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# Green Building Materials

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US Industry Study with Forecasts for **2013 & 2018**

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Study #2459 | February 2009 | \$4700 | 251 pages

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*Green building materials will account for an increasing share of materials used, with growth primarily driven by a recovery of the residential market from a depressed 2008 level.*

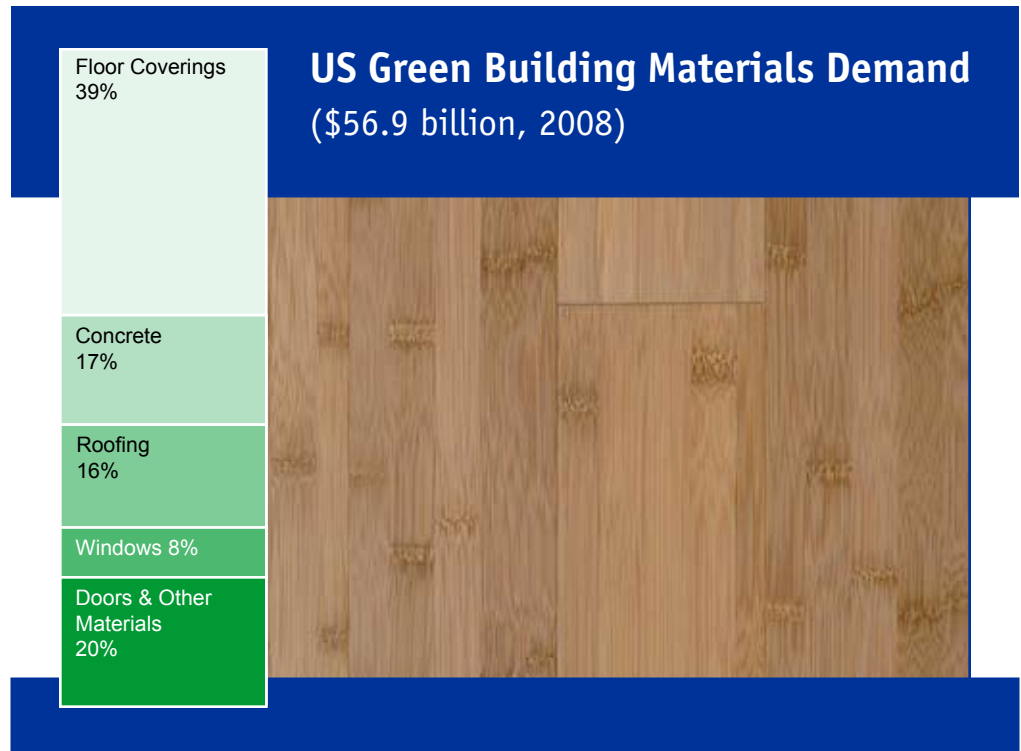
## US demand to grow 7.2% annually through 2013

The US market for “green” building materials generated sales of almost \$57 billion in 2008. This market is projected to expand 7.2 percent annually to over \$80 billion in 2013, outpacing the growth of building construction expenditures over that period. Although green building materials are expected to account for an increasing share of materials used, growth will be driven primarily by the recovery of the residential market through 2013 as it rises from its depressed 2008 level.

## FSC-certified products to be fastest growing

Forest Stewardship Council (FSC)-certified lumber and wood panels are expected to be the fastest growing green products, albeit from small bases. FSC-certified products are produced via environmentally responsible and socially beneficial forestry practices. As the supply of FSC-certified wood grows, demand for FSC-certified wood panels is projected to more than triple between 2008 and 2013, growing more than three times as fast as the overall market for wood panels.

Other products expected to see fast growth through 2013 include water-efficient plumbing fixtures and fittings, and energy-efficient lighting fixtures. Demand for each of these products is forecast to grow at a double-digit pace



through 2013, but account for only a small share of the total green building materials market. Demand will benefit from regulations banning the sale of general-use incandescent lamps, as well as the expansion of the EPA's Water-Sense labeling program.

## Largest gains to come from green floor coverings

Over the forecast period, the greatest absolute gains will come from green floor coverings, the largest source of green building materials demand. Green carpets and flooring include Green Label Plus-certified carpets and products made from rapidly renewable resources (e.g., bamboo and cork flooring). Demand for

green floor coverings is forecast to grow 5.6 percent annually to over \$29 billion in 2013, benefiting from the recovery of the residential market.

Concrete made from recycled materials (e.g., fly ash, blast furnace slag) had the second largest share of green building materials demand in 2008, accounting for over 15 percent of the market total. The use of recycled materials in concrete not only reduces the volume of waste sent to landfills, but often enhances the performance of the concrete. Going forward, demand for concrete made from recycled materials is forecast to grow 8.4 percent per year to \$14.3 billion in 2013, accounting for an increasing share of total concrete used.

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## Sample Text, Table & Chart

### PRODUCTS

**Market Demand --** Demand for prime residential windows is forecast to reach 50 million units in 2008. This market includes all residential windows except for storm windows, skylights, roof windows and windows. Prime residential windows are widely used throughout the residential market, and the average home contains 15. Although demand generally accounts for the larger share of demand in any year, a substantial share of demand is subject to the volatility of residential construction. Over the past decade, demand for windows followed the trend of residential construction activity: expanding from 1998 and 2005 before contracting to a 2008 level below that just ten years prior.

Demand for windows that meet the ENERGY STAR criteria is forecast to account for one-half of residential window demand in 2008, 50 million units. Although the share of energy-efficient windows has grown since 1998, the increased market penetration was not enough to offset the decline in the residential market between 2005 and 2008. As a result, demand for energy-efficient windows in 2008 in unit terms was below its 2003 level. However, due to rising unit prices over the 2003-2008 period, demand in terms of value increased.

Over the forecast period, demand for residential windows is forecast to recover from 2008 to 50 million units in 2013 on an annual gain of 1.5 percent. This growth will be in large part due to new construction of new housing units is projected to increase energy-efficient residential window demand, growing 13 percent per year to 10 percent of the market total. In terms of value, demand for residential windows is forecast to reach \$1 billion in 2013, with unit price growth slowing marginally.

**SAMPLE TEXT**

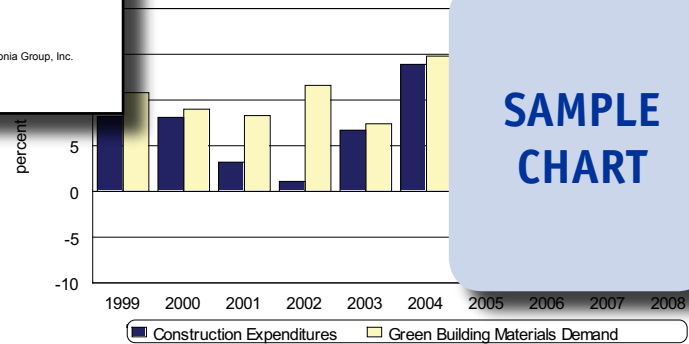
**TABLE IV-2**  
**RESIDENTIAL GREEN BUILDING MATERIALS DEMAND BY HOUSING TYPE & SEGMENT (million dollars)**

Item	1998	2003	2008	2013	2018
Res Construction Expenditures (bil \$)	232	232	232	232	232
\$ green materials/000\$ construction	8	8	8	8	8
Residential Green Building Materials Demand	0	0	0	0	0
By Housing Type:					
Single-Family	0	0	0	0	0
Multifamily	0	0	0	0	0
Manufactured Housing	0	0	0	0	0
By Segment:					
Interior	0	0	0	0	0
Exterior	0	0	0	0	0
Structural	0	0	0	0	0
Building Systems	0	0	0	0	0
Pavement	0	0	0	0	0
% residential Green Building Materials Demand	24	24	24	24	24

**SAMPLE TABLE**

**CHART II-2**

**BUILDING MATERIALS DEMAND GROWTH, 1999-2008 (percentage change)**



**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE V-6**  
**NORTHEAST GREEN BUILDING MATERIALS DEMAND**  
**BY SUBREGION, MARKET & SEGMENT**  
 (million dollars)

Item	1998	2003	2008	2013	2018
Northeast Construction Expend (bil \$)					
\$ green materials/000\$ construction					
Northeast Green Building Materials					
By Subregion:					
New England					
Middle Atlantic					
By Market:					
Residential					
Nonresidential					
By Segment:					
Interior					
Exterior					
Structural					
Building Systems					
Pavement					
% Northeast					
Green Building Materials Demand	24				300

**SAMPLE  
PROFILE**

**SAMPLE  
TABLE**

### COMPANY PROFILES

#### Columbia Forest Products

7820 Thorndike Road  
 Greensboro, NC 27409  
 336-605-0429  
<http://www.cfp.com>

Annual Sales  
 Employment  
 Key Products

Columbia Forest Products is a manufacturer of various types of plywood and distributor of Russian, Polish and other types of birch plywood. Products are sold to major original equipment manufacturers and through a network of wholesale distributors and mass merchandisers, including Home Depot Incorporated and Lowe's Companies Incorporated. In January 2008, the Company relocated its corporate headquarters from Portland, Oregon to Greensboro, North Carolina.

The Company participates in the US green building materials industry through the manufacture of wood panels for use in cabinets, furnishings, flooring and other non-structural applications. A specific product is CFP's PUREBOND hardwood plywood panels that are made using a formaldehyde-free production process and contribute to Leadership in Energy and Environmental Design certification developed by the US Green Building Council. PUREBOND products resist water and are offered in 4-foot-by-8-foot hardwood panels, among other configurations. The Company also makes wood panels using wood certified by the Forest Stewardship Council (FSC). FSC-certified wood panels include products made from aspen, poplar and western softwood. CFP's EUROPLY wood panels, which are composed of 60-percent Polish birch and 40-percent alder, are also FSC certified.

"Demand for green building materials in New England grew at an annual rate of 8.1 percent between 1998 and 2008, outpacing the Middle Atlantic. However, New England lagged the national average for the entire 1998-2008 period, and endured some of the steepest decelerations in construction activity from its 2005 peak. Going forward, recovering construction activity will drive demand for green building materials, which is projected to grow 6.1 percent per annum to \$3.5 billion in 2013."  
 --Section V, pg. 146

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**Wood & Competitive Decking**

This study analyzes the US wood and competitive decking industry. It presents historical demand data for the years 1998, 2003 and 2008 and forecasts for 2013 and 2018 by decking material (e.g., wood, wood-plastic composite, plastic), market (e.g., residential buildings, nonresidential buildings, nonbuilding construction) and US geographic subregion. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.  
 #2487 ..... 04/2009..... \$4800

**Wall Coverings**

This study analyzes the US wall covering industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by product (e.g., ceramic tile, wallpaper, wall paneling, finished gypsum board), market (e.g., single-family, multifamily, manufactured housing, office and commercial, institutional, industrial), application (new construction, repair and improvement) and region. The study also considers market environment factors, evaluates company market share and profiles industry competitors.  
 #2473 ..... 04/2009..... \$4600

**World Insulation**

This study analyzes the global insulation industry. It presents historical demand data for the years 1997, 2002 and 2007 and forecasts for 2012 and 2017 by insulation material (e.g., foamed plastic, fiberglass, mineral wool), market (construction; industrial, HVAC and OEM), world region (e.g., North America, Asia/Pacific, Western Europe) and major national market. The study considers market environment factors, details industry structure, evaluates company market share and profiles industry players.  
 #2434 ..... 02/2009..... \$5800

**World Flooring & Carpets**

World floor covering demand will rise 4% yearly through 2012, driven by nonresidential building construction in less developed areas. Nonresilient flooring will stay the largest product segment and grow the fastest. China will remain the largest national market and account for 43% of total gains. This study analyzes the 12.5 billion square meter world flooring and carpet industry, with forecasts for 2012 and 2017 by product, market, world region and for 32 countries. It also evaluates market share and profiles industry players.  
 #2417 ..... 12/2008..... \$5800

**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

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