



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

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# Molding & Trim

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

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## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General .....	4
Macroeconomic Environment.....	5
Demographic Trends .....	9
Consumer Spending Trends .....	12
Consumer Financing .....	15
Building Construction Trends .....	18
Residential.....	21
Housing Outlook.....	23
Housing Stock.....	28
Improvement & Repairs.....	32
Nonresidential.....	34
New.....	34
Improvements & Repairs .....	37
Molding & Trim Historical Market.....	39
Pricing Patterns .....	41
Regulatory & Environmental Issues .....	44
Building Codes .....	45
Industry Standards .....	46
Environmental Considerations .....	47
World Molding & Trim Overview .....	49
Foreign Trade .....	50

### MATERIALS

General .....	53
Wood Molding & Trim.....	56
Demand by Type .....	57
Hardwoods.....	58
Softwoods .....	60
Demand by Product .....	63
Demand by Market.....	65
Metal Molding & Trim .....	67
Demand by Product .....	67
Demand by Market.....	70
Plastic Molding & Trim .....	72
Product Characteristics .....	73
Demand by Product .....	74
Demand by Market.....	77
Demand by Resin Type .....	78
Polyvinyl Chloride .....	80
Polyurethane.....	80
Other Resins .....	81
Engineered Wood .....	82
Demand by Product .....	84

Demand by Market.....	86
Other Molding & Trim Materials .....	87
Wood-Plastic Composite .....	89
All Other Materials .....	89
Precast Plaster .....	90
Precast Stone & Concrete .....	90
Wood-Glass Composites.....	91
Miscellaneous Materials .....	92
Demand by Product .....	92
Demand by Market.....	95

### PRODUCTS

General .....	97
Moldings .....	100
Product Characteristics .....	102
Demand by Material.....	105
Demand by Market.....	108
Stairwork.....	110
Product Characteristics .....	112
Demand by Material.....	114
Demand by Market.....	117
Other Molding & Trim Products.....	119
Product Characteristics .....	121
Demand by Material.....	124
Demand by Market.....	127

### MARKETS

General .....	129
Residential.....	132
New.....	135
Demand by Product .....	136
Demand by Material.....	137
Improvements & Repair.....	138
Demand by Product .....	140
Demand by Material.....	142
Housing Type .....	143
Single-Family .....	145
Multifamily .....	147
Manufactured Housing .....	149
Nonresidential .....	151
New.....	155
Demand by Product .....	156
Demand by Material.....	158
Improvements & Repairs .....	159
Demand by Product .....	161
Demand by Material.....	163
Building Type .....	164

Institutional .....	165
Office & Commercial .....	167
Industrial .....	169
Other Nonresidential.....	171

### INDUSTRY STRUCTURE

General .....	173
Industry Composition .....	174
Market Share .....	178
Wood .....	180
Plastic.....	183
Other Materials .....	187
Vertical & Horizontal Integration.....	189
Product Development.....	191
Manufacturing .....	193
Materials .....	193
Manufacturing Processes .....	195
Marketing .....	197
Distribution .....	200
Mergers & Acquisitions.....	202
Cooperative Agreements.....	205

### COMPANY PROFILES

Associated Materials.....	208
Bright Wood.....	210
Builders FirstSource.....	211
Cascade Wood Products .....	212
CPG International.....	215
CRH plc .....	217
Fortune Brands .....	219
Georgia Gulf.....	221
Gossen Corporation .....	223
HB&G Building Products.....	225
Headwaters Incorporated .....	227
Louisiana-Pacific Corporation .....	230
Menard Incorporated .....	232
Orkla ASA .....	233
Ply Gem Holdings.....	235
Quanex Building Products.....	237
Saint-Gobain .....	239
Sierra Pacific Industries.....	240
SierraPine .....	241
Temple-Inland Incorporated.....	243
Tomkins plc.....	245
Weyerhaeuser Company .....	246
Woodgrain Millwork .....	249
Other Firms Mentioned in the Study .....	251

## List of Tables/Charts

### EXECUTIVE SUMMARY

1 Summary Table .....3

### MARKET ENVIRONMENT

1 Macroeconomic Indicators .....9  
2 Population & Households ..... 12  
3 Personal Consumption Expenditures .. 14  
4 Consumer Financing Environment,  
1999-2009..... 18  
5 Building Construction Expenditures... 21  
6 Residential Building Construction  
Expenditures ..... 23  
7 New Housing Indicators ..... 28  
8 Housing Stock by Type..... 31  
Cht Year of Construction of  
Housing Stock, 2009 ..... 32  
9 Residential Improvement  
& Repair Expenditures ..... 33  
10 Nonresidential Building  
Construction Expenditures ..... 37  
11 Nonresidential Building Improvement  
& Repair Expenditures ..... 38  
12 Molding & Trim Historical  
Market, 1999-2009..... 40  
Cht Molding & Trim Market  
Growth, 2000-2009 ..... 41  
13 Molding & Trim Pricing ..... 43  
Cht Molding & Trim Pricing Patterns  
by Material, 1999-2019..... 44  
14 Molding & Trim Foreign Trade..... 52

### MATERIALS

1 Molding & Trim Demand by Material .. 55  
Cht Molding & Trim Demand  
by Material, 2009..... 55  
2 Wood Molding & Trim Demand  
by Wood Type..... 58  
3 Wood Molding & Trim  
Demand by Product ..... 64  
Cht Wood Molding & Trim Demand  
by Product, 2009 ..... 65  
4 Wood Molding & Trim  
Demand by Market ..... 66  
5 Metal Molding & Trim  
Demand by Product ..... 69  
Cht Metal Molding & Trim Demand  
by Product, 2009 ..... 70

6 Metal Molding & Trim  
Demand by Market ..... 72  
7 Plastic Molding & Trim  
Demand by Product ..... 76  
Cht Plastic Molding & Trim Demand  
by Product, 2009 ..... 76  
8 Plastic Molding & Trim  
Demand by Market ..... 78  
9 Plastic Molding & Trim Demand  
by Resin Type..... 79  
10 Engineered Wood Molding &  
Trim Demand by Product ..... 85  
Cht Engineered Wood Molding & Trim  
Demand by Product, 2009 ..... 86  
11 Engineered Wood Molding &  
Trim Demand by Market..... 87  
12 Other Molding & Trim  
Demand by Material..... 88  
13 Other Molding & Trim  
Demand by Product ..... 94  
Cht Other Molding & Trim Demand  
by Product, 2009 ..... 94  
14 Other Molding & Trim  
Demand by Market ..... 96

### PRODUCTS

1 Molding & Trim Demand by Product... 99  
Cht Molding & Trim Demand  
by Product, 2009 ..... 99  
2 Selected Molding Products  
by Type & Material ..... 104  
3 Molding Demand by Material..... 108  
4 Molding Demand by Market..... 110  
5 Selected Stairwork Products  
by Type & Material ..... 114  
6 Stairwork Demand by Material..... 117  
7 Stairwork Demand by Market..... 119  
8 Selected Other Molding & Trim  
Products by Type & Material..... 123  
9 Other Molding & Trim Product  
Demand by Material..... 126  
10 Other Molding & Trim Product  
Demand by Market ..... 128

### MARKETS

1 Molding & Trim Demand by Market.. 131  
Cht Molding & Trim Demand  
by Market, 2009 ..... 131  
2 Residential Molding & Trim  
Demand by Application,  
Product & Material ..... 134

3 New Residential Molding & Trim  
Demand by Product & Material .... 136  
Cht New Residential Molding & Trim  
Demand by Product, 2009 ..... 137  
4 Residential Improvement & Repair  
Molding & Trim Demand  
by Product & Material..... 140  
Cht Residential Improvement &  
Repair Molding & Trim  
Demand by Product, 2009 ..... 141  
5 Residential Molding & Trim  
Demand by Housing Type ..... 144  
6 Single-Family Housing Molding & Trim  
Demand by Application & Product 147  
7 Multifamily Housing Molding & Trim  
Demand by Application & Product 149  
8 Manufactured Housing Molding & Trim  
Demand by Application & Product 151  
9 Nonresidential Molding & Trim  
Demand by Application,  
Product & Material ..... 154  
10 New Nonresidential Molding & Trim  
Demand by Product & Material .... 156  
Cht New Nonresidential Molding & Trim  
Demand by Product, 2009 ..... 158  
11 Nonresidential Improvement &  
Repair Molding & Trim Demand  
by Product & Material..... 161  
Cht Nonresidential Improvement &  
Repair Molding & Trim  
Demand by Product, 2009 ..... 163  
12 Nonresidential Molding & Trim  
Demand by Building Type ..... 165  
13 Institutional Molding & Trim  
Demand by Product ..... 167  
14 Office & Commercial Molding &  
Trim Demand by Product ..... 169  
15 Industrial Molding & Trim  
Demand by Product ..... 170  
16 Other Nonresidential Molding  
& Trim Demand by Product ..... 172

### INDUSTRY STRUCTURE

1 US Molding & Trim Sales for  
Selected Companies, 2009..... 177  
Cht US Molding & Trim  
Market Share, 2009 ..... 180  
Cht US Plastic Molding & Trim  
Market Share, 2009 ..... 183  
2 Selected Acquisitions  
& Divestitures ..... 205

*An expected rebound in new residential construction expenditures from their depressed 2009 level will fuel gains, as the segment regains its usual 40% market share by 2014.*

## US demand to rise 10% annually through 2014

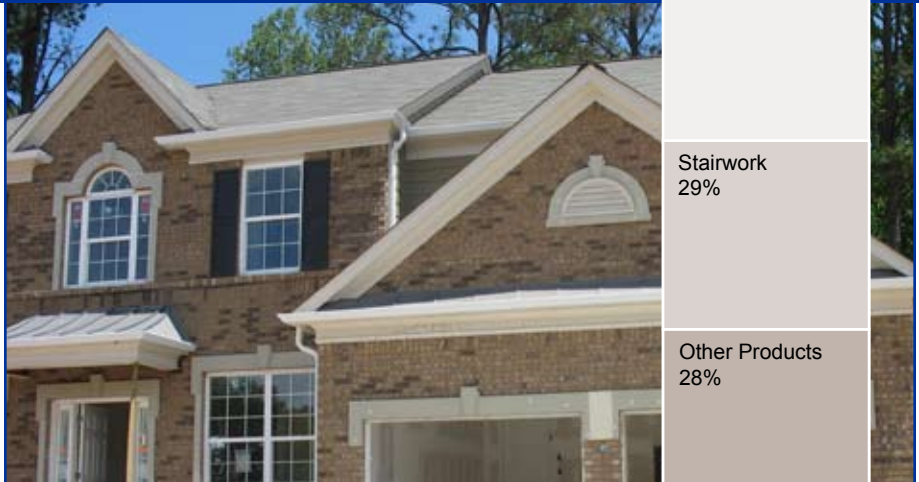
US demand for molding and trim is forecast to exceed \$10 billion in 2014 on annual increases of 10.0 percent. An expected rebound in new residential construction expenditures from their depressed 2009 level will fuel gains. As the housing market contracted from 2006 through 2009, molding and trim demand suffered a steep decline. The new residential market, which normally accounts for more than 40 percent of overall demand for molding and trim, saw its share drop to just over 20 percent in 2009. Even though the recovery in housing completions will still fall short of the 2004 level, new residential demand for molding and trim will have regained its usual share by 2014.

While other markets for molding and trim will see growth through 2014, advances will be much less spectacular than those for new residential building. Demand in the nonresidential building market, which managed modest growth over the 2004-2009 period, will accelerate as construction activity in the office and commercial segment, a key market for nonresidential molding and trim demand, recovers from weakness triggered by the US recession.

## Exterior trim to be fastest growing product segment

Interior molding accounts for the largest share of molding and trim demand.

## US Molding & Trim Demand (\$10.2 billion, 2014)



Because interior molding is widely used in all major types of housing, demand for these products will receive a major boost from the anticipated rebound in new residential construction. Value gains will be slightly faster, however, for exterior trim, aided in part by demand for higher-priced, more durable materials such as plastic.

## Plastic to surpass metal as second leading material

Despite competition from plastics and wood-plastic composites, wood will remain the leading material for molding and trim, with gains supported by the recovery in residential building construc-

tion. Solid price gains for wood will further boost market value. By 2014, plastic is forecast to surpass metal as the second leading material for molding and trim. Demand for plastic products will benefit from the rebounding new residential construction market, especially for exterior trim. Plastic products perform better than wood against exposure to the elements, thus making plastic an ideal choice for exterior molding and trim products. Further, improvements in the appearance of plastic have made high-end plastic molding almost indistinguishable to the untrained eye from wood molding.

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## Sample Text, Table & Chart

### MARKETS

**Demand by Material** -- Through 2014, residential improvement and repair demand for wood molding and trim is forecast to increase by \$1.5 billion. Despite accounting for 15 percent of the residential improvement and repair demand, wood has a 50 percent share of the residential improvement and repair market. Two factors are driving this demand, and within that segment, wood is the dominant material. First, stairwork plays a major role in residential improvement and repair demand, and within that segment, wood is the dominant material. The overall lack of stairwork demand in the residential improvement and repair market means wood loses one of its best markets. The other main factor is the replacement of wood molding and trim with products made from other materials. For example, when wood exterior trim products wear out, they are often replaced with plastic products that will last longer and perform better against the elements.

Unlike new residential construction, where demand for all material segments is forecast to grow rapidly, the fastest growing material segment in the residential improvement and repair market will not exceed seven percent per year. Plastic is the second fastest growing and second most popular molding and trim material used in residential improvement and repair. Demand for plastic molding and trim used in residential improvement and repair applications is forecast to grow just under six percent per annum through 2014 to \$670 million. Plastic finds much of its use in the replacement of wood exterior trim products as it is more weather resistant and often requires less maintenance after installation.

Along with plastic, engineered wood will be the only molding and trim material used in residential improvement and repair to experience growth of over five percent per year. Like plastic, engineered wood offers certain advantages over wood. For example, engineered wood can be produced in longer lengths than regular wood, and it is mechanically stable because of its uniformly consistent fiber arrangement.

142

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TABLE III-4

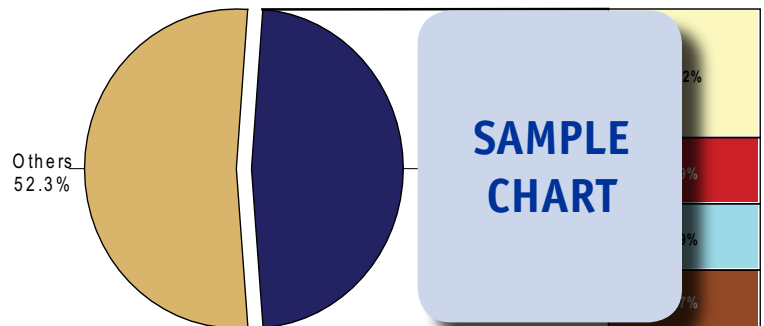
WOOD MOLDING & TRIM DEMAND BY MARKET  
 (million dollars)

Item	1999	2004	2009	2014	2019
Building Construction (bil \$)					
\$ wood/000\$ construction					
Wood Molding Demand					
Residential:					
New					
Improvement & Repair					
Nonresidential:					
New					
Improvement & Repair					

SAMPLE TABLE

CHART VI-2

US PLASTIC MOLDING & TRIM MARKET SHARE  
 (\$809 million, 2009)



SAMPLE CHART

## Sample Profile, Table & Forecast

**TABLE IV-4**  
**MOLDING DEMAND BY MARKET**  
 (million dollars)

Item	1999	2004	2009	2014	2019
Building Construction (bil \$) \$ molding/000\$ construction					
Molding Demand					
Residential:					
New					
Improvement & Repair					
Nonresidential:					
New					
Improvement & Repair					



**COMPANY PROFILES**

**Bright Wood Corporation**  
 335 Northwest Hess Street  
 Madras, OR 97741  
 541-475-2234  
 http://www.bri

Annual Sales:  
 Employment:

Key Products: trim products

Bright Wood is engaged in the production of molding products, including moldings, stair parts, and window and door components. The privately held company primarily serves markets in the US, Australia and New Zealand.

The Company competes in the US molding and trim market via the manufacture of such millwork components as standard and custom molding and trim products made from solid wood, including Radiata pine, Ponderosa pine, Lodgepole pine and hemlock-fir; and composite wood such as medium density fiberwood. In particular, BRIDIATA, a type Radiata pine used in the production of Bright Wood's molding and trim products, is imported from New Zealand's Southland/Otago and West Coast regions. The Company dries BRIDIATA pine material using DRIED BRIGHT technology, a process that uses a low-temperature, slow-drying kiln to produce stable fiber.

Manufacturing operations for Bright Wood are carried out in the US and New Zealand. In the US, the Company has plants in Madras and Redmond, Oregon.

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"The new nonresidential molding market, which is usually much smaller than the new residential market, actually managed to post modest growth from 2004 to 2009. This gain resulted from the relative strength of the new nonresidential construction market; in 2009, it was the second leading market for molding demand. Demand for molding products in new nonresidential construction will expand 3.7 percent per annum to \$870 million in 2014 as ..."

--Section IV, pg. 109



**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

**Wood & Competitive Decking**

US demand for decking is forecast to rise 2.7 percent 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

**World Housing**

Global demand for new housing will rise 3 percent yearly through 2014. North America, Western Europe and Japan will grow the fastest from steep recent declines. Among developing areas, the Asia/Pacific region will build the most new units while the Africa/Mideast region grows the fastest. The global housing stock will rise 1.8 percent yearly. This study analyzes the 1.9 billion unit world housing industry, with forecasts for 2014 and 2019 by type, world region and for 22 countries. It also considers market environment influences on demand.

#2692 ..... September 2010..... \$5300

**Fencing**

Demand for fencing in the US is forecast to expand 2.9 percent 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 lineal 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

**Extruded Plastics**

US demand for extruded plastics is forecast to expand 2.6 percent yearly through 2013, supported by a turnaround in the housing market. PVC will remain the largest segment, and will be one of the fastest growing. Slower advances for LDPE will reflect saturated film and sheet applications in packaging. Extruded polypropylene will grow the fastest. This study analyzes the 30 billion pound US extruded plastics industry, with forecasts for 2013 and 2018 by resin and market. It also evaluates company market share and profiles industry players.

#2566 ..... December 2009 ..... \$4700

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