INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Freedonia®

Molding & Trim in the US

US Industry Study with Forecasts for 2020 & 2025

Study #3474 | November 2016 | $5100

Sustained growth in building construction expenditures, particularly in new housing, will drive molding and trim gains. Rising improvement and repair spending will also boost sales, as building managers and homeowners opt for low cost ways to update structures. However, greater demand for more durable, higher quality products -- especially exterior trim -- will limit stronger sales growth going forward due to the longer lifespans of these products.

Wood to remain top material used

Wood, which is utilized for its good aesthetics, low cost, and versatility, will remain the major material for molding and trim. However, competition from plastic and engineered wood is projected to intensify as manufacturers improve the aesthetics of these products and contractors and homeowners increasingly favor these materials for their durability and low maintenance requirements.

New housing, home improvement to boost interior molding growth

Interior molding is forecast to record healthy demand gains through 2020, bolstered by strong growth in new housing completions and increased spending on home improvement projects. Stairwork demand will benefit from rising new building activity, especially in single-family housing. Based on long replacement cycles, stairwork accounts for a relatively small share of the residential improvement and repair market, but plays a much more significant role in new residential applications. Exterior trim will also post demand gains. Homeowners trying to sell their houses will increasingly install exterior trim as a more cost-efficient means of improving the appearance of the house than more expensive renovation projects. Homebuilders will also add exterior trim to newly built houses as a way to enhance the architectural design and curb appeal of their properties.

Residential market activity to outpace nonresidential gains

The residential market will remain a larger consumer of molding and trim than the nonresidential market because of the intensive use of interior and exterior decorative elements to improve the appearance of homes. In both markets, improvement and repair activity will generate considerable demand, as the economy continues to recover and building owners and managers boost improvement spending to attract customers and tenants.

Study coverage

This Freedonia study examines the US molding and trim market, which in 2015 totaled $7.5 billion. It presents historical demand data (2005, 2010, 2015) plus forecasts (2020 and 2025) by material (wood, plastic, engineered wood, metal, other), product (molding, stairwork, other), market (residential, nonresidential) and region of the US. This study provides company market shares and analysis on industry players such as Axiall, Bright Wood, Builders FirstSource, Cascade Wood Products, Fortune Brands, HB&G Building Products, Headwaters, Ply Gem, Sierra Pacific and Woodgrain Millwork.

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Regions

Industry Structure

REGIONS

West Sou
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economy has be
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become a financ
breeding area.
bases, producin
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Louisiana, both
and Oklahoma.
areas can differ

Although t
energy producti
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Oklahoma are a
sources. In addition to conventional production, this subregion is also a producer of shale gas. Important shale plays in the West South Central include the Barnett (Texas), Eagle Ford (Texas), Fayetteville (Arkansas), Haynesville (Louisiana, Texas), and Woodford (Oklahoma). In addition to crude oil production, the subregion has substantial petroleum refining capacity. Petroleum and natural gas also se
region's production of chemicals. Texas pr
than 50 percent of total US chemical outpu
Louisiana as well.

GDP in the West South Central is proj
percent per year through 2020. Annual popu
in the West South Central will be among th
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SAMPLE TEXT

TABLE V-10

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

Item	2005	2010	2015	2020	2025
Single-Family Molding & Trim Demand					
By Application:					
New					
Improvement & Repair					
By Product:					
Molding					
Stairwork					
Other					

SAMPLE TABLE

Source: The Freedonia Group

TABLE III-10

METAL MOLDING & TRIM DEMAND BY MARKET (million dollars)

Item	2005	2010	2015	2020	2025
Metal Molding & Trim Demand					
Residential:					
New					
Improvement & Repair					
Nonresidential:					
New					
Improvement & Repair					

SAMPLE TABLE

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

World Drywall & Building Plaster

Global demand for drywall is forecast to rise 4.0 percent per year through 2020 to 10.0 billion square meters. Over one-third of new drywall demand generated between 2015 and 2020 will be in China. Worldwide demand for building plaster is projected to rise 3.7 percent yearly to 37.1 million metric tons in 2020. This world study details the 8.2 billion square meter drywall market and the 31 million metric ton building plaster market, with forecasts by market for 2020 and 2025 in 6 regions and 21 countries. The study also assesses the industry structure and evaluates market share.

#3464............... October 2016 .... $6300

Wood-Plastic Composite & Plastic Lumber

US demand for wood-plastic composite (WPC) and plastic lumber is forecast to rise 6.9 percent yearly to $5.9 billion in 2020. Continuing growth in residential construction expenditures will spur advances. WPC and plastic lumber have taken market share from wood lumber in molding and trim and decking due to their favorable aesthetic and performance properties. The study presents historical demand data plus forecasts for 2020 and 2025 by material, application, market and region of the US. This study also analyzes company market share and profiles industry players.

#3414.................. May 2016 .... $5500

Cabinets

US demand for cabinets is projected to advance 6.4 percent annually to $17.3 billion in 2019, spurred by continuing consumer interest in kitchen and bathroom renovation projects. Style trends that call for homes to have larger kitchens and multiple bathrooms will also boost demand. The dominant residential market will be the fastest growing segment. This study analyzes the $12.7 billion US cabinet industry, with forecasts for 2019 and 2024 by material, product, market and region. The study also evaluates company market share and profiles industry players.

#3372............... January 2016 .... $5300

World Housing

World construction of new housing units is forecast to increase 3.0 percent annually to 2.3 billion units in 2019. North America and Western Europe will exhibit the fastest growth from a depressed 2014 base. On a global basis, new construction of multifamily units will outpace single-family units. This study analyzes the 2.1 billion unit world housing market, with existing stock and new unit projections presented for 2019 and 2024 by type in six world regions and 22 major countries. The study also considers economic trends, demographics, and other market factors.

#3312.................. July 2015 .... $5900

Contact Freedonia

1.800.927.5900 (US & Canada)
+1 440.684.9600 (Int'l)
email: info@freedoniagroup.com
website: freedoniagroup.com

Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

About The Freedonia Group

The Freedonia Group 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 and other world markets. Industries analyzed by Freedonia include:

Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

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