Wood Protection Coatings & Preservatives

US Industry Study with Forecasts to **2009 & 2014**

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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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Samples Pages, Tables & Charts

APPLICATIONS

Wood Protection Coatings & Preservatives Demand

Demand for wood protection coatings and preservative
windows and door ... per y
million in 2009, li ... mix
wood materials. V ... ction
at both the new an ... wood
and doors are bein ... ws a
are increasingly b ... ightl
market share losse ... ued
and use of improved coating formulations, which generally
higher pricing structure over traditional products.

Wood is widely used in residential window and door m
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, stror
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 devel-
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 com-
ponents 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

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APPLICATIONS
Text sections explain and support each table's numbers and projections

TABLE VI-5

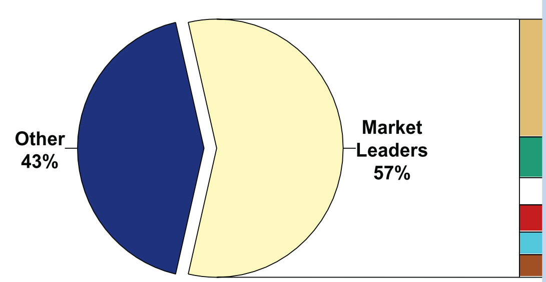
NONBUILDING CONSTRUCTION MARKET: DEMAND FOR WOOD PROTECTION COATINGS & PRESERVATIVES BY APPLICATION & END USE
(million dollars)

Item	1994	1999	2004	2009	2014
Nonbuilding Constr Expend (bil $)	104	135	163	228	302
$ protection/000$ nonbldg constr	3.6	3.3	3.7	3.2	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					

MARKETS
The Markets Section presents historical data plus forecasts to 2009 and 2014 for building construction, non-building construction and other markets' demand by application and by end use

CHART VII-1

US WOOD COATINGS & PRESERVATIVES MARKET SHARE, 2004
($2.6 billion)



INDUSTRY STRUCTURE
Section gives insight on restructuring activities, competitive strategies and market share

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Samples Pages, Tables & Charts

TABLE IV-5

WOOD STAIN DEMAND BY APPLICATION & END USE
(million dollars)

Item	1994	1999	2004	2009	2014
Wood Products Shipments	42276	55611	63510	69675	82730
$ stain/000$ products	10.0	10.1	10.8	11.6	12.1
Stain Demand					
__By Application:					
Decking					
Furniture					
Cabinets					
Fencing					
Flooring					
Other Applications					
By End Use:					
New					
Maintenance					
$/gal					
Stain Demand (mil gal)					

PRODUCTS
The Products Section provides demand for historical years (1994, 1999, 2004) as well as forecasts growth to 2009 and 2014; data is illustrated with more than 100 tables and charts

COMPANY PROFILES

Fuller (HB) Company
1200 Willow Lake Boulevard
Vadnais Heights, MN 55110
651-236-5900
http://www.hbfuller.com

Revenues: $
North Americ
Employment:

Key Products

HB Full ... emi-
cals. The Co ... and
Full-Valu/Spe

The Cor ... ts
industry throu ... 2004
revenues of $ ... Global
Coatings division (Oakdale, Minnesota), which also operates as HB 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 introduced the ALOREN line of designer metallic powder coatings that can be used for various home furnishings.

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COMPANY PROFILES
The Profiles Section analyzes 37 firms active in the wood protection coatings and preservatives market. The profiles are a sampling or cross-section of the types of companies involved in the industry.

"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 water-based, 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 water-based coatings, such as ..."

--Section IV, pg. 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.

#2031 .... 02/2006.................... $4200

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.

#2028 .... 01/2006.................... $5300

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 pressure-treated 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 .... 10/2005.................... $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.

#1902 .... 03/2005.................... $4100

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 .... 11/2004.................... $4100

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