



TAPE
WEEK
2025

Trends and Opportunities for PSA Tapes in Home Construction

Exploration of Market Data from the Annual Builder and
Consumer Practices Reports

Trends and Opportunities for PSA Tapes in Home Construction



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Home Innovation Research Labs

About Us

Home Innovation has been assisting manufacturers in developing and commercializing new building technologies since 1964. As independent, third-party researchers, we deliver everything you need under one roof:

- **Market research** through purchase tracking of building materials, surveys of contractors & observational studies
- **Building science** and real-world applied research
- **Laboratory testing** & product certification—fire, structural, thermal, water, and more
- Relationships with industry organizations and code bodies to help navigate and fast-track product certification & listing

Home Innovation is also the accrediting agency and standard developer for the #1 residential green home certification in the U.S. — the National Green Building Standard.

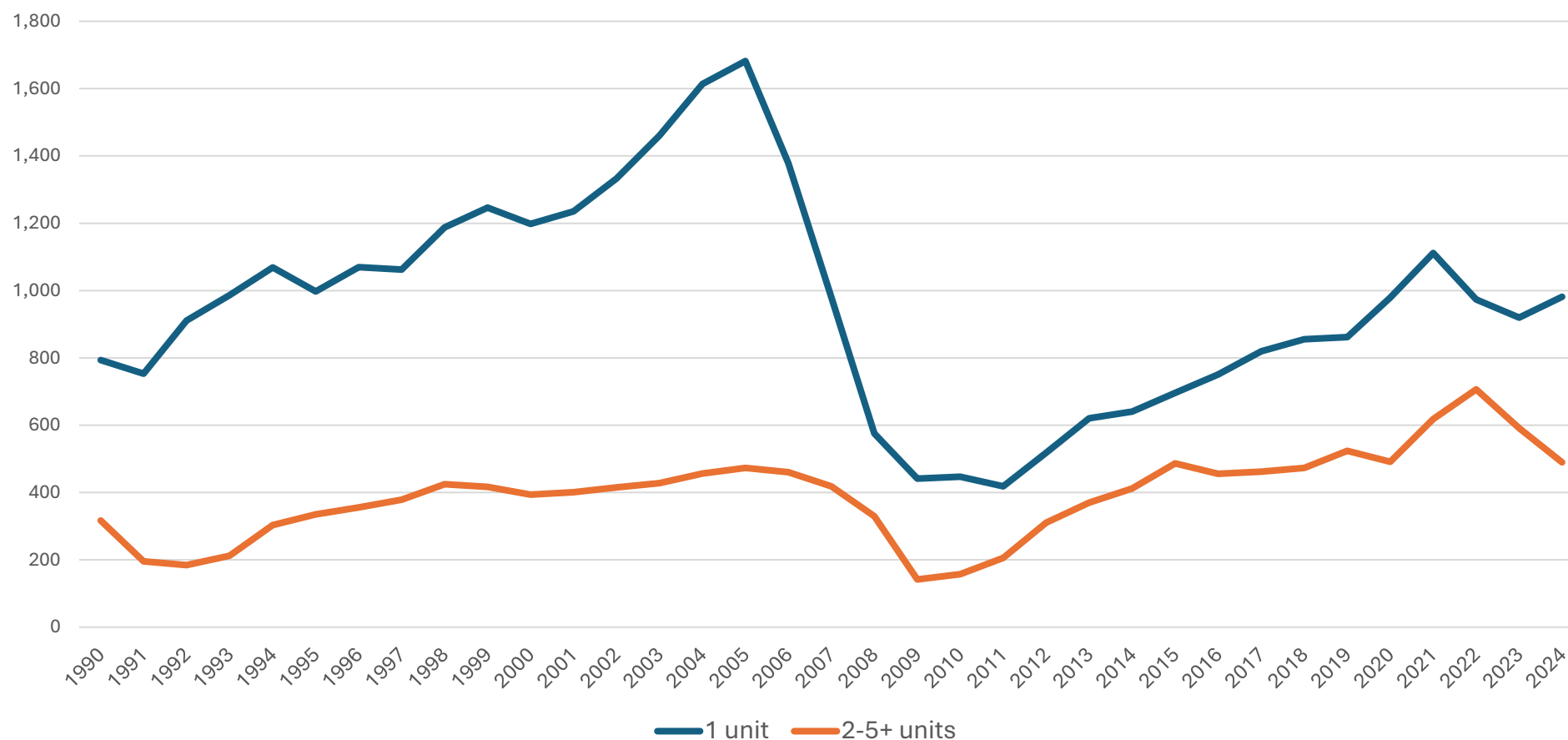


Current Trends in the Building Materials Industry

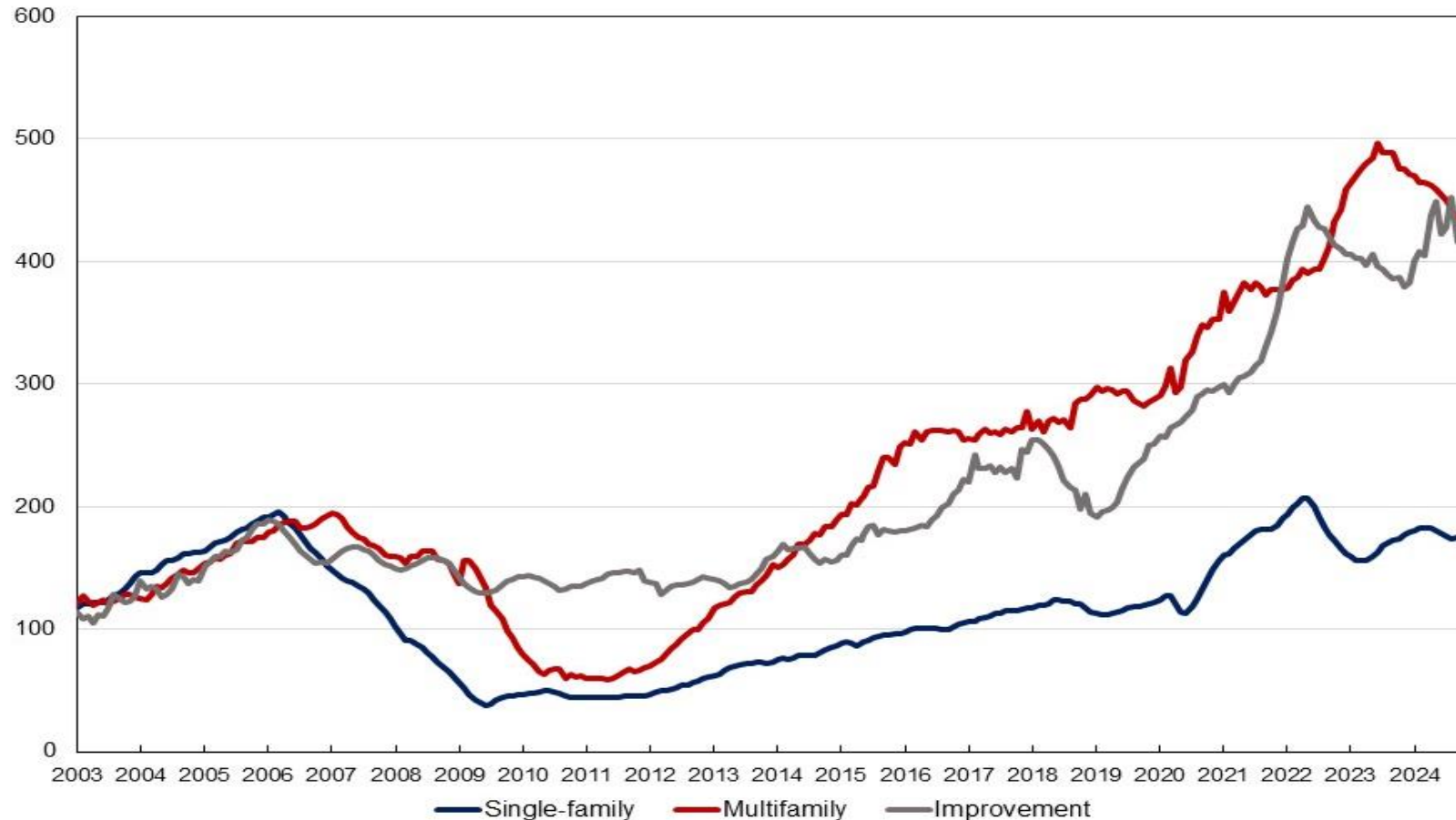
Creating Opportunities for Pressure-Sensitive Tapes

- Energy Codes—tighter air sealing favoring peel & sticks over wraps
- Resiliency momentum growing—particularly exterior building envelope, insurance companies are slowly getting on board
- Affordability of housing—builders trying to edge out costs on all fronts
- Demographic shift supports greater acceptance of polymer & engineered materials
 - Tech-savvy Millennial buyers now dominate home market, prefer engineered materials
 - Design trends favor Euro/Urban styles and wood finishes on floors
- Skilled labor shortage intensifies, wages and benefits increasing
 - Average home construction time increased was 6.7 months in 2020 and 7.7 months in 2024
 - Market strongly swinging to quick-to-install and pre-finished materials
 - Impact of stricter border controls uncertain on labor pool
- Importance of outdoor living spaces climbing, blending of indoor & outdoor
- Declining availability of development land in metro areas

Single and Multifamily Housing Starts Permits in U.S. (1990 – 2024): Housing Deficit Continues to Grow



Private Residential Construction Spending Index



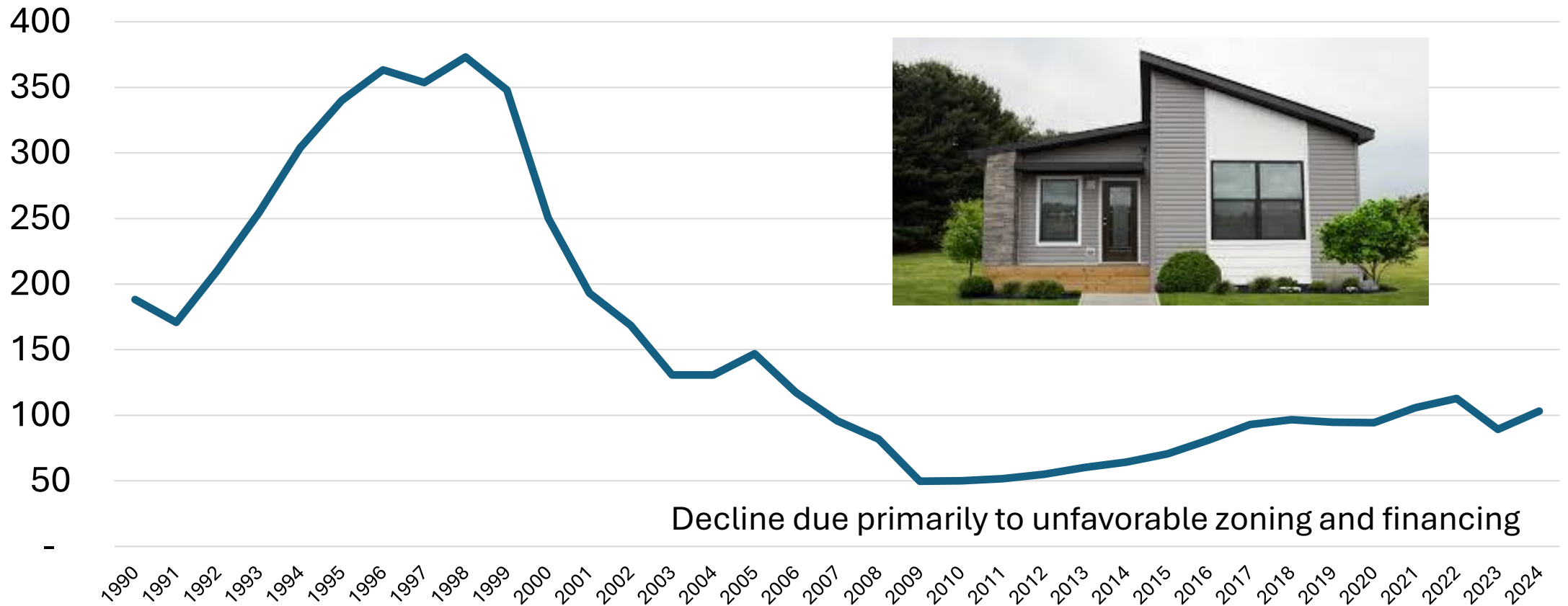
Home remodeling market still very favorable and near historic highs

Remodeling expenditures remain resilient despite new home construction downturn

Source: Construction Spending, Census Bureau, NAHB Analysis
Index Level 01/01/2000 = 100

Shipments of New Manufactured Homes in U.S.

(thousands of shipments)



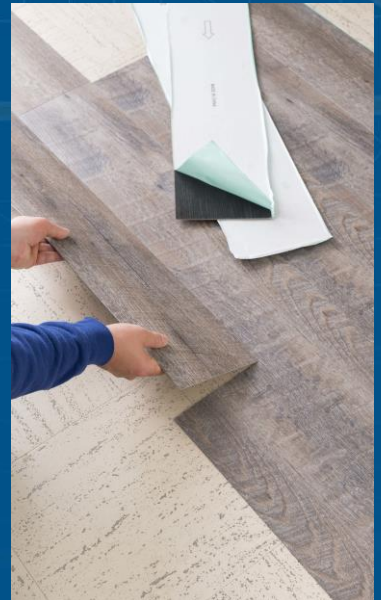
Decline due primarily to unfavorable zoning and financing

“Peel-and-Stick” Vinyl Flooring Reinvigorated by Luxury Vinyl

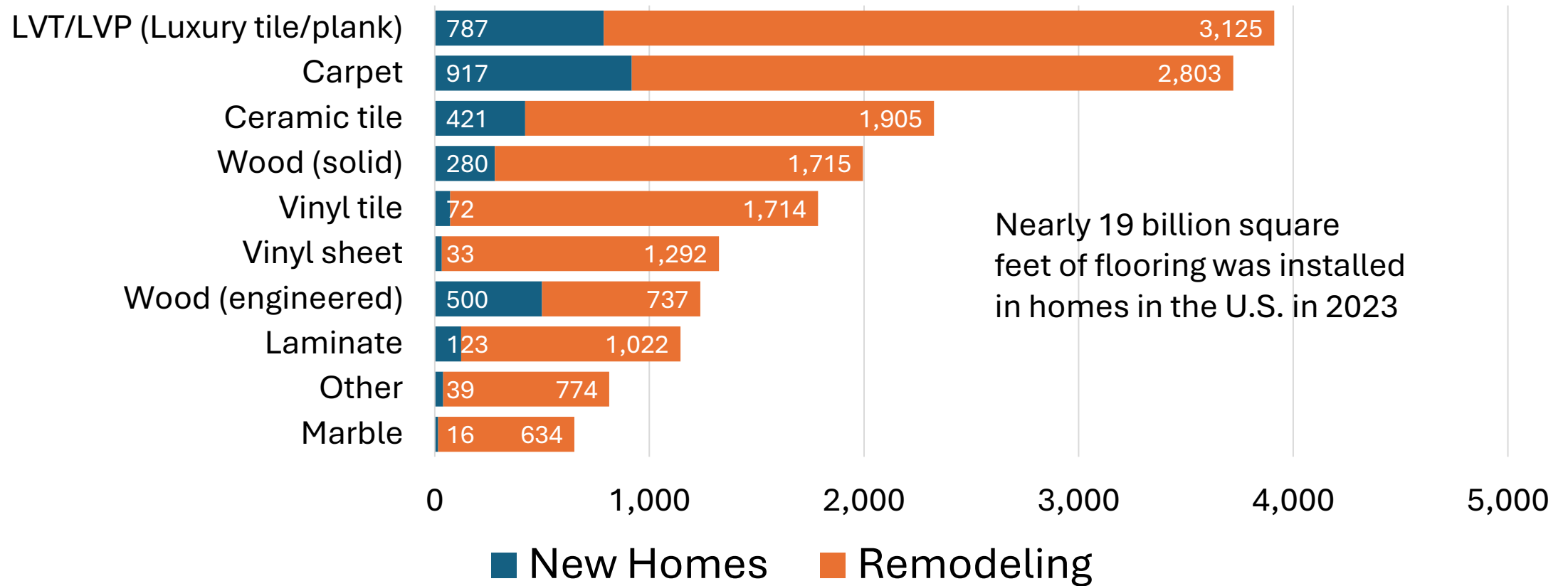


 PSTC

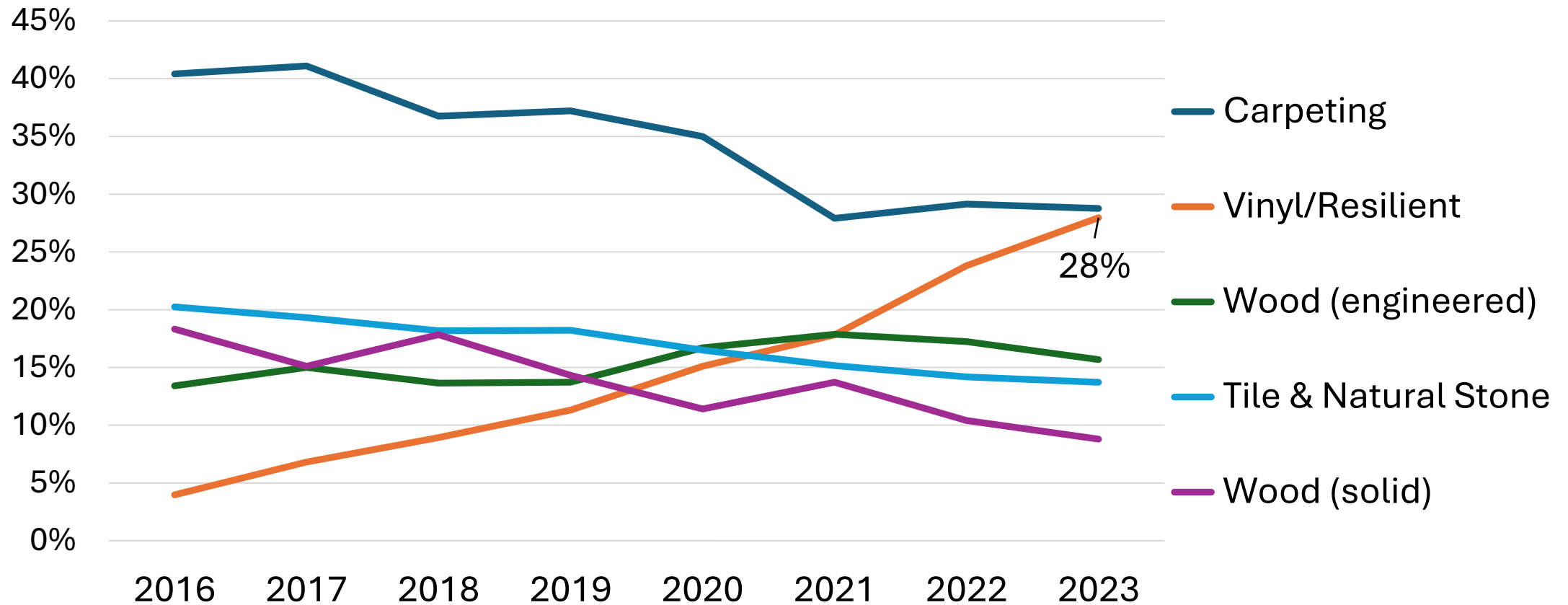
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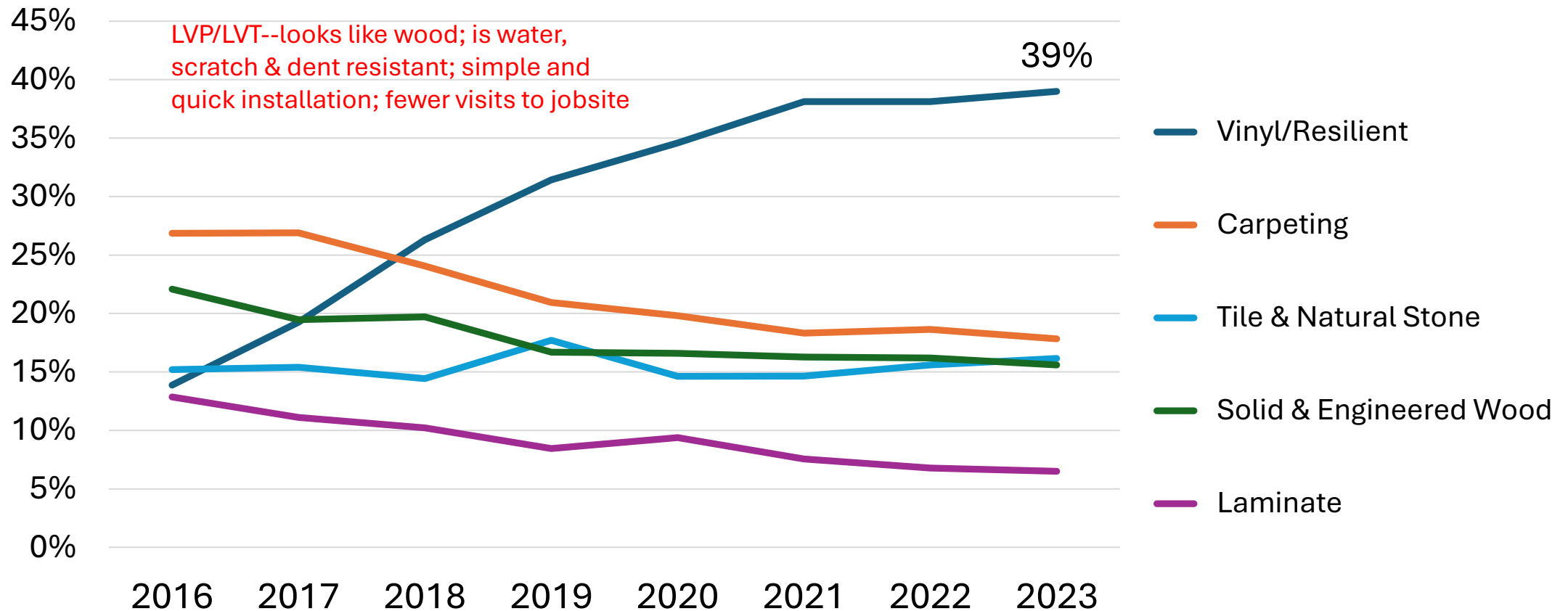
Residential Flooring Installations 2023 (millions of SF)



Flooring Trends in New Homes



Flooring Trends in Home Remodeling



Residential Roofing Underlayment

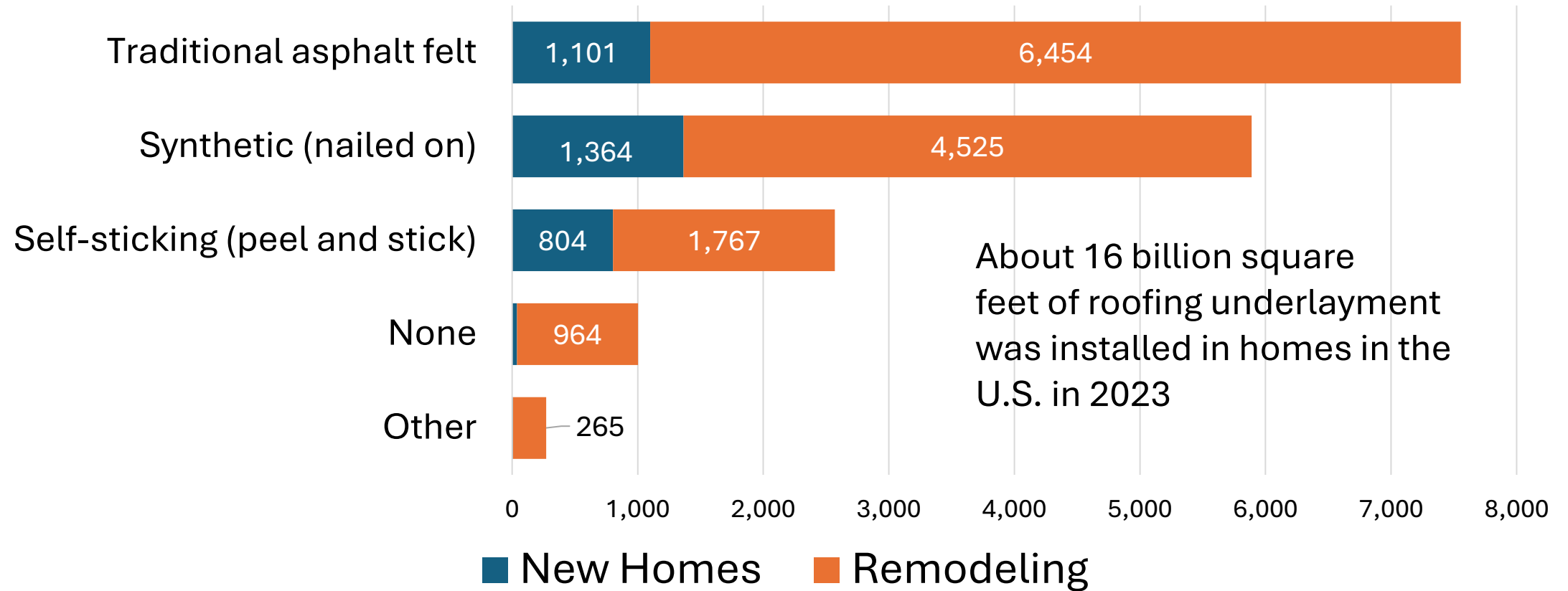


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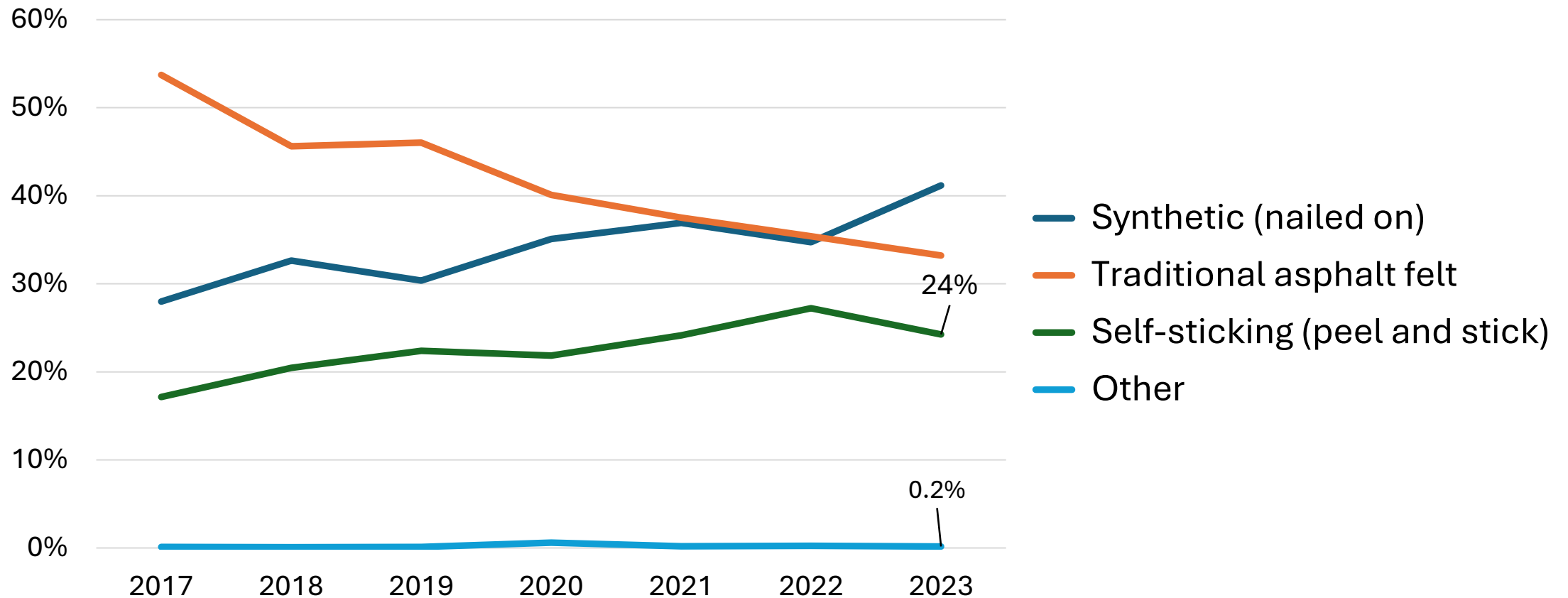
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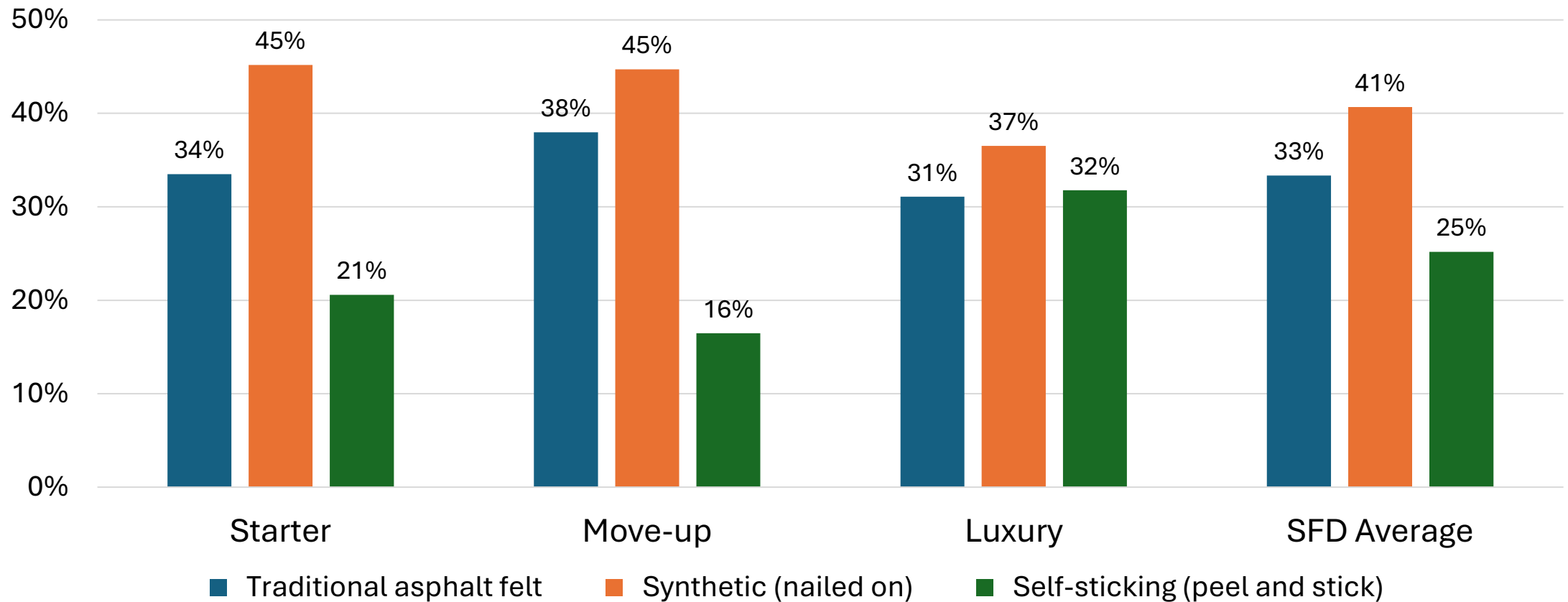
Residential Roofing Underlayment Installations 2023 (millions of SF)



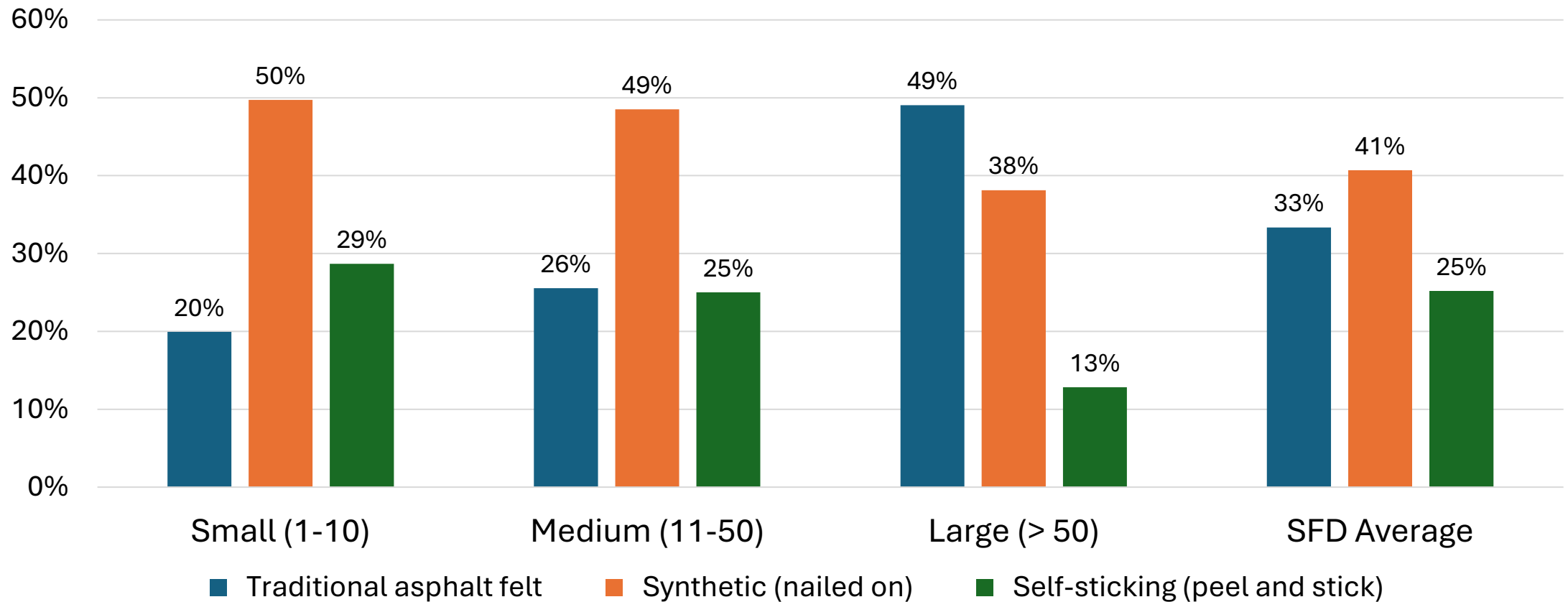
Roofing Underlayment Trend in New Homes



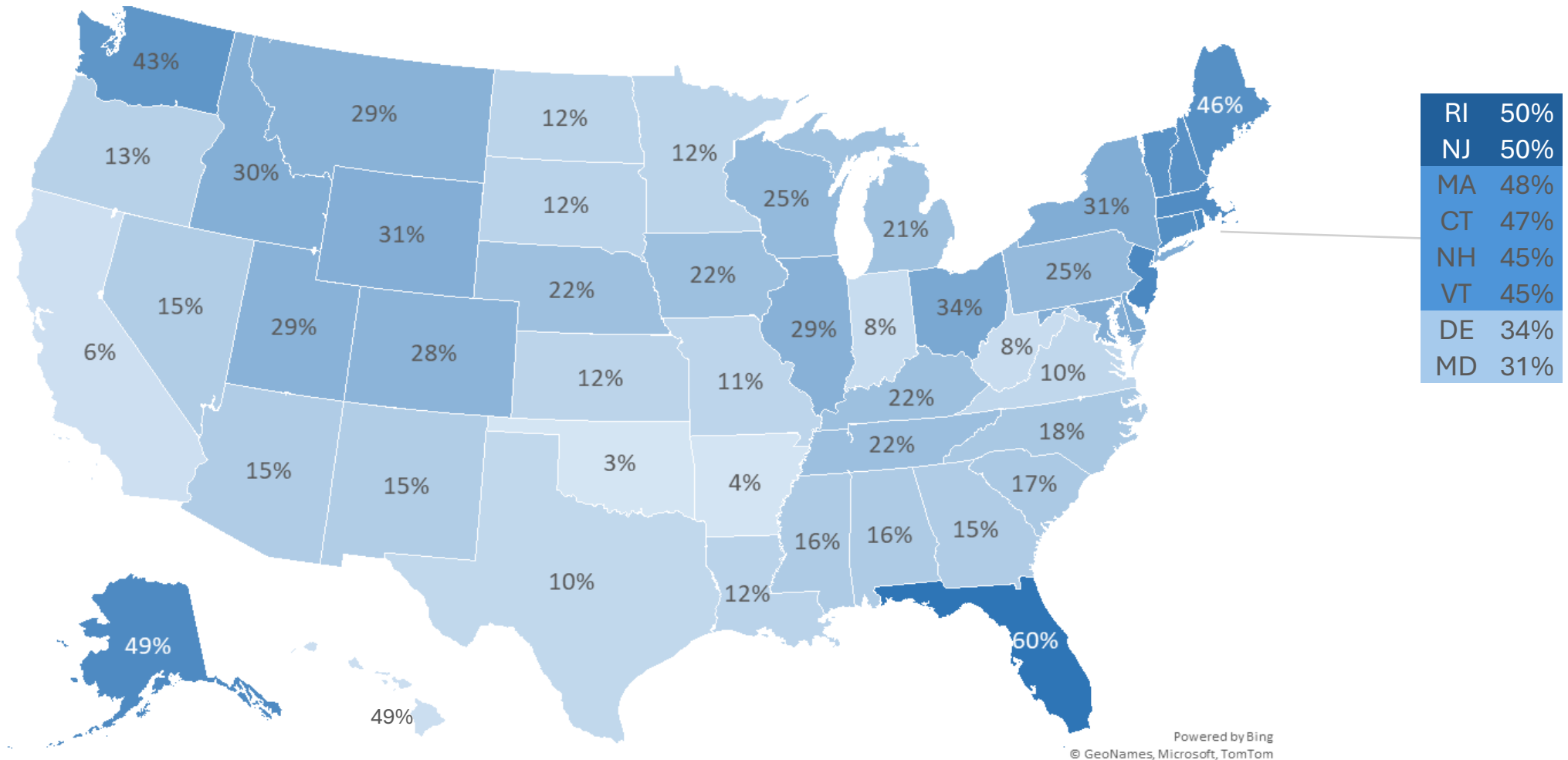
Roofing Underlayment Shares of U.S New Single Family Homes: Starter, Move-Up, and Luxury (2023)



Roofing Underlayment Use by Size of Single-Family Home Builder (2023)

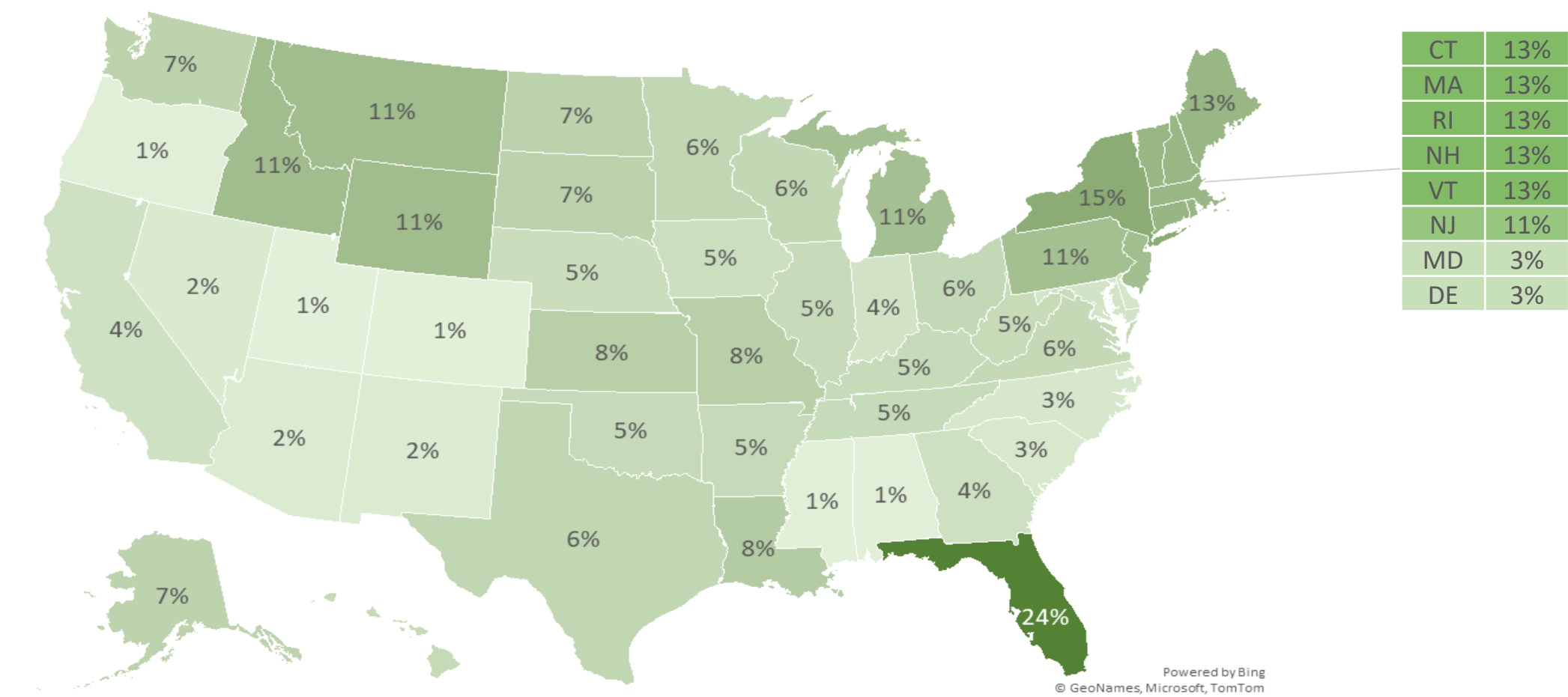


“Peel and Stick” Shares of Roofing Underlayment by State, New Homes (2023)



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“Peel and Stick” Shares of Roof Underlayment by State for Home Re-Roofing (2023)



Another Opportunity: Seam Tape on Sloped Roof Decks



Sealed Roof Decks: Seam Tape on Roof Deck Sheathing Seams

- Roof sheathing seam tape is another method to achieve sealed roof deck
- Potential of 1.6 billion LF potential for seam tape on new roofs annually
- 5 billion LF annual potential for home roof replacements

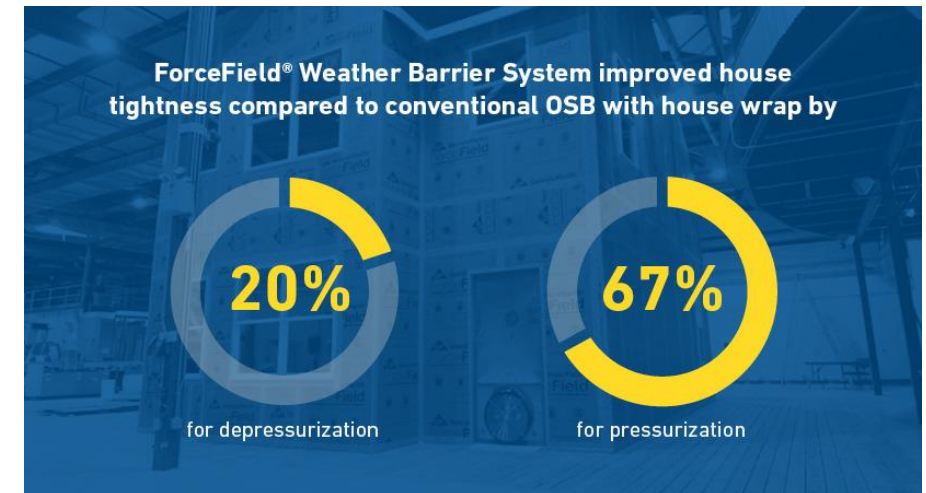


Another Exterior Opportunity: Wall Sheathing Tapes



Wall Sheathing Tapes

- Growing popularity of “combination OSB/WRB panels” and taping of foam board seams
- Can eliminate need for housewrap, improve airtightness
- Potential of 2 billion LF potential for seam tape on home wall sheathing annually

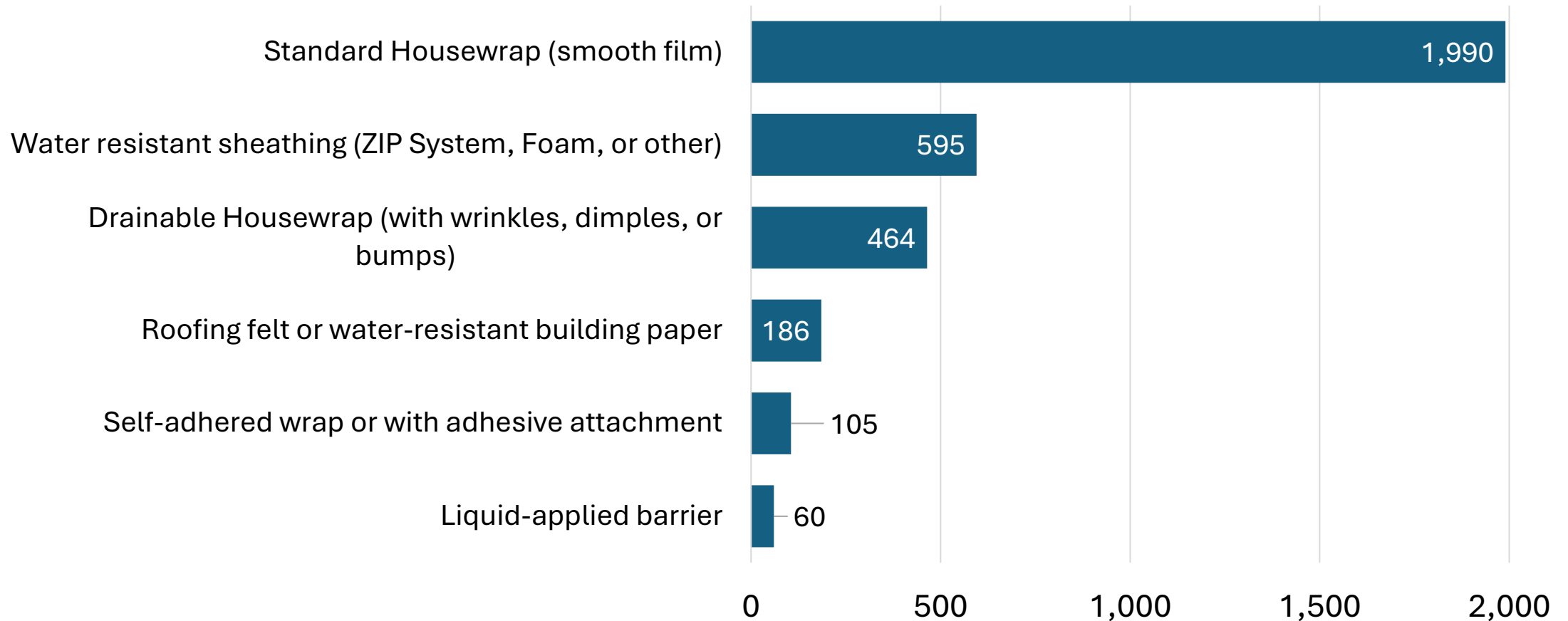


Self-Adhered Membranes on Home Exterior Walls

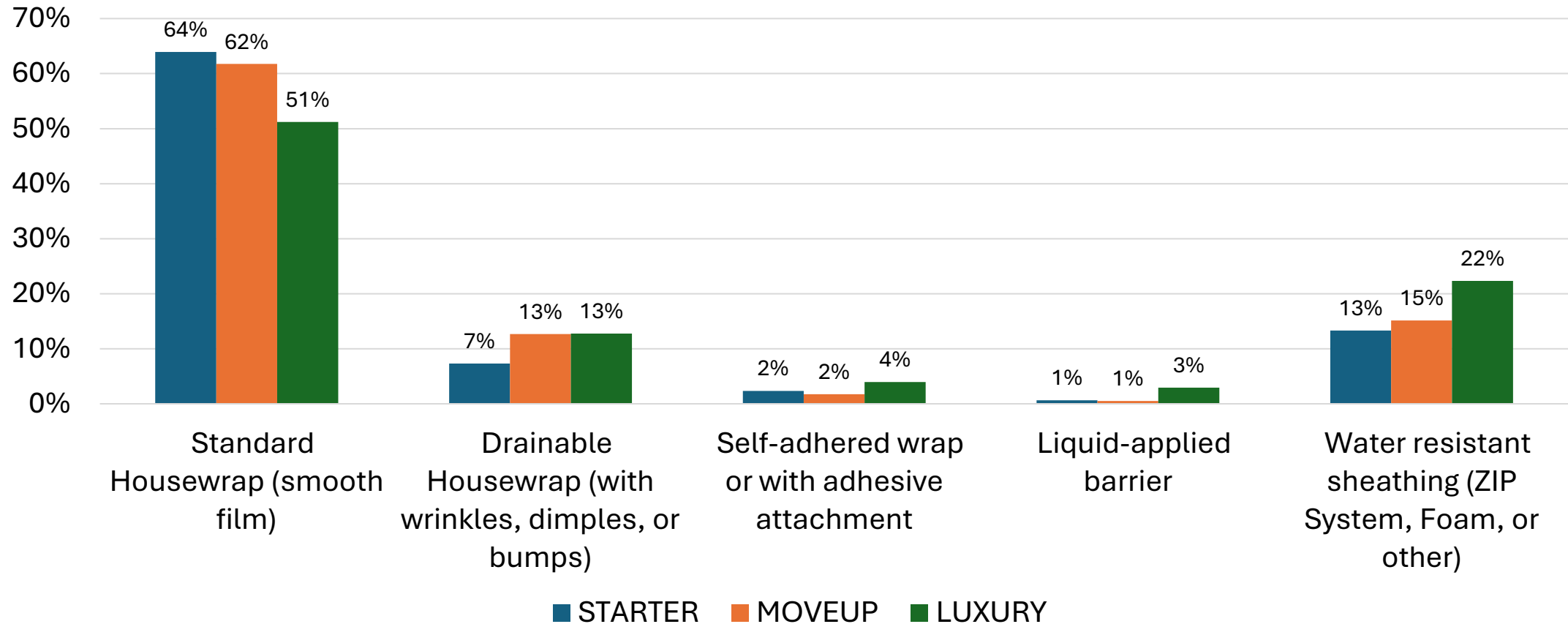


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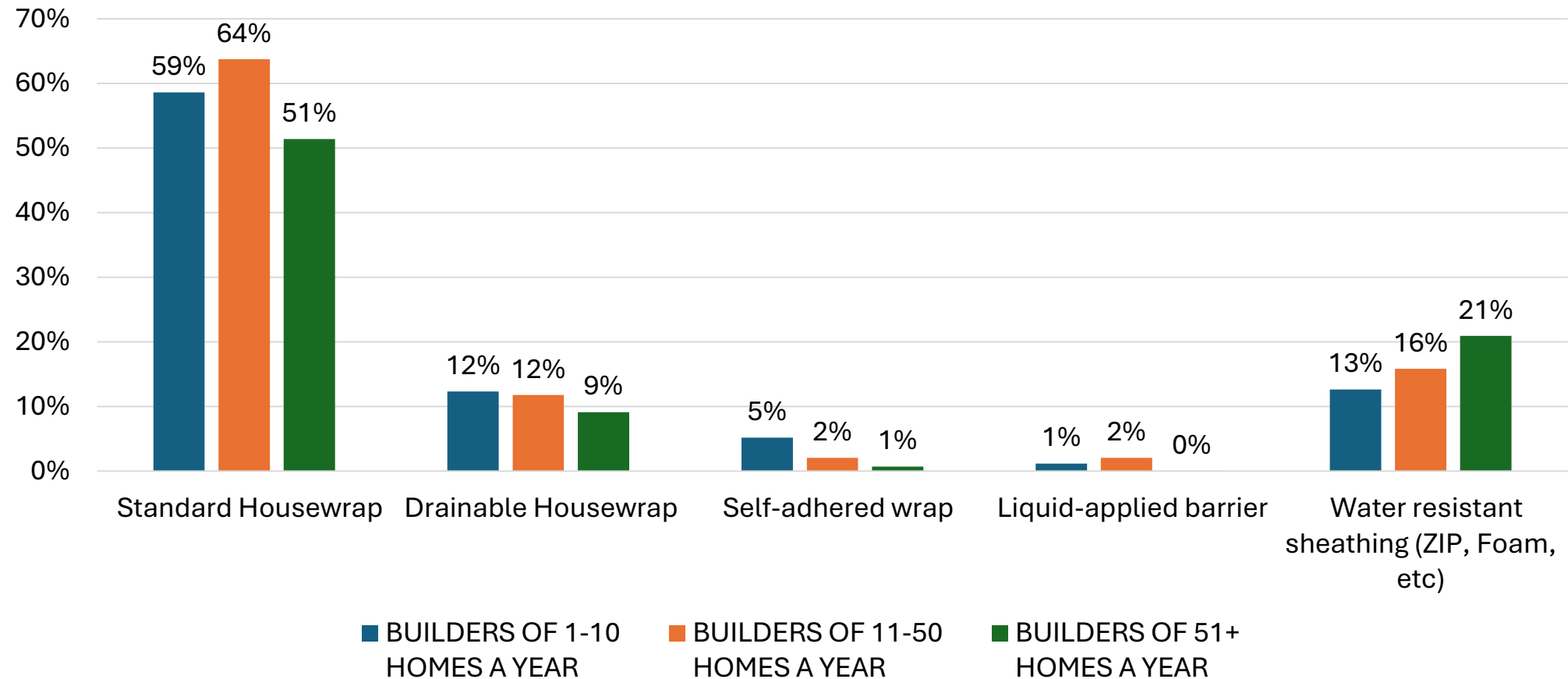
Residential Weather Resistant Barriers, New Homes 2023 (millions of SF)



Water-Resistant Exterior Wall Shares of U.S New Single Family Homes (2023)



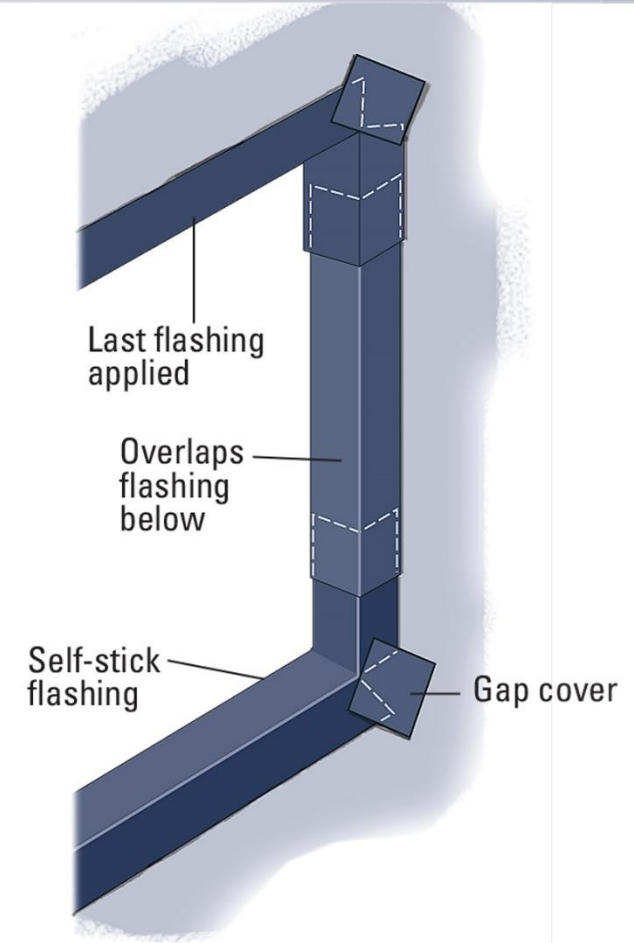
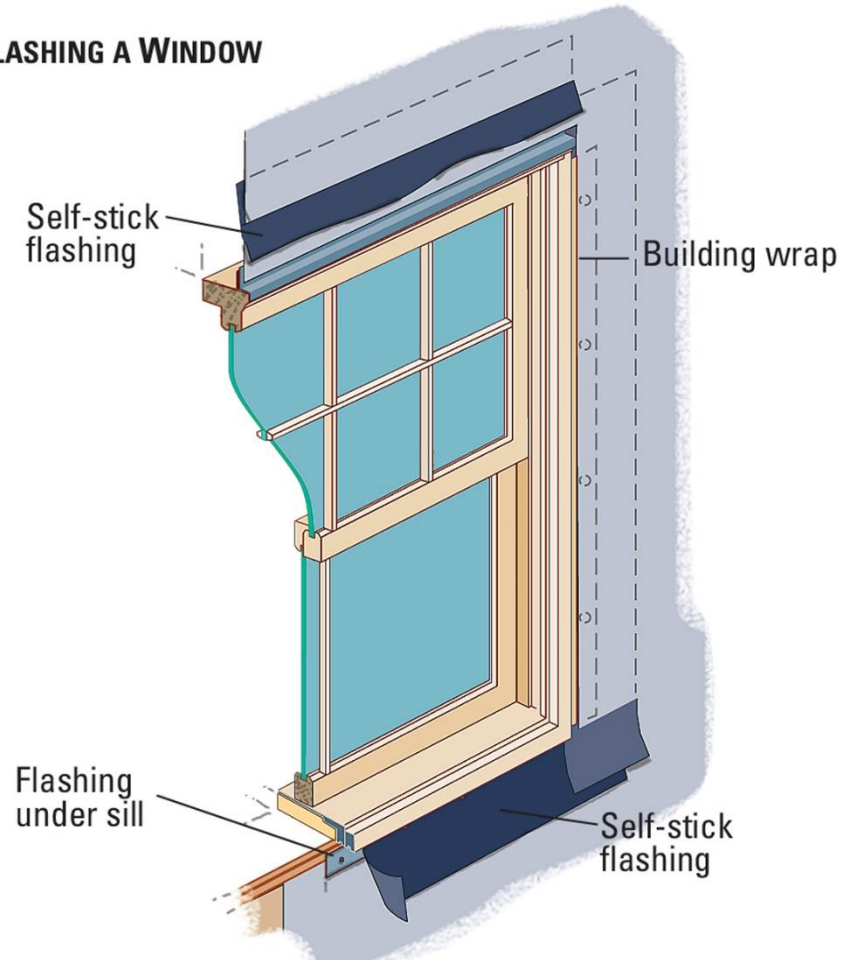
Water-Resistant Exterior Wall Shares of U.S New Single Family Homes (2023)



Residential New Construction Windows and Patio Doors

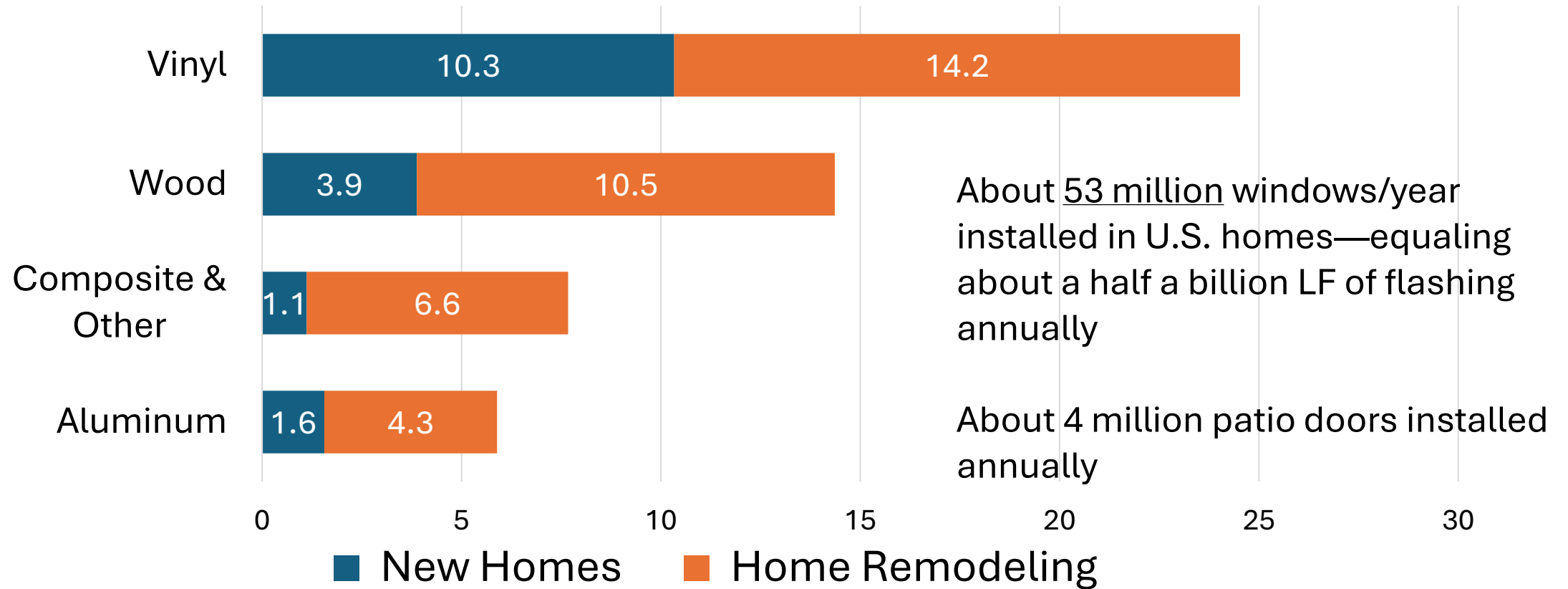
- Flashing tape is nearly universal for new construction windows and patio doors
- Placed at window head, sides, and sill
- Potential of about 750* million LF or more of window flashing tape annually
- Other flashing opportunities: roof, decks

FLASHING A WINDOW



Windows Installed in New U.S. Homes and Home Remodeling, 2023

(millions of window units)

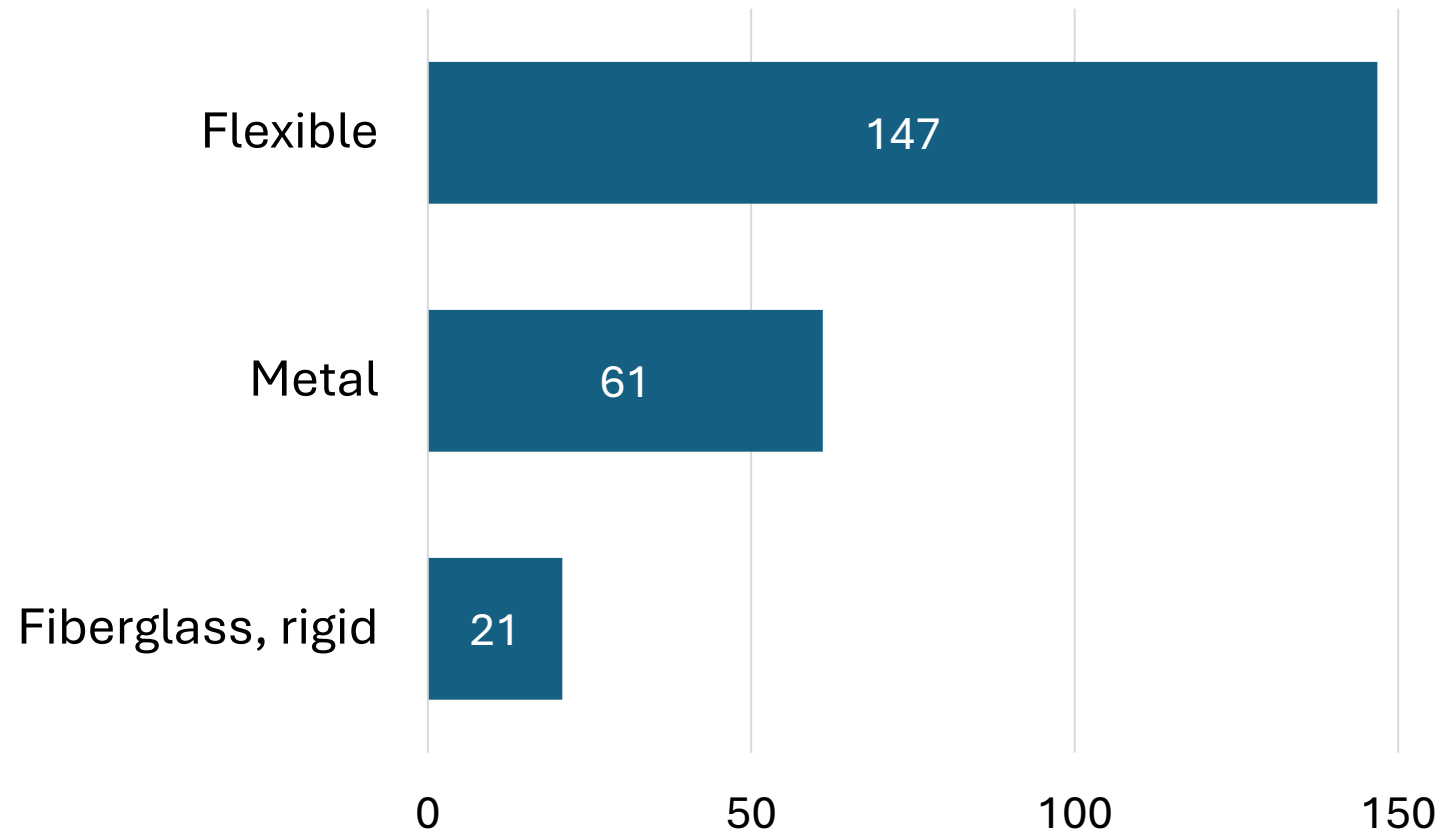


HVAC Ducts and Equipment



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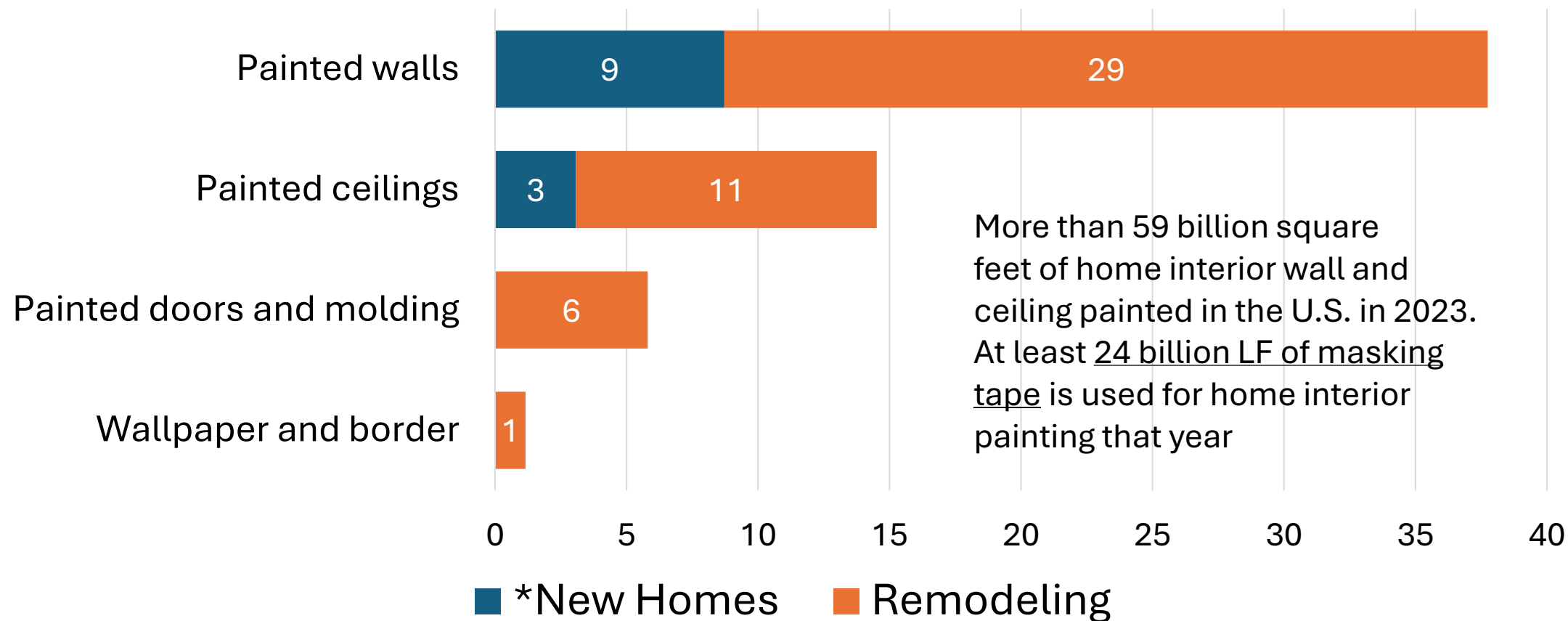
Residential HVAC Main and Run-Out Ducts Installations 2023, New Homes (millions of LF)



- 228 million linear feet of HVAC duct installed in new homes in the U.S. in 2023
- Ducts transitioning from outside to inside building envelope
- Less metal, more flex duct
- Bubble wrap insulation growing in popularity for metal ducts
- Aerosol duct sealing may change market
- Potential new air ducting system entrants that are self-sealing, such as Rheia

Residential Interior Painting, 2023

(billions of SF)



Summary of Opportunities in Home Construction and Remodeling

- Discrepancy between life expectancy of outdoor treated lumber and composite decking and railing systems—leading to efforts to protect substructures with tapes & flashing.
 - Nearly 2 billion square feet of outdoor decks/porches built annually
- Self-adhered roofing underlayment—particularly in home re-roofing, **but increasing at a faster pace in New Homes**
- Roof sheathing tapes—particularly in high-wind areas as part of re-roofing
- Self-adhered housewrap—higher-end new homes
- Wall sheathing tape on new homes—reduces cycle time and labor
- Flashing tapes for windows and doors
- HVAC, masking, and housewrap tape markets—mature but very large



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