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# Wood Protection Coatings & Preservatives

# US Industry Study with Forecasts to 2009 & 2014

Study #2018 | January 2006 | \$4200 | 289 pages

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# Wood Protection Coatings & Preservatives

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# Wood Protection Coatings & Preservatives

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## Interior cabinets and flooring applications will lead gains in wood protection coatings and preservatives overall, while maintenance coatings will support exterior uses.

# US market to reach \$3 billion in 2009

Demand for wood protection coatings and preservatives is forecast to increase 2.7 percent per year to \$3.0 billion in 2009, despite a challenging market environment. Continued weakness in the key siding market is prompting coatings manufacturers to place greater emphasis on growing applications such as cabinets and flooring. In addition, demand will benefit from upgrading, steady production of pressure treated lumber, and solid levels of construction-related repair and improvement spending.

In markets such as siding and windows and doors, wood has sustained substantial losses to alternative materials, in particular plastics, due to a range of factors, including relatively frequent maintenance requirements and environmental concerns over the products used in the wood preservation process. However, opportunities for growth still exist based in part on the favorable qualities of wood (e.g., high aesthetic and insulating value), and protective coatings and preservatives will play an important role in future market success.

# Interior wood applications to offer best opportunities

Wood protection coatings and preservatives demand will achieve the most favorable gains in interior wood applications, such as flooring and cabinets. Flooring and cabinet production will be promoted by growth in repair and improvement spending, as



the purchase of these items is common during remodeling activity. In order to maintain wood's position in interior applications, wood coating suppliers will strive to develop product lines that feature a wider range of colors, improved efficiency and enhanced durability. However, the longevity of interior wood limits gains in coatings demand, as maintenance requirements are infrequent.

# Maintenance coatings to lead gains in exterior applications

In exterior applications, wood will continue to suffer losses to competitive materials, resulting in an extremely difficult market environment for wood protection coatings and preservatives suppliers, especially as high maintenance requirements are a key factor in wood's gradual market losses. This is especially the case in siding, where the use of wood-based products continues to decline. However, maintenance coatings demand will continue to be supported by the large installed base of wood housing and decks.

Demand will also be boosted by the greater use of higher value coatings, featuring enhanced durability, greater ease of use and easier cleanup. Lastly, gains will be stimulated by the greater use of higher priced preservatives due to the voluntary ban on chromated copper arsenate (CCA) in residential applications, driven by concerns over the environmental impact of arsenic as a raw material.

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# **Wood Protection Coatings & Preservatives**

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# Samples Pages, **Tables & Charts**

#### TABLE VI-5

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#### NONBUILDING CONSTRUCTION MARKET: DEMAND FOR WOOD PROTECTION COATINGS & PRESERVATIVES **BY APPLICATION & END USE** (million dollare)

#### **APPLICATIONS**

Wood Protection Coatings & Preservatives Demand Demand for wood protection coatings and preservative

windows and door million in 2009, li wood materials. V at both the new an and doors are bein are increasingly be market share losse

**APPLICATIONS** Text sections explain and support each table's

numbers and projections

and use of improved coating formulations, which generally higher pricing structure over traditional products.

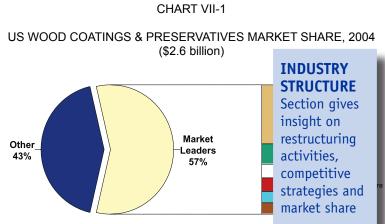
Wood is widely used in residential window and door n also finds some use in light commercial structures. The ma a number of positive product characteristics, including easy high strength, sound and thermal insulating properties, stron ics and high availability. However, wood is also associated drawbacks as higher prices and susceptibility to rotting and weathering, both of which make wood products vulnerable tion from other window and door materials. As a result, product deve

opments in the wood material segment are primarily aimed at lowering costs and increasing durability. For example, many wood window and door producers are incorporating a growing number of engineered wood components, which lowers the initial cost of the pro-duct as well as the overall life cycle costs through increased durability.

Newly produced wood windows and doors can be finished at the factory or on-site. During factory finishing, any exposed wood components designed for exterior use are first treated with a preservative to prevent decay and damage. The preservative is most commonly applied to the wood via a dipping method (i.e., non-pressure treatm

165		C Copyright by The Freed

(million dollars)						
Item	1994	1999	2004	2009	2014	_
Nonbuilding Constr Expend (bil \$) \$ protection/000\$ nonbldg constr	104 3.6		163 3.7		302 2.9	
Nonbldg Wood Protection Demand By Application: Decking Fencing Railway Products Utility Poles Landscaping Products Other By End Use: New Maintenance % nonbuilding Wood Protection Demand	pres plu and cons in oth	ne Ma sents s fore d 201 struct g con ner ma appli	histor casts 4 for ion, n struct rkets	Section rical d to 20 buildi on-bu ion ar i dema n and	lata 109 ng 11ld- 11d and	



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Page 5

# **Wood Protection Coatings & Preservatives**

US Industry Study with Forecasts to 2009 & 2014

#### Samples Pages, TABLE IV-5 **Tables & Charts** WOOD STAIN DEMAND BY APPLICATION & END USE (million dollars) 1994 1999 2004 2009 2014 Item Wood Products Shipments 42276 55611 63510 69675 82730 \$ stain/000\$ products 10.0 10.1 10.8 11.6 12.1 Stain Demand PRODUCTS \_\_By Application: The Products Section Decking provides demand for Furniture Cabinets historical years (1994, Fencing 1999, 2004) as well Flooring as forecasts growth **COMPANY PROFILES** Other Applications to 2009 and 2014; By End Use: data is illustrated with New Fuller (HB) Company Maintenance more than 1200 Willow Lake Boulevard 100 tables and charts Vadnais Heights, MN 55110 \$/gal 651-236-5900 Stain Demand (mil gal) http://www.hbfuller.com Revenues: \$ North Americ **COMPANY PROFILES**

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04

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Employment:

Key Products

HB Full Full-Valu/Spe

industry throu

The Cor

The Profiles Section analyzes 37 firms active in the wood protection coatings and preservatives market. cals. The Co The profiles are a sampling or crosssection of the types of companies involved in the industry.

revenues of \$ Coatings division (Oakdale, Minnesota), which also operates as HE Fuller Powder Coatings. The division formulates, manufactures and supplies powder coatings for wood and metal substrates in office and interior furniture, building, general industrial, hardware and automotive component applications. Specific powder coatings include DESIGNKOTE coatings for medium density fiberboard substrates used in the manufacture of such items as office furniture, kitchen cabinets and ready-to-assemble furniture; CALIBER coatings, including weatherable, nonweatherable and metallic types; and OMEGA coatings that consist of over 200 colors. In May 2005, HB Fuller Powder Coatings

can be used for various home furnishings.

introduced the ALOREN line of designer metallic powder coatings that

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"In 2004, solvent-based formulations accounted for 39 percent of total wood coatings demand. The market share held by solvent-based coatings will hold steady through 2009, as these products face intense competition from waterbased, powder and radiation-cured coatings. Over the past ten years, the role of solvent-based coatings has been reduced to applications where these coatings still hold significant advantages over waterbased coatings, such as ..."

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--Section IV, pq. 68

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## **RELATED STUDIES**

#### Automotive Coatings, **Adhesives & Sealants**

US demand for automotive coatings, adhesives and sealants will top \$7 billion in 2010. Gains will be driven in part by the use of more structural adhesives instead of heavier mechanical fasteners, and by sealants that make cabins quieter and better insulated. A shift toward larger light vehicles in the aftermarket will also support demand. This study analyzes the US automotive coating, adhesive and sealant industry to 2010 and 2015 by type, application and market. It also profiles major players and evaluates market share

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#### **World Architectural Paints**

Global architectural paint demand will rise 3.7% per year through 2009, led by gains in emerging markets such as China and India. The shift toward waterborne paints and increasing sales to the DIY sector will continue, especially in developing regions. This study analyzes the \$31.3 billion world architectural paint industry to 2009 and 2014 by paint formulation, market, end user (professional, consumer/DIY), world region and for 22 countries. It also evaluates producer market share and profiles major players. 

### Wood & Competitive Decking

US demand for decking will reach \$5.8 billion in 2009, supported by stable repair and improvement activity. Alternative materials such as wood-plastic composites, plastic and aluminum will continue to outpace wood and gain market share. Wood will nevertheless remain dominant, led by lower-priced pressuretreated types. This study analyzes the five billion board foot US decking industry to 2009 and 2014 by product material, market and region. It also evaluates market share and profiles major players.

#1991......\$4200

### **Protective Coatings**

Demand for protective coatings in the US will grow 4.6% annually through 2009. Advances will be driven by transportation equipment, machinery, electronics and structural metal applications. Corrosion control coatings will remain dominant while fire resistant, anti-wear and conformal coatings grow the fastest. This study analyzes the \$10.7 billion US protective coating industry to 2009 and 2014 by product, formulation and market. It also evaluates company market share and profiles leading industry competitors. 

#### **Construction Chemicals**

The US market for chemicals used in on-site construction applications will reach \$7.5 billion in 2008. Slowing demand in residential building will be offset by a rebound in nonresidential construction. Protective coatings and sealers will remain dominant while cement additives, sprayed polyurethane foam (SPF) and caulks grow the fastest. This study analyzes the US construction chemical industry to 2008 and 2013 by product and application. It also evaluates company market share and profiles leading competitors. #1873.....\$4100

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