

Siding Distribution Market in the US

Industry Study with Forecasts for 2021

Study #3494 | April 2017 | \$4900



Gains in US siding sales by distributors will be driven by continued strength in building construction activity. Other factors inducing growth will include:

- increasing reliance of siding producers on distributors to sell their products, rather than direct sales agents
- greater role that small- and medium-sized contractors play in siding installation

Construction professionals, such as homebuilders and commercial construction firms, are expected to further subcontract out siding installation jobs to small- and medium-sized contractors. This will boost sales of siding distributors, as smaller contractors are more likely to purchase siding from distributors because of the specialized services they provide.

Residential market at distributors' level leader in sales, fastest rising

The residential market accounted for the majority of siding sales at the distributors' level in 2016 and is forecast to post the more rapid sales growth through 2021. Strong gains in housing starts and greater homeowner interest in home renovation projects will fuel siding installation jobs.

Commercial contractors will also increasingly turn to distributors for siding materials due to the special services they offer. However, growth in siding sales by distributors to the commercial market will be restrained by modest

growth in the commercial construction stock and a decline in industrial building construction spending

Top siding distributors to expand share of the market

In 2016, the top six siding distributors represented 32% of overall siding sales. These firms are expected to continue to expand their presence in the US market by:

- adding sales outlets by opening new locations and purchasing smaller competitors
- providing value-added services, such as preferred contractor programs and credit assistance
- offering related building materials, such as roofing, exterior trim, insulation, ceiling products, and windows and doors

Study coverage

This Freedonia industry study analyzes distributors' siding sales in the US. It presents historical demand data (2006, 2011, and 2016) plus forecasts (2021) by sales channel (direct sales and siding distributors), market (residential and commercial), and material type (vinyl, fiber cement, wood, stucco, brick, concrete and stone, metal panels, EIFS, other). Sales of siding are analyzed at the subregional level, with further examination offered for state markets. The top siding distributors in each subregion and state are also identified.

WEST NORTH CENTRAL

Minnesota: Key Siding Market Trends

Sales of siding by distributors in Minnesota in 2016 totaled \$1.2 billion. The large Minneapolis metro area drives residential siding. The state's harsh winter climate drives brick, fiber cement, and vinyl siding.

Siding sales by distributors in Minnesota are expected to continue to grow through 2021. Insulation requirements will boost sales, particularly in the commercial sector. As business owners engage in renovation projects for older or worn siding, some building owners will opt for more durable siding materials to replace their existing siding. This will boost distributors' sales, as many contractors rely on distributors to sell them moderate quantities of siding. Minnesota continues to operate under IECC, so there is not expected to be a boost to insulated siding forward, since it cannot be used to satisfy insulation requirements.

Minnesota: Key Siding Distributors

Key siding distributors in the West North Central include Builders Source, ABC Supply, Beacon Roofing Supply, and Cedar Creek. Other siding distributors operating in the subregion include:

- Allied Building Products
- Alside
- Foundation Building Materials
- Home Depot
- Lowe's
- Scherer Bros.
- US LBM

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Table 5-5 | East North Central: Distributors' Commercial Siding Sales by Material, 2006 - 2021 (million dollars)

Item					% Compound Annual Growth		
	2006	2011	2016	2021	06-11	11-16	16-21
ENC Commercial Siding Demand % sold by distributors							
ENC Distributors' Commercial Siding Sales							
Vinyl							
Wood							
Metal Panels							
Concrete & Stone							
Other Materials							

Source: The Freedonia Group

Table 8-4 | East South Central: Distributors' Residential Siding Sales by Material, 2006 - 2021 (million dollars)

Item					% Compound Annual Growth		
	2006	2011	2016	2021	06-11	11-16	16-21
ESC Residential Siding Demand % sold by distributors							
ESC Distributors' Residential Siding Sales							
Vinyl							
Wood							
Metal Panels							
Concrete & Stone							
Other Materials							

Source: The Freedonia Group

Table 3-3 | New England: Distributors' Siding Sales by Market, 2006 - 2021 (million dollars)

Item					% Compound Annual Growth		
	2006	2011	2016	2021	06-11	11-16	16-21
New England Siding Distributors' Sales							
Residential							
Commercial							

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

The Freedonia Group

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Related Studies

Prefabricated Housing Market in the US

In 2020, demand for prefabricated housing in the US will reach 124,000 units. Demand for manufactured housing, the largest segment of the prefabricated housing market, is projected to lag gains in the overall housing market. The South, by far the largest regional market for manufactured units, will fuel growth. This study assesses the 98,200 unit US market for prefabricated housing, with demand forecasts (in shipments) for 2020 and 2025 by type and region. In addition, the study examines the industry structure and analyzes company market share.

#3489..... January 2017 \$4900

Molding & Trim in the US

Demand for molding and trim in the US is forecast to rise 1.6 percent per annum through 2020 to \$9.9 billion. Wood will remain the leading material for molding and trim, although competition from plastic and engineered wood will intensify. Interior molding and stairwork will post healthy gains based on rising new housing completions. The study offers historical data plus forecasts for 2020 and 2025 by material, product, market and region of the US. The study also examines the market environment, assesses the industry structure, and analyzes company market share.

#3474..... November 2016 \$5100

Siding

US siding demand is forecast to rise 5.6 percent annually to 100 million squares in 2019, valued at \$10.7 billion. Gains will be driven by a rebound in housing completions and an acceleration in the residential replacement market. Vinyl siding will remain the largest category by volume, but will lose market share to stucco and fiber cement siding. This study analyzes the 76.2 million square US siding industry, with forecasts for 2019 and 2024 by material, market and region. The study also evaluates company market share and profiles industry participants.

#3374..... January 2016 \$5500

World Siding (Cladding)

The global siding market is projected to grow 4.2 percent yearly through 2019 to 5.9 billion square meters, valued at \$80 billion. North America will post the fastest market gains while the Asia/Pacific region will account for half of additional global demand. Metal, vinyl, stucco and EIFS siding will grow the fastest. This study analyzes the 4.8 billion square meter world siding industry, with forecasts for 2019 and 2024 by product and market/application for six world regions and 20 major countries. The study also evaluates company market share and profiles industry players.

#3327..... September 2015 \$6500

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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

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