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Fencing

US Industry Study with Forecasts for **2014 & 2019**

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A rebound in housing completions will spur demand for fencing in the US, reversing recent declines and pushing fencing demand marginally above its 2004 level by 2014.

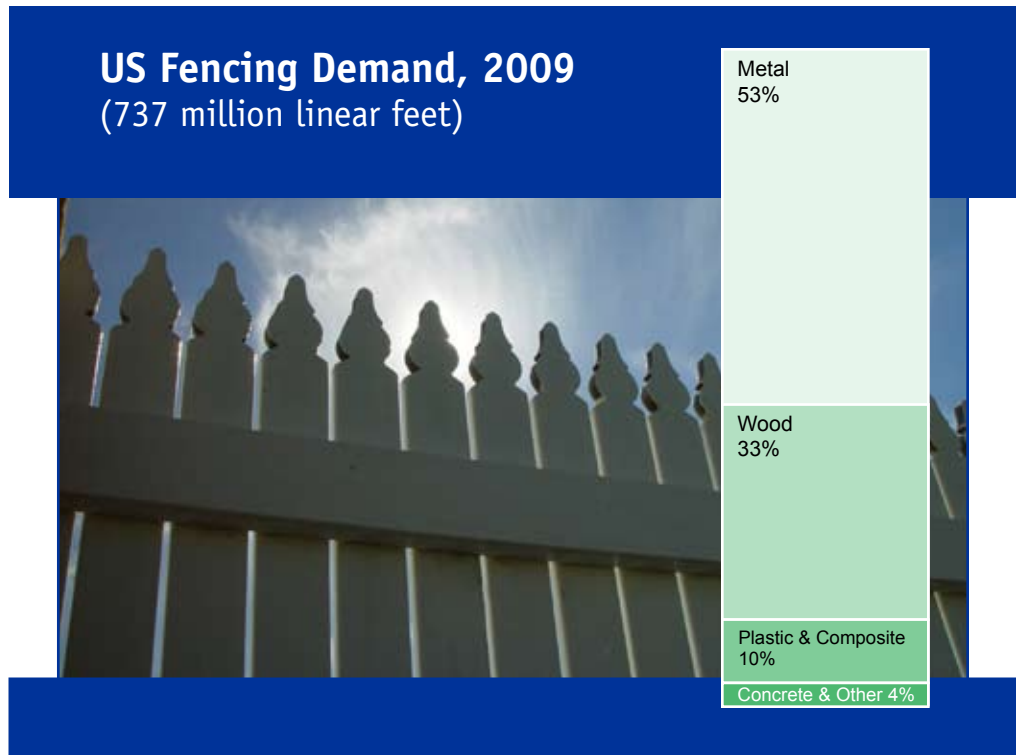
US demand to rise 2.9% annually through 2014

Demand for fencing in the US is forecast to expand 2.9 percent per year through 2014 to 850 million linear feet. A rebound in housing completions will spur demand for fencing, reversing recent declines and pushing demand marginally above its level ten years earlier. Despite the resurgence in demand in terms of linear feet, the value of fencing demand is expected to rise only slightly faster than it did in the 2004-2009 period, as growth in metal prices moderates.

Residential buildings to be fastest growing market

Residential buildings are the largest fencing market, so the recovery in residential construction will boost fencing demand over the forecast period. Indeed, the residential market will account for about three-fifths of the approximately \$1.1 billion increase in fencing demand through 2014. The new housing segment is expected to post the most rapid advances in demand. Growth will also be supported by the large residential replacement segment, as improvement and repair spending rebounds from a low 2009 base.

Fencing demand in the nonresidential building construction, nonbuilding construction and agricultural markets will advance 1.1 percent annually through 2014. Growth will be spurred by rebounding office and commercial construction, and by increases in transporta-



tion construction spending. Accelerating institutional construction spending will also support demand. More rapid gains will be checked by the agricultural market, as the number of farms is expected to remain constant.

Plastic, composite fencing to be fastest growing type

Among fencing materials, plastic and composite fencing is forecast to see the most rapid growth in demand through 2014. Plastic and composite fencing closely resemble natural wood, but require less maintenance and have longer lifespans. Plastic and composite fencing products are also seen as environmentally friendly materials. Wood

fencing will advance at the rate of 2.6 percent per year through 2014. Wood fencing is the most popular material choice in the residential market and will be helped by the rebound in housing completions, but wood will lose some share of the residential market to plastic and composite fencing.

In the dominant metal fencing segment, US demand in linear feet is expected to advance 2.0 percent annually. Below-average growth in the nonresidential market, where metal fencing dominates, will restrict gains. Metal fencing pricing is forecast to rise just over one percent per year through 2014 because of the projected minimal growth in metal prices.

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Sample Text, Table & Chart

PRODUCTS

Ornamental Fencing -- Demand for ornamental metal fencing is projected to rise to \$1.5 billion in 2014. This growth will be promoted by the projected increase in housing completions in housing completions. Builders and landscapers are expected to install fences as a value to home property. More rapid demand is expected to rise slowly.

Applications for ornamental fencing in residences include high-visibility locations as front yards, driveways and around Ornamental fencing is often installed around industrial, commercial and institutional sites to provide a more aesthetically pleasing alternative to chain link fences. Ornamental metal fences are often used in areas where buildings for small businesses resemble those of residences. An ornamental fence may be specified by zoning ordinances to maintain the value of surrounding properties.

Demand for ornamental fencing will benefit from legislation that requires homeowners to install fences around pools and other areas where small children must be kept from entering. Gains will also be supported by the efforts of some cities and states to prohibit or restrict the use of tethers to control pets, especially dogs. Homeowners will have to install fencing to keep pets within property boundaries. In the nonresidential building construction and nonconstruction markets, demand for ornamental fencing will be supported by its use as security fencing. Ornamental fencing can be used around buildings where security is not a concern as aesthetics. Ornamental metal fencing can also be used around sites with multiple security perimeters, as the fencing is as a less obtrusive secondary security barrier.

Aluminum is frequently used in ornamental fencing, which is replaced wrought iron. Compared to wrought iron fencing, aluminum

75

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TABLE III-11
PLASTIC & COMPOSITE FENCING DEMAND BY MATERIAL
 (million dollars)

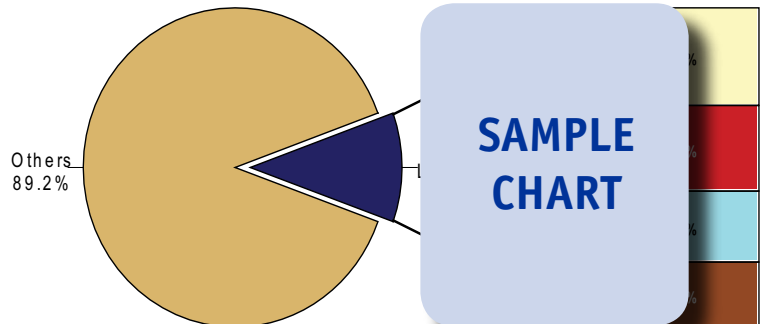
Item	1999	2004	2009	2014	2019
Construction Expenditures (bil 2005\$) 100% of linear feet fence/000\$ construction					290
Plastic/Composite Fencing (mil linear feet) \$/linear foot				8	5
Plastic & Composite Fencing Demand				5	5
Plastics:					
Vinyl				0	0
HDPE & Other Plastics				5	5
Composites				0	0
% plastic & composite Fencing Demand				9	0

SAMPLE
TEXT

SAMPLE
TABLE

CHART VI-1

US FENCING MARKET SHARE
 (\$6.8 billion, 2009)



SAMPLE
CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Genova Products Incorporated

7034 East Court Street
 Davison, MI 48423
 810-744-4500
<http://www.genova.com>

Annual Sales:
 Employment:

Key Products: PVC fencing, kits, accessories, and gate kits

Genova Products is a primary manufacturer of plumbing and building products. The Company's offerings include plastic pipe and fittings, plastic valves, polyvinyl chloride (PVC) gutters and downspouts, PVC fencing and wire channel moldings.

The Company is involved in the US fencing industry through the manufacture and sale of PVC fencing and related kits, accessories, and gate kits. Genova Products makes post and rail-style PVC fencing. This fencing offers long-lasting durability and features ultraviolet stabilizers for protection against discoloration. The Company's post and rail fencing incorporates notched rail design intended to facilitate installation. Genova Products makes this type of fencing in 42-inch-tall, two-rail models; 60-inch-tall three-rail types; and 66-inch-tall, four-rail varieties.

Genova Products also makes FENCE-IN-A-BOX kits, which contain the PVC rails and boards required for the construction of a fencing system. The Company's FENCE-IN-A-BOX kits are available in privacy, semi-privacy, picket, shadowbox, pool enclosure and other

**SAMPLE
PROFILE**

TABLE IV-8

SINGLE-FAMILY HOUSING DEMAND BY PRODUCT & APPLICATION (million dollars)

Item	1999	2004	2009	2014	2019
Single-Family Completions (000 units)	1,110	1,010	710	1,110	1,110
000\$ new housing fencing/completion	1,110	1,010	710	1,110	1,110
Single-Family Housing Stock (mil units)	110	110	110	110	110
\$ I&R fencing/unit	110	110	110	110	110
Single-Family Fencing Demand	2,220	2,020	1,420	2,220	2,220
By Product:					
Metal	1,110	1,010	710	1,110	1,110
Wood	1,110	1,010	710	1,110	1,110
Plastic & Composite	1,110	1,010	710	1,110	1,110
Concrete & Other	1,110	1,010	710	1,110	1,110
By Application:					
New	1,110	1,010	710	1,110	1,110
Improvement & Repair	1,110	1,010	710	1,110	1,110
% single-family Residential Fencing Demand	27.2	27.2	27.2	27.2	27.2

**SAMPLE
TABLE**

"Through 2014, single-family fencing demand is forecast to grow 5.4 percent per year to \$3.7 billion. Gains will be driven by the new construction segment, as housing completions rise strongly from the depressed 2009 base. Demand for fencing in the new single-family housing market is expected to advance over 18 percent annually to \$1 billion in 2014. Improvement and repair applications account for the larger share of single-family fencing demand, with 84 percent of the total in 2009."
 --Section IV, pg. 135

OTHER STUDIES

Wood & Competitive Decking

US demand for decking is forecast to rise 2.7% annually through 2014, driven by an expected advance in housing completions from their low 2009 base. Wood decking will remain dominant but will be outpaced by wood-plastic composite, plastic and other decking types. This study analyzes the 3 billion lineal foot US wood and competitive decking industry. It presents historical demand data and forecasts for 2014 and 2019 by material type, market and US region. It also evaluates company market share and profiles industry competitors.

#2718 January 2011 \$5100

Brick & Block

US demand for brick and block products is projected to increase 11.8% annually through 2014. Gains will be driven by a recovery in building construction, especially new housing. Common, glazed and other clay brick will be the fastest growing products, followed by concrete pavers. This study analyzes the 7.1 billion unit US brick and block industry, with forecasts for 2014 and 2019 by product, market, application and US region. It also evaluates company market share and profiles industry players.

#2652 September 2010 \$4800

Outdoor Furniture & Grills

US outdoor furniture and grill demand will increase 3.9% annually through 2013. Both the grill and furniture segments will match the industry's overall pace, with grill sales supported by demand for more expensive, highly featured grills and furniture sales bolstered by solid gains in metal furniture and cushions and covers. This study analyzes the \$6 billion US outdoor furniture and grill industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates company market share and profiles industry players.

#2554 December 2009 \$4700

Wood-Plastic Composite & Plastic Lumber

US demand for wood-plastic composite and plastic lumber will grow 9.2% annually through 2013, driven by advantages over natural wood. Decking, molding and trim will remain key markets while decking and fencing grow at above-average rates. Wood-plastic lumber will outpace plastic types. This study analyzes the \$3.4 billion US wood-plastic composite and plastic lumber industry, with forecasts for 2013 and 2018 by material, application and market. It also evaluates market share and profiles industry players.

#2534 July 2009 \$4800

Landscaping Products

US landscaping product demand is forecast to grow 6.1% yearly through 2013 based on a recovery in the housing market. Decorative products will benefit from the relatively low market penetration of water features. Hardscapes will see favorable growth as consumers value pavers, stones and boulders for patios, walkways and surrounds. This study analyzes the \$5.6 billion US landscaping product industry, with forecasts for 2013 and 2018 by type, market, end use and region. It also evaluates market share and profiles industry players.

#2488 April 2009 \$4700

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