INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Molding & Trim

US Industry Study with Forecasts for **2011 & 2016**

Study #2286 | December 2007 | $4500 | 289 pages

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Molding & Trim

US Industry Study with Forecasts for ***2011 & 2016***

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MARKET ENVIRONMENT

MATERIALS

PRODUCTS

MARKETS

INDUSTRY STRUCTURE

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The strongest opportunities for molding and trim will be seen in the office and commercial segment, where demand will rebound from the weak results posted between 2001 and 2006.

US demand to approach $11 billion in 2011

Demand for molding and trim is forecast to increase 2.1 percent per year through 2011 to $11 billion. Advances will be supported by healthy new nonresidential construction activity. The strongest opportunities for molding and trim will be seen in the office and commercial segment, where demand will rebound from the weak results posted between 2001 and 2006. Gains in the institutional building segment, which had supported growth in nonresidential markets between 2001 and 2006, will decelerate through 2011. However, gains in that segment will still be solid as new construction continues to expand. Nonresidential improvement and repair spending is anticipated to accelerate through 2011, also aiding molding and trim demand.

Residential aftermarket to outpace new housing uses

The residential building market will continue to dominate molding and trim demand through 2011. However, an expected decline in new single-family housing completions will significantly hamper growth. Gains will be faster in the aftermarket than in new applications through 2011, aided by a healthy outlook for residential improvement and repair activity. In addition, the large, aging US housing stock will support residential replacement demand. Demand for molding and trim in value terms will be restrained by moderating unit prices for plastic and metal materials, both of which were at elevated levels in 2006.

Interior moldings to grow faster than stairwork

Interior moldings are the largest product segment of the molding and trim market. These products will continue to benefit from widespread use in all of the major types of housing, where they provide decorative ornamentation and serve functional uses such as concealing joints. Moldings are also relatively common in selected nonresidential applications such as office, commercial and institutional structures. Value demand for stairwork products will slow significantly through 2011, restrained by a moderation in raw material prices for metal and wood from their highs between 2001 and 2006. Additionally, demand will be limited by the weak new housing market through 2011. Nevertheless, use will be supported by installation in nonresidential structures, as demand for stairwork will benefit from the projected upturn in nonresidential construction activity. Other products, including exterior molding and trim, will see above-average growth, supported by the recovery in nonresidential markets. A healthy outlook for residential improvement and repair spending will also bolster advances, as exterior molding and trim products need replacement more often than their interior counterparts because of exposure to weather.

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Sample Text, Table & Chart

TABLE IV-2
(continued)

SELECTED MOLDING PRODUCTS BY TYPE & MATERIAL

SAMPLE TABLE

Product	Description	Wood	Plastic	Metal	Precast Plaster	Precast Stone/ Concrete	Other
Cornice	horizontal molding which features a prominent projection						
Cove	a concave molding used to cover gap between wall and ceiling						
Crown	molding used to cover gap between wall and ceiling						
Dentil	small rectangular blocks used in a series to form a molding						
Escutcheon	protective fitting used around a keyhole						
Festoon	ornamental molding with flowers						
Fret	ornamental molding with a band or repeating figures						
Medallion	ornamental ceiling plaque used to cover the ceiling or to add decoration						
Pediment	triangular molding installed over a door, window or fireplace						
Pilaster	shallow rectangular column molding						

MARKETS

Nonresidential

Overall, nonresidential markets accounted for a relative
tion of molding and trim demand in 2006, with 27 percent of
Although the nonresidential building sector comprises a wide
office, commercial, institutional and industrial facilities, diff
construction practices and aesthetic requirements between th
tures and residential facilities result in much lower molding a
In general, nonresidential demand for molding and trim is co
in more human-intensive structures such as offices, commerc
ties and institutional buildings. In industrial and other nonresidential markets, demand focuses on functional molding and trim products that meet utilitarian requirements of covering or concealing joints between molding and trim or complying with building codes.

SAMPLE TEXT

Demand for molding and trim in nonresidential markets is forecast to increase … billion. Gains will derive prim… in the office and comme… onal segment, which had … 2001 and 2006, will continue to … principal contributor to demand, accounting for 74 percent of demand in 2006 and leading gains through 2011. Nonresidential improvement and repair spending is anticipated to see a slight upswing through 2011, supporting replacement demand for molding and trim products.

Nonresidential structures differ significantly from residential buildings in terms of the commonly used construction methods and design, which works to lessen the use of many molding and trim products in nonresidential structures. Demand for exterior trim products, for example, is restrained in these buildings as a result of the dominance of siding systems such as stucco, concrete and metal. While interior moldings are used in nonresidential structures, these more decorative products account

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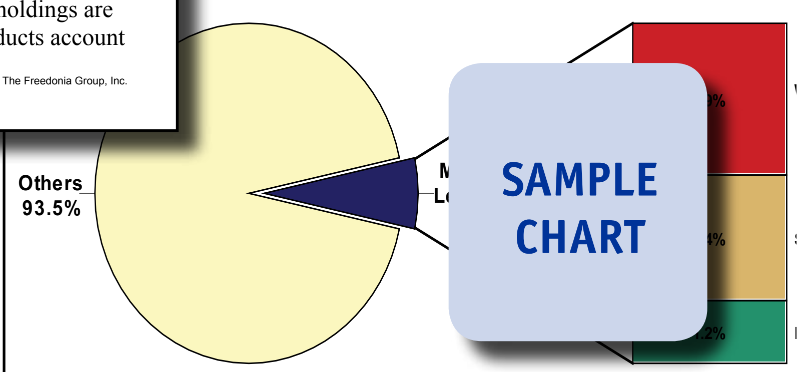
CHART VI-2

…OOD MOLDING & TRIM MARKET SHARE, 2006
($6.2 billion)



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Sample Profile, Table & Forecast

TABLE III-1

MOLDING & TRIM DEMAND BY MATERIAL
(million dollars)

Item	1996	2001	2006	2011	2016
Building Construction (bil $)					15
$ m&t/000$ construction					.1
Molding & Trim Demand	5				00
Wood	3				70
Metal					00
Plastic					10
Engineered Wood					40
Other					30

SAMPLE
TABLE

COMPANY PROFILES

Advanced Environmental Recycling Technologies Incorporated
914 North Jefferson Street
Springdale, AR 72764
479-756-7
http://wv

Sales: $9
Employr
Key Proc ... cts

SAMPLE
PROFILE

Adv ... gies (AERT) develops, n ... ing materials made from recla... use in specialized exterior construction applications. The Company groups its products into four main lines: commercial and residential decking surface components; exterior door and window components; housing trim components; and fence boards.

The Company is involved in the US molding and trim industry through the MOISTURESHIELD CORNERLOC trim components product line. The Company's MOISTURESHIELD CORNERLOC products are manufactured using a proprietary wood fiber and polyethylene composite material that is engineered to resist rotting, cracking, splitting, swelling, moisture and decay. The wood fiber in the 50/50 blend material is a waste byproduct generated by furniture, cabinet and flooring manufacturers. The polyethylene used by AERT is also recycled material made from consumer and industrial waste, such as used grocery bags and other packaging materials that are obtained through a supply agreement with Wal-Mart Stores Incorporated (Bentonville, Arkansas). AERT's composite material is marketed as an alternative to wood building material that can be designed and extruded to customer

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"Metal accounted for a large share of molding and trim demand in new nonresidential applications, with 35 percent in 2006, due principally to the extensive use of metal stairwork in new nonresidential construction. Through 2011, demand for metal products is projected to increase 3.3 percent per year to $810 million. The recovery in new construction spending will support demand. However, prices are expected to moderate for metal products through 2011, limiting value gains in the face of strong construction activity."
--Section V, pg. 157

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OTHER STUDIES

Decorative Tile

US decorative tile demand will grow 4.3% annually through 2011. The dominant flooring market will lead gains as consumer preferences shift away from carpets and rugs. Nonresidential flooring will be particularly strong based on better appreciation of tile's advantages over other high-end flooring materials. This study analyzes the 3.2 billion square foot decorative tile industry, with forecasts for 2011 and 2016 by product, application and market. It also evaluates market share and profiles major producers.

#2285 .... 01/2008.................... $4500

Windows & Doors in China

Demand for windows and doors (fenestration) in China will grow 11% annually through 2011. Gains will be driven by healthy growth in building construction, increased demand for larger living spaces, and further privatization of home ownership. Plastic fenestration will continue to supplant metal and wood types. This study analyzes the ¥115.6 billion Chinese fenestration industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates company market share and profiles major players.

#2258 .... 11/2007.................... $4900

Residential Kitchen & Bathroom Countertops

US countertop demand will reach 540 million square feet in 2011, driven by the remodeling segment. Engineered stone and natural stone countertops will grow the fastest while laminate countertops will remain the market leader. Kitchen countertops will continue to outpace bathroom types. This study analyzes the $12.7 billion US residential kitchen and bath countertop industry, with forecasts for 2011 and 2016 by material, product, market and region. It also evaluates market share and profiles major players.

#2237 .... 10/2007.................... $4500

Composite & Plastic Lumber

US composite and plastic lumber demand will grow 10% yearly through 2011, based on performance advantages over wood. Wood-plastic composites will fare better than plastic lumber. Molding and trim will remain a key market while windows and doors, decking and other applications lead gains. This study analyzes the $3.4 billion US composite and plastic lumber industry, with forecasts for 2011 and 2016 by material, application and market. It also evaluates company market share and profiles major players.

#2239 .... 09/2007.................... $4500

Gutters & Downspouts

US gutter and downspout demand will reach $4.2 billion in 2011. Gutters will remain the dominant segment while gutter guards grow the fastest. Aluminum will stay the largest material type, with plastic growing the fastest from a small base. The much smaller nonresidential market will outpace the residential sector. This study analyzes the US gutter and downspout industry, with forecasts for 2011 and 2016 by product, material, market and region. It also evaluates market share and profiles major players.

#2226 .... 08/2007.................... $4400

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