



Freedonia Focus Reports
US Collection

Moulding & Trim: United States

March 2018



BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	5
Historical Trends	5
Key Economic Indicators	6
Trade	7
Pricing Trends	8
Environmental & Regulatory Factors	9
3. Segmentation & Forecasts	10
Materials	10
Wood	11
Engineered Wood	11
Metal	12
Plastic	12
Other Materials	13
Products	15
Interior Moulding	16
Stairwork	16
Other Moulding & Trim	16
Markets	18
New Residential	19
Residential I&R	19
New Commercial	20
Commercial I&R	20
4. Industry Structure	21
Industry Characteristics	21
Market Share	22
Woodgrain Millwork	23
Builders FirstSource	23
Westlake Chemical	24
5. About This Report	25
Scope & Method	25
Sources	26
Industry Codes	26
Resources	27

List of Tables & Figures

Figure 1 Key Trends in US Moulding & Trim, 2017 – 2022	4
Figure 2 US Moulding & Trim Demand Trends, 2007 – 2017	5
Table 1 Key Indicators for US Moulding & Trim Demand, 2007 – 2022 (US\$ bil)	6
Table 2 US Moulding & Trim Supply & Demand, 2007 – 2022 (US\$ mil)	7
Table 3 US Moulding & Trim Price Deflators by Material, 2007 – 2022 (2009=100)	8
Figure 3 US Moulding & Trim Demand by Material, 2007 – 2022 (US\$ mil)	10
Table 4 US Moulding & Trim Demand by Material, 2007 – 2022 (US\$ mil)	10
Figure 4 US Moulding & Trim Demand by Material, 2007 – 2022 (%)	14
Figure 5 US Moulding & Trim Demand by Product, 2007 – 2022 (US\$ mil)	15
Table 5 US Moulding & Trim Demand by Product, 2007 – 2022 (US\$ mil)	15
Figure 6 US Moulding & Trim Demand by Product, 2007 – 2022 (%)	17
Figure 7 US Moulding & Trim Demand by Market, 2007 – 2022 (US\$ mil)	18
Table 6 US Moulding & Trim Demand by Market, 2007 – 2022 (US\$ mil)	18
Figure 8 US Moulding & Trim Demand by Market, 2007 – 2022 (%)	20
Figure 9 US Moulding & Trim Market Share by Company, 2017 (%)	22
Table 7 Leading Suppliers to the US Moulding & Trim Market by Materials Sold	23
Table 8 Industry Codes Related to Moulding & Trim	26

About This Report

Scope & Method

This report forecasts to 2022 US moulding and trim demand and shipments in nominal US dollars at the manufacturer level. Total demand is segmented by material in terms of:

- wood
- engineered wood
- metal
- plastic
- other materials such as fiber cement and synthetic stone veneers

Total demand is also provided by product in terms of:

- interior moulding
- stairwork
- other moulding and trim products such as exterior trim, decorative columns, and fireplace surrounds

Total demand is further segmented by market as follows:

- new residential
- residential improvement and repair
- new commercial
- commercial improvement and repair

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; shipments and the various segments are reported at five-year intervals for 2007, 2012, and 2017.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

About This Report

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Moulding & Trim: United States (FF20015) is based on *Moulding & Trim in the US*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 8 | Industry Codes Related to Moulding & Trim

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
321918	Other millwork	2431	Millwork
332323	Ornamental metal work	3446	Architectural metalwork
326199	Other plastics products	3449	Miscellaneous metalwork
327420	Gypsum products	3089	Plastic products, NEC
		3275	Gypsum products

Source: US Census Bureau

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Moulding & Trim in the US, March 2018

Freedonia Industry Studies

Siding in the US, January 2018

Insulation Market in the US, December 2017

Windows & Doors Market Forecasts, September 2017

Roofing: US Forecasts, September 2017

Roofing Underlay Market in the US, November 2016

Freedonia Focus Reports

Construction: United States

Doors: United States

Fabricated Metal Products: United States

Housing: United States

Nonresidential Building Construction: United States

Prefabricated Housing: United States

Roofing: United States

Windows: United States

Windows & Doors: United States

Freedonia Custom Research

Trade Publications

Builder

Building Design+Construction

Journal of Light Construction

Qualified Remodeler

Walls & Ceilings

Agencies & Associations

Moulding & Millwork Producers Association

Stairbuilders and Manufacturers Association

Wood Component Manufacturers Association

World Millwork Alliance