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Wood-Plastic Composite & Plastic Lumber

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

Study #2836 | January 2012 | \$5100 | 399 pages



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Consumer demand will be driven by a wide range of favorable performance properties, including durability, minimal maintenance requirements, and resistance to rot.

US demand to rise 13.2% annually through 2015

US demand for wood-plastic composite and plastic lumber is projected to advance over 13 percent per year to \$5.4 billion in 2015, creating a market for 2.6 billion pounds of plastic. Advances will be driven by a rebound in construction expenditures from a depressed 2010 base. Growth will be further boosted by increasing consumer demand for building products made from composite and plastic lumber, instead of natural wood and other traditional materials.

Decking applications to offer best opportunities

Decking, which was the leading application for composite and plastic lumber in 2010, will experience the most rapid demand advances through 2015. Homeowners will install decks made from these materials instead of traditional natural wood lumber because composite and plastic lumber decks require less annual maintenance and have longer lifespans. Decks made from these materials may cost more initially but offer long-term savings because they do not require annual staining or insect treatments.

Among other applications, molding and trim, and windows and doors are expected to post the most rapid demand gains through 2015. Molding and trim demand will be supported by an increase in housing completions, boosting demand

US Wood-Plastic Composite & Plastic Lumber Demand, 2015 (\$5.4 billion)



for building materials. Homeowners will install windows and doors made from cellular PVC and composite lumber because of their resistance to rotting and resemblance to natural wood. Demand for composite and plastic lumber in landscape and outdoor products, fencing and other applications will be promoted by increasing consumer recognition of the performance properties of these materials.

Wood-plastic composite lumber to outpace plastic

Demand for wood-plastic composite lumber will post more rapid gains than that for plastic lumber through 2015, advancing over 16 percent annually to

\$2.5 billion. Gains will be driven by ongoing consumer interest in composite lumber as a substitute for natural wood in such applications as decking and fencing. Moreover, because wood-plastic composite lumber incorporates recycled materials, it is seen as an environmentally friendly building material.

Plastic lumber demand is forecast to rise nearly eleven percent per year to \$2.8 billion in 2015. Gains will be spurred by rising consumer interest in the material because of its low maintenance properties. The efforts of manufacturers to create plastic lumber with more realistic woodgrain textures and surfaces will also support demand.

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Sample Text, Table & Chart

APPLICATIONS

Wood-Plastic Composite & Plastic Decking

Alternative decking materials have taken market share from traditional decking over the past decade. This growth has been fueled by interest in decking that has longer lifespans than traditional materials and requires less maintenance. Natural wood decks need regular washing and frequent painting or staining, and are subject to rot caused by exposure to insects and moisture. Wood-plastic composite and plastic decking have also seen market share increases because of the efforts of manufacturers to place their products in large-scale merchandisers, such as Lowe's and Home Depot. These retailers sell composite decking alongside natural wood lumber, making it easier for do-it-yourself homeowners and small-sized contractors to purchase composite and plastic lumber for their decks. Through 2015, wood-plastic composite and plastic decking demand will continue to rise, accounting for 21 percent of decking volume demand.

Through 2015, demand for wood-plastic composite decking is projected to increase nearly 100 percent, from 120 million lineal feet in 2010 to 240 million lineal feet in 2015. Advances in manufacturing technology and consumer spending, particularly in the residential market, are expected to drive this growth. Gains will also be realized in commercial applications. Materials that require minimal maintenance, such as wood-plastic composite, will benefit from its environmentally friendly image. These materials are generally made from recycled products and are biodegradable. They do not rot or warp, and they keep waste plastics out of landfills.

Demand for plastic lumber decking is forecast to double, totaling 120 million lineal feet. Like composite lumber, demand for plastic lumber decking will be fueled by consumer recognition of the performance advantages of the material, such as long lifespan and resistance to degradation caused by weathering or insects, and low maintenance requirements. Decks made from plastic lumber are

97

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SAMPLE TEXT

TABLE V-15

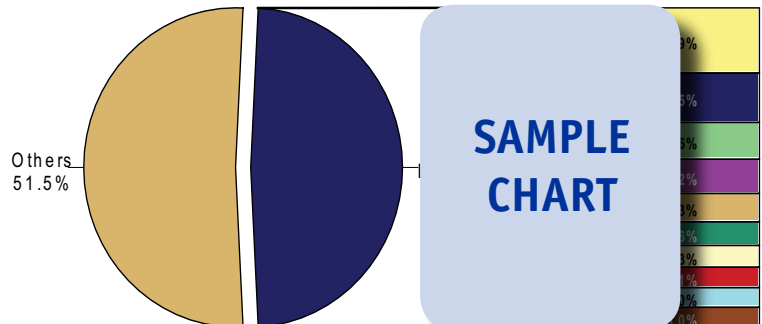
NEW NONBUILDING CONSTRUCTION MARKET FOR WOOD-PLASTIC COMPOSITE & PLASTIC LUMBER (million dollars)

Item	2000	2005	2010	2015	2020
Nonbuilding Construction Expenditures (billions of dollars)					
New Nonbuilding WPC & Plastic Lumber					
By Material:					
Wood-Plastic Composite					
Plastic					
By Application:					
Decking					
Fencing					
Other					
% new Nonbuilding WPC & Plastic Lumber					

SAMPLE TABLE

CHART VII-1

WOOD-PLASTIC COMPOSITE & PLASTIC LUMBER MARKET SHARE, 2010 (\$2.9 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-9

WEST DEMAND FOR WOOD-PLASTIC COMPOSITE & PLASTIC LUMBER BY SUBREGION & APPLICATION (million dollars)

Item	2000	2005	2010	2015	2020
West Construction Expenditures (bil \$): \$ lumber/000\$ construction					
West WPC & Plastic Lumber Demand					
By Subregion:					
Mountain					
Pacific					
By Application:					
Decking					
Molding & Trim					
Other					
% West WPC & Plastic Lumber Demand					



COMPANY PROFILES

LB Plastics Incorporated

482 East Plaza Drive
 Mooresville, NC 28115
 704-663-1543
<http://www.lbplastics.com>

Annual Sales:
 Employment:

Key Products: decking, railing, and fencing

LB Plastics manufactures decking, railing, windows and fencing, and extrudes polyvinyl chloride (PVC) profiles for windows and doors. The privately held company is owned by LB Plastics Limited (United Kingdom), a subsidiary of Litchfield Group of Companies (United Kingdom).

The Company is active in the US composite and plastic lumber industry through the manufacture and marketing of PVC decking, railing and fencing. Production operations for LB Plastics are conducted at a plant in Mooresville, North Carolina that occupies over 350,000 square feet of space. The Company markets its products through a network of distributors.

LB Plastics markets its decking under the SHEERGRAIN and UNI-DECK brand names. SHEERGRAIN decking is produced using the Company's SHEERGRAIN composite technology, an acrylic-based copolymer blend. This decking resists rotting, staining, fading, water absorption, splintering, impacts, ultraviolet (UV) light and the growth of mold. SHEERGRAIN decking is manufactured in 2-inch-by-6-inch boards and in 12-, 16- or 20-foot lengths. Moreover, LB Plastics' boards and in 12-, 16- or 20-foot lengths. Moreover, LB Plastics'



"Demand for composite and plastic lumber decking in the West is expected to rise just over 17 percent per year to \$525 million in 2015. Advances will be driven by the rebound in residential building construction activity. Increases in housing completions and residential improvement and repair expenditures will boost demand, as builders and homeowners put up decks to increase the amount of space for entertaining. Many consumers will select low-maintenance composite and ..."

--Section VI, pg. 273

OTHER STUDIES

Plastic & Competitive Pipe

US demand for pipe is expected to grow 6.2 percent per year to \$50.1 billion in 2016. Plastic pipe will experience the fastest growth, led by PVC. Concrete and ductile iron pipe will lead gains among other material types. Steel pipe will remain the leading pipe material in value terms, based on its dominance in the oil and gas market. This study analyzes the \$37 billion US pipe industry, with forecasts for 2016 and 2021 by market, material and resin. The study evaluates company market share and profiles industry participants.

#2958 October 2012 \$5300

Wood & Competitive Decking

US demand for decking is forecast to rise 2.4 percent annually through 2016 to 3.3 billion lineal feet, valued at \$5.7 billion. Wood-plastic composite and plastic lumber decking materials will grow at double-digit rates, far outpacing the dominant wood segment. The residential building market will lead gains. This study analyzes the 2.9 billion lineal foot US wood and competitive decking industry, with forecasts for 2016 and 2021 by material type, market, application and US region. The study also evaluates company market share and profiles industry competitors.

#2959 October 2012 \$5300

Fencing

Demand for fencing in the US is forecast to expand 7.1 percent per year to \$8.3 billion in 2016, totaling 835 million linear feet. Gains will be supported by rising installation of high-value fences, such as ornamental metal and composite fencing. Plastic and composite, as well as concrete and other fencing will be the fastest growing types. This study analyzes the 672 million linear foot US fencing industry, with forecasts for 2016 and 2021 by material type, market and US region. The study also evaluates company market share and profiles industry players.

#2921 July 2012 \$5100

Decorative Laminates

US demand for decorative laminates is forecast to advance 5.5 percent per year to 12.4 billion square feet in 2015. The cabinet market will remain the largest segment, while flooring will record the most rapid gains. Saturated papers will grow the fastest within the dominant low pressure overlays product segment, followed by decorative foils. This study analyzes the 9.5 billion square foot US decorative laminate industry, with forecasts for 2015 and 2020 by material, product and market. The study also evaluates company market share and profiles industry players.

#2849 February 2012 \$4900

World Siding (Cladding)

The global siding market is forecast to grow 4.8 percent per year through 2015 to over five billion square meters valued at \$87 billion. Masonry and concrete products will remain the dominant segment, while vinyl siding exhibits the most rapid gains. The North American region, led by the US, will be the fastest growing market. This study analyzes the 4.2 billion square meter world siding industry, with forecasts for 2015 and 2020 by product, market, world region and for 20 countries. The study also evaluates company market share and profiles industry players.

#2834 December 2011 \$6100

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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