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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

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Molding & Trim

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

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

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Environment.....	5
Demographic Trends	9
Consumer Spending Trends	12
Building Construction Trends	15
Residential Buildings.....	18
Housing Outlook	21
Housing Stock	25
Residential Floor Space.....	26
Improvements & Repairs.....	28
Nonresidential Buildings.....	29
Construction.....	30
Improvements & Repairs.....	32
Molding & Trim Market Trends	34
Pricing Patterns	36
Regulatory & Environmental Issues	40
Building Codes	41
Industry Standards.....	42
Environmental Considerations	42
World Molding & Trim Overview	45
Foreign Trade	46

MATERIALS

General	49
Wood Molding & Trim.....	52
Demand by Type	53
Hardwoods	55
Softwoods.....	57
Demand by Product	59
Demand by Market	62
Metal Molding & Trim	64
Demand by Product	64
Demand by Market	66
Plastic Molding & Trim	67
Product Characteristics	68
Demand by Product	70
Demand by Market	72
Demand by Resin Type.....	74
Polyvinyl Chloride.....	75
Polyurethane	76
Other Resins	77
Engineered Wood	78
Demand by Product.....	80
Demand by Market	82
Other Molding & Trim Materials	83
Wood-Plastic Composite.....	84
All Other Materials.....	87
Precast Plaster.....	87
Precast Stone & Concrete.....	88
Miscellaneous Materials.....	89

Demand by Product	90
Demand by Market	92

PRODUCTS

General	94
Moldings	98
Product Characteristics	100
Demand by Material	103
Demand by Market	105
Stairwork.....	107
Product Characteristics	109
Demand by Material	111
Demand by Market	113
Other Molding & Trim Products.....	115
Product Characteristics	117
Demand by Material	120
Demand by Market	123

MARKETS

General	126
Residential.....	129
New.....	132
Demand by Product.....	134
Demand by Material.....	135
Improvements & Repairs	136
Demand by Product.....	138
Demand by Material.....	140
Housing Type	141
Single-Family.....	143
Multifamily.....	146
Manufactured Housing	148
Nonresidential	150
New.....	153
Demand by Product.....	155
Demand by Material.....	157
Improvements & Repairs	158
Demand by Product.....	160
Demand by Material.....	162
Building Type.....	163
Office & Commercial.....	165
Institutional.....	167
Industrial.....	169
Other Nonresidential.....	171

INDUSTRY STRUCTURE

General	173
Industry Composition	174
Market Share	178
Wood.....	180
Woodgrain Millwork	181
Sierra Pacific	182
Bright Wood	182
Other Suppliers	182

Plastic	183
Tapco	184
Fortune Brands	184
Builders FirstSource.....	185
Royal Group.....	185
Other Leaders	186
Other Materials.....	188
Vertical & Horizontal Integration.....	189
Product Development.....	192
Manufacturing	195
Materials.....	196
Manufacturing Processes.....	197
Marketing	199
Distribution	202
Mergers & Acquisitions.....	205
Cooperative Agreements.....	209

COMPANY PROFILES

Advanced Environmental	
Recycling Technologies	214
Alcoa Incorporated.....	216
Associated Materials.....	217
Bright Wood.....	219
Builders FirstSource.....	221
Canamould Extrusions	223
Cascade Wood Products	224
Collins Companies	227
Contact Industries.....	228
CPG International.....	229
CRH plc	231
Fortune Brands	233
Georgia Gulf.....	236
Gossen Corporation	238
HB&G Building Products.....	240
Headwaters Incorporated	243
Hunter Douglas.....	247
Koch Industries	249
Louisiana-Pacific Corporation	251
Melton Classics	253
Menard Incorporated	254
Noël Group.....	255
Ply Gem Holdings.....	258
Quanex Corporation	261
Saint-Gobain	263
Sierra Pacific	265
SierraPine Limited.....	266
Southern Staircase	267
Stairways Incorporated	268
Temple-Inland Incorporated.....	270
Tomkins plc.....	272
Ultra-Flex Moulding	273
Universal Forest Products	275
Weyerhaeuser Company	277
WindsorONE Company	280
Wolseley plc.....	281
Woodgrain Millwork	283
Other Companies Mentioned in Study	286

List of Tables

EXECUTIVE SUMMARY

- 1 Summary Table..... 3

MARKET ENVIRONMENT

- 1 Macroeconomic Environment 9
- 2 Resident Population.....12
- 3 Personal Consumption Expenditures 15
- 4 Building Construction Expenditures 18
- 5 Residential Construction Expenditures21
- 6 Housing Indicators25
- 7 Residential Improvement & Repair Expenditures29
- 8 Nonresidential Construction Expenditures.32
- 9 Nonresidential Improvement & Repair Expenditures33
- 10 Molding & Trim Growth, 1996-2006.....35
- 11 Molding & Trim Pricing.....39
- 12 Molding & Trim Foreign Trade48

MATERIALS

- 1 Molding & Trim Demand by Material51
- 2 Wood Molding & Trim Demand by Wood Type.....55
- 3 Wood Molding & Trim Demand by Product Type.....61
- 4 Wood Molding & Trim Demand by Market..63
- 5 Metal Molding & Trim Demand by Product Type.....65
- 6 Metal Molding & Trim Demand by Market..67
- 7 Plastic Molding & Trim Demand by Product Type.....71
- 8 Plastic Molding & Trim Demand by Market 73
- 9 Plastic Molding & Trim Demand by Resin Type.....75
- 10 Engineered Wood Molding & Trim Demand by Product Type81
- 11 Engineered Wood Molding & Trim Demand by Market83
- 12 Other Molding & Trim Demand by Material.....84
- 13 Other Material Molding & Trim Demand by Product Type91
- 14 Other Material Molding & Trim Demand by Market93

PRODUCTS

- 1 Molding & Trim Demand by Product Type..97
- 2 Selected Molding Products by Type & Material 101
- 3 Molding Demand by Material Type 105
- 4 Molding Demand by Market 107

- 5 Selected Stairwork Products by Type & Material 110
- 6 Stairwork Demand by Material Type 113
- 7 Stairwork Demand by Market 115
- 8 Selected Other Molding & Trim Products by Type & Material..... 119
- 9 Other Molding & Trim Product Demand by Material Type 123
- 10 Other Molding & Trim Product Demand by Market 125

MARKETS

- 1 Molding & Trim Demand by Market 128
- 2 Residential Molding & Trim Demand by Application, Product & Material 132
- 3 New Residential Molding & Trim Demand by Product & Material..... 134
- 4 Residential Improvement & Repair Molding & Trim Demand by Product & Material 138
- 5 Residential Molding & Trim Demand by Housing Type 143
- 6 Single-Family Housing Molding & Trim Demand by Application & Product..... 146
- 7 Multifamily Housing Molding & Trim Demand by Application & Product..... 148
- 8 Manufactured Housing Molding & Trim Demand by Application & Product..... 150
- 9 Nonresidential Molding & Trim Demand by Application, Product & Material 153
- 10 New Nonresidential Molding & Trim Demand by Product & Material 154
- 11 Nonresidential Improvement & Repair Molding & Trim Demand by Product & Material 160
- 12 Nonresidential Molding & Trim Demand by Building Type 164
- 13 Office & Commercial Molding & Trim Demand by Product 167
- 14 Institutional Molding & Trim Demand by Product 169
- 15 Industrial Molding & Trim Demand by Product 170
- 16 Other Nonresidential Molding & Trim Demand by Product 172

INDUSTRY STRUCTURE

- 1 US Molding & Trim Sales for Selected Companies, 2006..... 177
- 2 Selected Acquisitions & Divestitures..... 208
- 3 Selected Cooperative Agreements..... 212

List of Charts

MARKET ENVIRONMENT

- 1 Year of Construction of Housing Stock, 2006 26
- 2 Molding & Trim Growth, 1997-200636
- 3 Molding & Trim Pricing Patterns by Material, 1996-2016.....40

MATERIALS

- 1 Molding & Trim Demand by Material, 2006..... 51
- 2 Wood Molding & Trim Demand by Product Type, 200662
- 3 Metal Molding & Trim Demand by Product Type, 200666
- 4 Plastic Molding & Trim Demand by Product Type, 200672
- 5 Engineered Wood Molding & Trim Demand by Product Type, 200682
- 6 Other Material Molding & Trim Demand by Product Type, 200692

PRODUCTS

- 1 Molding & Trim Demand by Product Type, 200697

MARKETS

- 1 Molding & Trim Demand by Market, 2006 128
- 2 New Residential Molding & Trim Demand by Product, 2006 135
- 3 Residential Improvement & Repair Molding & Trim Demand by Product, 2006 139
- 4 Residential Molding & Trim Demand by Housing Type, 2006..... 143
- 5 New Nonresidential Molding & Trim Demand by Product, 2006 156
- 6 Nonresidential Improvement & Repair Molding & Trim Demand by Product, 2006 162
- 7 Nonresidential Molding & Trim Demand by Building Type, 2006 165

INDUSTRY STRUCTURE

- 1 US Molding & Trim Market Share, 2006... 180
- 2 US Wood Molding & Trim Market Share, 2006 181
- 3 US Plastic Molding & Trim Market Share, 2006 184

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.

Sample Text, Table & Chart

MARKETS

Nonresidential

Overall, nonresidential markets accounted for a relative portion of molding and trim demand in 2006, with 27 percent of total demand. Although the nonresidential building sector comprises a wide range of office, commercial, institutional and industrial facilities, different construction practices and aesthetic requirements between these structures and residential facilities result in much lower molding and trim demand. In general, nonresidential demand for molding and trim is concentrated in more human-intensive structures such as offices, commercial buildings 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.

Demand for molding and trim in nonresidential markets is forecast to increase to \$2.2 billion in 2011. Gains will derive primarily from the office and commercial segment, which had a 1.5 percent increase in demand from 2001 and 2006, will continue to be the 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

TABLE IV-2
(continued)

SELECTED MOLDING PRODUCTS BY TYPE & MATERIAL

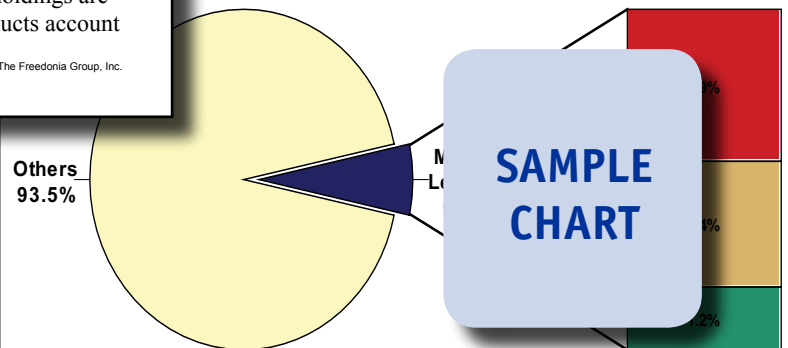
Product	Description	Wood	Plastic	Metal	Precast Plaster	Precast Stone/Concrete	Other
Cornice	horizontal molding which features a prominent projection						
Cove	a concave molding used to cover gap between wall and ceiling						
Crown	molding used to cover gap between wall and ceiling						
Dentil	small 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						

SAMPLE TABLE

SAMPLE TEXT

CHART VI-2

MOD MOLDING & TRIM MARKET SHARE, 2006
(\$6.2 billion)

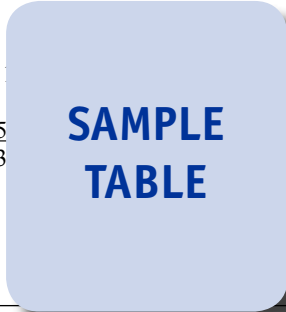


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE III-1
MOLDING & TRIM DEMAND BY MATERIAL
 (million dollars)

Item	1996	2001	2006	2011	2016
Building Construction (bil \$)					
\$ m&t/000\$ construction					
Molding & Trim Demand	5				
Wood	3				
Metal					
Plastic					
Engineered Wood					
Other					



COMPANY PROFILES

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

Sales: \$
 Employr
 Key Proc

SAMPLE PROFILE

Adv...gies (AERT) de-velops, n...ing materials made from reclaimed plastic and wood fiber waste for 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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