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Green Building Materials

US Industry Study with Forecasts for **2015 & 2020**

Study #2733 | April 2011 | \$4900 | 332 pages

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While the rising use of green materials will support gains, the most important driver for demand will be the expected rebound in the construction market from low 2010 levels.

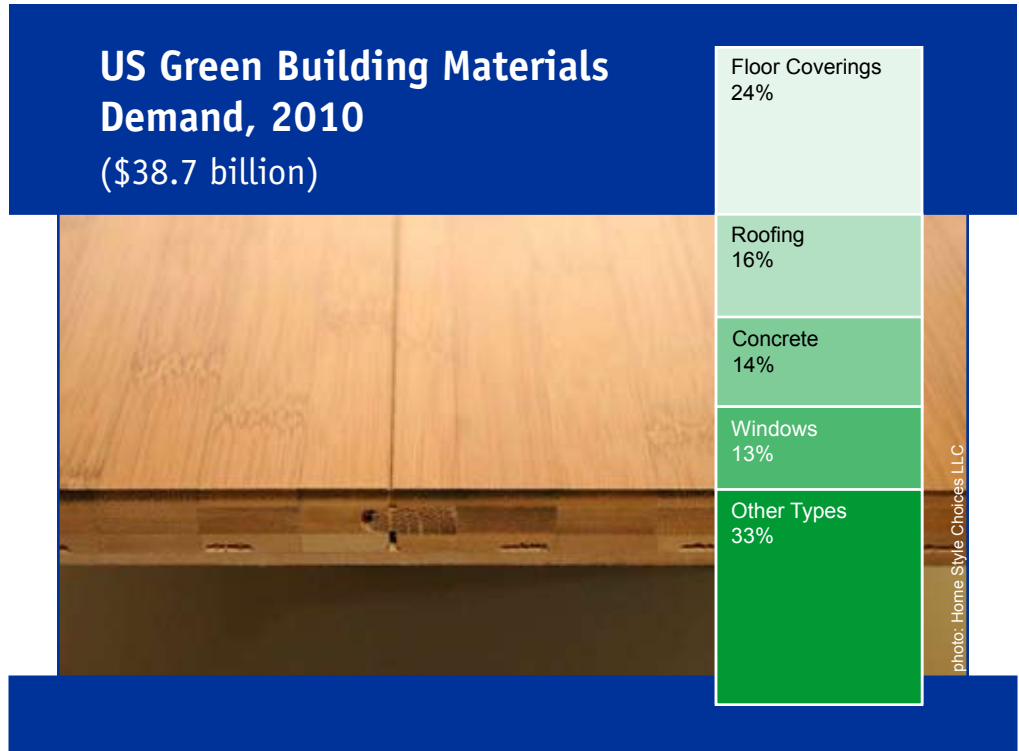
US demand to rise 13% annually through 2015

Demand for green building materials is projected to expand 13.0 percent annually to \$71.1 billion in 2015, slightly outpacing the growth of building construction expenditures over that period as green materials continue to account for an increasing share of materials used. While the rising use of green materials will support gains, the most important driver for demand will be the expected rebound in the construction market from low 2010 levels.

Recycled content concrete to see largest value gains

Demand for a number of green building products is expected to post gains in excess of 20 percent annually through 2015, benefiting from greater availability, environmental concern and more stringent regulatory or building code standards, coupled with the rebound in the construction market. Among these products are water-efficient plumbing fixtures and fittings, energy-efficient lighting fixtures, permeable pavement, and concrete which features recycled content. However, with the exception of recycled concrete, the market for most of these materials is fairly small and the additional demand will be relatively modest in value terms.

Through 2015, the largest value gains will be from concrete products featuring recycled content (e.g., fly ash, blast



furnace slag), which will increase nearly \$11 billion from low 2010 levels. In addition to the recovery in construction, green concrete products are expected to continue to gain market share because the use of recycled materials in concrete not only reduces the volume of waste sent to landfills, but often enhances the performance of the concrete.

Key green floor coverings segment to be outpaced by other materials

Green floor coverings, which include Green Label Plus-certified carpets and products made from rapidly renewable resources (e.g., bamboo and cork flooring), are the largest source of green

building materials demand, accounting for nearly one-quarter of the total market in 2010. Demand for green floor coverings is projected to increase at double-digit rates through 2015. However, gains will not match the pace of the rest of the green building materials market, primarily because the majority of floor coverings (including essentially all carpeting products) are already green, limiting opportunities for greater market penetration. Other product segments expected to see large value gains include energy-efficient residential heating, ventilation and air conditioning (HVAC) systems, green doors and energy-efficient residential windows.

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Sample Text, Table & Chart

PRODUCTS

Market Demand -- The market for roofing totaled 230 million squares in 2010, with the nonresidential market accounting for the larger share of the total. In both the residential and nonresidential markets, reroofing accounts for the majority of demand. This replacement demand helped to shield the roofing market from the downturn in building construction since roofs are generally replaced in case of failure, and the repair of an existing roof cannot be delayed. Among the various products, asphalt shingles account for the majority of the roofing demand, and are by far the most popular roofing product in the residential market.

Demand for green roofing accounted for just under one-tenth of the total roofing market in 2010, or 55 million squares. The demand for green roofing is concentrated in the nonresidential market because the materials that are popular in this market -- metal membranes -- are widely available with reflective characteristics. This is especially true of metal roofing products, which generally qualify as cool roofing, but are used infrequently in the residential market.

From 2000 to 2010, demand for green roofing grew from 39 million squares to 55 million squares, primarily due to increased market penetration, as the roofing market is slow growing. Market penetration -- which rose from 17 percent in 2000 to 24 percent in 2010 -- was helped by the relative strength of the nonresidential roofing market in 2010, which tends to use green roofing products more intensively. Indeed, the roofing market declined in 2009 as residential construction collapsed, while the nonresidential market posted moderate growth during the period.

Going forward, demand for green roofing is expected to increase at a rate of 10 percent annually to 2015, reversing the trend of the 2005-2010 period. Demand for green roofing will be driven by the same factors that have driven the overall roofing market.

77

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SAMPLE
TEXT

TABLE IV-2

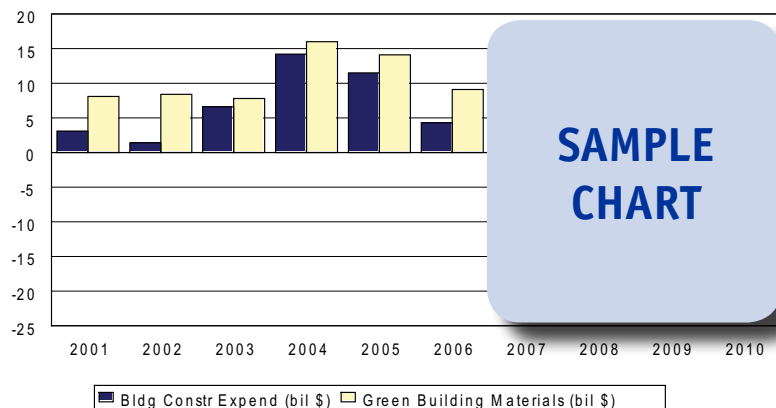
RESIDENTIAL GREEN BUILDING MATERIALS DEMAND BY HOUSING TYPE & SEGMENT (million dollars)

Item	2000	2005	2010	2015	2020
Residential Construction Expend (bil \$)	1,500	1,500	1,500	1,500	1,500
\$ green materials/000\$ construction	0.0	0.0	0.0	0.0	0.0
Residential Green Building Materials Demand	29,570	49,510	38,650	71,100	95,800
By Housing Type:					
Single-Family	10,000	10,000	10,000	10,000	10,000
Multifamily	10,000	10,000	10,000	10,000	10,000
Manufactured Housing	10,000	10,000	10,000	10,000	10,000
By Segment:					
Interior	10,000	10,000	10,000	10,000	10,000
Exterior	10,000	10,000	10,000	10,000	10,000
Structural	10,000	10,000	10,000	10,000	10,000
Building Systems	10,000	10,000	10,000	10,000	10,000
Permeable Pavement	10,000	10,000	10,000	10,000	10,000
% residential	0.72	0.72	0.72	0.72	0.82
Green Building Materials Demand	29570	49510	38650	71100	95800

SAMPLE
TABLE

CHART II-2

GREEN BUILDING MATERIALS MARKET, 2001-2010 (percent change)

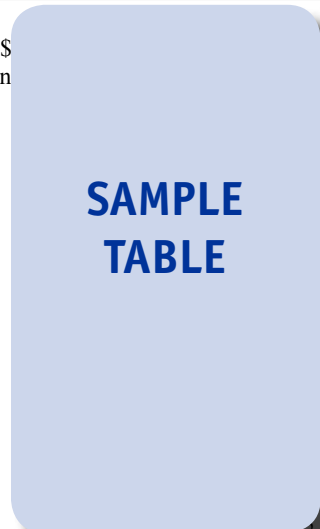


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE V-6
NORTHEAST GREEN BUILDING MATERIALS DEMAND
BY SUBREGION, MARKET & SEGMENT
 (million dollars)

Item	2000	2005	2010	2015	2020
Northeast Construction Expenditures (bil \$)	158	188	200	215	230
\$ green materials/000\$ construction	1.8	2.0	2.2	2.4	2.6
Northeast Green Building Materials	295	495	1038	1100	1140
By Subregion:					
New England	100	150	300	350	380
Middle Atlantic	100	150	300	350	380
By Market:					
Residential	100	150	300	350	380
Nonresidential	100	150	300	350	380
By Segment:					
Interior	100	150	300	350	380
Exterior	100	150	300	350	380
Structural	100	150	300	350	380
Building Systems	100	150	300	350	380
Permeable Pavement	100	150	300	350	380
% Northeast	1.8	2.0	2.2	2.4	2.6
Green Building Materials Demand	29570	49510	103865	110071	114095



COMPANY PROFILES

Columbia Forest Products Incorporated
 7900 Triad Center Drive, Suite 200
 Greensboro, NC 27409
 336-605-0429
<http://www.cfpwood.com>

Annual Sales:
 Employment:

Key Products

Columbia Forest Products Incorporated is a manufacturer of various wood products and distributor of Russian, Polish and European wood products. Products are sold to major original equipment manufacturers and through a network of wholesale distributors and mass merchandisers, including Home Depot Incorporated (Atlanta, Georgia). The Company operates 13 plants throughout the US and Canada.

CFP is involved in the US green building materials industry through the manufacture of wood panels for use in flooring, cabinets, furnishings and other non-structural applications. Many of CFP's wood panels are made from wood certified by the Forest Stewardship Council (FSC). FSC-certified wood panels include items produced from such wood species as poplar, alder, cedar, birch, cherry, pine, fir, hickory, knotty pine, maple, pecan, red and white oak, and walnut. Other FSC-certified wood panels from the Company include EUROPLY types, which consist of 60-percent Polish birch and 40-percent alder.

CFP also makes PUREBOND and bamboo wood hardwood plywood panels. PUREBOND hardwood plywood panels are produced in 1/8- to 1-1/4-inch thicknesses and are available in sizes ranging from

"Going forward, demand for green building materials in the Northeast is forecast to increase 11.9 percent per year to \$11.4 billion in 2015. Growth will primarily be driven by the recovery of residential construction, although demand in the nonresidential market will also post solid gains. Both the structural and permeable pavement product segments are expected to increase more than 20 percent per year through 2015. However, ..."
 --Section V, pg. 169

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OTHER STUDIES

Precast Concrete Products

US demand for precast concrete products is forecast to rise 6.1 percent annually through 2015. Residential building will be the fastest growing market, led by foundations, basement walls and floors. Architectural components will be the fastest growing products, spurred by decorative facades, door and window surrounds and siding. This study analyzes the \$8.4 billion US precast concrete products industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles 34 industry competitors.

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

World Flooring & Carpets

World demand for flooring and carpets is forecast to grow five percent annually through 2014. North America will register the fastest sales gains based on a strong rebound in residential construction and motor vehicle output. Nonresilient flooring (e.g., ceramic, laminate, wood) will outpace both resilient flooring and textile floor coverings. This study analyzes the 12 billion square meter world flooring and carpet industry, with forecasts for 2014 and 2019 by product, market, world region and for 38 countries. It also evaluates company market share and profiles industry players.

#2731 March 2011..... \$6100

World Insulation

Global demand for insulation is forecast to increase 6.3 percent annually (in value terms) through 2014. Insulation consumption in most developing countries will continue to expand at a healthy pace, while sales of insulation materials in developed countries will rebound after falling sharply in 2008 and 2009. This study analyzes the \$31.3 billion global insulation industry. It presents historical demand data and forecasts for 2014 and 2019 by material, market, world region and for 35 countries. It also evaluates company market share and profiles industry players.

#2707 February 2011..... \$6100

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

Windows & Doors

US window and door demand will rise 6.6 percent yearly through 2014. Plastic products will grow the fastest, driven by fiberglass entry doors and vinyl windows. Metal windows and doors will remain the top segment, supported by population growth in the South and West and by efforts in coastal regions to prevent storm damage. This study analyzes the \$22.7 billion US window and door industry with forecasts for 2014 and 2019 by material, market and region. It also evaluates company market share and profiles industry players.

#2699 November 2010..... \$5100

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