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Fencing

US Industry Study with Forecasts for **2012 & 2017**

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Although a more moderate outlook for raw material prices will restrain value growth, a recovery in the dominant residential fencing market will spark an acceleration in overall growth.

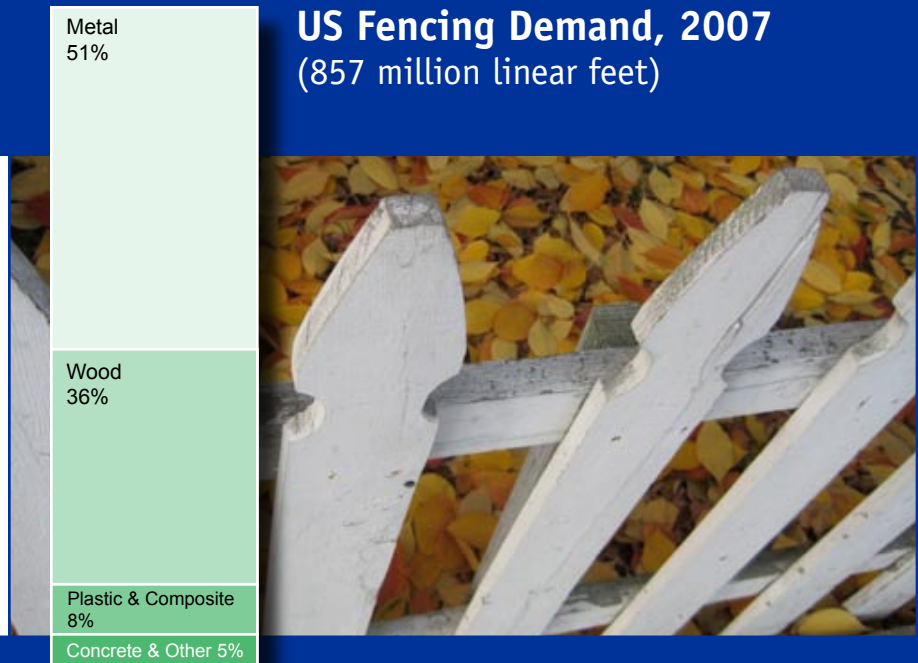
US demand to reach 935 million linear feet in 2012

US demand for fencing is forecast to expand approximately two percent per annum to 935 million linear feet in 2012. Although this pace represents an improvement from the 2002-2007 period in terms of linear feet, a more moderate outlook for raw material prices will restrain value growth. A recovery in the residential fencing market, which accounts for over one-half of demand, will spark an acceleration in overall growth. The residential market had contracted as housing construction declined sharply in 2006 and 2007, but is projected to improve based on a more favorable outlook for residential construction by 2012.

Plastic fencing to be fastest growing material

Among fencing materials, demand for plastic and composite fencing is forecast to grow fastest, as these products continue to penetrate the large residential fencing market at the expense of wood products. Although wood remains the most popular residential fencing type, competition from plastic and composite fencing is quickly eroding its market share. Plastic materials can offer similar aesthetics to wood products, while significantly reducing maintenance costs. While vinyl fencing products continue to account for the largest share of plastic fencing demand, more aes-

US Fencing Demand, 2007 (857 million linear feet)



thetically-pleasing composite products are expected to grow faster.

Metal fencing accounts for two-thirds of the fencing market in value terms (its share is somewhat smaller in terms of linear feet). Metal fencing's prominence stems from its popularity in the nonresidential building and nonbuilding markets, where metal fencing (particularly chain link) is commonly used to secure property. Although chain link fencing is the most frequently installed metal product, ornamental metal fencing generates the majority of the segment's market value. Going forward, demand for metal fencing is expected to grow in line with the market as a whole.

Nonresidential market among best opportunities

The nonresidential fencing market is projected to provide some of the best opportunities for growth, accounting for one-third of the forecast increases. Installations at institutional buildings will spur growth in this market, as demographic trends drive the construction of new health care and educational facilities. Overall, nonresidential fencing demand is expected to improve in new applications relative to the 2002-2007 period, while demand in improvement and repair applications remains firm.

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Sample Text, Table & Chart

MARKETS

Residential

In unit terms, the residential market accounted for more than half of total fencing demand in 2007. Residential fencing is forecast to decline slightly to 4.5 billion linear feet. This represents a 2% decline from 2007, largely due to stronger demand for nonstructural applications.

Residential fencing demand is expected to decline and to a sharp drop in new housing starts, as well as spending on nonstructural improvements. Between 2007 and 2012, housing construction is expected to recover (although not to peak) while nonstructural improvement activity is projected to decline slightly. Consequently, residential fencing demand is forecast to positive growth over the forecast period, with new applications expected to grow faster than residential fencing. Despite these gains, residential fencing demand in 2012 will remain below its 2006 peak of 500 million linear feet. Gains for fencing in the new housing market will be aided by demand for higher density single-family housing and gated multifamily communities.

In 2007, wood fencing accounted for the largest share of the residential market in terms of linear feet, with one-half of the total. In value terms, wood accounts for approximately one-quarter of demand and metal is the leading material. The difference in relative market share is due to the higher cost of metal fencing per linear foot than wood fencing. Despite its higher maintenance requirements, wood fencing will still remain the leading fencing material in 2012. However, demand is expected to fall marginally, primarily due to competition from plastic, wood-plastic composite and concrete fencing.

Metal fencing demand will see modest gains through 2012, although increases will be limited by the growing popularity of plastic and

**SAMPLE
TEXT**

TABLE V-7

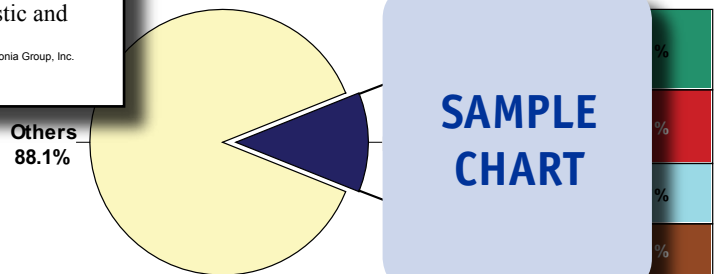
MIDWEST FENCING DEMAND BY SUBREGION & MARKET
 (million dollars)

Item	1997	2002	2007	2012	2017
Midwest Construction (bil 2000\$)	170	170	170	170	170
linear ft fencing/000\$ construction	170	170	170	170	170
Midwest Fencing Demand (mil ln ft)	200	200	200	200	200
\$/linear foot	200	200	200	200	200
Midwest Fencing Demand	4000	4920	7310	8050	11100
By Subregion:					
East North Central					
West North Central					
By Market:					
Residential Building					
Nonresidential Building					
Nonbuilding Construction					
Agricultural					
% Midwest Fencing Demand	6	6	6	6	6

**SAMPLE
TABLE**

CHART VI-1

US FENCING MARKET SHARE, 2007
 (\$7.5 billion)

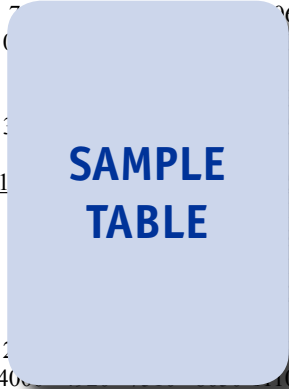


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE III-5
WOOD FENCING DEMAND BY TYPE
(million dollars)

Item	1997	2002	2007	2012	2017
Construction Expenditures (bil 2000\$)	7	10	13	16	20
linear ft fence/000\$ construction	0	1	1	1	1
Wood Fencing Demand (mil linear ft)	2	3	4	5	6
\$/linear foot	2	3	4	5	6
Wood Fencing Demand	1	1	1	1	1
Privacy					
Picket					
Post & Rail					
Split Rail & Other					
% wood	2	3	4	5	6
Fencing Demand	40	40	40	40	40



COMPANY PROFILES

Trex Company Incorporated
 160 Exeter Drive
 Winchester, VA 22603
 540-542-6300
 http://www.trex.com

Sales: \$
 Employe

Key Pro

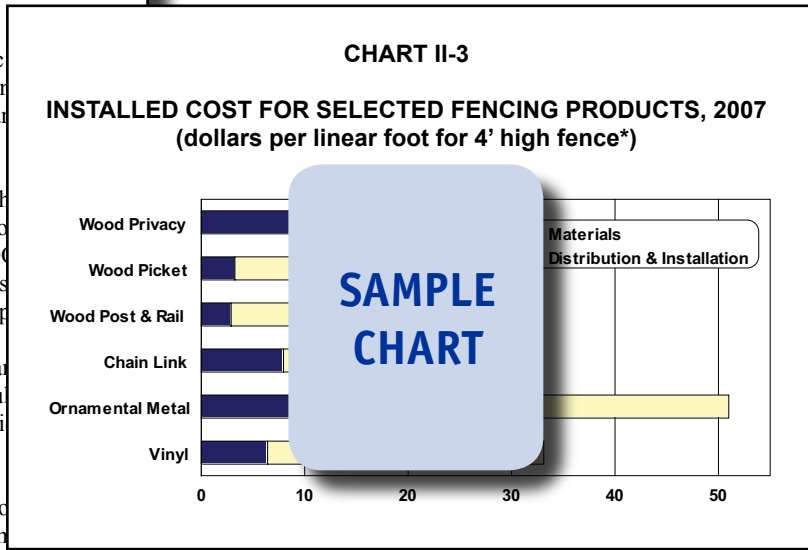
SAMPLE PROFILE

Tre wood-plastic
 posite pr
 ing and
 the US an

The Company is active in the US fencing industry through manufacture and sale of TREX SECLUSIONS wood-plastic composite privacy fencing. This fencing is made from Trex's TREX WOOD-POLYMER lumber, which is a composite material that consists of reclaimed polyethylene materials and wood waste mixed in approximately equal proportions. TREX WOOD-POLYMER lumber provides high durability; low thermal expansion/contraction; and enhanced resistance to moisture, insects and ultraviolet light. TREX WOOD-POLYMER lumber does not rot or deteriorate, is splinter-free, and does not require painting or staining.

TREX SECLUSIONS wood-plastic composite construction imitates the appearance of natural wood. This privacy fencing is manufactured with 9-foot fence posts, 7-1/2-foot top and aluminum-reinforced bottom rails, and 65.8-inch pickets. The pickets measure 5 inches in width and provide complete privacy. TREX SECLUSIONS fencing

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OTHER STUDIES

Siding

Demand for siding materials in the US will exceed 115 million squares in 2012. Gains will derive largely from a recovery in residential construction, particularly in single-family housing. Demand in the key vinyl siding segment will be moderated by competition from fiber cement siding. Stucco and related materials will also outpace vinyl. This study analyzes the \$10.4 billion US siding industry, with forecasts for 2012 and 2017 by material, market and region. It also evaluates market share and profiles industry players.
 #2376..... 07/2008..... \$4700

Brick & Block

US demand for brick and block will reach \$7.9 billion in 2012. Growth will be greatest in concrete products, reflecting stronger growth in key nonresidential building markets. Demand for clay brick will benefit from a recovery in residential building activity, especially in new single-family housing. This study analyzes the 14.2 billion unit US brick and block industry, with forecasts for 2012 and 2017 by product, market, application and US geographic region. It also evaluates company market share and profiles major players.
 #2331..... 05/2008..... \$4500

Roofing

US roofing demand will reach 280 million squares in 2012 based on a recovery in home building and an increase in nonresidential construction. Reroofing will remain the largest market while new roofing applications outpace them. Roofing tile and plastic roofing will see the fastest gains by type, but asphalt shingles will remain dominant. This study analyzes the \$13.7 billion US roofing industry, with forecasts for 2012 and 2017 by product, market and region. The study also details market share and profiles major players.
 #2339..... 04/2008..... \$4700

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

Wood & Competitive Decking

US demand for decking will reach 3.6 billion lineal feet by 2011, supported by solid residential improvement and repair activity. Alternative decking materials such as wood-plastic composite and plastic will continue to lead gains, further supplanting wood. Tropical hardwoods will grow the fastest in the wood decking segment. This study analyzes the \$4.6 billion US decking industry, with forecasts given for 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.
 #2222..... 07/2007..... \$4500

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