

EXTERIOR RESIDENTIAL CLADDING

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A Completed Study of the 2002
U.S. and Canadian Markets

First Edition • Spring 2003

Exterior Residential Cladding - Completed Study Prospectus

A Comprehensive Study of the U.S. and Canadian Markets is Now Available for Sale in its Entirety or by Chapter

Ciprus Limited LLC is pleased to announce the completion of our first edition of Exterior Residential Cladding - A Multi-Sponsored Study of United States and Canadian Markets. The report, representing over 10 months of exhaustive research, including in excess of 1,750 in-depth telephone interviews and hundreds of hours of additional conversations and meetings with industry participants across North America, is presented in one bound volume consisting of over 870 pages of detailed analysis in matrix format.

The report provides a thorough review of cladding installations by residential non-tract builders and contractors, residential tract builders and renovation and siding contractors. Cladding installations were documented in starter, move-up and luxury single family homes, multi family homes and renovation.

1. 2002 U.S. Cladding Market - Share by Cladding Material

Cladding Material	Squares	%	Rank
Total	95,000,000	100.0	
Aluminum	1,050,000	1.1	10
Brick	9,500,000	10.0	3
EIFS (Exterior Insulation Finish Systems)	450,000	0.5	12
Fiber Cement	14,000,000	14.7	2
Hardboard	4,150,000	4.4	7
Masonry	1,900,000	2.0	9
OSB	4,350,000	4.6	6
Steel	550,000	0.6	11
Stone	400,000	0.4	13
Stucco	8,700,000	9.2	4
Vinyl	40,030,000	42.1	1
Wood - Cedar	3,100,000	3.3	8
Wood-Plywood	5,500,000	5.8	5
All Other	1,320,000	1.4	-

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A Two Phase Research Plan Phase 1: Market Size, New vs Renovation, Producer Capacities, Growth Rates and More. Phase 2: A Statistical Survey Among 1,774 Builders, Contractors and Siding Contractors in the U.S. and Canada

Phase 1 Presents the overall market size, share by cladding type, new construction versus renovation, distribution including specialty distributors versus retail. Data presented are based upon hundreds of hours of face to face and telephone discussions among the leading cladding industry participants across North America and represent their combined industry knowledge.

Phase 2 Is based upon an in-depth survey among 1,774 builder and contractor establishments in the United States and Canada. This phase analyzes, in matrix format by parameter, the number of contractors installing cladding by type, the units clad and the number of squares of cladding installed:

3 Contractor Types 1. Builders 2. Non-Residential 3. Contractors 5. Insulation	3 Establishment Sizes 1. Small (1 - 6 employees) 2. Medium (7 - 19 employees) 3. Large (20+ employees)
9 U.S. Census Regions 1. New England 2. Middle Atlantic 3. South Atlantic 4. W. N. Central 5. Mountain 6. W. S. Central 7. E. N. Central 8. E. S. Central 9. Pacific	5 Housing Types 1. Starter 2. Move-Up 3. Luxury 4. Multi Family 5. Renovation
2 Canadian Regions 1. East 2. West	Related Products 1. Soffit, Trim, Fascia

New Construction and Renovation What types of cladding are being installed in new construction and renovation by housing type, including starter homes, move-up homes, luxury homes, multi-family housing and repair and renovation? What are the geographical differences in cladding installations in the 9 U.S. Census regions and Eastern and Western Canadian regions? What are the differences in installations by contractor type including

Exterior Residential Cladding - Completed Study Prospectus

Highlights and Enhancements - What is contained in the 2002 Edition

residential non-tract, residential tract and renovation and siding contractors. What is the difference in cladding installations by contractor size including small, medium and large contractors. What combinations of cladding are being installed with what types of soffit, fascia and trim?

Answers to these questions are contained in the completed report and provide powerful analytical tools for use in strategic, market and sales planning and business development.

Growth Factors	Throughout the report data is presented that summarize the factors that cause cladding materials to grow or decline.
Un-met Needs	Un-met needs are summarized by cladding material, trim configuration, width, length, thickness and other factors.
Related Products	These include the types and quantity of soffit used in conjunction with specific cladding materials, vented and un-vented, fascia quantity and type, as well as trim types used with cladding materials and quantities consumed.
Brand Specific Data	Analysis by brand is provided by cladding material, by region, contractor type and size, as well as construction type including starter, move-up, luxury, multi-family and renovation activities.
Matrix Data	All information is provided in matrix format by the key parameters in the research, including geographic area, contractor type, contractor size and construction type.
Cladding Products	Key cladding products included in the research are: <ul style="list-style-type: none">• Brick• EIFS (Exterior Insulation & Finish Systems)• Fiber Cement• Stucco• Vinyl• Wood• Other (Aluminum, Hardboard, OSB, Steel)

Price List Effective May 15, 2003

Now Available in its Entirety or By One or More of the 7 Product Chapters.

Complete Report Includes all 7 Product Chapters

Complete report contains 830 pages of data, charts, tables, summary tables, graphs and a detailed analysis of light gage steel framing activities and building products included in the research. The study documents installations of cladding materials by contractor type, size, census region and construction category along with soffit, fascia and trim usage. This study is the most comprehensive analysis of its type published in one easily referenced document.

The information has been developed through an impressive database of 1,774 detailed interviews with contractor establishments across North America, in addition to hundreds of hours of face to face discussions with leading cladding industry participants.

Each subscription - either the full report or individual chapters include three bound copies. *All subscriptions include unlimited telephone consultation.*

For more information please call John Ciprus at (860) 767-7685, Fax (860) 767-2941, or e-mail: john.ciprus@sidingresearch.com or john.ciprus@ciprus.com.

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Report and Chapter Description	Complete Report	Pricing Schedule - Individual Chapters						
		Brick	EIFS	Fiber Cement	Stucco	Vinyl	Wood	Other Aluminum Hardboard OSB Steel
All Prices Include 3 Copies	\$18,000	\$4,500	\$4,500	\$4,900	\$4,500	\$4,900	\$4,500	\$3,500
Total Pages	830	335	337	348	337	348	337	300
<u>Phase 1 Report</u>	<u>72</u>	<u>72</u>	<u>72</u>	<u>72</u>	<u>72</u>	<u>72</u>	<u>72</u>	<u>72</u>
Overview	11	11	11	11	11	11	11	11
Cladding Manufacturer Interviews	45	45	45	45	45	45	45	45
Summary of Phase 2 Highlights	16	16	16	16	16	16	16	16
<u>Phase 2 Report</u>	<u>758</u>	<u>263</u>	<u>265</u>	<u>276</u>	<u>265</u>	<u>276</u>	<u>265</u>	<u>228</u>
Introduction-U.S.	79	79	79	79	79	79	79	79
Introduction-Canada	15	15	15	15	15	15	15	15
Cladding Chapters + Trim - U.S.	578	83	85	96	85	96	85	48
All Cladding + Trim Canada	44	44	44	44	44	44	44	44
Open Ended Responses to Trends	42	42	42	42	42	42	42	42

* Orders for more than one chapter will receive a 10% discount.

Table of Contents - Phase 1

Introduction & Overview

Pages 12

Introduction

1. 2002 U.S. Cladding Market - Share by Cladding Material
2. 2002 Mix of New Construction vs Renovation
3. 2002 Share of New vs Renovation by Cladding Material
4. 2002 Manufactured Housing - Cladding Consumption
5. 2002 Multi - Family Housing Characteristics & Estimate of Cladding Consumption
6. 2002 Single Family Construction - Estimate of Total Cladding Consumed
7. 2002 Residential New Construction - Estimate of Cladding Consumed
8. Comparison of U.S. Housing Stock, 2002 U.S. Contractor Establishments and Annual Building Permits
9. 2002 Cladding Shares by Census Region - Percentages from Phase 2 Research
10. 2002 Estimates of Cladding Shares by Census Region - Squares
11. 2002 Estimates of Cladding Shares by Census Region - Squares

Manufacturer Interviews - Aluminum

Pages 4

1. 2002 Share by Cladding Material - Aluminum
2. Aluminum Cladding - Manufacturer Interviews - New vs Renovation
3. Aluminum Cladding - Manufacturer Interviews - Non-Retail vs Retail
4. U.S. Market Ranking of Leading Aluminum Producers

Manufacturer Interviews - Brick

Pages 5

1. 2002 Share by Cladding Material - Brick
2. U.S. Residential Brick Market Size Calculation
3. Brick Cladding - Manufacturer Interviews - New vs Renovation
4. Brick Cladding - Manufacturer Interviews - Non-Retail vs Retail
5. U.S. Market Ranking of Leading Brick Producers

Manufacturer Interviews - EIFS

Pages 2

1. 2002 Share by Cladding Material - EIFS
2. U.S. Market 2002 Share of EIFS Cladding Manufacturers

Manufacturer Interviews - Fiber Cement

Pages 6

1. 2002 Share by Cladding Material - Fiber Cement
2. Fiber Cement Cladding - Manufacturer Interviews - New vs Renovation
3. Fiber Cement Cladding - Manufacturer Interviews - Non-Retail vs Retail
4. U.S. Market Ranking of Leading Fiber Cement Producers
5. Fiber Cement Cladding Historical Market Size and Three Year Forecast
6. 2002 U.S. Fiber Cement Industry Capacity by Manufacturer

Manufacturer Interviews - Hardboard

Pages 5

1. 2002 Share by Cladding Material - Hardboard
2. U.S. Hardboard Market Size Calculation
3. Hardboard Cladding - Manufacturer Interviews - New vs Renovation
4. Manufacturer Interviews - Hardboard Cladding Sales Channels
5. Hardboard Cladding Market Shares and Industry Capacities (Millions of Square Feet)

Manufacturer Interviews - OSB

Pages 4

1. 2002 Share by Cladding Material - OSB
2. OSB Cladding - Manufacturer Interviews - New vs Renovation
3. OSB Cladding - Manufacturer Interviews - Non-Retail vs Retail
4. LP Specialty Products Production Facilities

Manufacturer Interviews - Steel**Pages 4**

1. 2002 Share by Cladding Material - Steel
2. Steel Cladding - Manufacturer Interviews - New vs Renovation
3. Steel Cladding - Manufacturer Interviews - Non-Retail vs Retail
4. U.S. Market Ranking of Leading Steel Producers

Manufacturer Interviews - Stucco**Pages 2**

1. 2002 Share by Cladding Material - Stucco
2. U.S. Listing of Leading Stucco Producers

Manufacturer Interviews - Vinyl**11**

1. 2002 Share by Cladding Material - Vinyl
2. Vinyl Cladding - Manufacturer Interviews - New vs Renovation
3. Vinyl Cladding - Manufacturer Interviews - Residential vs Light Commercial vs Mfr'd Housing
4. Manufacturer Interviews - Vinyl Cladding Sales Channels
5. 2002 U.S. Market Size and Share Estimates by Manufacturer
6. Vinyl Cladding Historical Market Size and Three Year Forecast
7. Alcoa - Vinyl Siding Production Facilities
8. Alside - Vinyl Siding Production Facilities
9. CertainTeed - Vinyl Siding Production Facilities
10. LP Specialty Products - Vinyl Siding Production Facilities
11. 2002 Canadian Market Size and Ranking Estimates by Manufacturer

Manufacturer Interviews - Trim**Pages 2**

1. U.S. Hardboard Trim Market Size Calculation
2. Composite Trim Market Size - Market 2002 Shares and Industry Capacities (Millions of Square Feet)

Builders & Contractors - Summary of Phase 2 Data**Pages 13**

1. Cladding Installations by Construction Category - Weighted by Contractor Population
2. Cladding Installations by Contractor Size - Weighted by Contractor Population
3. Cladding Installations by Contractor Type - Weighted by Contractor Population
4. Cladding Installations by Region - Weighted by Contractor Population
5. Who Specified the Cladding - All Cladding Types
6. How Cladding Usage Changed - Past 3 Years - Incidence
7. How Cladding Usage Changed - Past 3 Years - Weighted
8. Reason for Cladding Changes
9. Where Cladding Is Purchased
10. Soffit Usage by Cladding Type - Weighted
11. Trim Usage by Cladding Type - Weighted
12. Definition of Other Trim by Cladding Type
13. Fascia Usage by Cladding Type - Weighted

Distributors & Retailers - Summary of Phase 2 Data**Pages 3**

14. Cladding Sales by Distributors & Retailers - Weighted
15. Anticipated Changes in Cladding Sales - Incidence Basis
16. To Whom Distributors and Retailers Sell Cladding

Chapter Outline - Phase 2 - Introduction to Phase 2

A Series of 3 Surveys: Builder/Contract, Distributor/Retailer & Manufactured Housing - 1,774 Interviews

Introduction

Pages 18

1. Objectives of Phase 2
2. Regional Definitions - United States
3. Regional Definitions - Canada
4. Size Categories
5. Study Respondents
6. Builder and Contractor Types - SIC's
7. Construction Categories - Definitions
8. Universe of Builders and Contractors by Type of Construction - U.S. & Canada
9. Universe of Builders and Contractors Shown by Region - U.S.
10. Universe of Builders and Contractors Shown by Contractor Type and Size - U.S.
11. Universe of Builders and Contractors Shown by Contractor Type and Size and Region - U.S.
12. Universe of Builders and Contractors Shown by Contractor Type and Size and Region - Canada
13. Typical Respondents - Residential Non Tract Builders
14. Typical Respondents - Residential Tract Builders
15. Typical Respondents - Residential Siding & Remodeling Contractors
16. Typical Respondents - Retailers
17. Typical Respondents - Distributors
18. Typical Respondents - Manufactured Housing

Builder/Contractor Sample Description

Pages 52

19. Builder/Contractor Sample by Construction Category & Region
20. Builder/Contractor Sample by Construction Category & Contractor Size
21. Builder/Contractor Sample by Construction Category & Contractor Type
22. Builder/Contractor Total Units Clad by Construction Category & Region
23. Builder/Contractor Total Units Clad by Construction Category & Contractor Size
24. Builder/Contractor Total Units Clad by Construction Category & Contractor Type
25. Builder/Contractor Average Units Clad by Construction Category & Region
26. Builder/Contractor Average Units Clad by Construction Category & Contractor Size
27. Builder/Contractor Average Units Clad by Construction Category & Contractor Type
28. Builder/Contractor Total Units Clad by Construction Category & Region - 2000 vs 2001
29. Builder/Contractor Total Units Clad by Construction Category & Contractor Size - 2000 vs 2001
30. Builder/Contractor Total Units Clad by Construction Category & Contractor Type - 2000 vs 2001
31. Builder/Contractor Total Units Clad by Construction Category & Region - 2002 vs 2001
32. Builder/Contractor Total Units Clad by Construction Category & Contractor Size - 2002 vs 2001
33. Builder/Contractor Total Units Clad by Construction Category & Contractor Type - 2002 vs 2001
34. Squares of Cladding Installed by Construction Category
35. Squares of Cladding Installed by Construction Category - Graphic
36. Squares of Cladding Configuration - % of Total Squares Installed
37. Total Sample - Cladding Surface Configuration - % of Total Surface
38. Total Sample - Cladding Surface Configuration - % of Total Surface - Single Family
39. Total Sample - Cladding Surface Configuration - % of Total Surface - Single Family - Starter Homes
40. Total Sample - Cladding Surface Configuration - % of Total Surface - Single Family - Move-Up
41. Total Sample - Cladding Surface Configuration - % of Total Surface - Single Family - Luxury
42. Total Sample - Cladding Surface Configuration - % of Total Surface - Multi Family
43. Total Sample - Cladding Surface Configuration - % of Total Surface - Renovation
44. Summary - Cladding Surface Configuration - % of Total Surface - New England
45. Summary - Cladding Surface Configuration - % of Total Surface - Middle Atlantic
46. Summary - Cladding Surface Configuration - % of Total Surface - South Atlantic
47. Summary - Cladding Surface Configuration - % of Total Surface - West North Central

48. Summary - Cladding Surface Configuration - % of Total Surface - Mountain
49. Summary - Cladding Surface Configuration - % of Total Surface - West South Central
50. Summary - Cladding Surface Configuration - % of Total Surface - East North Central
51. Summary - Cladding Surface Configuration - % of Total Surface - East South Central
52. Summary - Cladding Surface Configuration - % of Total Surface - Pacific
53. Summary - Cladding Surface Configuration - % of Total Surface - All Regions
54. Summary - Cladding Surface Configuration - % of Total Surface - By Region
55. Incidence of Cladding Installation in New Construction and Renovation
56. Incidence of Cladding Installation by Construction Category
57. Incidence of Cladding Installation in New Construction by Contractor Size
58. Incidence of Cladding Installation in New Construction by Contractor Type
59. Incidence of Cladding Installation in New Construction by Region
60. Incidence of Cladding Installation in Renovation by Contractor Size
61. Incidence of Cladding Installation in Renovation by Contractor Type
62. Incidence of Cladding Installation in Renovation by Region
63. Squares of Cladding Installed - New Construction & Renovation
64. Installation Index for all Cladding Materials
65. Summary - Total Squares of Cladding Installed as Reported in the Sample - New Construction
66. Summary - Total Squares of Cladding Installed as Reported in the Sample - Renovation
- 66.1 Summary - Bases - Total Incidence by Cladding Type - By All Categories
- 66.2 Summary - Bases - Total Squares Installed by Cladding Type - By All Categories
- 66.3 Summary - Bases - Total Units Clad by Cladding Type - By All Categories
- 66.4 Summary - Bases - Average Units Clad by Cladding Type - By All Categories

Distributor Sample

Pages 5

67. Distributor/Retailer Sample by Region
68. Distributor/Retailer Mix of Single Family vs Multi Family Business - Weighted by Total Cladding Squares Sold
69. Distributor/Retailer Mix of New Construction vs Renovation - Weighted by Total Cladding Squares Sold
70. Distributor/Retailer Incidence of Cladding Sold
71. Distributor/Retailer Mix of Cladding Sold - Weighted by Total Cladding Squares Sold

Manufactured Housing Sample

Pages 4

72. Manufactured Housing Sample by Housing Type
73. Total Single Wide Versus Double Wide Cladding Usage
74. How do Your Exterior Cladding and Trim Product Sales Compare: 2002 vs 2001?
- 74.1 Manufactured Housing Mix of Cladding Sold - Weighted by Total Cladding Squares Sold

Builder/Contractor Sample Description - Canada

Pages 10

75. Builder/Contractor Sample, Units & Squares by Construction Category & Region - Canada
76. Builder/Contractor Sample, Units & Squares by Construction Category & Contractor Size - Canada
77. Builder/Contractor Sample, Units & Squares by Construction Category & Contractor Type - Canada
78. Squares of Cladding Installed by Construction Category - Graphic - Canada
79. Squares of Cladding Configuration - % of Total Squares Installed - Canada
80. Total Sample - Cladding Surface Configuration - % of Total Surface - Canada
81. Total Sample - Cladding Surface Configuration - % of Total Incidence - Canada
82. Installation Index for all Cladding Materials - Canada
83. Summary - Total Squares of Cladding Installed as Reported in the Sample - New Construction - Canada
84. Summary - Total Squares of Cladding Installed as Reported in the Sample - Renovation - Canada

85. Distributor/Retailer Sample by Region - Canada
86. Distributor/Retailer Mix of Single Family vs Multi Family Business - Weighted by Total Cladding Squares Sold - Canada
87. Distributor/Retailer Mix of New Construction vs Renovation - Weighted by Total Cladding Squares Sold - Canada
88. Distributor/Retailer Incidence of Cladding Sold - Canada
89. Distributor/Retailer Mix of Cladding Sold - Weighted by Total Cladding Squares Sold - Canada

Builder/Contractor Survey - Brick

1. Percentage of Residential Construction Installing Brick
2. Percentage of Residential Construction Installing Brick Cladding - With "Other" Cladding
3. Squares of Brick Installed
4. Units of Brick Installed
5. Brick Cladding Installations - Squares by Construction Category - Graphic
6. Brick Cladding Installations - By Construction Category by Contractor Size
7. Brick Cladding Installations - By Construction Category by Contractor Type
8. Brick Cladding Installations - By Construction Category by Region
9. Brick - US Population of Builder/Contractor Establishments
10. Brick Cladding - Weighted Data - Installations by Construction Category
11. Brick Cladding - Weighted Data - Installations by Contractor Size
12. Brick Cladding - Weighted Data - Installations by Contractor Type
13. Brick Cladding - Weighted Data - Installations by Region
14. Brick Cladding - Weighted Data Shown by Construction Category, Contractor Size & Type and Region
15. The Installation Index for Brick by Construction Category
16. Installation Index for Brick - Starter Homes - by Contractor Size
17. Installation Index for Brick - Starter Homes - by Contractor Type
18. Installation Index for Brick - Starter Homes - by Region
19. Installation Index for Brick - Move-Up Homes - by Contractor Size
20. Installation Index for Brick - Move-Up Homes - by Contractor Type
21. Installation Index for Brick - Move-Up Homes - by Region
22. Installation Index for Brick - Luxury Homes - by Contractor Size
23. Installation Index for Brick - Luxury Homes - by Contractor Type
24. Installation Index for Brick - Luxury Homes - by Region
25. Installation Index for Brick - Multi-Family Homes - by Contractor Size
26. Installation Index for Brick - Multi-Family Homes - by Contractor Type
27. Installation Index for Brick - Multi-Family Homes - by Region
28. Installation Index for Brick - Renovation - by Contractor Size
29. Installation Index for Brick - Renovation - by Contractor Type
30. Installation Index for Brick - Renovation - by Region
31. Installation Index for Brick - Summary
32. Installation Index for Brick - by Construction Category, Contractor Size, Type -New England
33. Installation Index for Brick - by Construction Category, Contractor Size, Type -Middle Atlantic
34. Installation Index for Brick - by Construction Category, Contractor Size, Type -South Atlantic
35. Installation Index for Brick - by Construction Category, Contractor Size, Type -West North Central
36. Installation Index for Brick - by Construction Category, Contractor Size, Type -Mountain
37. Installation Index for Brick - by Construction Category, Contractor Size, Type -West South Central
38. Installation Index for Brick - by Construction Category, Contractor Size, Type -East North Central
39. Installation Index for Brick - by Construction Category, Contractor Size, Type -East South Central
40. Installation Index for Brick - by Construction Category, Contractor Size, Type -Pacific
41. Who Specified the Brick? - Overall (Weighted by Total Cladding Squares Installed)
42. Who Specified the Brick? - By Construction Category (Weighted by Total Cladding Squares Installed)
43. How Has Your Usage of Brick Changed Over the Last 3 Years - Incidence
44. How Has Your Usage of Brick Changed Over the Last 3 Years - Weighted by Squares Installed
45. What Are the Reasons for Brick Usage Changes Last 3 Years - On a Mention Basis
46. Where Do You Purchase Your Cladding Materials? - Summary
47. Where Do You Purchase Your Cladding Materials? - By Construction Category
48. Summary of Brick Labor and Material Costs
49. Brick Brand Share by Construction Category
50. Brick Brand Share by Region

51. What is the Builder Preferred Brand of Brick
52. What is the Importance of Brick Brand to the Home Buyer
53. Brick Cladding Installations - Incidence of Soffit - Usage by Construction Category
54. Brick Cladding Installations - Squares of Soffit - Usage by Construction Category
55. Brick Cladding Installations - Squares of Soffit - Usage by Region
56. Brick Cladding Installations - Incidence of Trim - Usage by Construction Category
57. Brick Cladding Installations - Description of ""Other" Trim"
58. Brick Cladding Installations - Lineal Feet of Trim - Usage by Construction Category
59. Brick Cladding Installations - Lineal Feet of Trim - Usage by Region
60. Brick Cladding Installations - Incidence of Fascia - Usage by Construction Category
61. Brick Cladding Installations - Lineal Feet of Fascia - Usage by Construction Category
62. Brick Cladding Installations - Lineal Feet of Fascia - Usage by Region
63. How Has Your Usage of Trim Changed Over the Last 3 Years? - Incidence
64. What are the Reasons for Changes in Brick Trim Usage Over the Last 3 Years? - On a Mention Basis
65. Trim Labor and Material Costs
66. What are the 3 Most Important Attributes Concerning Brick Cladding?

Distributor Retailer Survey - Brick

Pages 9

67. Brick Cladding Sales by Type of Distributor/Retailer - Excluding Brick & Mason Yards
68. Do You Anticipate Your Sales of Brick Cladding to Grow, Stay the Same or Decrease Next Year - Mention Basis
69. Do You Anticipate Your Sales of Brick Cladding to Grow, Stay the Same or Decrease Next Year - Weighted
70. What Percent of Your Brick Cladding is Sold to Builders, Remodelers, Lumberyards, Homcenters, Mfr'd Housing - Weighted
71. What Are Your Top 3 Brands of Brick Cladding Sold?
72. What 3 Attributes are Most Important Concerning Brick Cladding?
74. Trim Sold by Distributors & Retailer Type
75. Anticipated Growth Next Year of Trim Sold by Distributors & Retailer Type
76. Top 3 Brands of Trim Sold by Distributors & Retailer Type

Builder/Contractor Survey - EIFS

Pages 72

1. Percentage of Residential Construction Installing EIFS
2. Percentage of Residential Construction Installing EIFS Cladding - With "Other" Cladding
3. Squares of EIFS Installed
4. Units of EIFS Installed
5. EIFS Cladding Installations - Squares by Construction Category - Graphic
6. EIFS Cladding Installations - By Construction Category by Contractor Size
7. EIFS Cladding Installations - By Construction Category by Contractor Type
8. EIFS Cladding Installations - By Construction Category by Region
9. EIFS - US Population of Builder/Contractor Establishments
10. EIFS Cladding - Weighted Data - Installations by Construction Category
11. EIFS Cladding - Weighted Data - Installations by Contractor Size
12. EIFS Cladding - Weighted Data - Installations by Contractor Type
13. EIFS Cladding - Weighted Data - Installations by Region
14. EIFS Cladding - Weighted Data Shown by Construction Category, Contractor Size & Type and Region
15. The Installation Index for EIFS by Construction Category
16. Installation Index for EIFS - Starter Homes - by Contractor Size
17. Installation Index for EIFS - Starter Homes - by Contractor Type
18. Installation Index for EIFS - Starter Homes - by Region
19. Installation Index for EIFS - Move-Up Homes - by Contractor Size
20. Installation Index for EIFS - Move-Up Homes - by Contractor Type
21. Installation Index for EIFS - Move-Up Homes - by Region
22. Installation Index for EIFS - Luxury Homes - by Contractor Size
23. Installation Index for EIFS - Luxury Homes - by Contractor Type
24. Installation Index for EIFS - Luxury Homes - by Region
25. Installation Index for EIFS - Multi-Family Homes - by Contractor Size
26. Installation Index for EIFS - Multi-Family Homes - by Contractor Type
27. Installation Index for EIFS - Multi-Family Homes - by Region
28. Installation Index for EIFS - Renovation - by Contractor Size
29. Installation Index for EIFS - Renovation - by Contractor Type

30. Installation Index for EIFS - Renovation - by Region
31. Installation Index for EIFS - Summary
32. Installation Index for EIFS - by Construction Category, Contractor Size, Type -New England
33. Installation Index for EIFS - by Construction Category, Contractor Size, Type -Middle Atlantic
34. Installation Index for EIFS - by Construction Category, Contractor Size, Type -South Atlantic
35. Installation Index for EIFS - by Construction Category, Contractor Size, Type -West North Central
36. Installation Index for EIFS - by Construction Category, Contractor Size, Type -Mountain
37. Installation Index for EIFS - by Construction Category, Contractor Size, Type -West South Central
38. Installation Index for EIFS - by Construction Category, Contractor Size, Type -East North Central
39. Installation Index for EIFS - by Construction Category, Contractor Size, Type -East South Central
40. Installation Index for EIFS - by Construction Category, Contractor Size, Type -Pacific
41. Who Specified the EIFS? - Overall - (Weighted by Total Cladding Squares Installed)
42. Who Specified the EIFS? - By Construction Category - (Weighted by Total Cladding Squares Installed)
43. How Has Your Usage of EIFS Changed Over the Last 3 Years - Incidence
44. How Has Your Usage of EIFS Changed Over the Last 3 Years - Weighted by Squares Installed
45. What Are the Reasons for EIFS Usage Changes Last 3 Years - On a Mention Basis
46. Where Do You Purchase Your Cladding Materials? - Summary
47. Where Do You Purchase Your Cladding Materials? - By Construction Category
48. Summary of EIFS Labor and Material Costs
49. EIFS Brand Share by Construction Category
50. EIFS Brand Share by Region
51. EIFS - Overall Brand Share
- 51.1 EIFS - Surface Finishes by Construction Category
- 51.2 EIFS - Surface Finishes by Region
52. EIFS Cladding - Vented vs Unvented Soffit - Overall
53. EIFS Cladding Installations - Incidence of Soffit - Usage by Construction Category
54. EIFS Cladding Installations - Squares of Soffit - Usage by Construction Category
55. EIFS Cladding Installations - Squares of Soffit - Usage by Region
56. EIFS Cladding Installations - Incidence of Trim - Usage by Construction Category
57. EIFS Cladding Installations - Description of "Other Trim"
58. EIFS Cladding Installations - Lineal Feet of Trim - Usage by Construction Category
59. EIFS Cladding Installations - Lineal Feet of Trim - Usage by Region
60. EIFS Cladding Installations - Incidence of Fascia - Usage by Construction Category
61. EIFS Cladding Installations - Lineal Feet of Fascia - Usage by Construction Category
62. EIFS Cladding Installations - Lineal Feet of Fascia - Usage by Region
63. How Has Your Usage of Trim Changed Over the Last 3 Years? - Incidence
64. What are the Reasons for Changes in EIFS Trim Usage Over the Last 3 Years? - On a Mention Basis
65. Trim Labor and Material Costs
66. What are the 3 Most Important Attributes Concerning EIFS Cladding?

Distributor Retailer Survey - EIFS

Pages 10

67. EIFS Cladding Sales by Type of Distributor/Retailer
68. Do You Anticipate Your Sales of EIFS Cladding to Grow, Stay the Same or Decrease Next Year - Mention Basis
69. Do You Anticipate Your Sales of EIFS Cladding to Grow, Stay the Same or Decrease Next Year - Weighted
70. What Percent of Your EIFS Cladding is Sold to Builders, Remodelers, Lumberyards, Homcenters, Mfr'd Housing - Weighted
71. What Are Your Top 3 Brands of EIFS Cladding Sold?
72. What 3 Attributes are Most Important Concerning EIFS Cladding?
73. EIFS Surface Finishes by Distributors & Retailer Type
74. Trim Sold by Distributors & Retailer Type
75. Anticipated Growth Next Year of Trim Sold by Distributors & Retailer Type
76. Top 3 Brands of Trim Sold by Distributors & Retailer Type

Builder/Contractor Survey - Fiber Cement

Pages 76

1. Percentage of Residential Construction Installing Fiber Cement
2. Percentage of Residential Construction Installing Fiber Cement Cladding - With "Other" Cladding
3. Squares of Fiber Cement Installed
4. Units of Fiber Cement Installed
5. Fiber Cement Cladding Installations - Squares by Construction Category - Graphic

6. Fiber Cement Cladding Installations - By Construction Category by Contractor Size
7. Fiber Cement Cladding Installations - By Construction Category by Contractor Type
8. Fiber Cement Cladding Installations - By Construction Category by Region
9. Fiber Cement - US Population of Builder/Contractor Establishments
10. Fiber Cement Cladding - Weighted Data - Installations by Construction Category
11. Fiber Cement Cladding - Weighted Data - Installations by Contractor Size
12. Fiber Cement Cladding - Weighted Data - Installations by Contractor Type
13. Fiber Cement Cladding - Weighted Data - Installations by Region
14. Fiber Cement Cladding - Weighted Data Shown by Construction Category, Contractor Size & Type and Region
15. The Installation Index for Fiber Cement by Construction Category
16. Installation Index for Fiber Cement - Starter Homes - by Contractor Size
17. Installation Index for Fiber Cement - Starter Homes - by Contractor Type
18. Installation Index for Fiber Cement - Starter Homes - by Region
19. Installation Index for Fiber Cement - Move-Up Homes - by Contractor Size
20. Installation Index for Fiber Cement - Move-Up Homes - by Contractor Type
21. Installation Index for Fiber Cement - Move-Up Homes - by Region
22. Installation Index for Fiber Cement - Luxury Homes - by Contractor Size
23. Installation Index for Fiber Cement - Luxury Homes - by Contractor Type
24. Installation Index for Fiber Cement - Luxury Homes - by Region
25. Installation Index for Fiber Cement - Multi-Family Homes - by Contractor Size
26. Installation Index for Fiber Cement - Multi-Family Homes - by Contractor Type
27. Installation Index for Fiber Cement - Multi-Family Homes - by Region
28. Installation Index for Fiber Cement - Renovation - by Contractor Size
29. Installation Index for Fiber Cement - Renovation - by Contractor Type
30. Installation Index for Fiber Cement - Renovation - by Region
31. Installation Index for Fiber Cement - Summary
32. Installation Index for Fiber Cement - by Construction Category, Contractor Size, Type -New England
33. Installation Index for Fiber Cement - by Construction Category, Contractor Size, Type -Middle Atlantic
34. Installation Index for Fiber Cement - by Construction Category, Contractor Size, Type -South Atlantic
35. Installation Index for Fiber Cement - by Construction Category, Contractor Size, Type -W. N. Central
36. Installation Index for Fiber Cement - by Construction Category, Contractor Size, Type -Mountain
37. Installation Index for Fiber Cement - by Construction Category, Contractor Size, Type -W. S. Central
38. Installation Index for Fiber Cement - by Construction Category, Contractor Size, Type -E. N. Central
39. Installation Index for Fiber Cement - by Construction Category, Contractor Size, Type -E. S. Central
40. Installation Index for Fiber Cement - by Construction Category, Contractor Size, Type -Pacific
41. Who Specified the Fiber Cement? - Overall (Weighted by Total Cladding Squares Installed)
42. Who Specified the Fiber Cement? - By Construction Category - (Weighted by Total Cladding Squares Installed)
43. How Has Your Usage of Fiber Cement Changed Over the Last 3 Years - Incidence
44. How Has Your Usage of Fiber Cement Changed Over the Last 3 Years - Weighted by Squares Installed
45. What Are the Reasons for Fiber Cement Usage Changes Last 3 Years - On a Mention Basis
46. Where Do You Purchase Your Cladding Materials? - Summary
47. Where Do You Purchase Your Cladding Materials? - By Construction Category
48. Summary of Fiber Cement Labor and Material Costs
49. Fiber Cement Brand Share by Construction Category
50. Fiber Cement Brand Share by Region
51. Fiber Cement - Overall Brand Share
- 51.1 Fiber Cement - Surface Finishes by Construction Category
- 51.2 Fiber Cement - Surface Finishes by Region
- 51.3 Fiber Cement - Lap vs Panel by Construction Category
- 51.4 Fiber Cement - Lap vs Panel by Region
52. Fiber Cement Cladding - Vented vs Unvented Soffit - Overall
53. Fiber Cement Cladding Installations - Incidence of Soffit - Usage by Construction Category
54. Fiber Cement Cladding Installations - Squares of Soffit - Usage by Construction Category
55. Fiber Cement Cladding Installations - Squares of Soffit - Usage by Region
56. Fiber Cement Cladding Installations - Incidence of Trim - Usage by Construction Category
57. Fiber Cement Cladding Installations - Description of "Other Trim"

58. Fiber Cement Cladding Installations - Lineal Feet of Trim - Usage by Construction Category
59. Fiber Cement Cladding Installations - Lineal Feet of Trim - Usage by Region
60. Fiber Cement Cladding Installations - Incidence of Fascia - Usage by Construction Category
61. Fiber Cement Cladding Installations - Lineal Feet of Fascia - Usage by Construction Category
62. Fiber Cement Cladding Installations - Lineal Feet of Fascia - Usage by Region
63. How Has Your Usage of Trim Changed Over the Last 3 Years? - Incidence
64. What are the Reasons for Changes in Fiber Cement Trim Usage Over the Last 3 Years? - On a Mention Basis
65. Trim Labor and Material Costs
66. What are the 3 Most Important Attributes Concerning Fiber Cement Cladding?

Distributor Retailer Survey - Fiber Cement

Pages 10

67. Fiber Cement Cladding Sales by Type of Distributor/Retailer
68. Do You Anticipate Your Sales of Fiber Cement Cladding to Grow, Stay the Same or Decrease Next Year - Mention Basis
69. Do You Anticipate Your Sales of Fiber Cement Cladding to Grow, Stay the Same or Decrease Next Year - Weighted
70. What Percent of Your Fiber Cement Cladding is Sold to Builders, Remodelers, Lumberyards, Homcenters - Weighted
71. What Are Your Top 3 Brands of Fiber Cement Cladding Sold?
72. What 3 Attributes are Most Important Concerning Fiber Cement Cladding?
73. Fiber Cement Surface Finishes by Distributors & Retailer Type
74. Trim Sold by Distributors & Retailer Type
75. Anticipated Growth Next Year of Trim Sold by Distributors & Retailer Type
76. Top 3 Brands of Trim Sold by Distributors & Retailer Type

Manufactured Housing Survey - Fiber Cement

Pages 9

77. Fiber Cement Cladding Consumed by Manufactured Housing Type
78. Do You Anticipate Your Use of Fiber Cement Cladding to Grow, Stay the Same or Decrease Next Year - Weighted
79. From What Sources do you Purchase Your Fiber Cement Siding - HUD Code - Weighted
80. From What Sources do you Purchase Your Fiber Cement Siding - Modular Housing - Weighted
81. Trim Consumed by Manufactured Housing Type
82. Fiber Cement Surface Finishes by Manufactured Housing Type
83. Top Brands of Fiber Cement Used by Manufactured Housing Type
84. Top 3 Brands of Trim Used by Manufactured Housing Type
85. What 3 Attributes are Most Important Concerning Fiber Cement Cladding?

Builder/Contractor Survey - Stucco

Pages 72

1. Percentage of Residential Construction Installing Stucco
2. Percentage of Residential Construction Installing Stucco Cladding - With "Other" Cladding
3. Squares of Stucco Installed
4. Units of Stucco Installed
5. Stucco Cladding Installations - Squares by Construction Category - Graphic
6. Stucco Cladding Installations - By Construction Category by Contractor Size
7. Stucco Cladding Installations - By Construction Category by Contractor Type
8. Stucco Cladding Installations - By Construction Category by Region
9. Stucco - US Population of Builder/Contractor Establishments
10. Stucco Cladding - Weighted Data - Installations by Construction Category
11. Stucco Cladding - Weighted Data - Installations by Contractor Size
12. Stucco Cladding - Weighted Data - Installations by Contractor Type
13. Stucco Cladding - Weighted Data - Installations by Region
14. Stucco Cladding - Weighted Data Shown by Construction Category, Contractor Size & Type and Region
15. The Installation Index for Stucco by Construction Category
16. Installation Index for Stucco - Starter Homes - by Contractor Size
17. Installation Index for Stucco - Starter Homes - by Contractor Type
18. Installation Index for Stucco - Starter Homes - by Region
19. Installation Index for Stucco - Move-Up Homes - by Contractor Size
20. Installation Index for Stucco - Move-Up Homes - by Contractor Type

21. Installation Index for Stucco - Move-Up Homes - by Region
22. Installation Index for Stucco - Luxury Homes - by Contractor Size
23. Installation Index for Stucco - Luxury Homes - by Contractor Type
24. Installation Index for Stucco - Luxury Homes - by Region
25. Installation Index for Stucco - Multi-Family Homes - by Contractor Size
26. Installation Index for Stucco - Multi-Family Homes - by Contractor Type
27. Installation Index for Stucco - Multi-Family Homes - by Region
28. Installation Index for Stucco - Renovation - by Contractor Size
29. Installation Index for Stucco - Renovation - by Contractor Type
30. Installation Index for Stucco - Renovation - by Region
31. Installation Index for Stucco - Summary
32. Installation Index for Stucco - by Construction Category, Contractor Size, Type -New England
33. Installation Index for Stucco - by Construction Category, Contractor Size, Type -Middle Atlantic
34. Installation Index for Stucco - by Construction Category, Contractor Size, Type -South Atlantic
35. Installation Index for Stucco - by Construction Category, Contractor Size, Type -West North Central
36. Installation Index for Stucco - by Construction Category, Contractor Size, Type -Mountain
37. Installation Index for Stucco - by Construction Category, Contractor Size, Type -West South Central
38. Installation Index for Stucco - by Construction Category, Contractor Size, Type -East North Central
39. Installation Index for Stucco - by Construction Category, Contractor Size, Type -East South Central
40. Installation Index for Stucco - by Construction Category, Contractor Size, Type -Pacific
41. Who Specified the Stucco? - Overall (Weighted by Total Cladding Squares Installed)
42. Who Specified the Stucco? - By Construction Category (Weighted by Total Cladding Squares Installed)
43. How Has Your Usage of Stucco Changed Over the Last 3 Years - Incidence
44. How Has Your Usage of Stucco Changed Over the Last 3 Years - Weighted by Squares Installed
45. What Are the Reasons for Stucco Usage Changes Last 3 Years - On a Mention Basis
46. Where Do You Purchase Your Cladding Materials? - Summary
47. Where Do You Purchase Your Cladding Materials? - By Construction Category
48. Summary of Stucco Labor and Material Costs
49. Stucco Brand Share by Construction Category
50. Stucco Brand Share by Region
51. Stucco - Overall Brand Share
- 51.1 Stucco - Surface Finishes by Construction Category
- 51.2 Stucco - Surface Finishes by Region
52. Stucco Cladding - Vented vs Unvented Soffit - Overall
53. Stucco Cladding Installations - Incidence of Soffit - Usage by Construction Category
54. Stucco Cladding Installations - Squares of Soffit - Usage by Construction Category
55. Stucco Cladding Installations - Squares of Soffit - Usage by Region
56. Stucco Cladding Installations - Incidence of Trim - Usage by Construction Category
57. Stucco Cladding Installations - Description of "Other Trim"
58. Stucco Cladding Installations - Lineal Feet of Trim - Usage by Construction Category
59. Stucco Cladding Installations - Lineal Feet of Trim - Usage by Region
60. Stucco Cladding Installations - Incidence of Fascia - Usage by Construction Category
61. Stucco Cladding Installations - Lineal Feet of Fascia - Usage by Construction Category
62. Stucco Cladding Installations - Lineal Feet of Fascia - Usage by Region
63. How Has Your Usage of Trim Changed Over the Last 3 Years? - Incidence
64. What are the Reasons for Changes in Stucco Trim Usage Over the Last 3 Years? - On a Mention Basis
65. Trim Labor and Material Costs
66. What are the 3 Most Important Attributes Concerning Stucco Cladding?

Distributor Retailer Survey

Pages 10

67. Stucco Cladding Sales by Type of Distributor/Retailer
68. Do You Anticipate Your Sales of Stucco Cladding to Grow, Stay the Same or Decrease Next Year - Mention Basis
69. Do You Anticipate Your Sales of Stucco Cladding to Grow, Stay the Same or Decrease Next Year - Weighted
70. What Percent of Your Stucco Cladding is Sold to Builders, Remodelers, Lumberyards, Homcenters - Weighted
71. What Are Your Top 3 Brands of Stucco Cladding Sold?

72. What 3 Attributes are Most Important Concerning Stucco Cladding?
73. Stucco Surface Finishes by Distributors & Retailer Type
74. Trim Sold by Distributors & Retailer Type
75. Anticipated Growth Next Year of Trim Sold by Distributors & Retailer Type
76. Top 3 Brands of Trim Sold by Distributors & Retailer Type

Builder/Contractor Survey - Vinyl

Pages 74

1. Percentage of Residential Construction Installing Vinyl
2. Percentage of Residential Construction Installing Vinyl Cladding - With "Other" Cladding
3. Squares of Vinyl Installed
4. Units of Vinyl Installed
5. Vinyl Cladding Installations - Squares by Construction Category - Graphic
6. Vinyl Cladding Installations - By Construction Category by Contractor Size
7. Vinyl Cladding Installations - By Construction Category by Contractor Type
8. Vinyl Cladding Installations - By Construction Category by Region
9. Vinyl - US Population of Builder/Contractor Establishments
10. Vinyl Cladding - Weighted Data - Installations by Construction Category
11. Vinyl Cladding - Weighted Data - Installations by Contractor Size
12. Vinyl Cladding - Weighted Data - Installations by Contractor Type
13. Vinyl Cladding - Weighted Data - Installations by Region
14. Vinyl Cladding - Weighted Data Shown by Construction Category, Contractor Size & Type and Region
15. The Installation Index for Vinyl by Construction Category
16. Installation Index for Vinyl - Starter Homes - by Contractor Size
17. Installation Index for Vinyl - Starter Homes - by Contractor Type
18. Installation Index for Vinyl - Starter Homes - by Region
19. Installation Index for Vinyl - Move-Up Homes - by Contractor Size
20. Installation Index for Vinyl - Move-Up Homes - by Contractor Type
21. Installation Index for Vinyl - Move-Up Homes - by Region
22. Installation Index for Vinyl - Luxury Homes - by Contractor Size
23. Installation Index for Vinyl - Luxury Homes - by Contractor Type
24. Installation Index for Vinyl - Luxury Homes - by Region
25. Installation Index for Vinyl - Multi-Family Homes - by Contractor Size
26. Installation Index for Vinyl - Multi-Family Homes - by Contractor Type
27. Installation Index for Vinyl - Multi-Family Homes - by Region
28. Installation Index for Vinyl - Renovation - by Contractor Size
29. Installation Index for Vinyl - Renovation - by Contractor Type
30. Installation Index for Vinyl - Renovation - by Region
31. Installation Index for Vinyl - Summary
32. Installation Index for Vinyl - by Construction Category, Contractor Size, Type -New England
33. Installation Index for Vinyl - by Construction Category, Contractor Size, Type -Middle Atlantic
34. Installation Index for Vinyl - by Construction Category, Contractor Size, Type -South Atlantic
35. Installation Index for Vinyl - by Construction Category, Contractor Size, Type -West North Central
36. Installation Index for Vinyl - by Construction Category, Contractor Size, Type -Mountain
37. Installation Index for Vinyl - by Construction Category, Contractor Size, Type -West South Central
38. Installation Index for Vinyl - by Construction Category, Contractor Size, Type -East North Central
39. Installation Index for Vinyl - by Construction Category, Contractor Size, Type -East South Central
40. Installation Index for Vinyl - by Construction Category, Contractor Size, Type -Pacific
41. Who Specified the Vinyl? - Overall (Weighted by Total Cladding Squares Installed)
42. Who Specified the Vinyl? - By Construction Category (Weighted by Total Cladding Squares Installed)
43. How Has Your Usage of Vinyl Changed Over the Last 3 Years - Incidence
44. How Has Your Usage of Vinyl Changed Over the Last 3 Years - Weighted by Squares Installed
45. What Are the Reasons for Vinyl Usage Changes Last 3 Years - On a Mention Basis
46. Where Do You Purchase Your Cladding Materials? - Summary
47. Where Do You Purchase Your Cladding Materials? - By Construction Category
48. Summary of Vinyl Labor and Material Costs

49. Vinyl Brand Share by Construction Category
50. Vinyl Brand Share by Region
51. Vinyl - Overall Brand Share
- 51.1 Vinyl - Surface Finishes by Construction Category
- 51.2 Vinyl - Surface Finishes by Region
- 51.3 Vinyl - Lap vs Panel by Construction Category
- 51.4 Vinyl - Lap vs Panel by Region
52. Vinyl Cladding - Vented vs Unvented Soffit - Overall
53. Vinyl Cladding Installations - Incidence of Soffit - Usage by Construction Category
54. Vinyl Cladding Installations - Squares of Soffit - Usage by Construction Category
55. Vinyl Cladding Installations - Squares of Soffit - Usage by Region
56. Vinyl Cladding Installations - Incidence of Trim - Usage by Construction Category
57. Vinyl Cladding Installations - Description of "Other Trim"
58. Vinyl Cladding Installations - Lineal Feet of Trim - Usage by Construction Category
59. Vinyl Cladding Installations - Lineal Feet of Trim - Usage by Region
60. Vinyl Cladding Installations - Incidence of Fascia - Usage by Construction Category
61. Vinyl Cladding Installations - Lineal Feet of Fascia - Usage by Construction Category
62. Vinyl Cladding Installations - Lineal Feet of Fascia - Usage by Region
63. How Has Your Usage of Trim Changed Over the Last 3 Years? - Incidence
64. What are the Reasons for Changes in Vinyl Trim Usage Over the Last 3 Years? - On a Mention Basis
65. Trim Labor and Material Costs
66. What are the 3 Most Important Attributes Concerning Vinyl Cladding?

Distributor Retailer Survey - Vinyl

Pages 10

67. Vinyl Cladding Sales by Type of Distributor/Retailer
68. Do You Anticipate Your Sales of Vinyl Cladding to Grow, Stay the Same or Decrease Next Year - Mention Basis
69. Do You Anticipate Your Sales of Vinyl Cladding to Grow, Stay the Same or Decrease Next Year - Weighted
70. What Percent of Your Vinyl Cladding is Sold to Builders, Remodelers, Lumberyards, Homcenters - Weighted
71. What Are Your Top 3 Brands of Vinyl Cladding Sold?
72. What 3 Attributes are Most Important Concerning Vinyl Cladding?
73. Vinyl Surface Finishes by Distributors & Retailer Type
74. Trim Sold by Distributors & Retailer Type
75. Anticipated Growth Next Year of Trim Sold by Distributors & Retailer Type
76. Top 3 Brands of Trim Sold by Distributors & Retailer Type

Manufactured Housing Survey - No Vinyl Cladding Reported

Pages 9

77. Vinyl Cladding Consumed by Manufactured Housing Type
78. Do You Anticipate Your Use of Vinyl Cladding to Grow, Stay the Same or Decrease Next Year - Weighted
79. From What Sources do you Purchase Your Vinyl Siding - HUD Code - Weighted
80. From What Sources do you Purchase Your Vinyl Siding - Modular Housing - Weighted
81. Trim Consumed by Manufactured Housing Type
82. Vinyl Surface Finishes by Manufactured Housing Type
83. Top Brands of Vinyl Cladding Used by Manufactured Housing Type
84. Top 3 Brands of Trim Used by Manufactured Housing Type
85. What 3 Attributes are Most Important Concerning Vinyl Cladding?

Builder/Contractor Survey - Wood

Pages 72

1. Percentage of Residential Construction Installing Wood
2. Percentage of Residential Construction Installing Wood Cladding - With "Other" Cladding
3. Squares of Wood Installed
4. Units of Wood Installed
5. Wood Cladding Installations - Squares by Construction Category - Graphic
6. Wood Cladding Installations - By Construction Category by Contractor Size
7. Wood Cladding Installations - By Construction Category by Contractor Type

8. Wood Cladding Installations - By Construction Category by Region
9. Wood - US Population of Builder/Contractor Establishments
10. Wood Cladding - Weighted Data - Installations by Construction Category
11. Wood Cladding - Weighted Data - Installations by Contractor Size
12. Wood Cladding - Weighted Data - Installations by Contractor Type
13. Wood Cladding - Weighted Data - Installations by Region
14. Wood Cladding - Weighted Data Shown by Construction Category, Contractor Size & Type and Region
15. The Installation Index for Wood by Construction Category
16. Installation Index for Wood - Starter Homes - by Contractor Size
17. Installation Index for Wood - Starter Homes - by Contractor Type
18. Installation Index for Wood - Starter Homes - by Region
19. Installation Index for Wood - Move-Up Homes - by Contractor Size
20. Installation Index for Wood - Move-Up Homes - by Contractor Type
21. Installation Index for Wood - Move-Up Homes - by Region
22. Installation Index for Wood - Luxury Homes - by Contractor Size
23. Installation Index for Wood - Luxury Homes - by Contractor Type
24. Installation Index for Wood - Luxury Homes - by Region
25. Installation Index for Wood - Multi-Family Homes - by Contractor Size
26. Installation Index for Wood - Multi-Family Homes - by Contractor Type
27. Installation Index for Wood - Multi-Family Homes - by Region
28. Installation Index for Wood - Renovation - by Contractor Size
29. Installation Index for Wood - Renovation - by Contractor Type
30. Installation Index for Wood - Renovation - by Region
31. Installation Index for Wood - Summary
32. Installation Index for Wood - by Construction Category, Contractor Size, Type -New England
33. Installation Index for Wood - by Construction Category, Contractor Size, Type -Middle Atlantic
34. Installation Index for Wood - by Construction Category, Contractor Size, Type -South Atlantic
35. Installation Index for Wood - by Construction Category, Contractor Size, Type -West North Central
36. Installation Index for Wood - by Construction Category, Contractor Size, Type -Mountain
37. Installation Index for Wood - by Construction Category, Contractor Size, Type -West South Central
38. Installation Index for Wood - by Construction Category, Contractor Size, Type -East North Central
39. Installation Index for Wood - by Construction Category, Contractor Size, Type -East South Central
40. Installation Index for Wood - by Construction Category, Contractor Size, Type -Pacific
41. Who Specified the Wood? - Overall (Weighted by Total Cladding Squares Installed)
42. Who Specified the Wood? - By Construction Category (Weighted by Total Cladding Squares Installed)
43. How Has Your Usage of Wood Changed Over the Last 3 Years - Incidence
44. How Has Your Usage of Wood Changed Over the Last 3 Years - Weighted by Squares Installed
45. What Are the Reasons for Wood Usage Changes Last 3 Years - On a Mention Basis
46. Where Do You Purchase Your Cladding Materials? - Summary
47. Where Do You Purchase Your Cladding Materials? - By Construction Category
48. Summary of Wood Labor and Material Costs
49. Wood Brand Share by Construction Category
50. Wood Brand Share by Region
51. Wood - Overall Brand Share
- 51.1 Wood - Surface Finishes by Construction Category
- 51.2 Wood - Surface Finishes by Region
52. Wood Cladding - Vented vs Unvented Soffit - Overall
53. Wood Cladding Installations - Incidence of Soffit Usage by Construction Category
54. Wood Cladding Installations - Squares of Soffit - Usage by Construction Category
55. Wood Cladding Installations - Squares of Soffit - Usage by Region
56. Wood Cladding Installations - Incidence of Trim - Usage by Construction Category
57. Wood Cladding Installations - Description of "Other Trim"
58. Wood Cladding Installations - Lineal Feet of Trim - Usage by Construction Category
59. Wood Cladding Installations - Lineal Feet of Trim - Usage by Region
60. Wood Cladding Installations - Incidence of Fascia - Usage by Construction Category
61. Wood Cladding Installations - Lineal Feet of Fascia - Usage by Construction Category

62. Wood Cladding Installations - Lineal Feet of Fascia - Usage by Region
63. How Has Your Usage of Trim Changed Over the Last 3 Years? - Incidence
64. What are the Reasons for Changes in Wood Trim Usage Over the Last 3 Years? - On a Mention Basis
65. Trim Labor and Material Costs
66. What are the 3 Most Important Attributes Concerning Wood Cladding?

Distributor Retailer Survey - Wood

Pages 10

67. Wood Cladding Sales by Type of Distributor/Retailer
68. Do You Anticipate Your Sales of Wood Cladding to Grow, Stay the Same or Decrease Next Year - Mention Basis
69. Do You Anticipate Your Sales of Wood Cladding to Grow, Stay the Same or Decrease Next Year - Weighted
70. What Percent of Your Wood Cladding is Sold to Builders, Remodelers, Lumberyards, Homcenters - Weighted
71. What Are Your Top 3 Brands of Wood Cladding Sold?
72. What 3 Attributes are Most Important Concerning Wood Cladding?
73. Wood Surface Finishes by Distributors & Retailer Type
74. Trim Sold by Distributors & Retailer Type
75. Anticipated Growth Next Year of Trim Sold by Distributors & Retailer Type
76. Top 3 Brands of Trim Sold by Distributors & Retailer Type

Builder/Contractor Survey

Pages 33

1. Percentage of Residential Construction Installing "Other" Cladding
2. Percentage of Residential Construction Installing "Other" Cladding - With "Other" Cladding
3. Squares of "Other" Cladding Installed
4. Units of "Other" Cladding Installed
9. "Other" Cladding - US Population of Builder/Contractor Establishments
14. "Other" Cladding - Weighted Data Shown by Construction Category, Contractor Size & Type and Region
15. The Installation Index for Aluminum Cladding
16. The Installation Index for Hardboard Cladding
17. The Installation Index for OSB Cladding
18. The Installation Index for Steel Cladding
19. The Installation Index for "Other" Cladding
42. Who Specified the "Other" Cladding? - By Construction Category (Weighted by Total Cladding Squares Installed)
43. How Has Your Usage of "Other" Changed Over the Last 3 Years - Incidence
44. How Has Your Usage of "Other" Changed Over the Last 3 Years - Weighted by Squares Installed
45. What Are the Reasons for "Other" Cladding Usage Changes Last 3 Years - On a Mention Basis
47. Where Do You Purchase Your Cladding Materials? - By Construction Category
49. "Other" Brand Share by Overall
- 51.1 "Other" - Surface Finishes by Construction Category
- 51.3 "Other" - Lap vs Panel
53. "Other" Cladding Installations - Incidence of Soffit - Usage by Cladding Type
54. "Other" Cladding Installations - Squares of Soffit - Usage by Cladding Type
56. "Other" Cladding Installations - Incidence of Trim - Usage by Cladding Type
57. "Other" Cladding Installations - Description of "Other Trim"
58. "Other" Cladding Installations - Lineal Feet of Trim - Usage by Construction Category
59. "Other" Cladding Installations - Lineal Feet of Trim - Usage by Region
60. "Other" Cladding Installations - Incidence of Fascia - Usage by Construction Category
61. "Other" Cladding Installations - Lineal Feet of Fascia - Usage by Construction Category
62. "Other" Cladding Installations - Lineal Feet of Fascia - Usage by Region
63. How Has Your Usage of Trim Changed Over the Last 3 Years? - Incidence
64. What are the Reasons for Changes in "Other" Trim Usage Over the Last 3 Years? - On a Mention Basis
66. What are the 3 Most Important Attributes Concerning "Other" Cladding?

Distributor Retailer Survey - Other Cladding

Pages 10

67. "Other" Cladding Sales by Type of Distributor/Retailer
68. Do You Anticipate Your Sales of "Other" Cladding to Grow, Stay the Same or Decrease Next Year - Mention Basis
69. Do You Anticipate Your Sales of "Other" Cladding to Grow, Stay the Same or Decrease Next Year - Weighted
70. What Percent of Your "Other" Cladding is Sold to Builders, Remodelers, Lumberyards, Homcenters - Weighted
71. What Are Your Top 3 Brands of "Other" Cladding Sold?

72. What 3 Attributes are Most Important Concerning "Other" Cladding?
73. "Other" Surface Finishes by Distributors & Retailer Type
74. Trim Sold by Distributors & Retailer Type
75. Anticipated Growth Next Year of Trim Sold by Distributors & Retailer Type
76. Top 3 Brands of Trim Sold by Distributors & Retailer Type

Trim - U.S.

Pages 3

1. Where do You Buy the Trim You Use for Your Cladding Installations?
2. What Brands of Trim Do You Use for Your Cladding Installations - by Construction Category
3. What Brands of Trim Do You Use for Your Cladding Installations - by Region

Trim - Canada

Pages 3

4. Where do You Buy the Trim You Use for Your Cladding Installations? - Canada
5. What Brands of Trim Do You Use for Your Cladding Installations - by Construction Category - Canada
6. What Brands of Trim Do You Use for Your Cladding Installations - by Region - Canada

Trim - U.S. & Canada

Pages 4

7. Changes Builders & Contractors Want in Trim
8. Builder & Contractors Comments on Longer Trim
9. Builder & Contractors Comments on Thicker Trim
10. Builder & Contractors Comments on Wider Trim

Builder/Contractor Survey - Canada

Pages 34

1. Percentage of Residential Construction Installing Cladding
- 2.1 Percentage of Residential Construction Installing Cladding - With "Other" Cladding
2. Squares of Cladding Installed
3. Units of Cladding Installed
4. Canadian Builder/Contractor Establishments
5. Squares of Vinyl Installed by Construction Category - Graphic
6. All Cladding - Weighted Data Shown by Construction Category, Contractor Size & Type and Region
7. The Installation Index for Brick Cladding
8. The Installation Index for EIFS Cladding
9. The Installation Index for Fiber Cement Cladding
10. The Installation Index for Stucco Cladding
11. The Installation Index for Vinyl Cladding
12. The Installation Index for Wood Cladding
- 13.1 The Installation Index for Other Cladding - Aluminum
- 13.2 The Installation Index for Other Cladding - Steel
14. Who Specified the Cladding? - Overall (Weighted by Total Cladding Squares Installed)
15. How Has Your Usage of Cladding Changed Over the Last 3 Years - Incidence
16. What Are the Reasons for Cladding Usage Changes Last 3 Years - On a Mention Basis
17. Where Do You Purchase Your Cladding Materials? - Summary
18. Cladding Brand Share
19. Cladding - Surface Finishes
20. Cladding - Lap vs Panel
21. Cladding Installations - Squares of Soffit
22. Cladding - Vented vs Unvented Soffit - Overall
23. Cladding Installations - Lineal Feet of Trim
24. Cladding Installations - Description of "Other Trim"
25. Cladding Installations - Lineal Feet of Fascia - Usage by Construction Category
26. How Has Your Usage of Trim Changed Over the Last 3 Years? - Incidence
27. What are the Reasons for Changes in Trim Usage Over the Last 3 Years? - On a Mention Basis
28. Trim Brand Share
29. What are the 3 Most Important Attributes Concerning Cladding?

30. Cladding Sales by Type of Distributor/Retailer
31. Do You Anticipate Your Sales of Cladding to Grow, Stay the Same or Decrease Next Year - All Distributors/Retailers
32. What Percent of Your Cladding is Sold to Builders, Remodelers, Lumberyards, Homcenters - Weighted
34. What Are Your Top 3 Brands of Cladding Sold?
35. What 3 Attributes are Most Important Concerning Cladding?
36. Surface Finishes by Distributors & Retailer Type
37. Trim Sold by Distributors & Retailers
38. Anticipated Growth Next Year of Trim Sold by Distributors & Retailer Type
39. Top 3 Brands of Trim Sold by Distributors & Retailer Type

Comments from Builders, Contractors, Distributors & Retailers**Pages 42**

1. What Manufacturers Can Do To Help Distributors and Retailers Sell Cladding
2. What Manufacturers Can Do To Help Manufactured Housing Producers Install Cladding
3. For Remodeling - Factors Determining Re-covering Existing Cladding
4. For Remodeling - Factors Determining Replacement of Existing Cladding
5. Open Ended Comments Regarding Residential Cladding