Basis for Presentation Data: Home Innovation’s Building Products Tracking Studies

- Home Innovation has been tracking annual materials purchases since 1995
  - Builder Practices Survey of 1,550 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
SF Detached Exterior Wall Materials, Above-Grade

Source: Annual Builder Practices Reports
New Home Wall Construction, 2019
Combined Single & Multifamily

- Site built - light wood frame: 77.4%
- Concrete block: 7.4%
- Panelized - light wood frame: 5.8%
- Poured concrete: 2.3%
- Steel (all types): 1.9%
- Modular - light wood frame: 1.9%
- Post & beam: 0.9%
- Insulated concrete forms: 0.9%
- Logs: 0.5%
- Structural insulated panels: 0.5%
- Other concrete or masonry: 0.4%
- Precast concrete: 0.2%

Source: 2020 Annual Builder Practices Reports
Shares of **Exterior Wood Wall Framing by Species / Type (2017 & 2019)**

- Spruce / Pine / Fir (SPF) or eastern spruce: 38.0%
- Southern yellow pine (SYP): 25.6%
- Douglas fir: 25.5%
- Finger joined (any species): 20.5%
- Preservative treated (any species): 11.5%
- Hem-fir or other western woods: 10.0%
- LVL (laminated veneer lumber): 0.7%
- LSL (Timberstrand, etc): 0.2%
- Other: 0.0%
Reduce Lumber Cost Through Advanced Framing or Optimum Value Engineered (OVE) Framing

• Primary Benefits—more resource efficient and energy efficient
• Designing on two-foot modules for sheathing
• Spacing wall studs, joists and rafters up to 24 inches on center
• Two-stud corner framing (ladder blocking for drywall)
• Eliminate headers in non-bearing walls;
  • single headers or downsized double headers in bearing walls
• Use single top plates with in-line framing
• Eliminate jack studs and cripple studs where possible
• Use 2 x 4 + foam sheathing in place of 2 x 6
Exterior Wall Framing in New Single Family Detached Homes

Source: Annual Builder Practices Reports
New Single Family Home Floor Construction (% of floor area)

Source: Annual Builder Practices Reports
Roof Construction in Single Family Homes
(% of roof area)

Steel = 0.2% and I-Joists = 3% of rafters

Source: Annual Builder Practices Reports
Shares of Primary Wall Sheathing in New SFD Construction

Source: Annual Builder Practices Reports
Shares of Roof Sheathing in New SFD Homes

Other options: corrugated steel deck or metal roof over spaced boards

Source: Annual Builder Practices Reports
Shares of Floor Sheathing Materials in New SF Detached Homes (All Floors)

Source: Annual Builder Practices Reports
Porch Surface Materials, New SF Detached Homes 2019

Source: Annual Builder Practices Reports
Deck Surface Materials, New SF Detached Homes 2019

- Composite plastic: 40%
- Treated wood: 38%
- Cedar: 9%
- PVC & other plastic: 7%
- Other: 2%
- Redwood: 2%
- Other untreated wood: 2%

Source: Annual Builder Practices Reports
THANK YOU

Contact me for further discussion
ehudson@homeinnovation.com

Home Innovation Research Labs
400 Prince George’s Blvd | Upper Marlboro, MD 20774
P: 301.430.6194 | F: 301.430.6180
HomeInnovation.com