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Wood-Plastic Composite & Plastic Lumber

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

Study #2534 | July 2009 | \$4800 | 302 pages

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The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

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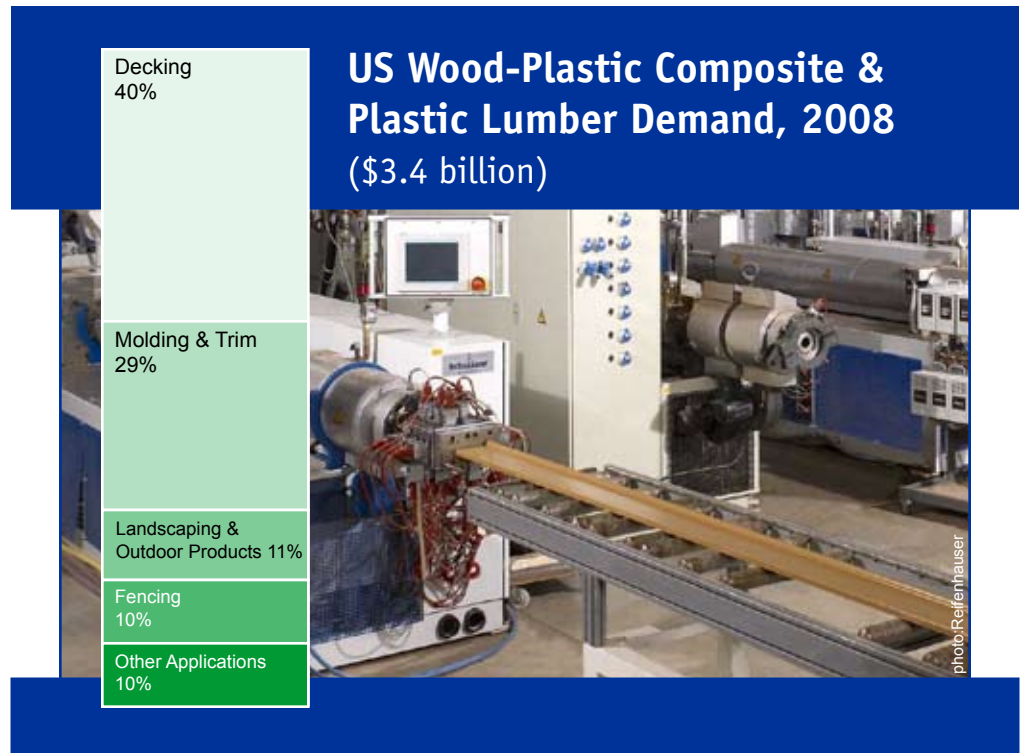
The advantages of wood-plastic and plastic lumber include long lifespans, minimal maintenance, resistance to insects and the elements, and their perception as environmentally friendly.

US demand to rise 9.2% annually through 2013

Demand for wood-plastic composite and plastic lumber is projected to advance 9.2 percent per year to \$5.3 billion in 2013. Gains will be driven by continued consumer acceptance of these products as replacements for more traditional materials, such as natural wood. Composite and plastic lumber will increasingly be desired due to their long lifespans, minimal maintenance requirements, resistance to degradation caused by insect attack and exposure to the elements, and ability to be cut and hewn like natural wood. Moreover, the increasing perception of these materials as environmentally friendly products, due to their incorporation of recycled materials, will further promote demand. Gains will also be boosted by the rebound of residential construction from the low levels experienced in 2008. Rising housing completions will promote demand in the new residential construction market, while increasing residential improvement and repair expenditures will lead to growth in demand for composite and plastic lumber decking, fencing, and landscaping and outdoor products.

Decking, fencing to offer best growth opportunities

Among the major applications, decking and fencing are forecast to see above-average gains, primarily due to rising interest in using alternative materials in



place of natural wood lumber. Molding and trim will remain a key market for composite and plastic lumber, but will see below-average growth, as plastic lumber has already attained substantial market penetration. Demand for composite and plastic lumber in landscape and outdoor products, windows and doors, and other applications will be promoted by continued consumer recognition of the performance properties of the materials, as well as by their image as ecologically friendly products.

Wood-plastic composite lumber to outpace plastic

Wood-plastic composite lumber will post more rapid gains than plastic lumber,

advancing 10.5 percent annually to \$2.4 billion in 2013. Gains will be driven by ongoing consumer interest in wood-plastic material as a substitute for wood in decking, landscaping and outdoor products, and fencing. Moreover, as decks will continue to be seen as a highly desirable addition to the home, more homeowners will install them, further promoting demand advances for composite lumber. Growth in demand for plastic lumber is forecast to rise 8.2 percent per year to \$2.9 billion in 2013. Demand for plastic lumber will be promoted by continued acceptance of the material as a replacement for wood in fencing, landscaping and outdoor products, and molding and trim.

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Sample Text, Table & Chart

MARKETS

Multifamily -- Wood-plastic composite and plastic lumber

SAMPLE TEXT

in the use of wood-plastic composite and plastic lumber materials. The use of these materials in multifamily construction will add to the demand for wood-plastic composite and plastic lumber. Multifamily housing accounted for 16 percent of total residential composite and plastic lumber demand in 2008. The overall size of the multifamily composite and plastic lumber market is limited by a number of factors, including lower levels of new construction and a relatively small housing stock in comparison to single-family homes. Additionally, multifamily housing demand is restrained by the relatively low incidence of decks and fences in these types of residences. However, many builders and property owners will install such amenities as decks, outdoor living spaces, childrens' play areas, and porches and patios in an attempt to attract tenants. These structures will often be built out of composite or plastic lumber to reduce long-term maintenance and repair costs.

Wood-plastic composite lumber demand is forecast to see faster growth through 2013 than plastic lumber. Composites will continue to benefit from their long product life and lower maintenance requirements, which are attractive characteristics to builders, homeowners and property managers alike. Growing acceptance of composite materials by builders

TABLE IV-4

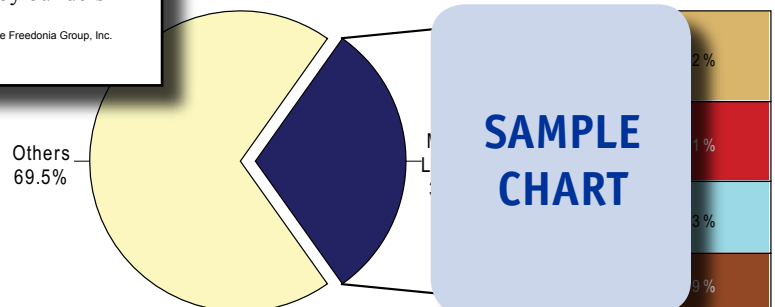
WOOD-PLASTIC COMPOSITE DECKING DEMAND BY FUNCTION & MARKET (million lineal feet)

Item	1998	2003	2008	2013	2018
Decking Demand	25	35	45	55	60
% wood-plastic composite					6
WPC Decking Demand					0
By Function:					
Boards					5
Rails & Accessories					5
By Market:					
Residential Construction					5
Nonresidential Construction					6
Nonbuilding Construction					9
\$/In ft					6
WPC Decking (mil \$)					5
% wood-plastic composite					9
WPC & Plastic Decking (mil \$)	527	703	1070	2240	3625

SAMPLE TABLE

CHART VI-1

WOOD-PLASTIC COMPOSITE & PLASTIC LUMBER MARKET SHARE, 2008 (\$3.4 billion)

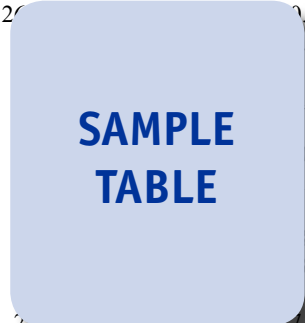


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE V-10
NONRESIDENTIAL BUILDING MARKET FOR
WOOD-PLASTIC COMPOSITE & PLASTIC LUMBER
 (million dollars)

Item	1998	2003	2008	2013	2018
Nonres Bldg Construction (bil \$)	200	250	290	330	370
\$ lumber/000\$ construction	1.5	2.2	3.0	3.8	4.5
Nonres Bldg WPC & Plastic Lumber					
By Material:					
Wood-Plastic Composite					
Plastic					
By Use:					
New					
Improvement & Repair					
% nonresidential	25.0	18.8	20.0	18.2	17.3
WPC & Plastic Lumber Demand	1173	2183	3414	5300	8150



COMPANY PROFILES

Fiber Composites LLC
 181 Random Drive
 New London, NC 28127
 704-463-7120
<http://www.fibercomposites.com>

Annual Sales:
 Employment:
 Key Products:

SAMPLE PROFILE

Fiber Composites LLC is a wood fiber-plastic composite manufacturer. The company is privately held. In January 2009, Fiber Composites acquired Sensibuilt Building Solutions (Bloomfield, Connecticut), a producer of decking and siding based on new generation polyvinyl chloride (PVC) technology. Following the transaction, Pegasus Capital Advisors LP (Cos Cob, Connecticut), which held a majority interest in Sensibuilt Building Solutions, acquired a minority position in Fiber Composites.

The Company is active in the US composite and plastic lumber industry through the manufacture and marketing of composite decking, railing and fencing for residential and commercial applications. These products are manufactured using a composite of PVC and high-density polyethylene (HDPE) materials. Fiber Composites markets its products, which can be used in the construction of decks, docks, porches, balconies and verandas, among other outdoor spaces, under the FIBERON brand name. In October 2007, the Company completed the acquisition of the WEATHERBEST line of wood-plastic composite decking, as well as a 175,000-square-foot production facility in Meridian, Idaho, from Louisiana-Pacific Corporation. Beginning in 2008,

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“Demand for composite decking in value terms is expected to rise 10.3 percent annually to \$1.9 billion in 2013. Value gains will outpace volume gains, as advances will be derived from the development of composite lumber railing systems and accessories, which are typically more costly than deck boards. Technological developments that create composite decking materials that more closely resemble natural woods, especially tropical hardwoods, will also encourage value gains.”
 --Section IV, pg. 89

OTHER STUDIES

Wood Protection Coatings & Preservatives

US demand for wood protection products is forecast to increase 2.2% per year through 2013. Higher value formulations will continue to gain market share, primarily due to environmental and performance issues. Interior wood applications will achieve the best gains, promoted by a rebound in both housing starts and remodeling. This study analyzes the \$2.7 billion US wood protection industry, with forecasts for 2013 and 2018 by product, application and market. It also evaluates market share and profiles industry players.

#2509 07/2009..... \$4800

World Windows & Doors

Global window and door demand will grow 4.3% yearly through 2013. China will claim over half of gains based on rapid growth in nonresidential building construction, and will surpass the US as the largest market. India and Indonesia will also grow at above average rates. Plastic windows and doors will grow the fastest. This study analyzes the \$136 billion world window and door industry, with forecasts for 2013 and 2018 by product, market, world region and for 22 countries. It also details market share and profiles industry players

#2513 06/2009..... \$6100

Wood & Competitive Decking

Although wood decking demand in the US will be flat through 2013, alternative decking will grow nearly 10% annually. Nevertheless, wood decking will continue to account for the majority of decking demand in volume and value. The residential market will remain dominant as consumers add amenities to their existing decks. This study analyzes the \$4.1 billion US decking industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates market share and profiles industry players.

#2487 04/2009..... \$4800

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

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

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