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# Wood & Competitive Decking

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

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Study #2718 | January 2011 | \$5100 | 350 pages

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*Decking demand gains will be driven by an expected advance in housing completions from their low 2009 base, reflecting the collapse of the housing market between 2007 and 2009..*

## US demand to rise 2.7% per year through 2014

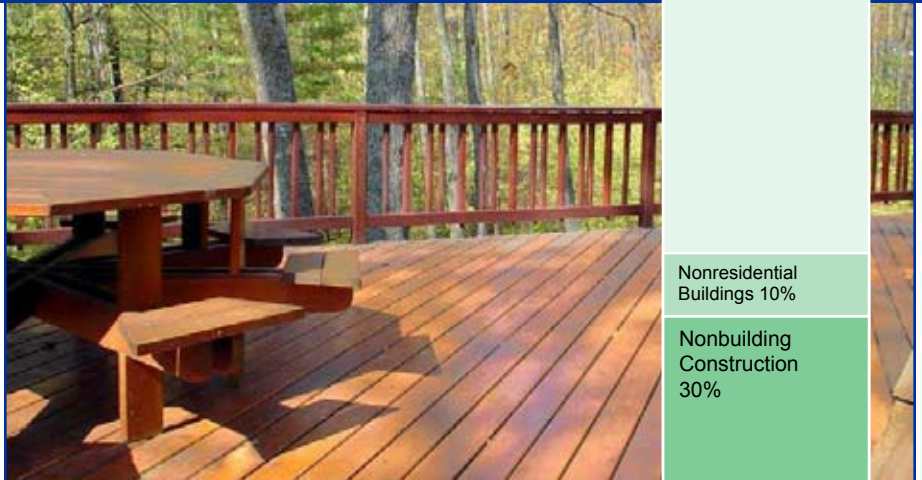
US demand for decking is forecast to rise 2.7 percent per year to 3.5 billion lineal feet in 2014, valued at \$6.2 billion. This pace will represent a rebound from the 2004-2009 period, when demand fell less than one percent annually, reflecting the collapse of the housing market between 2007 and 2009. Through 2014, decking demand gains will be driven by an expected advance in housing completions from their low 2009 base.

## Composite, plastic lumber decking to outpace wood

Wood-plastic composite and plastic lumber decking materials are expected to experience double-digit demand gains through 2014. Indeed, composite decking will account for nearly 70 percent of demand growth in lineal foot terms through 2014. In addition to its low maintenance requirements, composite decking's resemblance to wood decking, consumer perception of it as being an environmentally friendly option, and the introduction of hidden fastener systems that facilitate installation will boost demand gains.

Wood decking will continue to account for the majority of decking demand in volume and value terms. However, demand for wood decking is forecast to rise only one-half of one percent annually to 2.7 billion lineal feet in 2014. While gains will be restrained by compe-

## US Decking Demand by Market (3.5 billion lineal feet, 2014)



titution from composite and plastic decking materials, interest in tropical hardwoods, such as ipe, will provide growth opportunities in the residential building and nonbuilding construction markets.

## Dominant residential market to lead gains

Through 2014, decking demand in the dominant residential market is forecast to advance at the most rapid pace of all markets. Rebounding housing completions and improvement and repair expenditures will spur gains. Growth will also be supported by homeowner desire for larger decks. Not only do these larger decks require more deck boards, but many homeowners will install additional

railings and other accessories to create separate areas for dining and entertaining, or to add safety features to prevent falls by small children or older adults.

Decking demand in the nonresidential market is projected to rise 2.4 percent annually through 2014, as rebounding office and commercial construction expenditures drive growth. Owners of such facilities as restaurants and resorts will add decks to increase space for leisure activities. Decking demand in the nonbuilding construction market will rise slowly through 2014, as budget constraints on government agencies will cause the delay or cancellation of deck installation and maintenance projects.

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## Sample Text, Table & Chart

### MARKETS

#### Nonbuilding Construction

Nonbuilding decking was the second largest market for the US in 2009, accounting for 32 percent of demand in volume. The nonbuilding segment encompasses decks that are not attached to a building. The majority of these decks are located in coastal waterfront areas and include boardwalks, docks, marinas and Nonbuilding decks also include walkways and platforms at national state or local parks; amusement parks; water parks; and playgrounds. In many cases, decks in these applications are built through residential or government contracts that may include the construction of several areas.

While decks in nonbuilding construction use serve the same purpose as those in the building markets, the nonbuilding segment is somewhat different from these other decking markets in terms of the type of material use. Although wood decking dominates overall consumption in nonbuilding construction applications, the types of wood used differ somewhat from residential and nonresidential markets. For example, in comparison to residential markets, nonbuilding demand for wood decking is characterized by a higher use of tropical hardwoods such as ipe and a lower utilization of cedar and redwood. In addition, plastic and other decking materials such as aluminum account for a larger share of demand in nonbuilding markets than they do in building applications.

Demand for decking in nonbuilding construction applications is forecast to rise to 1.1 billion lineal feet in 2014. Growth will be below-average in building construction. State and local governments are expected to increase public works projects and budgetary requirements for deck installation and maintenance at public areas will thus be cut altogether.

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**SAMPLE  
TEXT**

TABLE IV-3

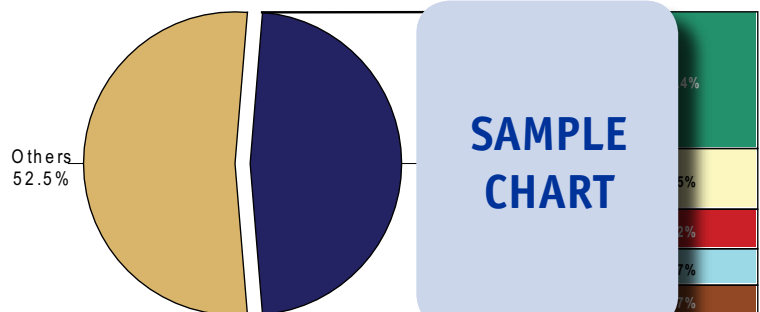
**PRESSURE-TREATED WOOD DECKING  
DEMAND BY FUNCTION & TYPE  
(million lineal feet)**

Item	1999	2004	2009	2014	2019
Wood Decking Demand					
% pressure-treated					
Pressure-Treated Wood Decking Demand					
By Function:					
Boards					
Railings & Accessories					
By Type:					
Southern Yellow Pine					
Ponderosa Pine					
Douglas & Hemlock Fir					
Other Treated					
\$/lineal foot					
Pressure-Treated Wood Decking (mil \$)	2300	2422	1970	1600	1910

**SAMPLE  
TABLE**

CHART IV-1

**WOOD-PLASTIC COMPOSITE DECKING MARKET SHARE  
(\$1.1 billion, 2009)**

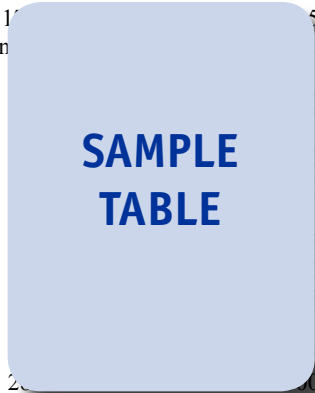


**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

**TABLE VI-6**  
**NORTHEAST DECKING DEMAND BY SUBREGION & MARKET**  
 (million lineal feet)

Item	1999	2004	2009	2014	2019
Northeast Construction (bil 2005\$)	100	100	100	100	100
lineal feet decking/000\$ construction					
<b>Northeast Decking Demand</b>					
<b>By Subregion:</b>					
New England					
Middle Atlantic					
<b>By Market:</b>					
Residential Buildings					
Nonresidential Buildings					
Nonbuilding Construction					
<b>% Northeast Decking Demand</b>					
	20	20	20	20	20



**COMPANY PROFILES**

**Hoover Treated Wood Products Incorporated**  
 154 Wire Road  
 Thomson, GA  
 706-595-1264  
<http://www.frt.com>

Annual Sales:  
 Employment:

Key Products/Services: related treating services

**SAMPLE PROFILE**

Hoover Treated Wood Products is a leading full-line treating company of fire-retardant and preservative-treated wood. The privately held company is owned by Berggruen Holdings Limited and Hoover's management.

The Company's products for the US decking industry include pressure-treated lumber suitable for decking applications. Hoover Treated Wood Products' pressure-treated lumber includes EXTERIORFIRE-X pressure-impregnated, fire-retardant lumber, which offers decay resistance and fire protection in decks and other constructions exposed to high humidity and weathering. EXTERIORFIRE-X lumber can be stained or painted.

In addition, Hoover Treated Wood Products offers treating services that involve such wood preservatives as copper-8-quinolinolate (COP-8) and DURAGUARD products. These preservatives can be used to treat lumber for decking and other applications. COP-8 wood preservative is an oil-borne, fungicidal water repellent formulated to prevent wood from warping or splitting when exposed to sun and rain. The Company uses this product to treat Southern pine, Douglas fir,

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"Demand for decking in the Northeast is forecast to rise 1.8 percent per year to 840 million lineal feet in 2014, a rebound from the 2004-2009 performance, which saw annual declines of one percent. Gains will be driven by the rebound in housing completions from their low 2009 levels. Further growth will be supported by the region's large stock of installed decks, many of which are nearing the end of their lifespans and will have to be replaced."  
 --Section VI, pg. 219



**OTHER STUDIES**

**Precast Concrete Products**

This study analyzes the US precast concrete products industry, excluding concrete pipe, brick and block. The study presents historical demand data (2000, 2005, 2010) and forecasts for 2015 and 2020 by precast concrete type (e.g., structural building components, architectural building components, transportation and marine, cemetery products, waste and waste handling, agricultural) and US regional market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2746 ..... March 2011..... \$4800

**Green Building Materials**

This study analyzes the US green building material industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by green building material product (e.g., interior, exterior, structural, building systems), end use market (e.g., residential, nonresidential) and US regional market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2733 ..... March 2011..... \$4900

**Molding & Trim**

This study analyzes the US molding and trim industry. It presents historical demand data for the years 1999, 2004 and 2009, and forecasts for 2014 and 2019 by molding and trim material (e.g., wood, metal, engineered wood, plastic), product (e.g., moldings, stairwork) and market (e.g., residential, nonresidential, new construction, improvements and repairs).

The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2729 ..... January 2011 ..... \$4900

**Fencing**

Demand for fencing in the US is forecast to expand 2.9% yearly through 2014, based on a rebound in housing completions. Residential buildings will be the fastest growing market and remain the largest. Plastic and composite fencing will be the most rapidly growing material type. This study analyzes the 737 million linear foot US fencing industry, with forecasts for 2014 and 2019 by material type, market and region. It also evaluates company market share and profiles industry players.

#2682 ..... September 2010..... \$5900

**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

**About The Freedonia Group**

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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