

# MouldingTrends|09

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Trendspotting is an important tool for enabling manufacturers to be proactive rather than reactive in their business. In this issue we track trends in the moulding segment. Trends revolve around demographics, new materials, alternative species, sustainability, the economy and other factors.

As a manufacturer it is up to you to pick and choose the trends and opportunities that best suit your manufacturing, marketing and customer profile. We hope this document can tip you off to new opportunities, alert you to some pitfalls and inspire your product lines. Good luck!

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*High  
Definition  
is the new  
term for  
moulding*

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Moulding is no longer used to just cover small defects. It is used to highlight and complement the decor of each room in the house, and to add architectural interest to plain walls and ceilings. Due to globalization and the Internet, consumers have access to the latest home decoration and renovation styles from around the world.

Selecting mouldings is as personal a choice as selecting the paint colour for a room. However, there are a variety of factors that cause some moulding products to be in higher demand than others. These are also factors that contribute to trend-setting. An important feature to note is the thickness of the moulding, as thicker mouldings have more profile and give a room a richer look. The usual thickness for high-end moulding is  $\frac{3}{4}$ ".

High Definition is the new term in moulding for crisp profile lines as crisp lines allow the moulding to stand out. Solid wood mouldings provide a better High Definition effect when compared to MDF mouldings <sup>[5]</sup>.

Proportionality and sizing the profile to a room is important. Use the following as a suggested width for mouldings <sup>[5]</sup>:

CEILING HEIGHT	BASEBOARD	CASING	CROWNS
Standard 8 ft	4 to 5"	2 ½"	4 ½"
9 ft	5" plus	3 ½"	5 ½"
Over 9 ft	5" plus	3 ½"	5 ½" plus

Symmetry is also a very important feature to note when installing mouldings and trim. The profile of mouldings used in the house should all be either the same or very similar and the colour of the mouldings should complement the general style of the home's decor. This allows for a unified and visually pleasing finish. For example, painted moulding complements hardwood design flooring. Colour contrast among the walls, mouldings, and the floor is key for a visually appealing transition between wall and floor <sup>[1]</sup>. Painted trim, particularly white, has become quite trendy in most new houses. In addition, home owners that are remodelling their homes are substituting their existing mouldings for white, or are painting their existing mouldings white. Mainly due to the demand for a lighter, brighter interior <sup>[1]</sup> at a lower cost, oak has been replaced as the trendy moulding by paint grade moulding.

Mirrors are no longer designated exclusively to bedrooms and washrooms, as they now are being used for decoration throughout houses. Flawless transition between mirrors and walls can be achieved by applying trim around mirrors <sup>[1]</sup>.

In general, mouldings have become a popular design trend item and their usage is increasing in every room of the home. This is due to the increase in consumer awareness resulting from the expansion of big box home improvement centers and Do It Yourself (DIY) home improvement TV shows <sup>[2]</sup>. Mouldings and trim are a natural upgrade for consumers beyond just painting.

When a wood finish is desired, there is a shift towards a natural, fresher look, using character finishes and exotic woods such as zebra wood for example. Also, there is an increase in the use of environmentally friendly materials such as bamboo. Light colour finishes are used for increased visual interest by amplifying the texture and grain patterns of wood <sup>[3]</sup>.

## Diverging Trends in Homes & Condominiums

The construction of new multi-family housing surpassed 50% of the annual construction of new homes built in Canada last year. The percentage of multi-family housing built in urban areas is even higher. For example, Vancouver's multi-family dwelling construction represented 80% of the total houses built in 2007. The reasons for the increase in multi-family housing construction in Canada are primarily affordability, convenience and increases in urban density.

With such an increase in multi-family construction, this category is developing its own aesthetic look. This is in stark contrast to the universal application of large mouldings, trim and crown in the 1990's and earlier this decade.

### Multi-Family Trends: *Simplicity=Space*

The multi-family building boom has seen unit sizes become smaller and smaller. To counter this, owners are tending to favour modern and simple decor and furnishings.

Simple trim work, banding details and flat mouldings are often applied in condominiums. These simplified moulding and trim details provide the illusion of space rather than emphasizing the outline of a room with baseboards, or pulling the ceiling down visually with large crown moulding.

### Single-Family Trends: *Luxury in the Details*

This trend is driven by moderately higher income families desiring larger homes. Due to the size of the house, the possibilities for various types of mouldings are greater than for multi-family homes. Consumers in this bracket look for architectural enhancements to make a home unique rather than playing down the mouldings and trim. Large crown mouldings, as well as wall and window framing create contours and contrast. Details and bold lines give the room a more luxurious feel.

At the high end of the market, stain-grade hardwood moulding is the current popular choice with a high demand being experienced for maple and cherry woods. Dark wood mouldings that resemble species such as mahogany are also popular.

Built-up moulding using MDF is in demand as well<sup>[6]</sup>. They are the combination of different standard moulding profiles connected together to create multi-layer custom mouldings. For example, a combination of flat base, cove, and a base cap moulding can create a custom base moulding.

It is important to note that the single-family home trend represents a smaller demographic when compared to the multi-family trend.

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*Multi-family  
dwelling  
construction  
is  
increasing*

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### What's IN: Condominiums

Simple narrow moulding and trim works

No ornamental plaster work

Small crown moulding/or no crown moulding

### What's IN: Detached Homes

Ornate moulding and trim works

Ornamental plaster work

Stain grade hardwood moulding

Large crown moulding

Built up mouldings

## Outdoor Trim

*Outdoor  
trim  
options  
are  
growing*

There is currently a growing trend in outdoor living products in the wood deck and fence sectors. This trend is spilling over into a renewed focus on outdoor trim on homes where homeowners are installing trim to differentiate their home from other neighbouring houses. As the economic downturn puts a focus on projects under \$5,000, the addition of trim around windows and doors is a less expensive upgrade than replacing the siding or other exterior cladding.

Today, more consumers are opting for synthetic rather than natural products, particularly flat trim when using exterior mouldings and trim. PVC and urethane millwork and trim have gained a large market share in the past decade. This trend is partially due to the lower maintenance and superior weather resistance of polymer-based exterior millwork and trim. The cellular PVC market share has increased close to 12% from less than 1% in 2001<sup>[10]</sup>.

There are other synthetic and composite materials available on the market. One such product which has increased its market share is fibre cement. Fibre cement trim is a high density material typically made of Portland cement, sand and wood fibre. Its reputation for resistance to fire and rot has made it a popular option for exterior siding and trim. Manufacturers of this product use other additives to enhance various properties of the product such as moisture resistance and weight. The properties of fibre cement have improved in recent years and there



are many low density fibre cement trim products available. The fibre cement is visually appealing, it has high paint retention<sup>[11]</sup>, and the product is available in various wood grain patterns.

Due to advances in polymer technology, companies are now able to produce plastic-based mouldings that are visually similar to wood products. As a result, plastic/composite moulding products have taken considerable market share from exterior wood moulding products. This is partially due to the vast marketing effort of plastic/composite companies who promote their product as low maintenance and environmentally friendly, as well as their provision of warranties which range from one year to a lifetime. It is apparent that consumers are willing to pay more for exterior products that are longer lasting and require less maintenance.

## New Products / Innovations

### Bamboo

Bamboo mouldings are targeted at the sustainable purchasing consumer niche. Bamboo is a rapidly renewable resource and new technologies developed for harvesting and processing bamboo have allowed it to be used for manufacturing various products. Bamboo mouldings are slowly becoming popular as bamboo trim has a unique visual appearance (shown below) and can be produced using formaldehyde-free resins <sup>[7]</sup>.



### “No Mitre Moulding”

One of the hardest parts of installing moulding, especially crown moulding, is cutting the mitre section where the two ends of the moulding meet. This is extremely hard for most DIY customer groups and “No Mitre Moulding” is a solution to this problem. This product has corner pieces in various profiles, including those that match the rest of the crown moulding, and can be easily installed. The product is generally available in solid wood, fibreglass or polyurethane and for a more decorative look, there are various multi-layer, ornate corner pieces available. This product is also available as a package that contains the corner pieces and the horizontal mouldings in between <sup>[4]</sup>.

### Flexible Moulding

Flexible moulding is designed to replace wood moulding in labour intensive areas, such as around curved window frames and around cylindrical posts or in other areas where flexibility is important. It is made from polymer-based resins such as urethane and, in terms of strength and paintability, is similar to other polymer-based mouldings <sup>[8]</sup>.



These products are commonly used in high-rise offices and condominiums where columns and irregular walls can be found. They are also used in high-end detached homes for curved details.

### Decorative Hardwood Moulding

Hardwood mouldings that are embossed with different patterns range in size and profile. The embossed pattern along with the allure of hardwood creates a sense of natural beauty and warmth. This type of moulding is favoured by consumers who are interested in adding their preferences and personality to every corner of their home. Matching corner blocks, plinth blocks and rosettes not only complement hardwood moulding, they eliminate mitre cuts thereby making installation simple and worry-free.

### Veneered Hardwood Moulding

Veneered hardwood moulding is made by wrapping fingerjointed pine moulding or MDF with a veneer of oak, cherry, maple or other hardwoods. The veneer is wrapped all the way around to the back of each piece. Since the moulding has a fingerjointed or MDF base, the cost of this product is significantly lower than that of solid hardwood moulding. In addition, the veneer accepts stains and clear finishes evenly.

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*New  
products  
developed  
for ease of  
installation*

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# Market Size

*Repair and remodelling show signs of strength*

The past year was one of the most difficult years for most wood manufacturing businesses. While moulding and trim demand from new housing starts has been drastically reduced, repair, remodelling and commercial demand has been more robust.

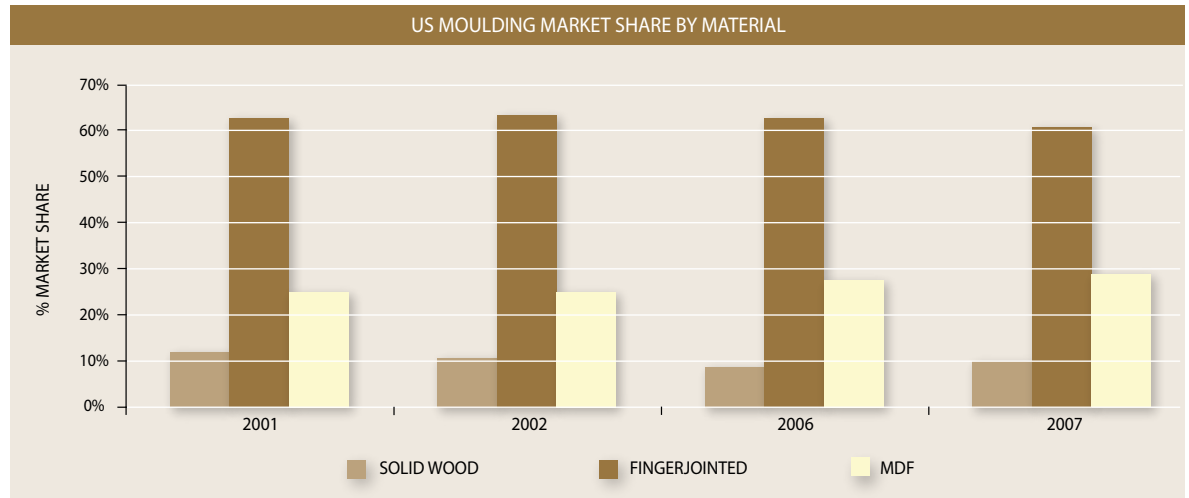
The information found in the table below was collected in 2007 at the beginning of the housing downturn. It is expected that the 2009 numbers will be considerably lower than forecasted.

US MOULDING & TRIM DEMAND			
BILLION DOLLARS			
Item	2001	2006	2009f
Moulding & Trim Demand	<b>7.4</b>	<b>9.8</b>	<b>9.8</b>
Moulding	3.3	4.2	4.6
Stairwork	2.0	2.9	2.6
Outdoor	2.1	2.7	2.6

Source: The Freedonia Group Inc.<sup>[12]</sup>

Over two-thirds of the demand for moulding and trim is made up of wood products. The 2009 forecasted demand for wood is \$6 billion, with plastic and metal each forecasted at \$1.3 billion, and various other materials making up the remaining \$1.2 billion.

While traditional wood products face competition from plastics, metal, bamboo and cement, there has also been considerable market share changes within the wood category in the past 10 to 15 years with finger-jointed and MDF mouldings taking market share from solid wood. In 2007 the market share of MDF increased by four percent reaching 29%, taking market share away from fingerjointed mouldings<sup>[13]</sup>. Solid wood moulding market share had a slight increase reaching 10% and fingerjointed moulding decreased to 61% in 2007.



Wood Markets. 2008<sup>[13]</sup>

## MDF + CARB

The California Air Resources Board (CARB) has set in place emission standards in order to reduce formaldehyde emissions from composite wood products. Composite wood products that have been manufactured with adhesives containing formaldehyde must meet these regulations. The regulations will go into effect in two phases with specific deadlines for each composite product group: Phase 1 began January 1, 2009 and Phase 2 will be in place by 2012.

MDF mouldings will also be subject to CARB regulations. MDF moulding manufacturers outside

of California will have to produce a product that meets CARB standards for shipment into California. As California makes up more than 12% of the population in the United States and is the same size as the Canadian market, the decision to avoid selling into California comes at a significant sacrifice<sup>[16]</sup>.

There are existing formaldehyde emission standards already in place for European countries and Japan. These standards have been in place for some years and many manufacturers of MDF-based products who export to these areas have already met these restrictions.

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*Environmental  
concerns are  
impacting  
product  
selection*

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WORLDWIDE FORMALDEHYDE STANDARDS FOR COMPOSITES  
(using US large chamber test values)

Standard	European E1 (EN.717)	Japanese F**	Japanese F***	Japanese F****	CPA EPP	CARB Phase 1	CARB Phase 1
Maximum Emission Level (ppm)*	≤0.10	0.90*	0.50*	0.30*	0.20	0.18 (PB) 0.21 (MDF)	0.09 (PB) 0.11 (MDF)

\*\*Part Per Million (PPM). \*Approximately. [15]

Note: The methodology used to measure the level formaldehyde differs in each standard.

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"Market and Attribute Trends" is a series of fact sheets aimed at improving awareness and information on market trends that shape the demand for wood products. Markets and Attribute Trends is complemented by a "Facts on Wood" series that provides technical information on the various commercial wood species in Canada.

Through the Value to Wood program, Canadian wood product manufacturers have access to the expertise and information they need to extract greater value from wood resources. To download the Market and Attribute Trends, visit [www.valuetowood.ca](http://www.valuetowood.ca)

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