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# Molding & Trim

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US Industry Study with Forecasts for **2016 & 2021**

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Study #2976 | December 2012 | \$5100 | 328 pages

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*A sharp rebound in new housing construction and a partial recovery in nonresidential building construction will drive gains, but not enough to raise demand in 2016 to the 2006 level.*

## US demand to rise 11% annually through 2016

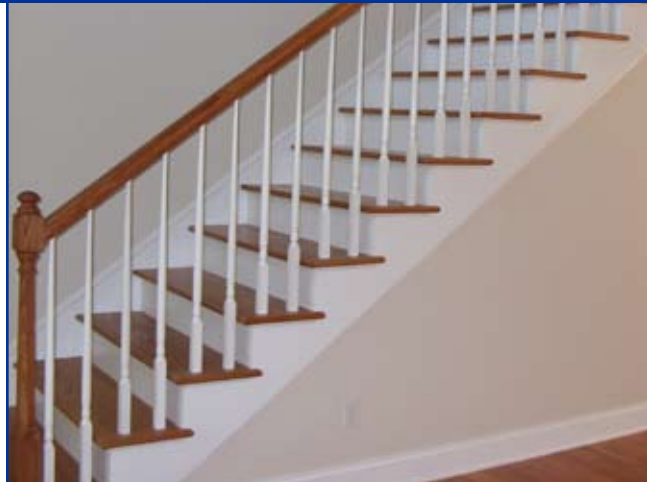
US demand for molding and trim is forecast to rise nearly 11 percent per year to \$9.0 billion in 2016. A sharp rebound in new housing construction and a partial recovery in nonresidential building construction will drive gains. However, this revival in new construction activity will still not be sufficient to raise molding and trim demand in 2016 to the level achieved in 2006.

## Engineered wood molding and trim to grow fastest

Within each of the market segments for molding and trim, demand shares by material in 2016 will be similar to those in 2011. Therefore, overall gains for the different materials will primarily be shaped by the underlying growth in the respective market segments, rather than from increases in share within the particular market segments. For example, because wood is used extensively in new residential molding and stairwork, the rebound in new residential construction will support demand increases for wood molding and trim. Residential consumers overwhelmingly opt for wood molding because of its favorable aesthetics. Wood will see an increase in the stairwork segment, spurred by a rebound in housing completions, as most wood stairways are installed in residences.

Exterior trim is one application in which material shares are expected to change

## US Molding & Trim Demand (\$9 billion, 2016)



Molding  
43%

Stairwork  
26%

Other  
31%

photo: Walden Hatten Construction

slightly over the forecast period. Wood will remain the market leader but face increasingly stiff competition from plastic and engineered wood, which better resist degradation caused by insects and exposure to the elements.

Engineered wood molding and trim is forecast to advance at the most rapid pace of all materials through 2016. The increasing use of these materials in the fast-growing new residential market will spur advances. Home builders will choose engineered wood products because they look like wood, but do not need to be painted or stained prior to installation. This will support the use of engineered wood as molding and exterior trim.

## Stairwork demand to outpace molding and trim

Stairwork demand is forecast to advance more than 11 percent annually through 2016. Because most stairwork is installed in new structures, rebounding new building construction spending will drive gains. Wood will continue to dominate residential stairwork demand, while metal will account for the majority of the nonresidential market.

Demand for molding -- defined here as molding and trim products only used in interior applications -- will be driven by strong growth in housing completions. Wood will remain the leading material used in its production.

## Sample Text, Table & Chart

### PRODUCTS

#### Demand by Market

New residential demand for other molding and trim is projected to advance by \$1.1 billion in 2011. This increase will be due to new construction and renovations. Gains will be supported by the fact that homebuilders are adding stockpiles of molding and trim to their inventories and other components are being used in the surrounding areas of a home. The market is expected to return on a minimal investment in molding and trim.

**SAMPLE TEXT**

The residential improvement and repair market for other molding and trim typically accounts for a higher share of residential demand than the replacement markets in the other two product segments. Generally, exterior trim and other components were not often installed by builders on newly built homes. Homeowners would add these components later as part of renovation projects. Demand for other molding and trim products in the residential improvement and repair market is forecast to rise 4.6 percent per year to \$950 million in 2016. Unlike molding and stairwork, a high percentage of other molding and trim is used on building exteriors. Thus, wood products often need replacement due to degradation caused by exposure to the elements. In some cases, homeowners and property managers will replace older materials with newer products that are more resistant to damage, such as plastic, precast concrete, or fiber cement.

Nonresidential demand for other molding and trim products accounts for a smaller percentage of demand than any other product segment. Other molding and trim products are often highly decorative and are used less often in nonresidential structures, aside from those where aesthetics play a major role, such as hotels, resorts, restaurants, and casinos. Such products as porch rails and shutters are seen less often in nonresidential buildings because there is little need for the

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TABLE V-6

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

Item	2001	2006	2011	2016	2021
Single-Family House Completes (000)	1,000	1,000	1,000	1,000	1,000
Single-Family House Stock (mil units)	2,000	2,000	2,000	2,000	2,000
1000\$ new molding & trim/complete	7	7	7	7	7
\$ I&R molding & trim/stock unit	4	4	4	4	4
Single-Family Molding/Trim Demand	5	5	5	5	5
By Application:					
New	0	0	0	0	0
Improvement & Repair	5	5	5	5	5
By Product:					
Molding	0	0	0	0	0
Stairwork	5	5	5	5	5
Other	0	0	0	0	0
% single-family	7	7	7	7	7
Residential Molding & Trim Demand	4	4	4	4	4

**SAMPLE TABLE**

CHART VII-2

### US PLASTIC MOLDING & TRIM MARKET SHARE (\$818 million, 2011)



**SAMPLE CHART**

## Sample Profile, Table & Forecast

### COMPANY PROFILES

**Gossen Corporation**  
 2030 West Bender Road  
 Milwaukee, WI  
 414-228-9800  
<http://www.gos>

Annual Sales:  
 Employment:

Key Products: and wood  
 millwork produ

Gossen is a manufacturer of polyvinyl chloride (PVC) and wood millwork, trim, accessories, and other products for interior and exterior applications. The Company is privately held.

The Company is active in the US molding and trim market via the production of PVC and wood millwork products for exterior and interior end uses. PVC millwork products from Gossen are made through a free expansion process for enhanced durability and strength.

Exterior millwork products from the Company are produced from solid core cellular PVC that resists splitting, cracking, warping, rotting, mold, insects, and ultraviolet light. Specific products include molding and trim, and railing. Gossen's railing systems are sold under the WEATHERREADY brand name. WEATHERREADY railing systems comprise balusters, hand rails, newel post covers, and other components. This line also includes such other building products as exterior trim, trim boards, and decking systems. Interior millwork products from the Company include DEEP DIMENSIONS fine-grain textured and CS MOULDINGS smooth surface molding, both of which are made from 100-percent cellular PVC. These prefinished molding

**SAMPLE  
PROFILE**

TABLE VI-6

**NORTHEAST MOLDING & TRIM  
DEMAND BY SUBREGION & PRODUCT  
(million dollars)**

Item	2001	2006	2011	2016	2021
Northeast Construction (bil \$)	1				0
\$ molding & trim/000\$ construction					5
Northeast Molding & Trim Demand					2
By Subregion:					
New England					5
Middle Atlantic					5
By Product:					
Molding					0
Stairwork					0
Other					0
% Northeast					5
Molding & Trim Demand	7	1	0	0	1

**SAMPLE  
TABLE**

"Molding and trim demand in the Northeast is forecast to rise 7.9 percent annually to \$1.5 billion in 2016. While this is a rebound from the declines experienced between 2006 and 2011, demand for molding and trim is expected to rise at the slowest pace of all US regions. The Northeast will lag the other US regions in terms of growth in population, GDP, and housing sales. These factors will prevent more rapid growth in molding and trim demand."  
 --Section VI, pg. 203-4

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**OTHER STUDIES**

**Prefabricated Housing**

US demand for prefabricated housing is forecast to expand 15 percent annually through 2017 to 135,000 units. Manufactured housing will remain the most common type, while other prefabricated housing such as modular, precut and panelized housing will grow the fastest. The South will remain the leading US regional market. This study analyzes the 67,000 unit US prefabricated housing industry, with forecasts for 2017 and 2022 by product and US region. The study also evaluates company market share and profiles industry competitors in the US market.

#3001 ..... February 2013 ..... \$4900

**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

**World Housing**

New housing construction will reach 60.5 million units in 2016, an increase of 3.5 percent per annum. Most new units will be built in developing countries, where population and housing growth will be the strongest. Multifamily housing units will outpace single-family units. This study analyzes the 50.7 million unit world housing industry, with forecasts for 2016 and 2021 by type, world region and for 22 major countries. The study also considers market environment factors such as world economic and demographic trends, and housing construction expenditures.

#2942 ..... September 2012 ..... \$5500

**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

**Wood-Plastic Composite & Plastic Lumber**

US demand for wood-plastic composite and plastic lumber is projected to advance 13.2 percent annually to \$5.4 billion in 2015. Decking will remain the largest application and grow the fastest, followed by the molding and trim and windows and doors segments. Wood-plastic composite lumber will outpace plastic types. This study analyzes the \$2.9 billion US wood-plastic composite and plastic lumber industry, with forecasts for 2015 and 2020 by material, application and market. The study also evaluates company market share and profiles industry players.

#2836 ..... January 2012 ..... \$5100

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