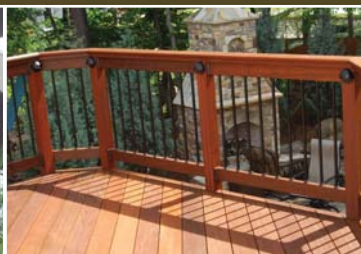


Exclusive offer from NADRA

# Residential Exterior Railing 2014

Decks, Porches & Balconies

REGIONAL MARKET DATA





### Residential exterior railing demand in North America

was \$2 billion (manufacturer gate pricing) in 2013 and is forecast to grow about 12% to \$2.3 billion by 2016. Wood railing continues to dominate the category, but low maintenance products such as plastic and powder-coated metal railing will take market share from wood as the economy improves and more consumers opt to upgrade railing to low maintenance materials.

The housing market economic recovery combined with homeowners' continued interest in creating custom outdoor living space are both key drivers of decking and porch railing demand, and will provide growth opportunities for manufacturers and fabricators. In addition, strong growth for multifamily housing will boost demand for metal railing systems used on balconies.

The trend to contemporary style railing is rapidly growing and is having a huge effect on the entire supply chain from railing manufacturers to retailers. Consumers are



customizing railing systems by mixing and matching colors and materials (e.g. wood railing with black aluminum balusters or composite railing



with cable infill). The trend is helping to fuel railing category complexity, SKU proliferation, and retail special ordering. Total demand for these systems has doubled in the past five years.

Railing materials, styles and color preferences vary considerably from region to region due to geography (e.g., coastal, mountain, plains, urban, suburbs, rural), homeowner demographics, and regional architectural styles. As a consequence, material use and market share also vary considerably from one region to the next. For example, plastic railing (composites and PVC) market share is nearly 30% in one region and as low as 5% in another. Regional metal railing share penetration also varies considerably from 4% to 25%.

### About the Program

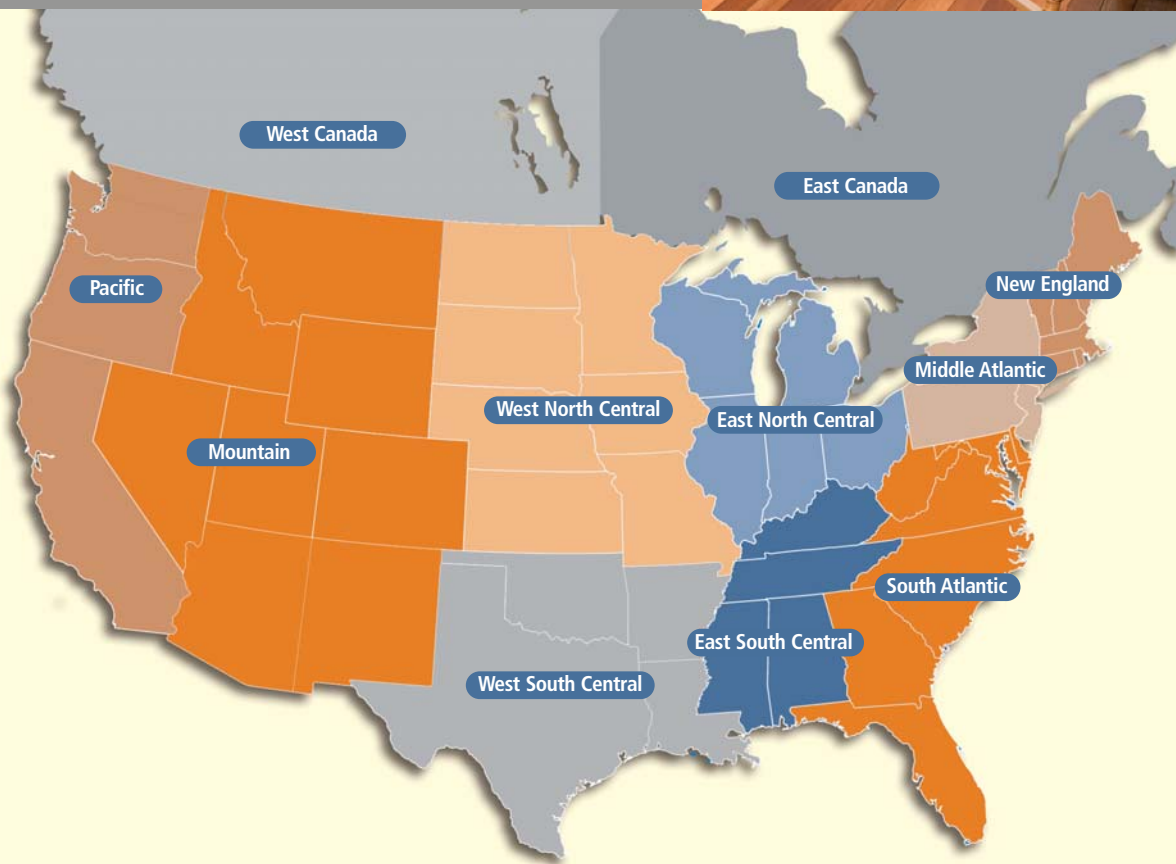
NADRA's reports, which provide regional residential exterior railing market data and trend information, are developed from Principia's highly regarded *Residential Exterior Railing 2014* report. Regional reports are only available through NADRA and members receive a significant discount. A portion of the revenues directly benefit NADRA.

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### Why Subscribe?

Regional residential exterior railing reports are the premier resource for executives involved in business planning at companies in, or planning participation in, the railing business. Whether your company is a regional or national manufacturer, distributor, retailer or contractor, you can now have access to the information that fits your needs and budget.



### NADRA Decking & Railing Reports

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##### Industry Summary

- Top industry trends
- Exterior railing demand by material
- Major trends and developments
- Forecast to 2016
- Business assessment

##### Railing Product Review

- Materials
- Railing infill

#### Market Data

■ Railing demand (volume and \$ value) by:

- Material
  - Wood
  - Plastic
  - Metal
- End Use
  - Decks
  - Porches
  - Balconies
- Average selling price (factory gate) by material and end use

■ Demand by construction type

- Single family
- Multifamily

■ Demand by market sector

- New
- Repair / remodel / replacement

■ Demand by distribution channel

- Two-step
- Pro dealer
- Big box retail
- Specialty 1-step
- Direct from manufacturer

■ Outlook to 2016





*DOING THINGS FOR THE RIGHT REASON...  
...AND HAVING FUN DOING THEM*

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