



Home Innovation
RESEARCH LABS

MARKET TRENDS AND OPPORTUNITIES FOR PLASTIC COMPOSITE PRODUCTS IN CONSTRUCTION

CLMA BOARD MEETING

October 2018

Finding Innovation a Home

Home Innovation Research Labs

- Founded in 1964 as wholly-owned subsidiary of NAHB
- Independent, for-profit researchers assisting development and commercialization of new building technologies
 - Engineering research & development
 - Market & field research
 - Laboratory testing
- #1 in green home building certification (NGBS)
- Building codes and standards developers
- Partners with ICC-ES to fast-track issuance of ESRs



Purpose and Outline of Presentation

1. Review of building materials trends in new homes and remodeling
 1. Decks & Porch Surfacing
 2. Deck & Porch Railing Systems
 3. Exterior Trim & Fascia
 4. Fences & Privacy Walls
 5. Siding & Exterior Finishes
 6. Residential Roofing
 7. New Home Construction Industry Trends
2. Discuss current and future market opportunities

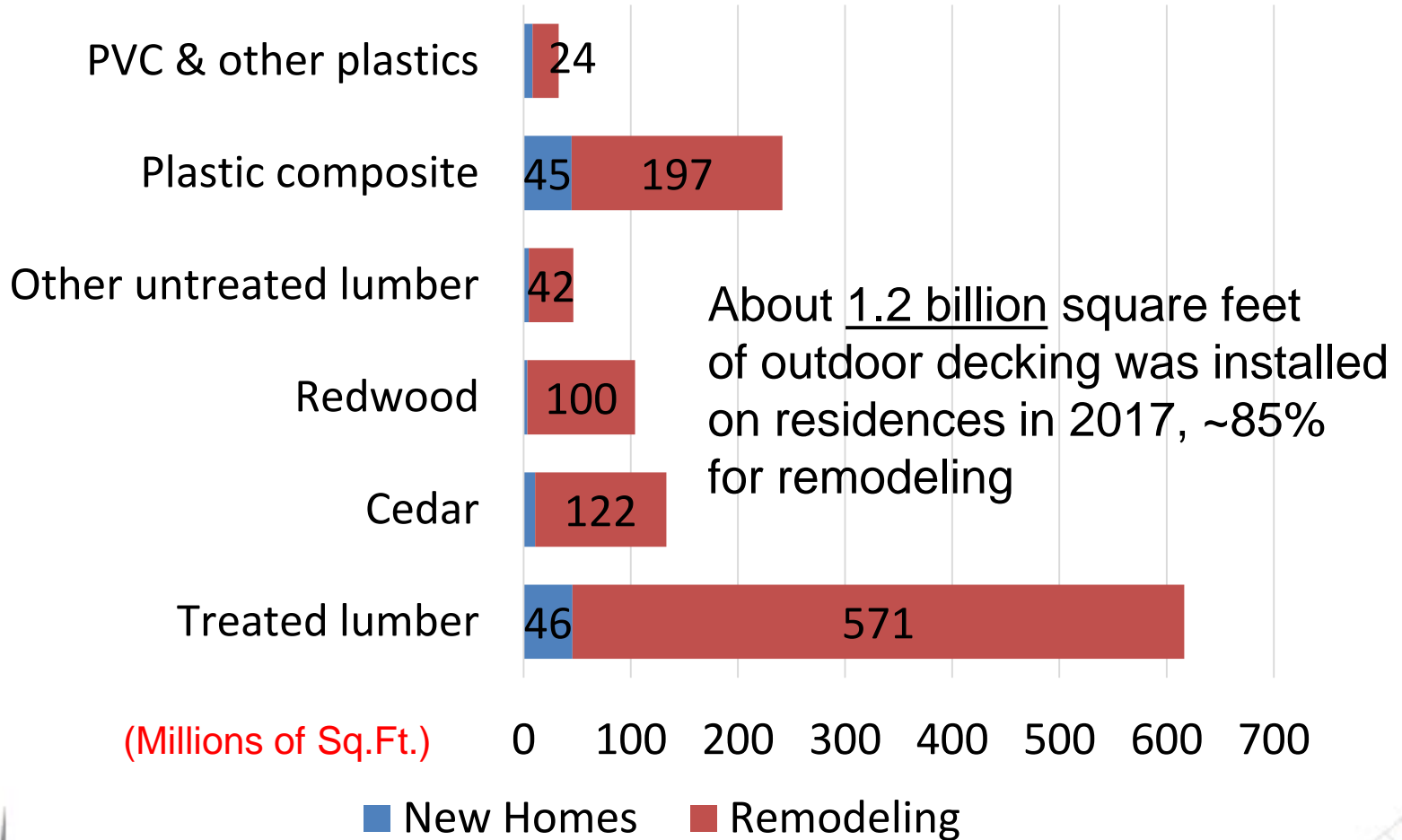


Annual Building Product Tracking Studies

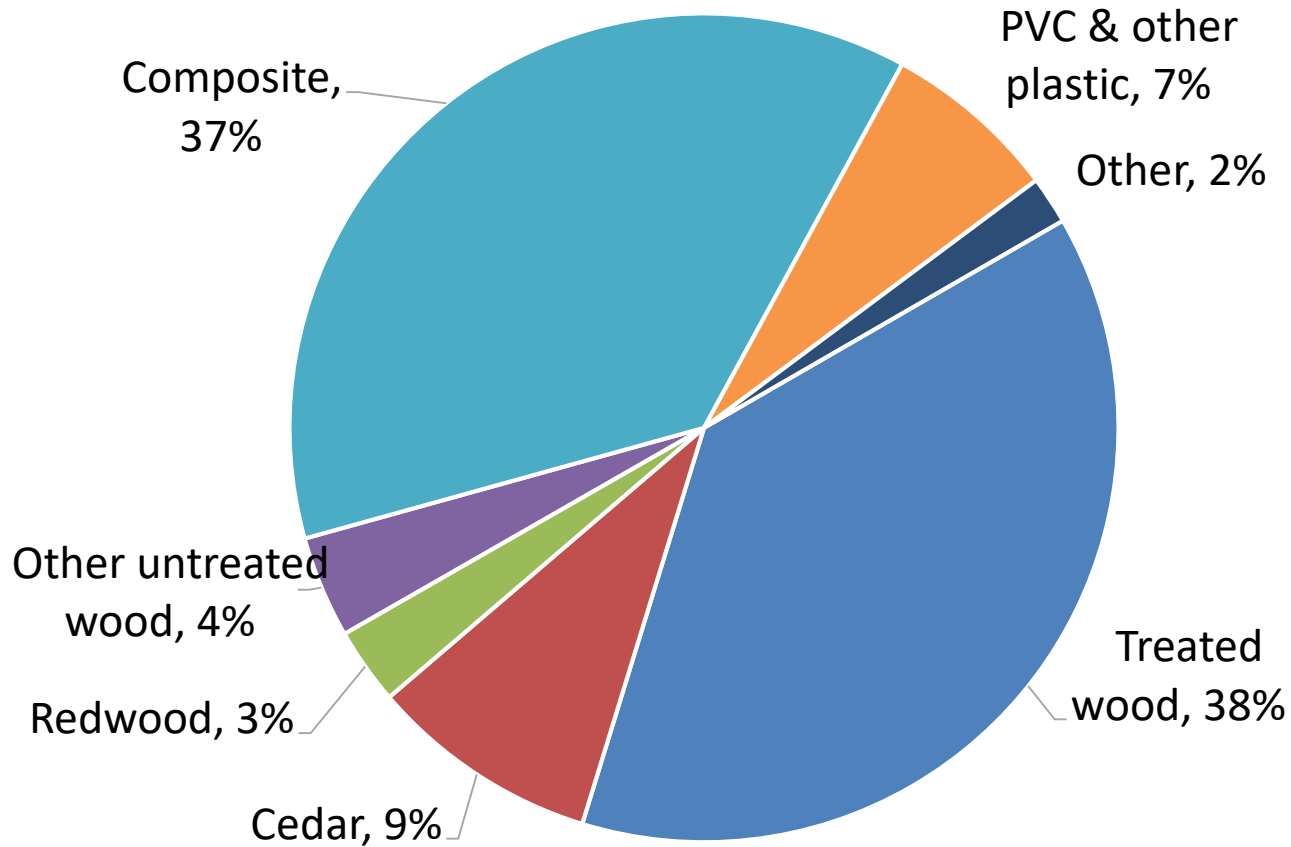
- Home Innovation has been tracking annual materials purchases since 1995
 - Builder Practices Survey of 1,500 U.S. Builders
 - Consumer Practices Survey of 100,000+ U.S. households
- Decades of custom market research, sponsored by hundreds of building materials manufacturers
- Support of development and launch of hundreds of new building products



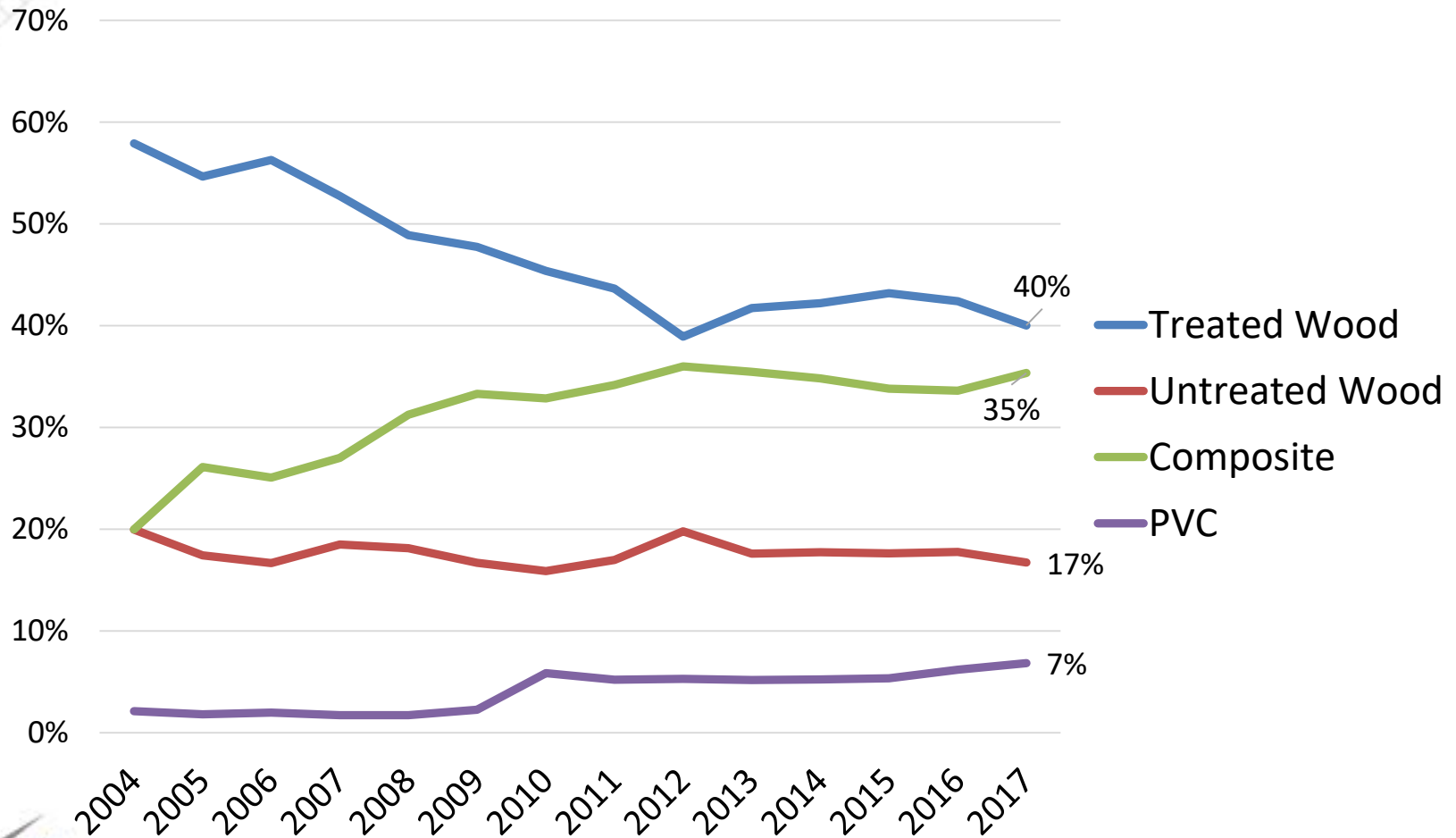
Decking Volumes in New Homes and Remodeling, by Material Type (2017)



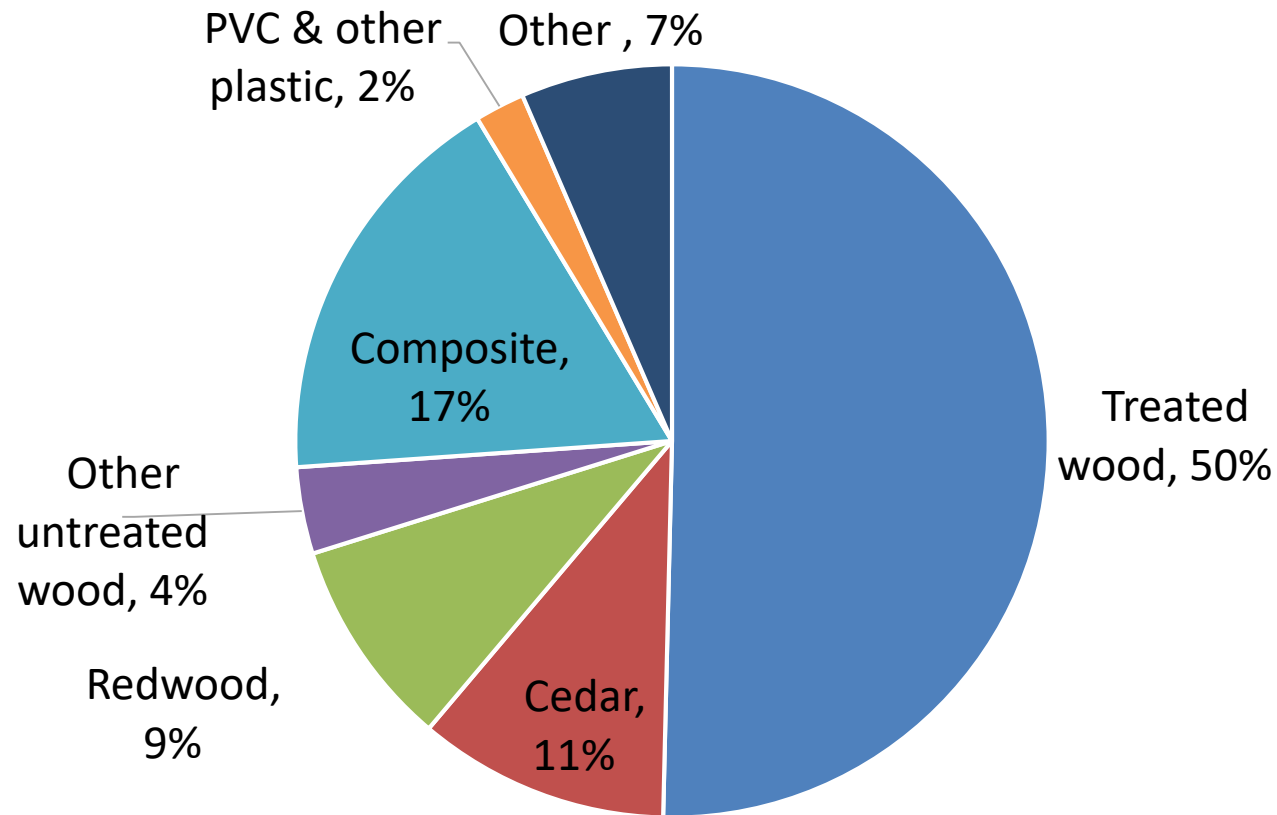
Decking Material in All New Homes, 2017



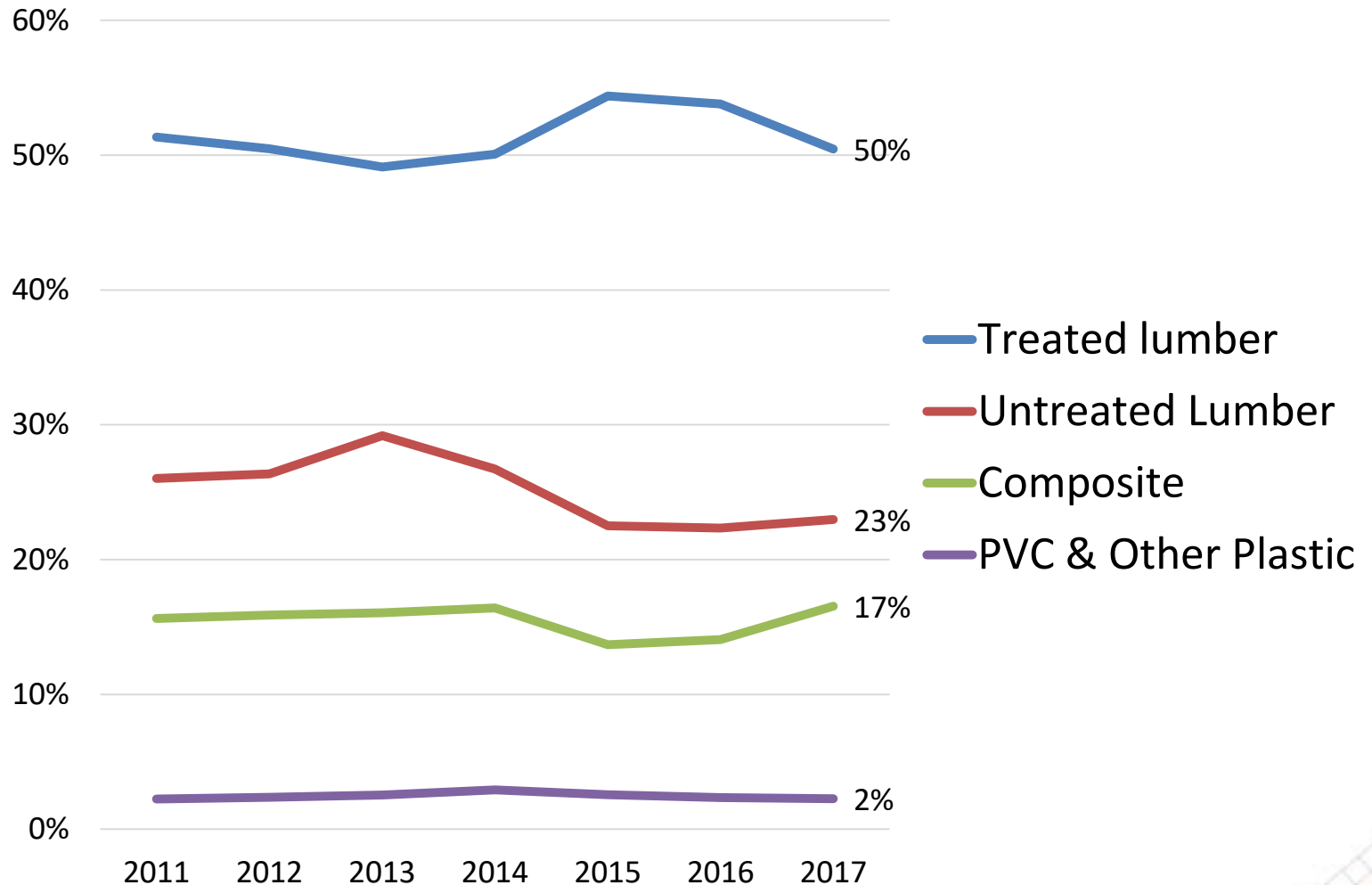
Shares of Decking Material in New Single Family Detached Homes



Decking Material in Repair and Remodeling, 2017



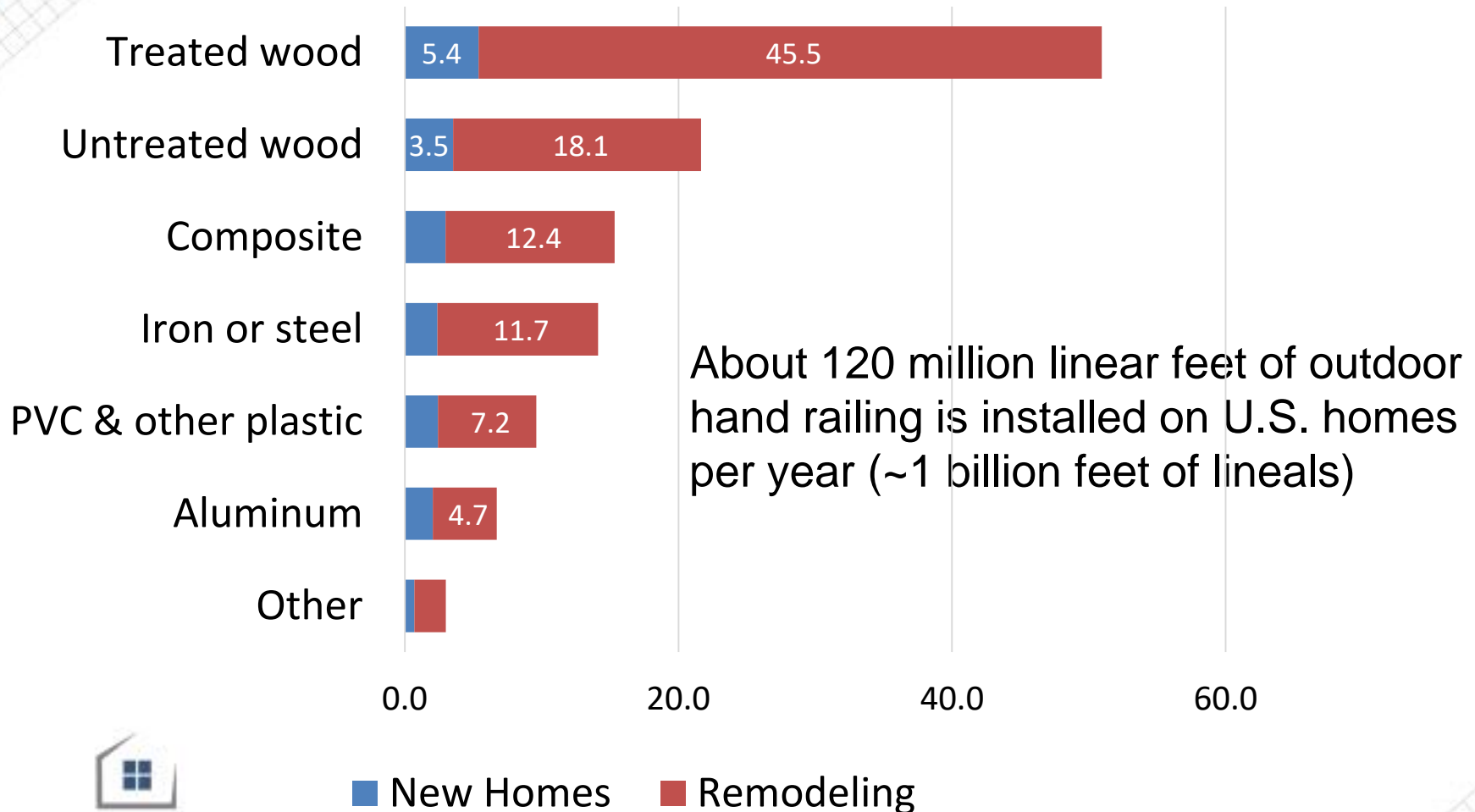
Shares of Raised Porch and Decking Material in Residential Remodeling



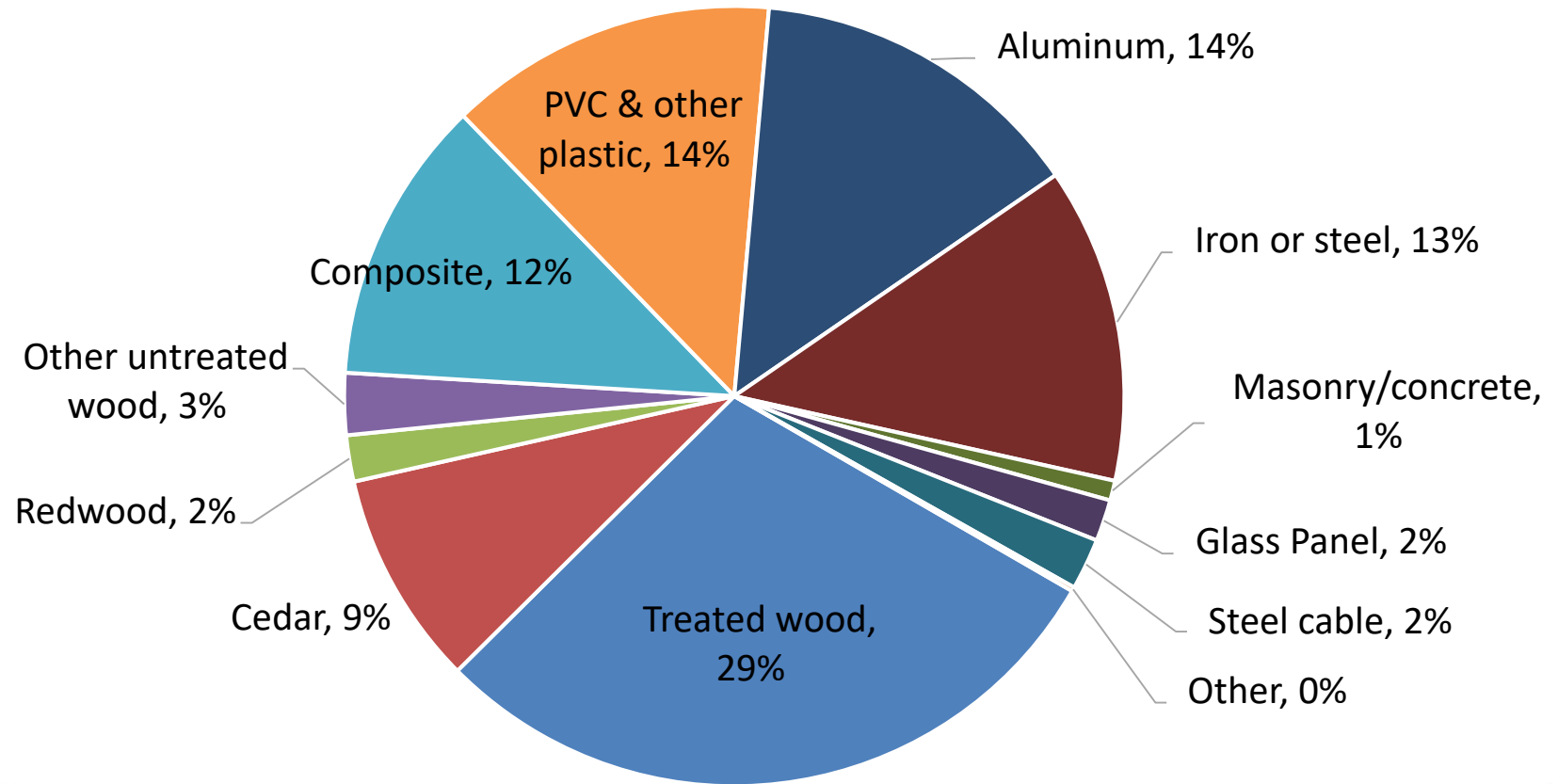
Source: Annual Consumer Practices Reports

Porch and Deck Railing Systems on New Homes and Remodeling, 2017

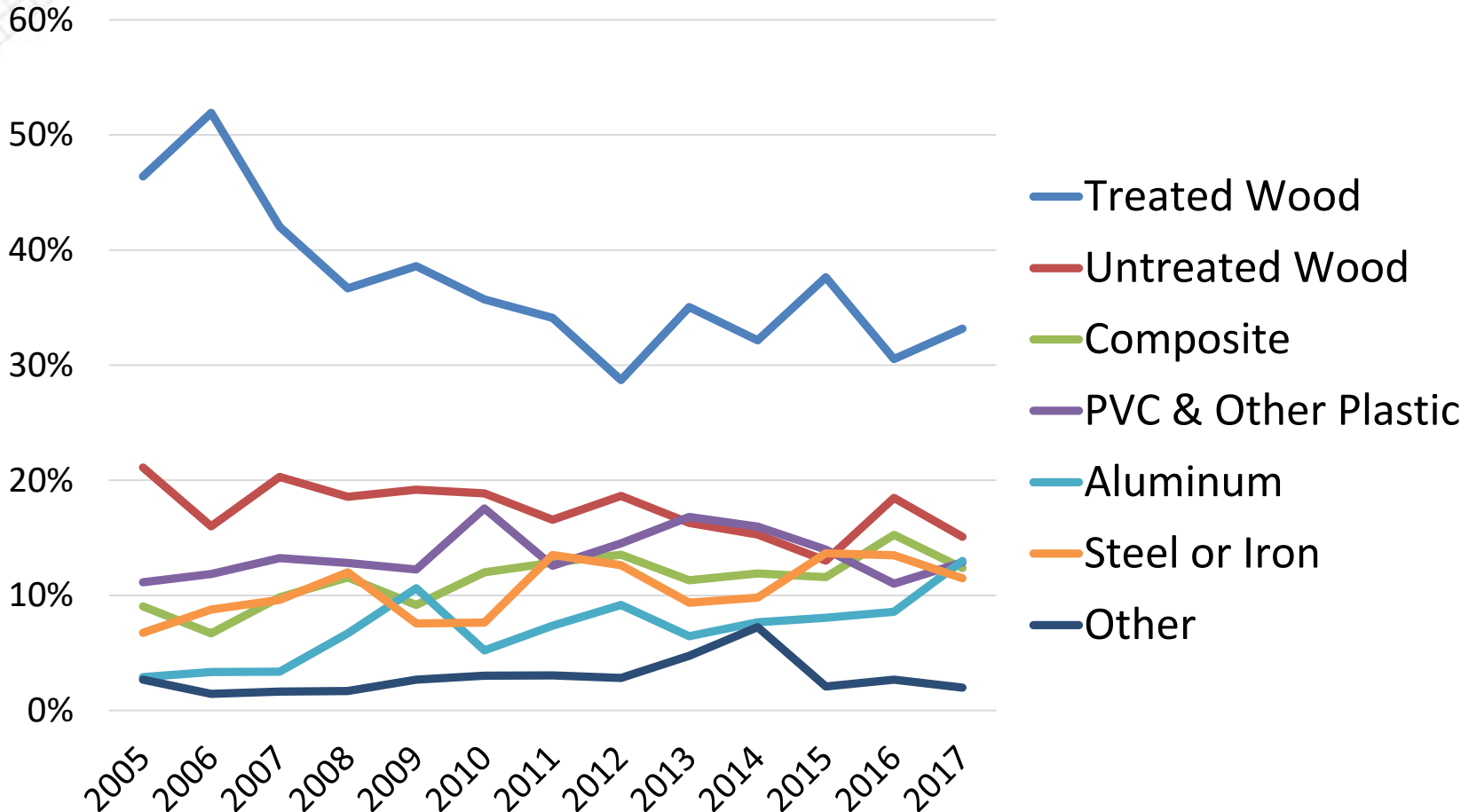
(millions of linear feet of railing)



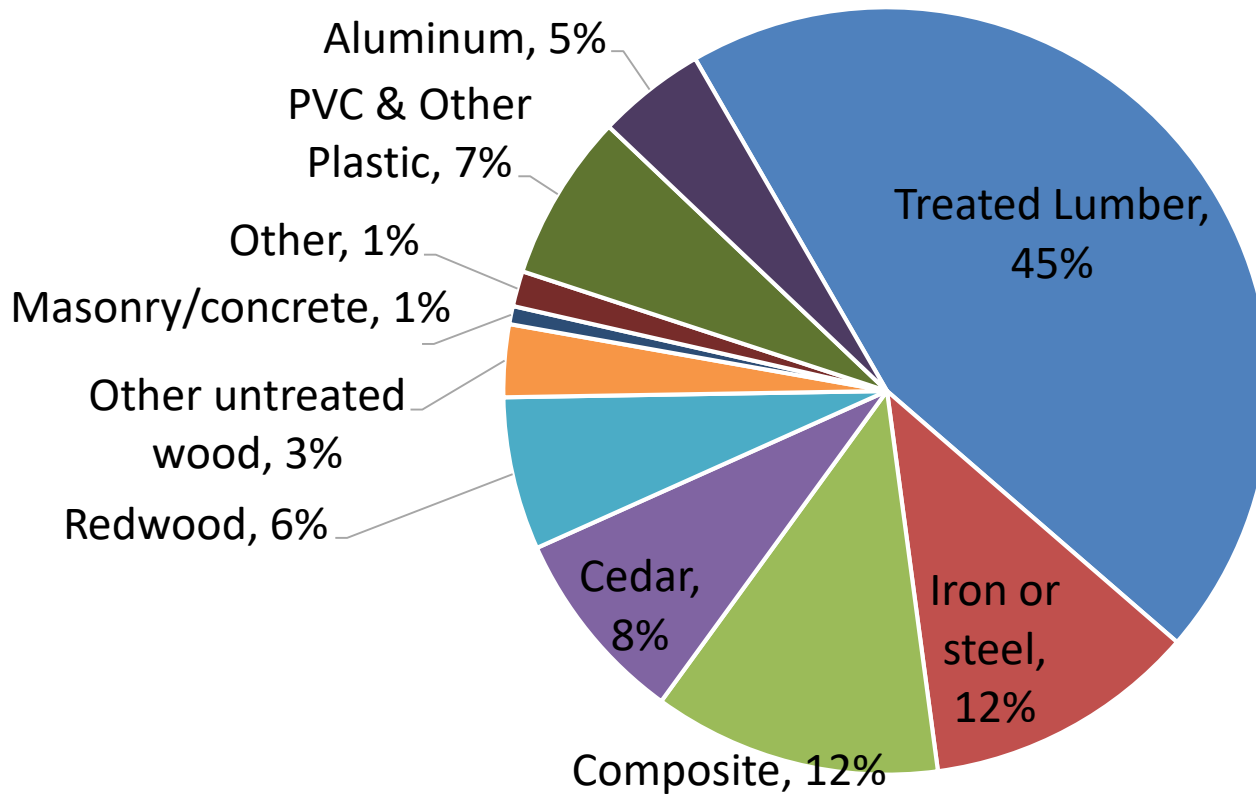
Deck & Porch Railing Shares in New Homes, 2017



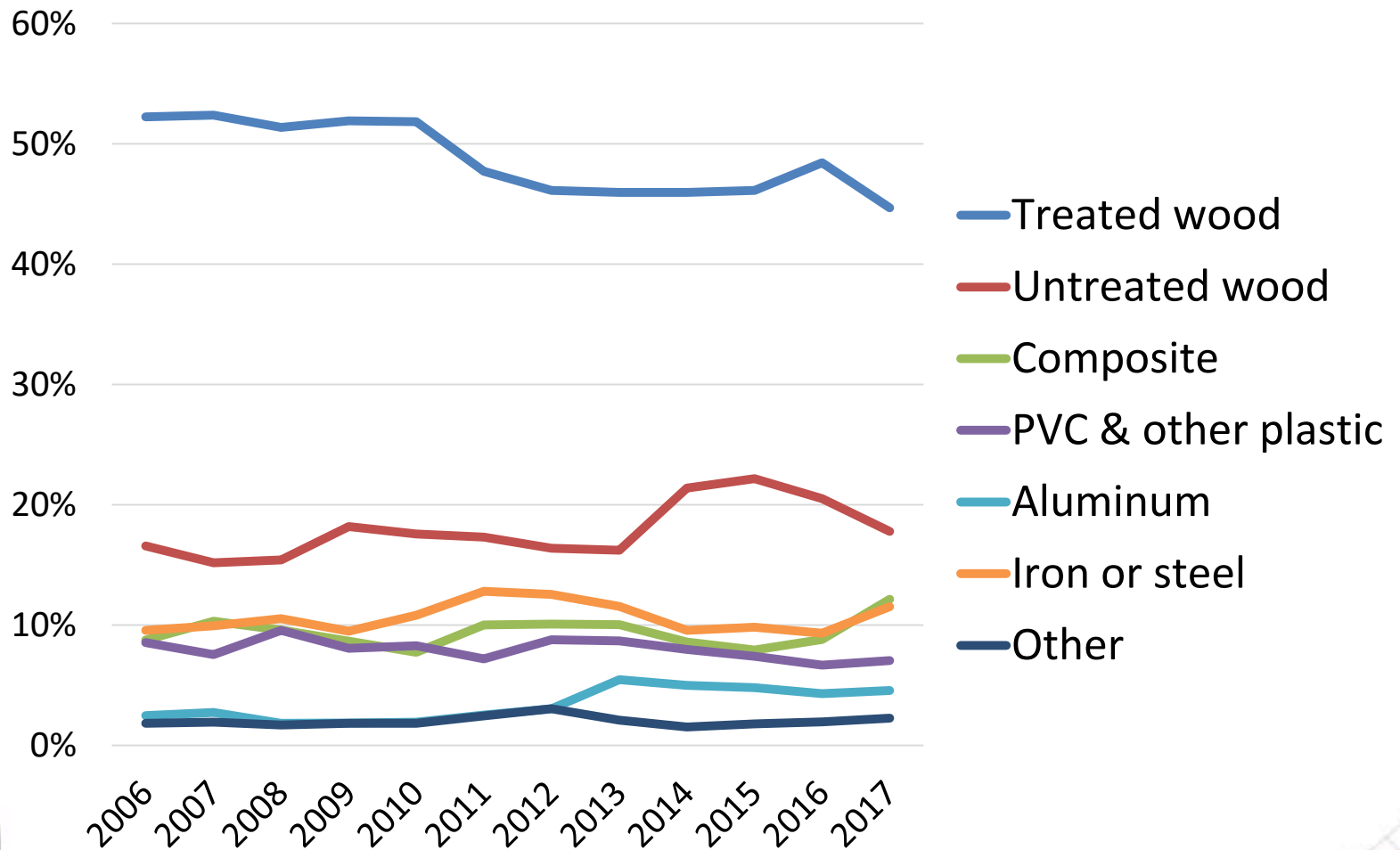
Deck and Porch Railing in New U.S. Homes



Deck & Porch Railing Shares in Repair & Remodeling, 2017

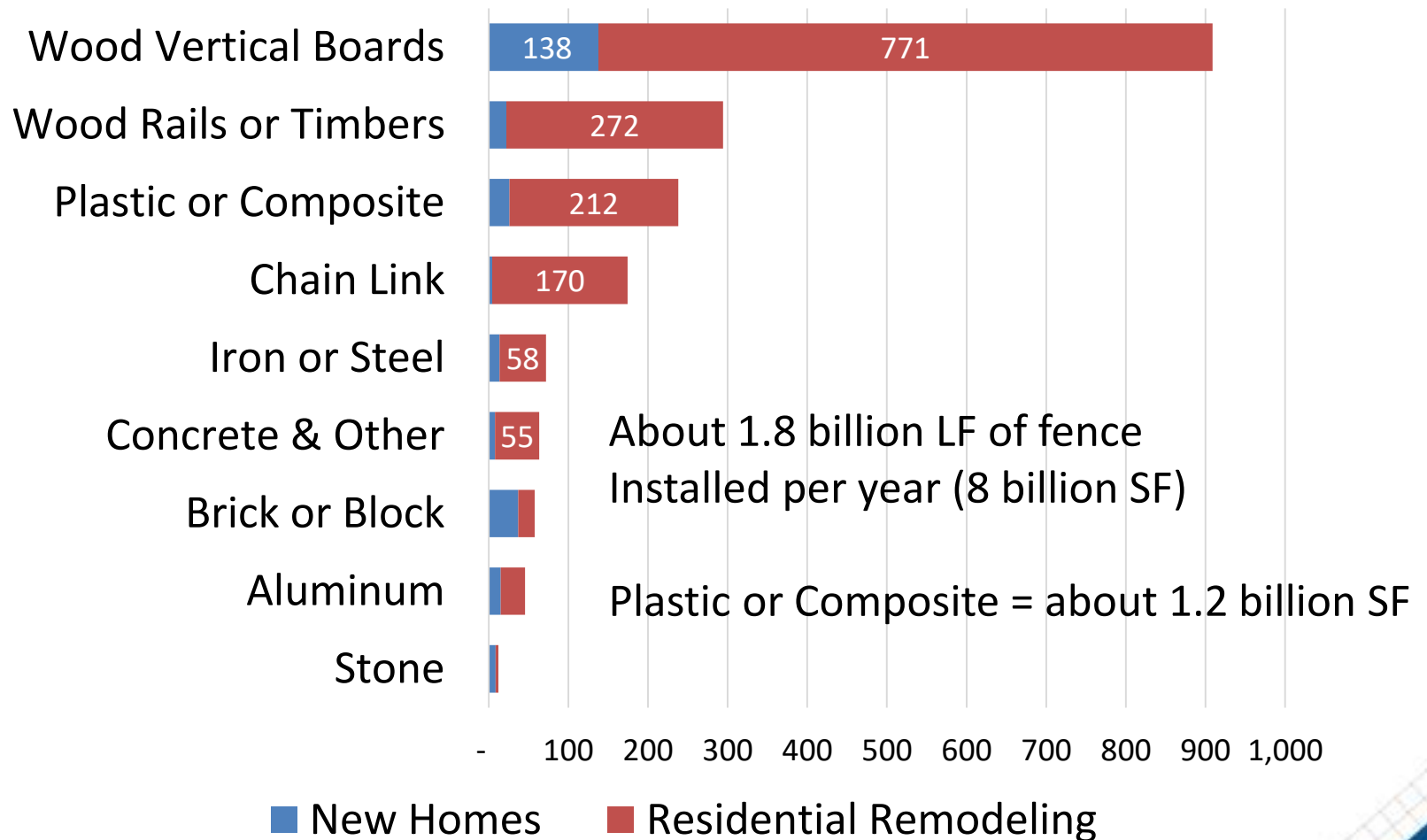


Deck and Porch Railing in U.S. Home Remodeling

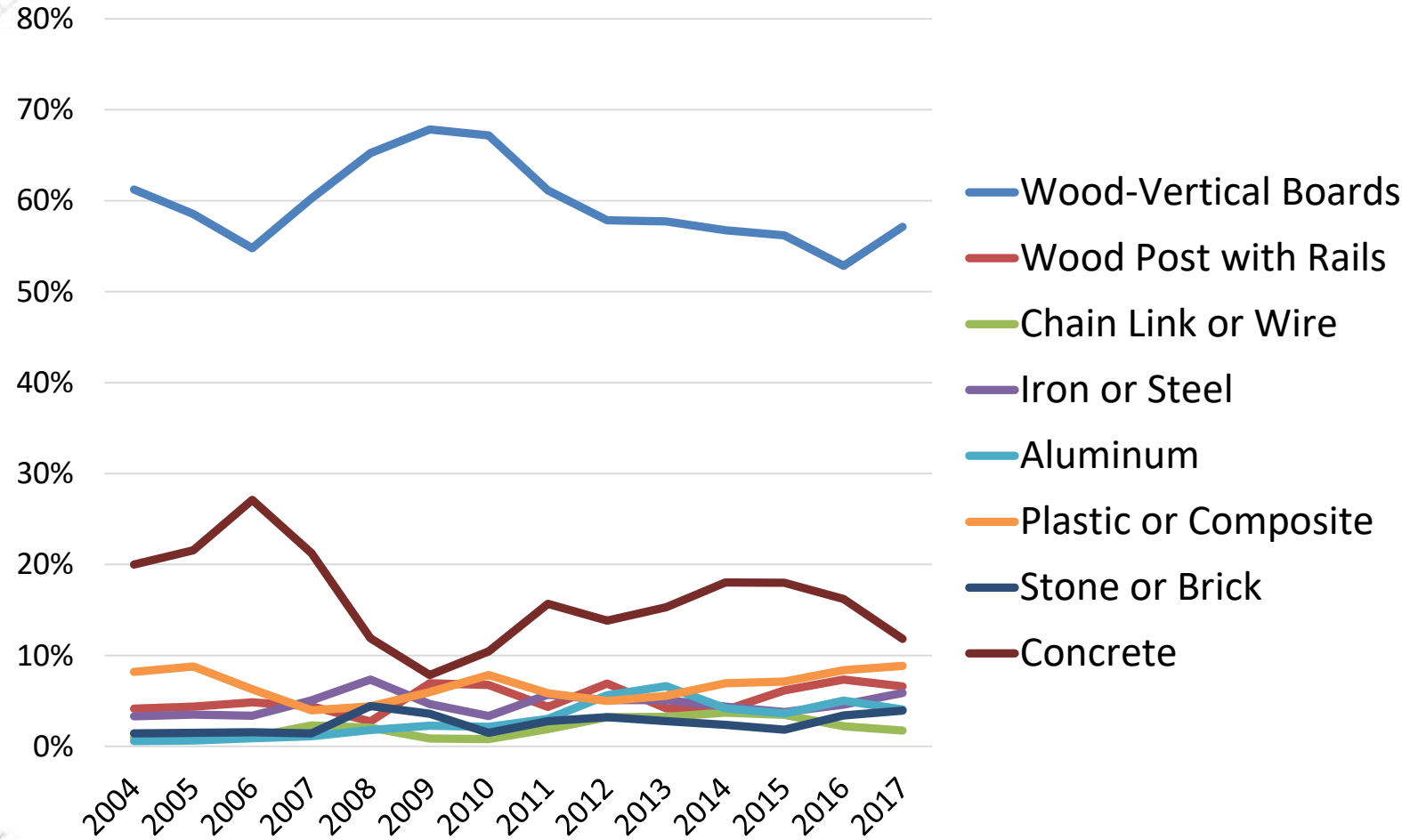


Fences & Privacy Walls Installed in New Homes and Remodeling, 2017

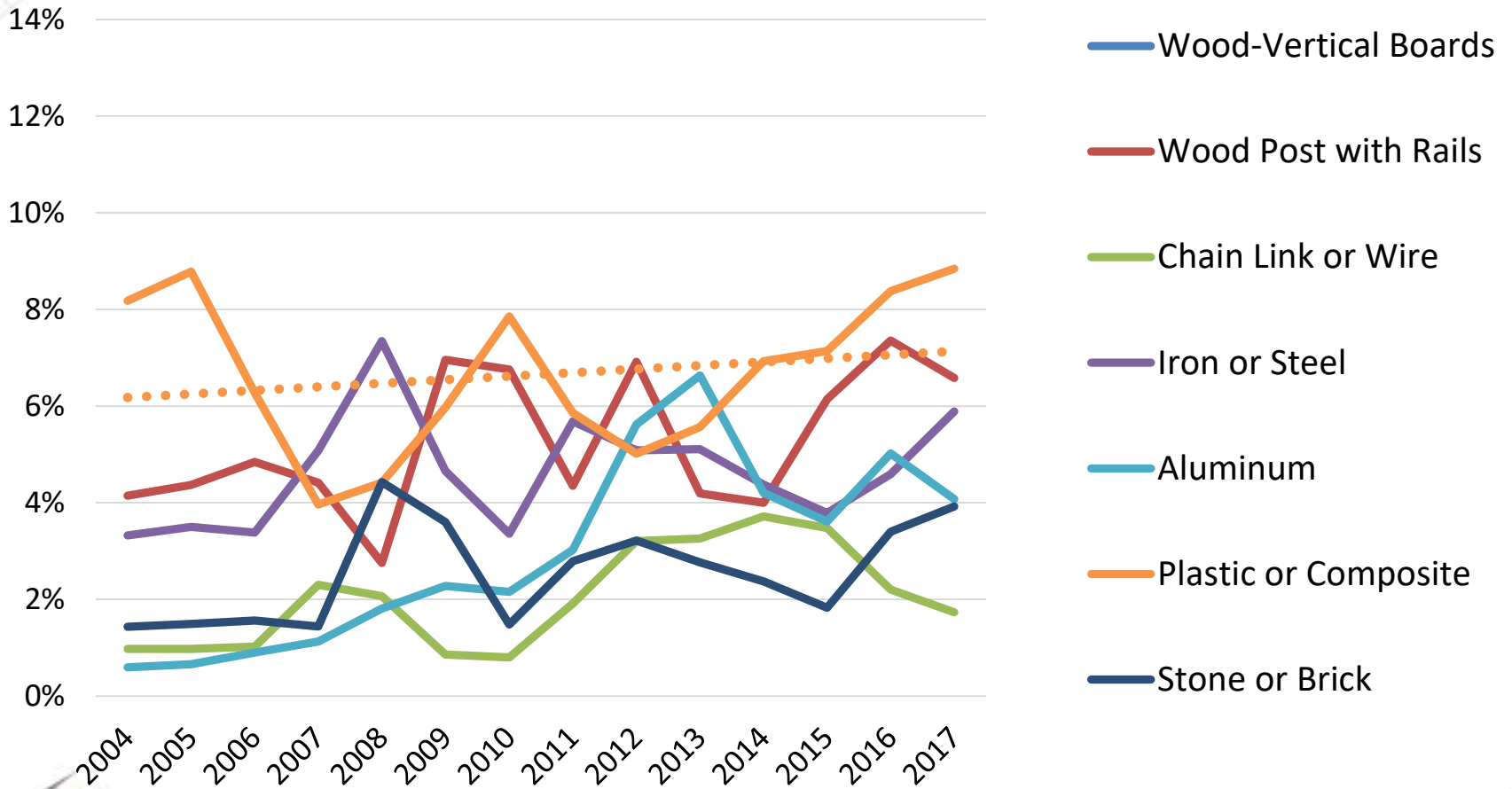
(millions of LF)



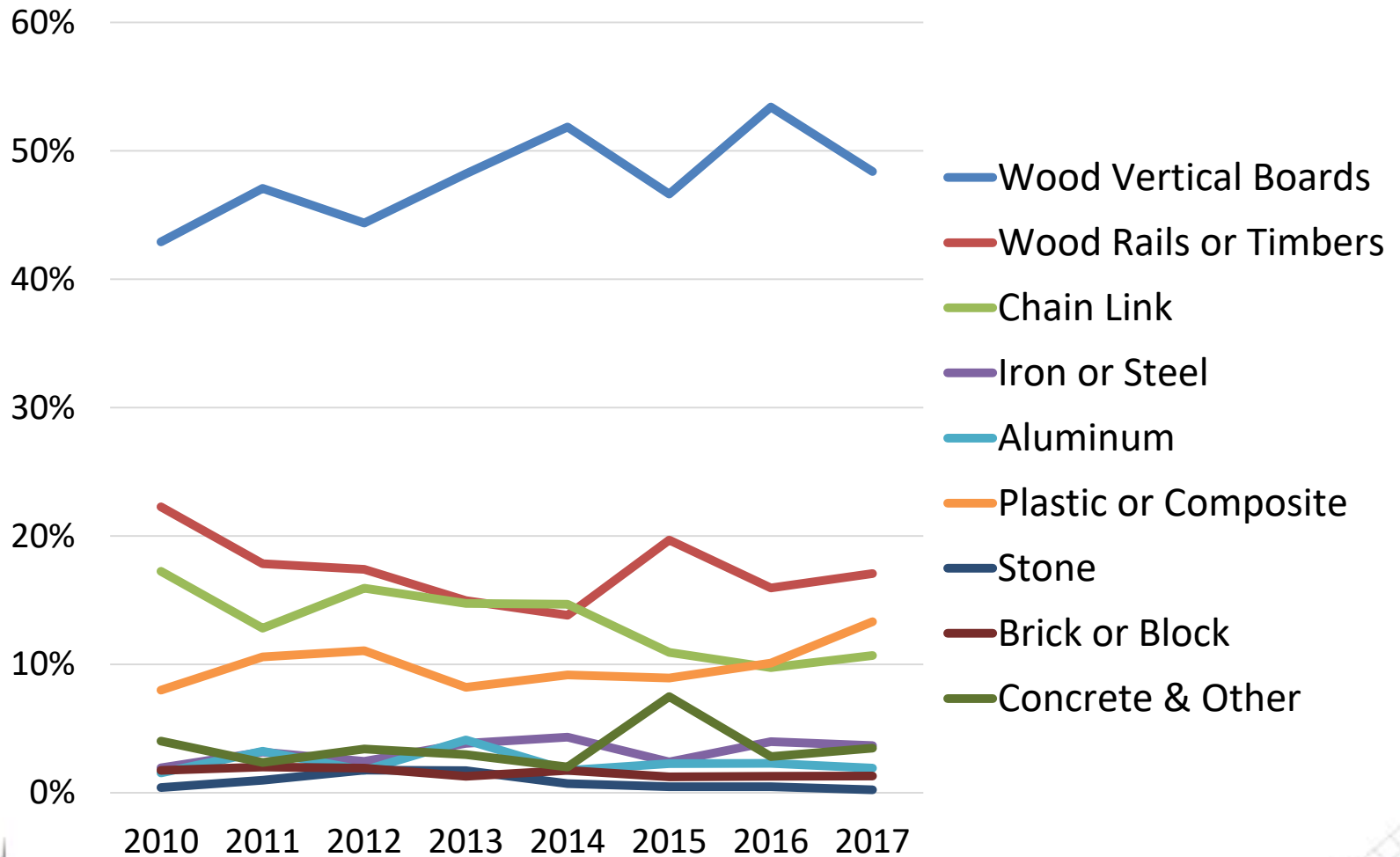
Fence & Privacy Wall Trends in New U.S. Homes



Fence & Privacy Wall Trends in New U.S. Homes (2nd Tier)



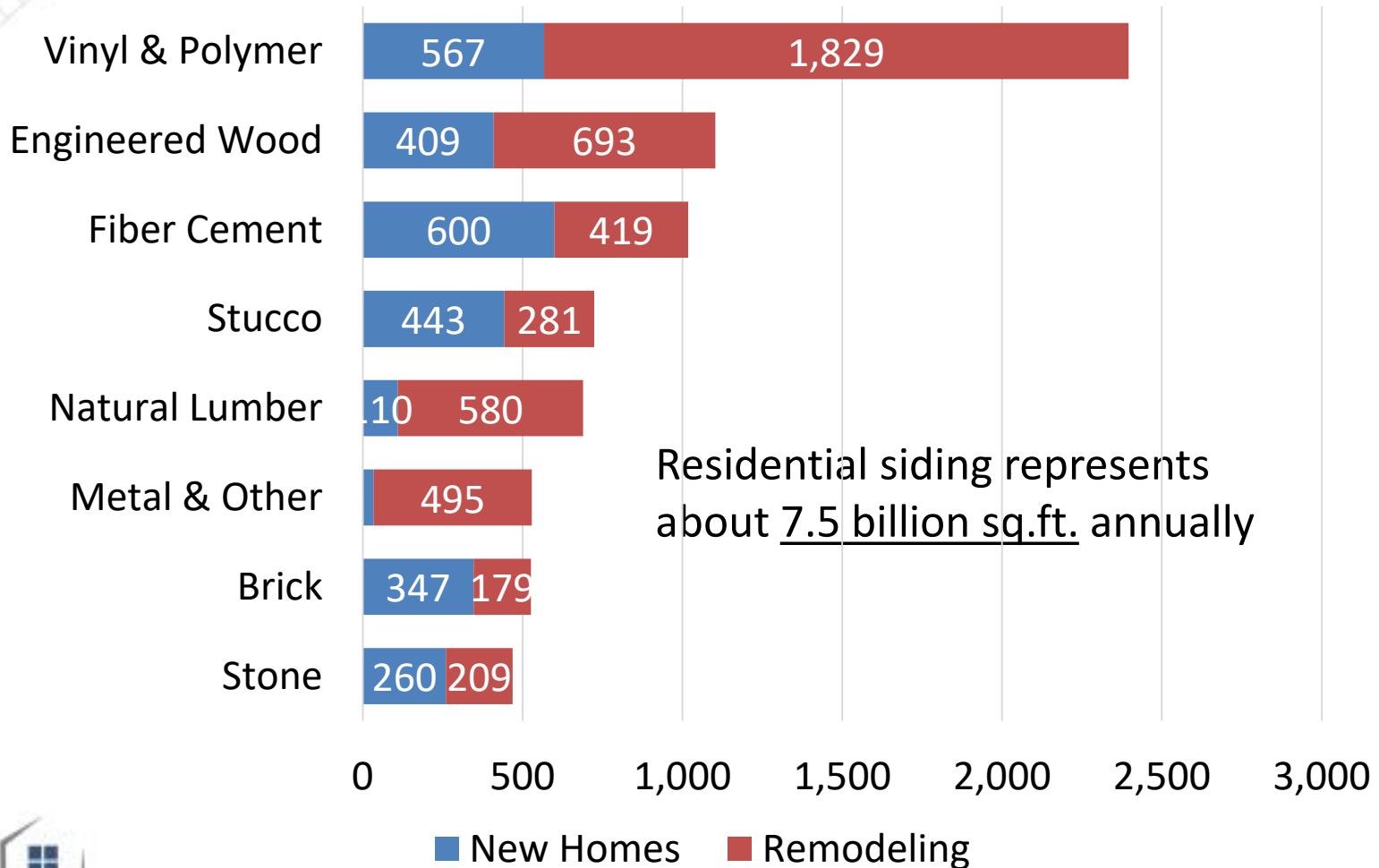
Fence & Privacy Walls Installed in U.S. Home Remodeling



Source: Annual Consumer Practices Reports

Siding in New Homes and Remodeling, 2017

(millions of sq.ft.)



Your New Product Installs So Easily, Anyone Can Do It...

- Anticipate resistance from some skilled trades
- Demonstration is very important to selling
- Consider non-traditional users, like
 - remodeling generalists
 - handymen who welcome alternatives that don't require special tools or training
- Consider do-it-yourselfers (prosumers, weekend warriors, etc.)



Management Labor Deficit

- Recent Home Innovation study of ASHRAE members revealed that there is a deficit management levels of construction companies – not just skilled tradespeople
 - The primary lack was project coordination and management
 - The skills were particularly lacking a deep knowledge of construction (not engineering) need jobsite experience and maturity to anticipate issues
- Technologies/apps/software solutions are available, but only tech saavy younger generation inclined to use them
 - Webinars to facilitate face-to-face contact
 - Tracking software to communicate real-time with building team
 - Communications apps





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THANK YOU

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