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# Wood & Competitive Decking

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

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Study #2487 | April 2009 | \$4800 | 331 pages

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*Demand for wood-plastic composite decking is forecast to rise 9.5 percent per year through 2013, while demand for plastic and other decking is projected to advance 9.7 percent annually.*

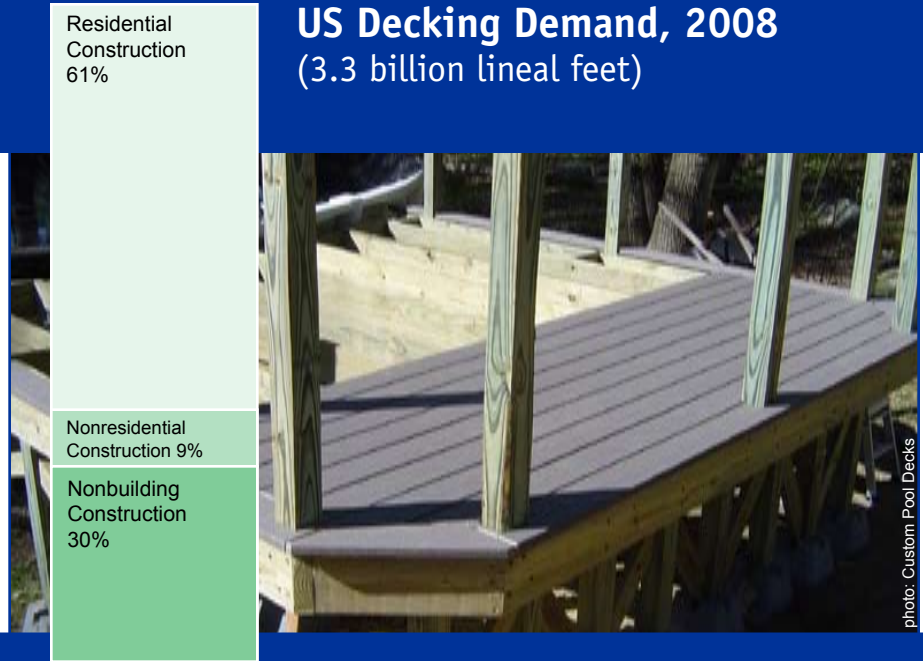
## Alternative decking materials to outpace wood

Although demand for wood decking in the US is projected to advance less than one percent annually through 2013, demand for alternative decking will grow nearly ten percent per year. Demand for wood-plastic composite decking is forecast to rise 9.5 percent per year to 700 million lineal feet, while demand for plastic and other decking is projected to advance 9.7 percent annually to 135 million lineal feet in 2013. Overall, demand for decking will reach 3.6 billion lineal feet, valued at \$5.2 billion. Consumers will be attracted to alternative decking materials because of their long lifespans, minimal maintenance requirements, and imperviousness to degradation caused by general wear and tear and long-term exposure to moisture. While decks made from these materials generally cost more initially, they require less annual maintenance than most wood decks, and thus can offer customers savings in the long term.

## Residential market to remain dominant

The residential market, which accounted for 61 percent of total decking demand in 2008, will continue to account for the majority of decking demand through 2013, posting 2.6 percent annual growth rates. Advances will be boosted by consumers adding amenities to their existing decks, such as outdoor kitchens, spas and hot tubs, and areas for other activities. Not only do these larger decks

## US Decking Demand, 2008 (3.3 billion lineal feet)



require deck boards, but many homeowners will install additional railings and other accessories to separate areas of the deck, in order to enhance the safety of their decks by preventing falls by small children or older adults. Further gains will be derived from an expected recovery in new housing construction from the low level in 2008.

## Composite, plastic decking enjoy many advantages

In addition to the performance characteristics of composite decking, gains will be encouraged by its close resemblance to natural wood, its ability to be cut like wood decking, and the perception that it is an environmentally friendly material,

due to the use of reclaimed plastics in its production. Advances in demand for plastic decking will be driven by the high durability of this product, making it ideal for use in public parks, commercial spaces, and such facilities as dockyards and marinas.

Wood decking will continue to account for the majority of decking demand in volume and value terms. Demand for wood decking is forecast to rise less than one percent annually to 2.8 billion lineal feet in 2013. Advances will be restrained by heavy competition from other materials, although increasing consumer interest in tropical hardwoods, such as ipe, will offer some bright spots.

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## Sample Text, Table & Chart

### MARKETS

#### Nonresidential Buildings

Nonresidential buildings represent a small market for decking, accounting for ten percent of total demand in 2008. Although the nonresidential building sector comprises a wide range of office, commercial, institutional and industrial facilities, decking is commonly used in a small portion of the overall market. Use of decking is primarily concentrated in the commercial segment, where decks are installed on public and recreational facilities such as hotels, restaurants, spas and casinos. Albeit to a lesser extent, decks are also used on institutional facilities such as schools, museums and medical buildings.

In comparison to residential markets, nonresidential markets place higher demands on decking products, primarily as a result of the high levels of human traffic common in many nonresidential applications. As a result, nonresidential decking specifiers often focus more on durability and maintenance requirements than aesthetic concerns, leading to a relatively higher level of use of such wear-resistant products as exotic hardwoods and vinyl decking. However, appearance is very important in some higher-end and human-intensive nonresidential applications, resulting in healthy demand for aesthetically pleasing decking materials such as cedar, redwood and wood-plastic composites.

Demand for decking in nonresidential buildings is forecast to rise less than in residential markets, to 1.1 billion lineal feet in 2013. Advances in decking materials and the nonresidential construction market as a whole are expected to decline in spending through 2013. Demand for decking in nonresidential buildings is limited by the limited market potential of the nonresidential sector, as not every structure can support a deck. Demand for decking in nonresidential buildings will primarily be driven by improvement and repair work. Property owners will attempt to improve the appearance of their structures by replacing older decking with newer materials. Further advances will be derived from safety improvements

**SAMPLE TEXT**

TABLE IV-3

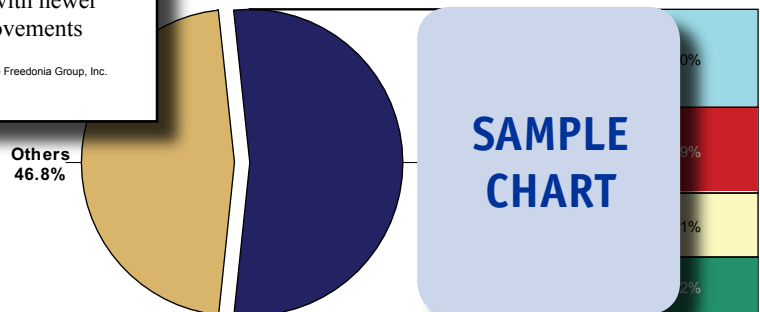
### PRESSURE-TREATED WOOD DECKING DEMAND (million lineal feet)

Item	1998	2003	2008	2013	2018
Wood Decking Demand	2,000	2,500	3,000	3,500	4,000
% pressure-treated	20	22	24	26	28
Pressure-Treated Decking Demand	400	550	720	910	1,120
By Function:					
Boards	300	400	500	600	700
Railings & Accessories	100	150	220	310	420
By Species:					
Southern Yellow Pine	100	120	150	180	210
Ponderosa Pine	50	60	75	90	105
Douglas & Hemlock Fir	50	60	75	90	105
All Other Treated	100	150	200	250	300
\$/lineal foot	15	15	15	15	15
P-T Decking Demand (mil \$)	6,000	8,250	10,800	13,650	16,800

**SAMPLE TABLE**

CHART IV-2

### PLASTIC DECKING MARKET SHARE, 2008 (\$235 million)



**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE VI-9**  
**WEST DECKING DEMAND BY SUBREGION & MARKET**  
 (million lineal feet)

Item	1998	2003	2008	2013	2018
West Construction (bil 2000\$) lineal feet/000\$ construction	18				66.5
West Decking Demand					95
By Subregion:					
Mountain					35
Pacific					60
By Market:					
Residential					15
Nonresidential					90
Nonbuilding					90
% West Decking Demand	2				9.4
					100



### COMPANY PROFILES

#### Hoover Treated Wood Products Incorporated

154 Wire Road  
 Thomson, GA 30824  
 706-595-1264  
<http://www.frtw.com>

Annual Sales:  
 Employment:

Key Products: lumber

Hoover Treated Wood Products is a treating company of fire-retardant lumber. The privately held company was founded in 1964, formerly Alpha Private Equity.

The Company's products include wood preservatives and pressure-treated lumber suitable for decking applications. Hoover Treated Wood Products manufactures lumber for the decking and other industries in Pine Bluff, Arkansas; Thomson, Georgia; Winston, Oregon; Detroit, Michigan; and Milford, Virginia.

Among Hoover Treated Wood Products' offerings for deck applications are Copper-8-quinolinolate (COP-8) and DURA-GUARD preservatives, and EXTERIOR FIRE-X lumber. For example, COP-8 preservative is an oil-borne fungicidal water repellent intended to reduce warping and splitting in wood. COP-8 preservative can be utilized in the treatment of Southern yellow pine, Douglas fir, redwood, kapur, keruing, white fir, white oak, red oak, Western red cedar, hemlock and other wood species. Lumber treated with COP-8 preservative is typically used in truck beds and storage structures; however, it can



"Nonresidential applications also account for an elevated share of decking demand in the West, representing twelve percent of total sales in 2008 compared to under ten percent in the overall US market. Demand for decking in nonresidential construction applications is projected to advance 1.3 percent per year to 80 million lineal feet in 2013. Nonresidential decking demand in the West will also benefit from ..."

--Section VI, pg. 239



**OTHER STUDIES**

**Hard Surface Flooring**

This study analyzes the US hard surface flooring industry. It presents historical demand data for 1998, 2003 and 2008, and forecasts for the years 2013 and 2018 by flooring product (e.g., vinyl, rubber, linoleum, cork, asphalt, wood, laminate, ceramic, seamless) and new and replacement market (e.g., residential building, nonresidential building, transportation equipment). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2493 ..... 06/2009..... \$4700

**Green Building Materials**

US "green" building material demand is projected to rise 7.2% yearly through 2013, driven mainly by a recovery of the residential market. Forest Stewardship Council (FSC)-certified lumber and wood panels, water-efficient plumbing fixtures and fittings, and energy-efficient lighting fixtures will grow at double-digit rates. This study analyzes the \$60 billion US green building material industry, with forecasts for 2013 and 2018 by type, market and region. It also considers market environment factors and profiles industry players.

#2459 ..... 02/2009..... \$4700

**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

**Fencing**

US demand for fencing will reach 935 million linear feet in 2012, supported by a recovery in the residential fencing market. Plastic and composite fencing will be the fastest growing materials, as these products continue to penetrate the large residential fencing market at the expense of wood products. The Midwest and West regions will lead gains. This study analyzes the US fencing industry, with forecasts for 2012 and 2017 by product, market and region. It also evaluates market share and profiles industry players.

#2415 ..... 10/2008..... \$4600

**World Cement**

Global demand for cement will grow 5.3% annually through 2012, driven by strong increases in construction activity in developing countries. The rate of growth in China, the largest market, will moderate considerably but remain above the world average. The second largest market, India, will grow the fastest. This study analyzes the 2.8 billion metric ton world cement industry, with forecasts for 2012 and 2017 by type, market, world region and for 46 countries. It also evaluates company market share and profiles 44 major players.

#2325 ..... 04/2008..... \$5800

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- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

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