key Media & Research

ANALYSIS: Glazing Activity Slips Amid Mixed Segment Trends

Architectural glass- and glazing-related construction dipped just under 0.5% year-over-year in the first quarter of 2025, extending the trend of flattened growth that has persisted for over a year.

Commercial glass and glazing activity continues to be a drag. While lodging held flat, all other major commercial subsectors—such as office and retail—registered year-over-year declines. Much of the broader construction market is still buoyed by a flood of data center projects, which have limited use of glass. With data centers now broken out from traditional office construction in spending data, the true trajectory of glazing-related commercial work is easier to isolate—and the picture isn't promising.

Institutional construction, however, offered a welcome boost. Glass and glazing work tied to this sector improved, led by strong performances in the amusement/recreation, transportation and educational categories. While healthcare remained flat, the gains elsewhere provided a solid foundation for growth. Institutional continues to serve as the most reliable source of stability in the glazing market.

Meanwhile, multifamily residential glazing fell in the quarter, reversing the moderate gains seen in the second half of 2024. Large-scale residential construction remains under pressure, facing the dual challenges of financing constraints and shifting demand patterns.

Overall, the start to 2025 has been in line with expectations. Growth remains elusive, with activity hovering near 2024 levels. While some market participants still hold out hope for a second-half pickup, the weight of ongoing macroeconomic pressures—tariffs, inflation, interest rates, and labor shortages—continues to keep the glazing sector in check.

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ABOUT THE AUTHOR

Nick St. Denis is the vice president of research and data for Key Media & Research (KMR), a leading information provider to the glass, fenestration and related industries. He previously served as an editor for several KMR publications. Nick has covered the market for more than a decade and works regularly with industry businesses, conducting custom research projects for clients. He holds a master's degree in Survey Research and Data Analysis from the University of Connecticut, a bachelor's degree in journalism from the State University of New York at Plattsburgh, and has completed additional studies in economics and statistics.

Key Media & Research offers research services across all segments of the glass industry and related markets. For inquiries, contact Nick St. Denis at nick@keymediaresearch.com, Debra Levy at deb@glass.com, or call 540/720-5584.

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