

A complex network diagram on the left side of the slide, consisting of numerous small grey and blue dots connected by thin grey lines, with one prominent blue dot.

BUILDING PRODUCTS

Supply Chain Insights

2025

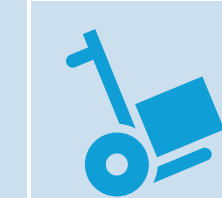
DATA SET OVERVIEW



Source: Data from a leading manufacturer of paper and building products.



Coverage: Standalone indices for Lumber, OSB, Plywood, Gypsum, Commercial Gypsum, and Wallboard.



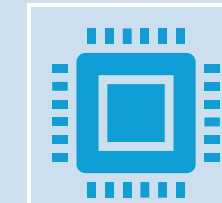
Insights: Price, quantity, and sales trends backed by granular B2B order data from hundreds of distributors and customers.



History: Data spans back to 2014, capturing ~\$200B in total spend.



Privacy Measures: Data obfuscated to protect the source and customers while retaining value for buyers by aligning with broader market trends.



Index Calculations: Methodologies detailed in the accompanying data dictionary.

- ✓ **Structured:** Yes
- ✓ **History:** 2014 – Present
- ✓ **Spend:** \$200B+
- ✓ **Geography:** U.S., Regional, State *
- ✓ **Cadence:** Daily, Weekly & Monthly*
- ✓ **Lag:** T + 3
- ✓ **Mapped to Tickers:** No
- ✓ **Data Granularity:** Derived indices, no actuals

*Index & product dependent



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DATA DICTIONARY

FIELD	DESCRIPTION	Values	Daily	Weekly	Monthly	Rolling Window	Base Period	YoY%
price_index	Tracks aggregate average sku price for a given building product and region. Index methodology uses first month of available historical data for each building product type and region combination as the base period to index from.	Float >0, 100 Base	X	X	X		X	
qty_index	Indexed metric representing total quantity of items sold for each building product and region. Index methodology uses 2014 as a base period with a starting value of ~100 to measure quantity trends in subsequent periods.	Float >0, 100 Base	X	X	X		X	
sales_index	Indexed metric representing total sales for each building product and region. Index methodology uses 2014 as a base period with a starting value of ~100 to measure sales trends in subsequent periods.	Float >0, 100 Base	X	X	X		X	
total_sales_direction	Indicates overall direction of year-over-year growth rates for sales for a given building product and region. Possible values are -1, 0 and 1, representing YoY decline, no-change and growth respectively.	Integer 1, 0, -1		X	X	X		X
total_qty_direction	Indicates overall direction of year-over-year growth rates for quantity for a given building product and region. Possible values are -1, 0 and 1, representing YoY decline, no-change and growth respectively.	Integer 1, 0, -1		X	X	X		X
total_cust_direction	Indicates overall direction of year-over-year growth rates for number of distinct customers for a given building product and region. Possible values are -1, 0 and 1, representing YoY decline, no-change and growth respectively.	Integer 1, 0, -1		X	X	X		X



DATA DICTIONARY

FIELD	DESCRIPTION	Values	Daily	Weekly	Monthly	Rolling Window	Base Period	YoY%
cust_sales_direction	Indicates direction of overall number of customers with positive, negative or flat YoY sales growth rates for a given building product and region. Possible values are -1, 0 and 1.	Integer 1, 0, -1		X	X	X		X
cust_qty_direction	Indicates direction of overall number of customers with positive, negative or flat YoY quantity of items growth rates for a given building product and region. Possible values are -1, 0 and 1.	Integer 1, 0, -1		X	X	X		X
cust_sales_pct	Percentage of total customers for a given building product and region with positive or negative YoY sales growth rates.	Percent		X	X	X		X
cust_qty_pct	Percentage of total customers for a given building product and region with positive or negative YoY quantity growth rates.	Percent		X	X	X		X
cust_sales_median	Median YoY sales growth rates per customer for a given building product and region.	Percent		X	X	X		X
cust_qty_median	Median YoY quantity growth rates per customer for a given building product and region.	Percent		X	X	X		X



BUILDING PRODUCT DESCRIPTIONS

PRODUCT	DESCRIPTION
Lumber	<p>Primarily southern yellow pine and western softwood lumber products included in coverage. This type of lumber is preferred for numerous applications, such as treated lumber, general framing, truss design, as well as packaging and crating.</p> <p>Product Line Coverage: Full spectrum of lumber products, from 2×4 to 2×12 in 8' to 20' lengths, and timbers from 4×4 to 6×6 in 8' to 20' lengths. From MSR, Select Structural, #1, #2 Prime, and #2, to #3 and Economy lumber</p>
OSB	<p>Oriented strand board sheathing panels covered in this data provide a base layer for wall and roof sheathing applications. This building product type is ideal for residential and light commercial construction.</p> <p>Product Line Coverage: Blue Ribbon OSB Rated Sheathing</p>
Plywood	<p>Plywood products covered in this data include construction applications in flooring, sheathing, roofs, siding and panels. These plywood products are ideal for residential and light commercial construction, with some panels also used for concrete pouring applications.</p> <p>Product Line Coverage: Plytanium Sheathing, Plytanium Sturd-I-Floor, Plytanium Siding, Plytanium Sanded Panels, Ply-Bead Panels, PlyFrame Panels, DryPly Plywood</p>
Gypsum	<p>Gypsum represents the total aggregate for all gypsum-based products covered in the data, including those used for commercial gypsum and wallboard applications, which are each provided as standalone products. Other gypsum products include those used in more general commercial construction.</p> <p>Product Line Coverage: ToughRock Gypsum Boards & Sheathing, DensArmor Panels, DensGlass Sheathing & Shaftliner, DensShield Tile Backer, DensDeck Roof Boards</p>
Commercial Gypsum	<p>Gypsum-based dens boards and panels used in a variety of commercial construction applications including roof boards, interior panels, shaftliners and sheathing.</p> <p>Product Line Coverage: All "Dens" Gypsum Products</p>
Wallboard	<p>Gypsum-based wallboard panels covered in this data is used for internal wall applications in both residential and commercial construction.</p> <p>Product Line Coverage: ToughRock Gypsum Boards</p>



REGIONS COVERED BY PRODUCT

COMMERCIAL GYPSUM	GYPSUM	LUMBER	OSB	PLYWOOD	WALLBOARD
NATIONAL	NATIONAL	NATIONAL	NATIONAL	NATIONAL	NATIONAL
EAST NORTH CENTRAL	EAST NORTH CENTRAL	EAST NORTH CENTRAL	EAST NORTH CENTRAL	EAST NORTH CENTRAL	EAST NORTH CENTRAL
EAST SOUTH CENTRAL	EAST SOUTH CENTRAL	EAST SOUTH CENTRAL	EAST SOUTH CENTRAL	EAST SOUTH CENTRAL	MOUNTAIN
MIDDLE ATLANTIC	MIDDLE ATLANTIC	SOUTH ATLANTIC	MIDDLE ATLANTIC	MIDDLE ATLANTIC	PACIFIC
MOUNTAIN	MOUNTAIN	WEST SOUTH CENTRAL	MOUNTAIN	MOUNTAIN	WEST NORTH CENTRAL
PACIFIC	NEW ENGLAND	MIDWEST	SOUTH ATLANTIC	SOUTH ATLANTIC	WEST SOUTH CENTRAL
SOUTH ATLANTIC	PACIFIC	NORTHEAST	WEST NORTH CENTRAL	WEST NORTH CENTRAL	MIDWEST
WEST NORTH CENTRAL	SOUTH ATLANTIC	SOUTH	WEST SOUTH CENTRAL	WEST SOUTH CENTRAL	NORTHEAST
	WEST NORTH CENTRAL				
	CENTRAL		MIDWEST	MIDWEST	SOUTH
	WEST SOUTH CENTRAL				
	MIDWEST		NORTHEAST	NORTHEAST	WEST
			SOUTH	SOUTH	
			WEST	WEST	



STATES COVERED BY PRODUCT

COMMERCIAL GYPSUM	GYPSUM	LUMBER	OSB	PLYWOOD	WALLBOARD
ARIZONA	ARKANSAS	NORTH CAROLINA	FLORIDA	FLORIDA	CALIFORNIA
CALIFORNIA	CALIFORNIA	TEXAS	INDIANA	GEORGIA	TEXAS
FLORIDA	COLORADO	FLORIDA	MARYLAND	ILLINOIS	
ILLINOIS	FLORIDA	TENNESSEE	MISSOURI	MARYLAND	
IOWA	GEORGIA		NEW YORK	NORTH CAROLINA	
NORTH CAROLINA	ILLINOIS		NORTH CAROLINA	OHIO	
OHIO	INDIANA		OHIO	TENNESSEE	
OREGON	IOWA		PENNSYLVANIA	TEXAS	
PENNSYLVANIA	KANSAS		SOUTH CAROLINA	VIRGINIA	
TEXAS	MASSACHUSETTS		VIRGINIA		
WASHINGTON	MICHIGAN		GEORGIA		
	MISSOURI		ILLINOIS		
	NEBRASKA		TENNESSEE		
	NEW_JERSEY				
	NORTH CAROLINA				
	OHIO				
	OKLAHOMA				
	OREGON				
	SOUTH CAROLINA				
	TENNESSEE				
	TEXAS				
	UTAH				
	WASHINGTON				



TICKERS COVERED

COMPANY NAME	TICKER	INDUSTRY/SECTOR	COMPANY DESCRIPTION	MARKET CAP		NUMERICAL	EMP. COUNT
CRH PLC	CRH	Building Materials	International building materials group	\$34.59B	\$	34,590,000,000	71,000
James Hardie Industries plc	JHX	Building Materials	Manufacturer of fiber cement products	\$14.49B	\$	14,490,000,000	5,000
CEMEX S.A.B. de C.V.	CX	Building Materials	Global building materials company	\$13.98B	\$	13,980,000,000	47,000
Owens Corning	OC	Building Materials	Manufacturer of insulation	\$9.41B	\$	9,410,000,000	19,000
Summit Materials	SUM	Building Materials	Supplier of aggregates-based materials	\$8.00B	\$	8,000,000,000	6000
Eagle Materials Inc	EXP	Building Materials	Producer of heavy construction materials	\$4.51B	\$	4,510,000,000	2,500
Builders FirstSource Inc	BLDR	Building Materials	Supplier of building materials	\$4.39B	\$	4,390,000,000	14,000
Louisiana-Pacific Corporation	LPX	Building Materials	Manufacturer of building materials	\$4.29B	\$	4,290,000,000	5,200
Beacon Roofing Supply	BECN	Building Materials	Distributor of roofing materials	\$3.83B	\$	3,830,000,000	8,500
			Distributor of gypsum, ceilings, and other building products	\$2.53B	\$	2,530,000,000	4,200
GMS Inc.	GMS	Building Materials	Manufacturer of wallboard	\$1.13B	\$	1,130,000,000	2,000
Continental Building Products	CBPX	Building Materials	Manufacturer of home improvement products	\$10.39B	\$	10,390,000,000	17,000
Masco Corporation	MAS	Building Products	Installer and distributor of insulation	\$5.17B	\$	5,170,000,000	10,500
TopBuild Corp	BLD	Building Products	Manufacturer of composite decking	\$4.59B	\$	4,590,000,000	1,200
Trex Company Inc	TREX	Building Products	Manufacturer of low-maintenance, exterior building products	\$4.17B	\$	4,170,000,000	3,500
AZEK Co Inc/The	AZEK	Building Products	Global leader in ceiling and wall solutions	\$3.45B	\$	3,450,000,000	7,100
Armstrong World Industries	AWI	Building Products	Installer of insulation	\$3.45B	\$	3,450,000,000	8,500
Installed Building Products	IBP	Building Products	Manufacturer of construction products	\$3.45B	\$	3,450,000,000	4,500
Simpson Manufacturing Co Inc	SSD	Building Products	Manufacturer of doors and windows	\$1.43B	\$	1,430,000,000	22,000
JELD-WEN Holding Inc	JELD	Building Products	Manufacturer of kitchen cabinets and vanities	\$1.23B	\$	1,230,000,000	9,300
American Woodmark Corp	AMWD	Building Products	Producer of construction aggregates	\$24.49B	\$	24,490,000,000	10,000
Vulcan Materials Co	VMC	Construction Materials	Producer of aggregates	\$23.71B	\$	23,710,000,000	9,300
Martin Marietta Materials Inc	MLM	Construction Materials	Civil construction company	\$4.29B	\$	34,590,000,000	3,800
Granite Construction	GVA	Construction/Engineering					



TICKERS COVERED (Cont.)

COMPANY NAME	TICKER	INDUSTRY/SECTOR	COMPANY DESCRIPTION	MARKET CAP		NUMERICAL	EMP. COUNT
Carlisle Cos Inc	CSL	Diversified Manufacturing	Diversified manufacturer	\$7.69B	\$	7,690,000,000	12,000
Griffon Corp	GFF	Diversified Manufacturing	Diversified holding company	\$1.43B	\$	1,430,000,000	6,500
Mohawk Industries Inc	MHK	Flooring Manufacturing	Flooring manufacturer	\$12.49B	\$	12,490,000,000	42,000
West Fraser Timber Co. Ltd.	WFG	Forest Products	Integrated forest products company	\$4.51B			
				(CAD)	\$	4,510,000,000	12,000
				\$2.53B			
Canfor Corp	CFP	Forest Products	Integrated forest products company	(CAD)	\$	2,530,000,000	7,300
Boise Cascade Company	BCC	Forest Products	Manufacturer and distributor of wood products				
				\$2.53B	\$	2,530,000,000	7,200
Home Depot Inc	HD	Home Improvement	Home improvement retailer				
		Retail		\$343.59B	\$	343,590,000,000	490,000
Lowe's Companies Inc	LOW	Home Improvement	Home improvement retailer				
		Retail		\$133.92B	\$	133,920,000,000	290,000
D.R. Horton Inc	DHI	Homebuilding	Homebuilder	\$54.81B	\$	23,390,000,000	9,300
Lennar Corporation	LEN	Homebuilding	Homebuilder	\$46.7B			
PulteGroup, Inc.	PHM	Homebuilding	Homebuilder	\$27.4B			
Toll Brothers, Inc.	TOL	Homebuilding	Homebuilder	\$15.8B			
RH	RH	Luxury Home Furnishings	Luxury home furnishings retailer	\$7.59B	\$	7,590,000,000	15,000
WestRock Company	WRK	Packaging	Provider of paper and packaging solutions	\$13.49B	\$	13,490,000,000	42,000
Packaging Corporation of America	PKG	Packaging	Manufacturer of packaging solutions	\$12.29B	\$	12,290,000,000	15,000
Graphic Packaging Holding Co	GPK	Packaging	Manufacturer of packaging solutions	\$5.61B	\$	5,610,000,000	19,000
Sherwin-Williams Company	SHW	Paint Manufacturing	Paint manufacturer	\$72.55B	\$	72,550,000,000	62,000
International Paper Co	IP	Paper and Packaging	Paper and packaging company	\$19.11B	\$	19,110,000,000	39,000
Floor & Decor Holdings Inc-A	FND	Specialty Retail	Specialty retailer of flooring	\$6.51B	\$	6,510,000,000	12,000
Weyerhaeuser Company	WY	Timber REIT	Timberland REIT and forest products company				
				\$24.95B	\$	24,950,000,000	9,400
				\$4.55B	\$	4,550,000,000	600
Rayonier Inc	RYN	Timber REIT	Timberland REIT	\$2.75B	\$	2,750,000,000	900
PotlatchDeltic Corporation	PCH	Timber REIT	Timberland REIT				
Advanced Drainage Systems Inc	WMS	Water Management	Manufacturer of water management solutions				
				\$7.59B	\$	7,590,000,000	5,500
UFP Industries Inc	UFPI	Wood Products	Manufacturer of wood and wood-alternative products	\$2.53B	\$	2,530,000,000	10,000



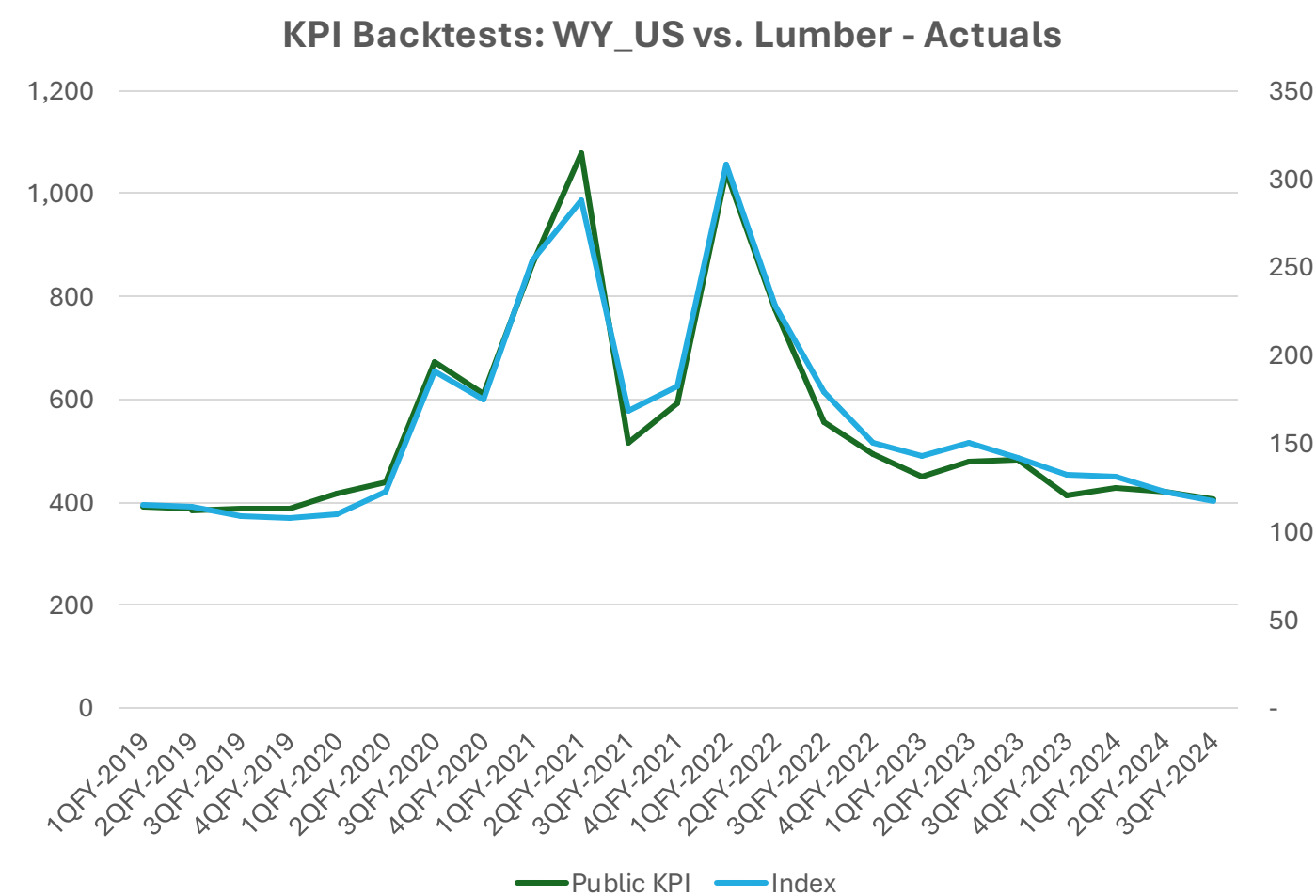
SELECTED KPI COMPARISONS

BUILDING PRODUCT	TICKER	COMPANY NAME	GICS SUB-INDUSTRY	KPI	CORRELATION - ACTUALS	CORRELATION - YOY%
Lumber	WY_US	Weyerhaeuser Company	Timber REITs	Average Realized Price - Lumber	99%	99%
	WFG_CA	West Fraser Timber Co. Ltd.	Lumber & Wood Production	Average Realized Price - Lumber	98%	98%
	WFG_CA	West Fraser Timber Co. Ltd.	Lumber & Wood Production	Total revenue - Lumber	88%	97%
	WY_US	Weyerhaeuser Company	Timber REITs	Total revenue - Lumber	94%	96%
	LPX_US	Louisiana-Pacific Corporation	Lumber & Wood Production	Total revenue - Wood products	88%	85%
OSB	LPX_US	Louisiana-Pacific Corporation	Lumber & Wood Production	Average Realized Price - Oriented strand board	96%	99%
	WY_US	Weyerhaeuser Company	Timber REITs	Oriented strand board revenue - Wood products	98%	96%
	LPX_US	Louisiana-Pacific Corporation	Lumber & Wood Production	Total revenue - Oriented strand board	94%	95%
	PHM	PulteGroup, Inc.	Homebuilding	Backlog volume - Home	89%	85%
	TOL	Toll Brothers, Inc.	Homebuilding	Backlog volume - Home, United States	70%	65%
Plywood	WY_US	Weyerhaeuser Company	Timber REITs	Average Realized Price - Plywood	98%	98%
	BCC_US	Boise Cascade Company	Lumber & Wood Production	Average realized price - Plywood	96%	97%
	WFG_CA	West Fraser Timber Co. Ltd.	Lumber & Wood Production	Average Realized Price - Plywood	94%	94%
	WY_US	Weyerhaeuser Company	Timber REITs	Total revenue - Plywood	84%	92%
	WFG_CA	West Fraser Timber Co. Ltd.	Lumber & Wood Production	Total revenue - Plywood	91%	91%
	PCH_US	PotlatchDeltic Corporation	Timber REITs	Total revenue - Plywood	92%	89%
Gypsum	EXP_US	Eagle Materials Inc	Construction Materials	Revenue - Gypsum Wallboard and Paperboard	94%	54%
Commercial Gypsum	BECN_US	Beacon Roofing Supply	Building Products	Net sales - Non-Residential	87%	50%
	OC_US	Owens Corning	Construction Materials	Total revenue - Building products	81%	21%
	AWI_US	Armstrong World Industries	Construction Materials	Total revenue - Building products	75%	21%
	CSL	Carlisle Cos Inc	Building Products	Total revenue - Building products	86%	65%
	BLD_US	TopBuild Corp	Building Products	Total revenue - Insulation	95%	77%
Wallboard	EXP_US	Eagle Materials Inc	Construction Materials	Revenue - Gypsum Wallboard and Paperboard	95%	58%
	OC_US	Owens Corning	Construction Materials	Total revenue - Insulation	86%	48%

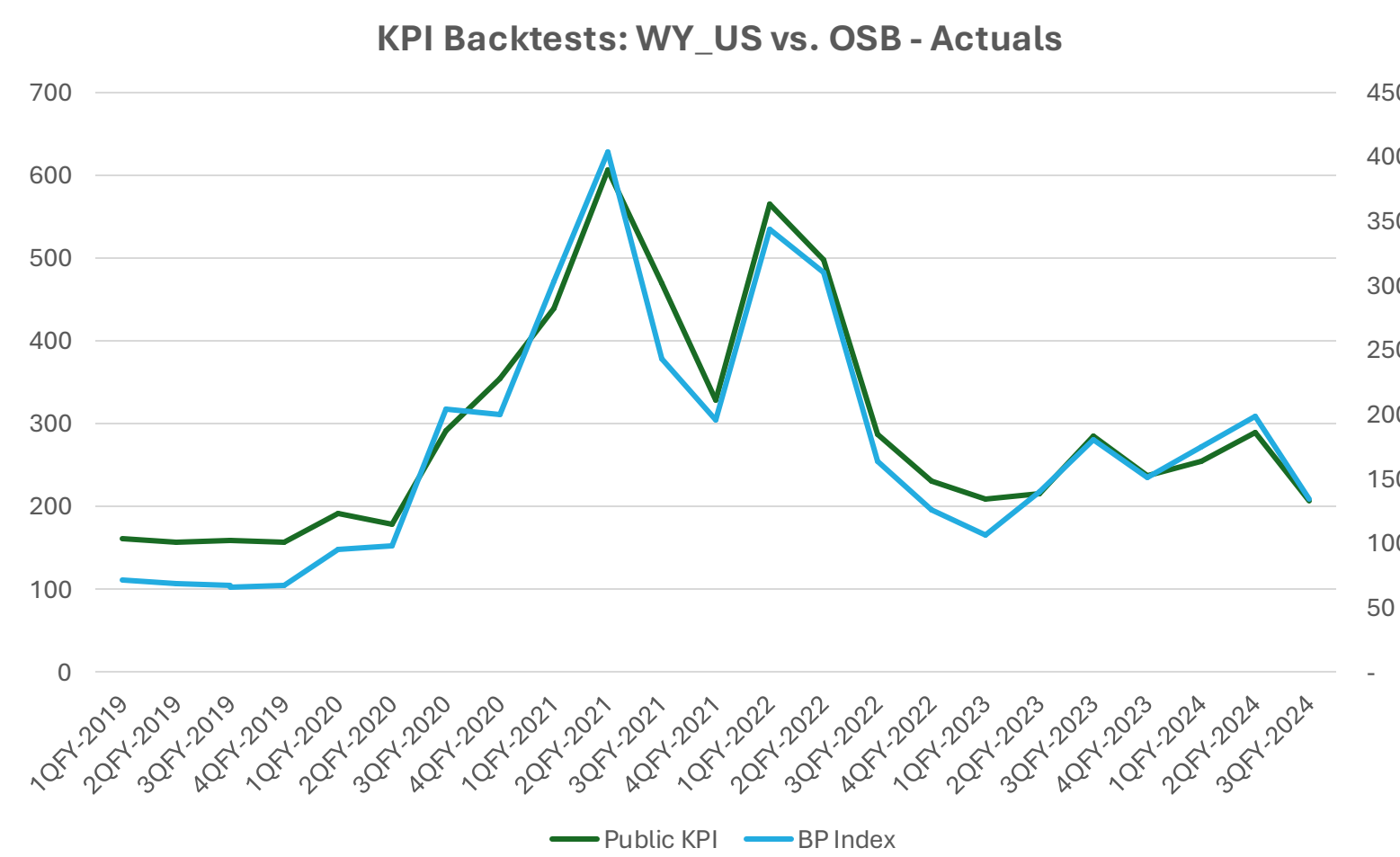


SELECTED KPI COMPARISONS

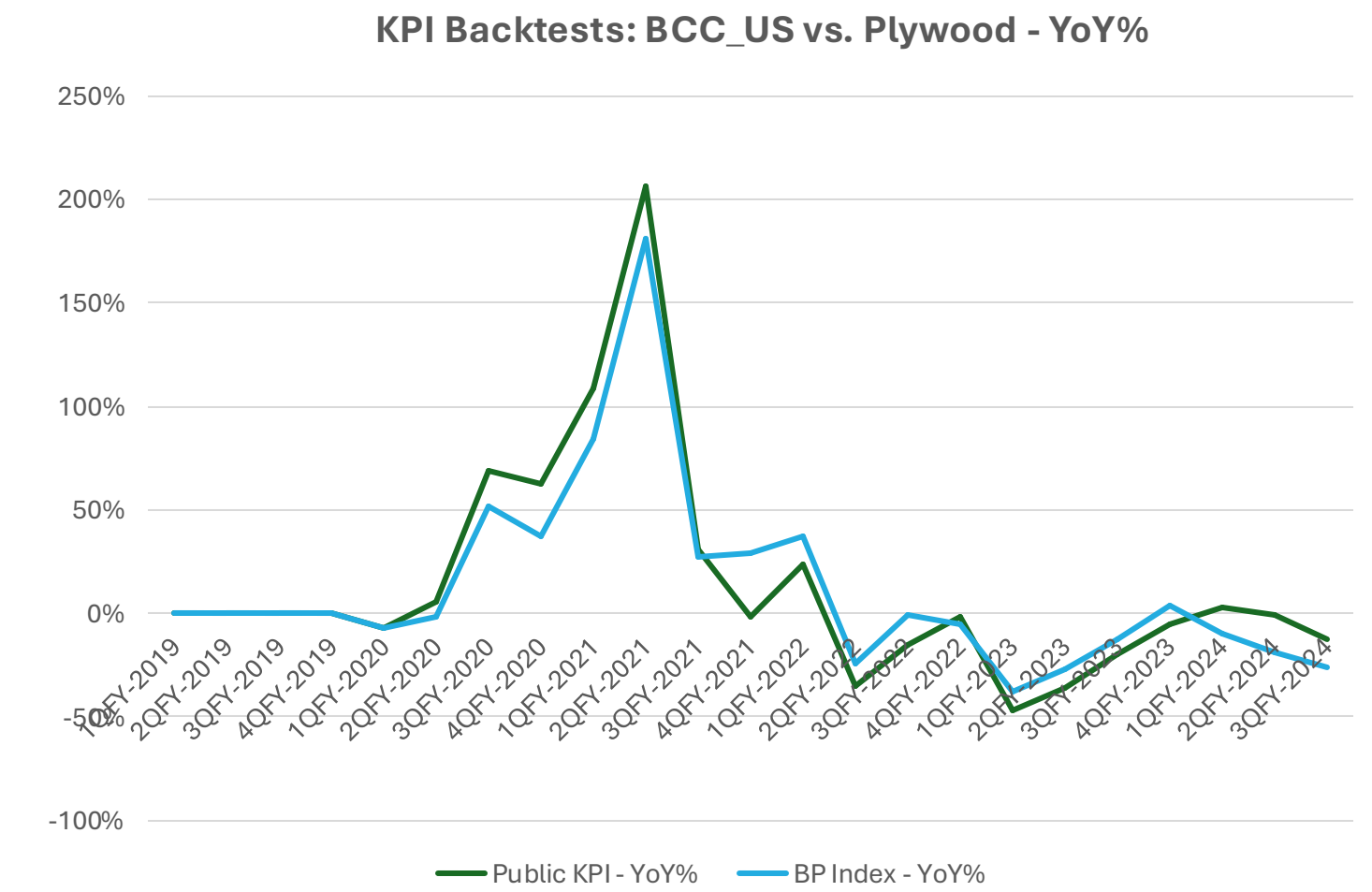
i360 Lumber Price Index vs Avg Realized Price



i360 OSB Sales Index vs Realized Revenue



i360 Plywood Price Index vs Avg Realized Price



INSIGHTS

LUMBER

Diagnostics

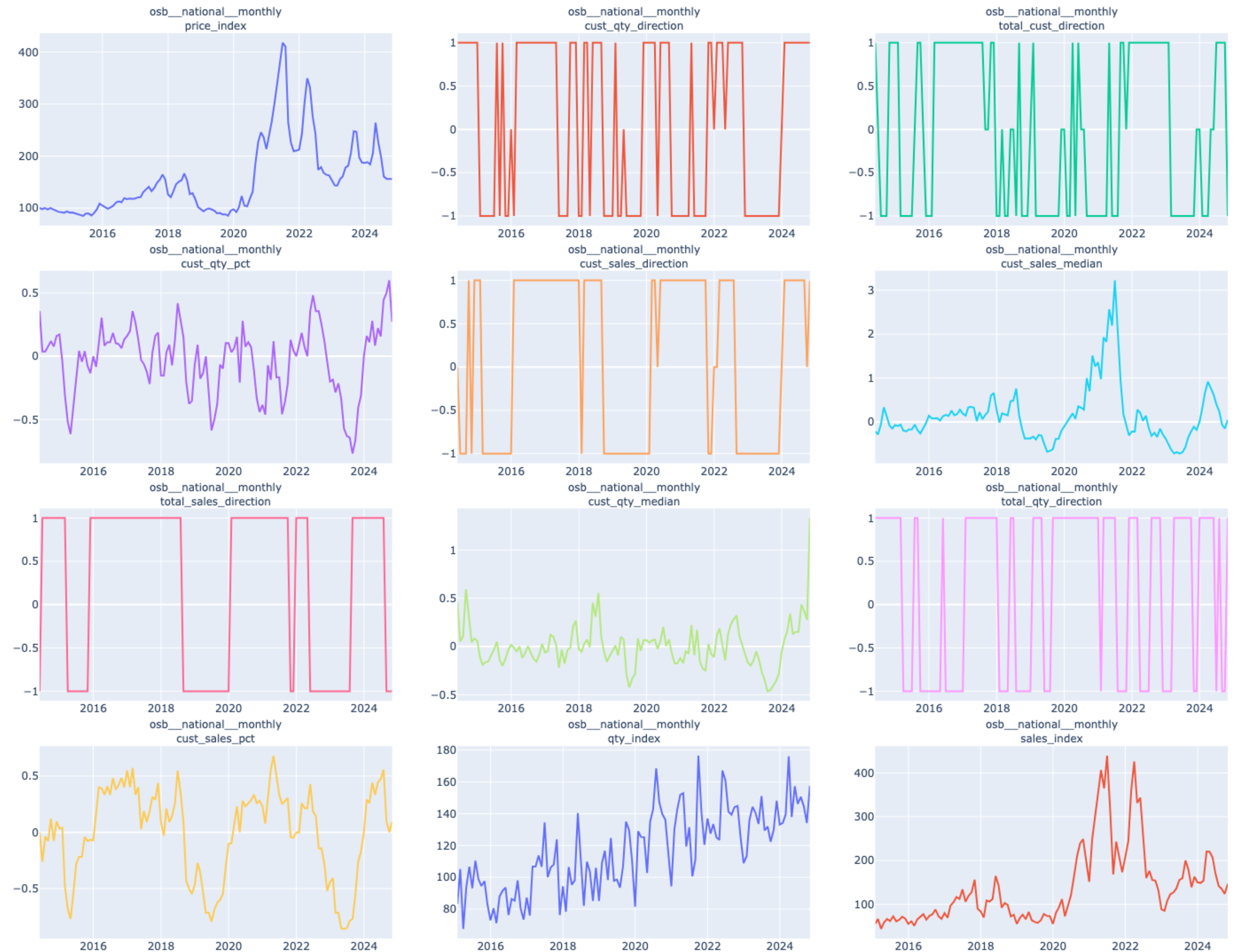


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INSIGHTS

OSB

Diagnostics

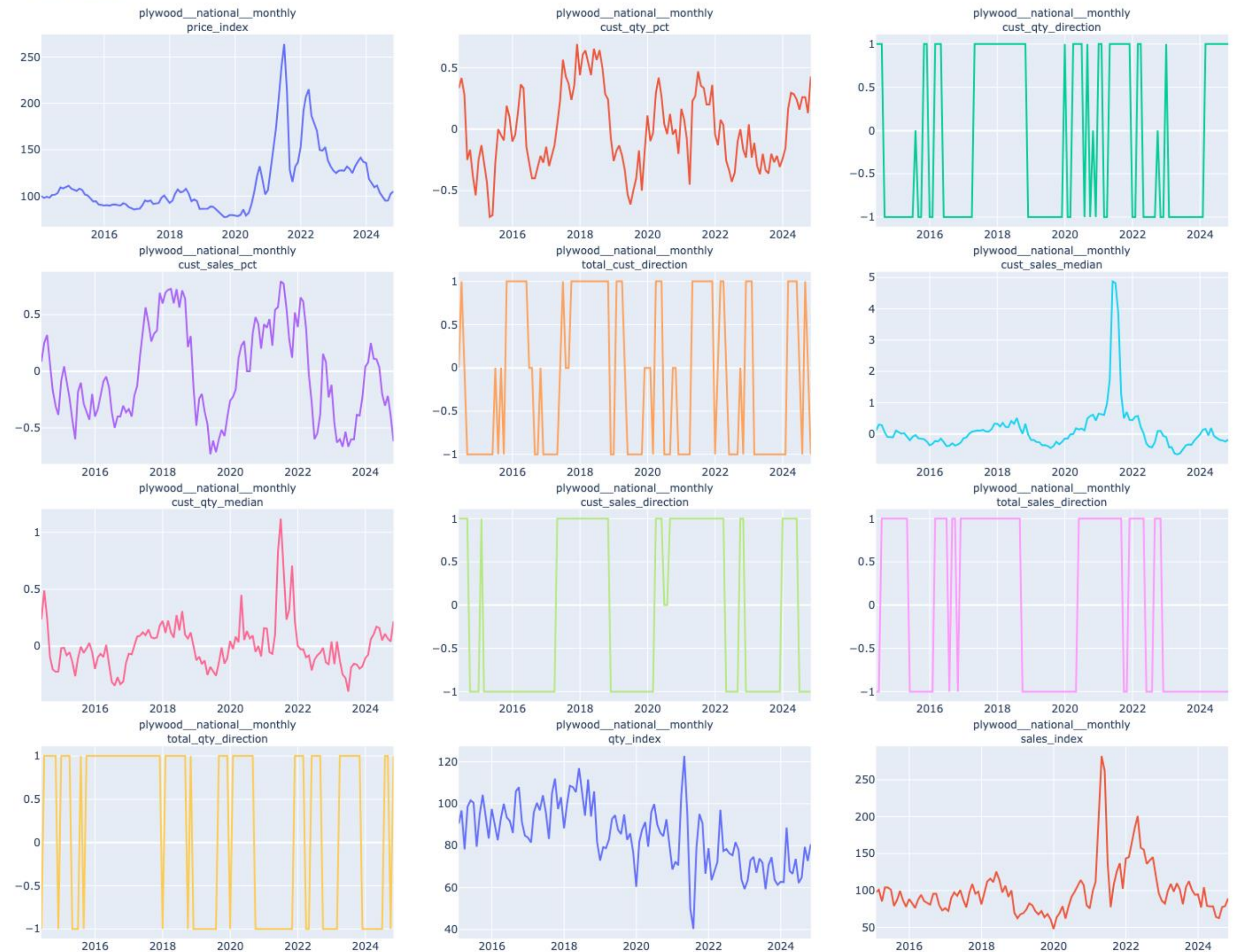


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INSIGHTS

PLYWOOD

Diagnostics

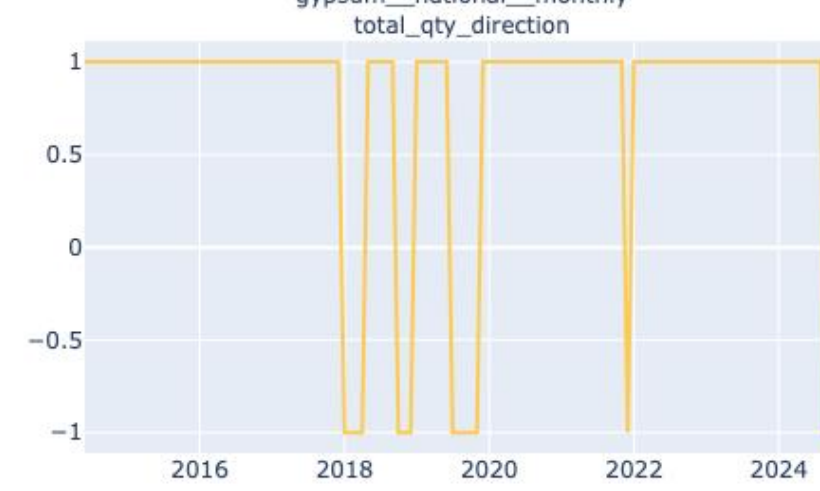
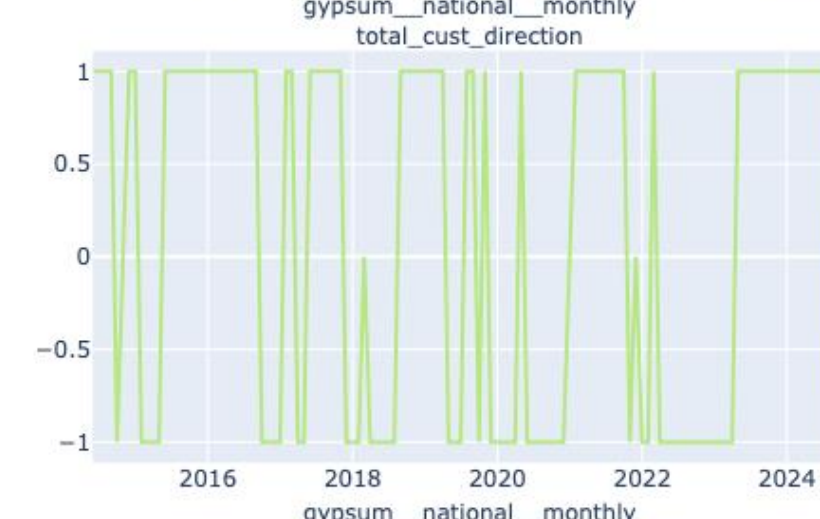
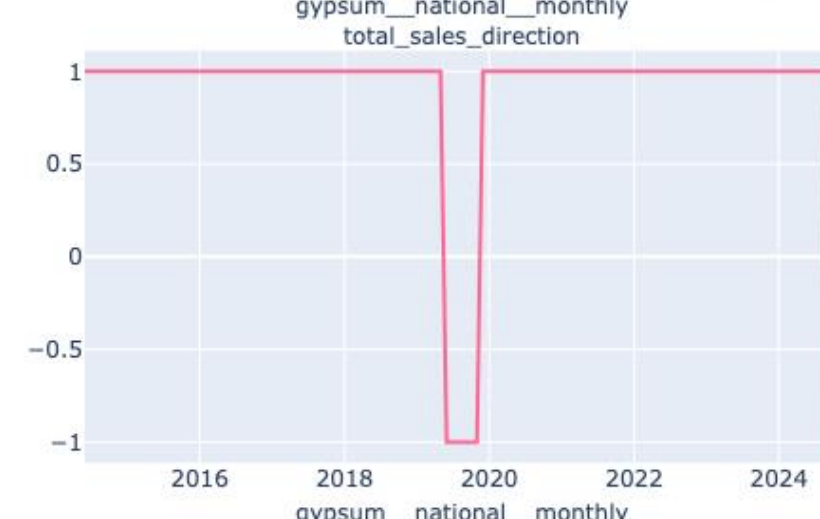
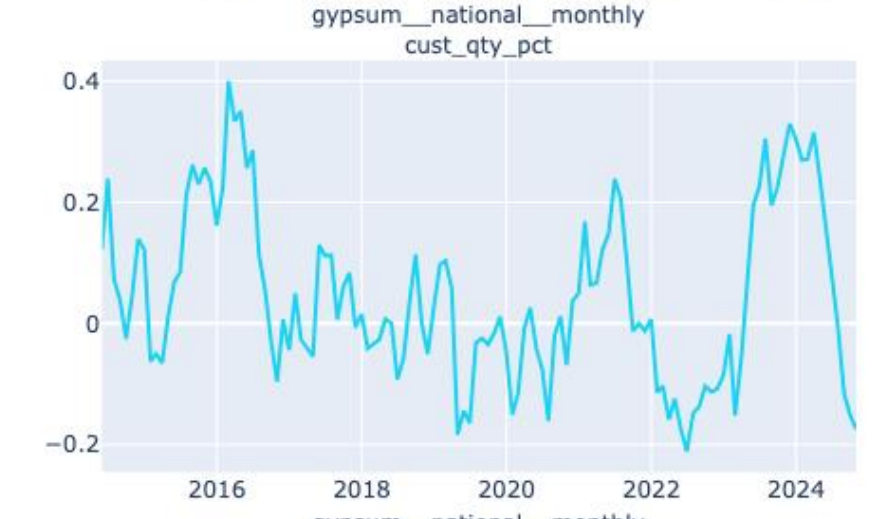
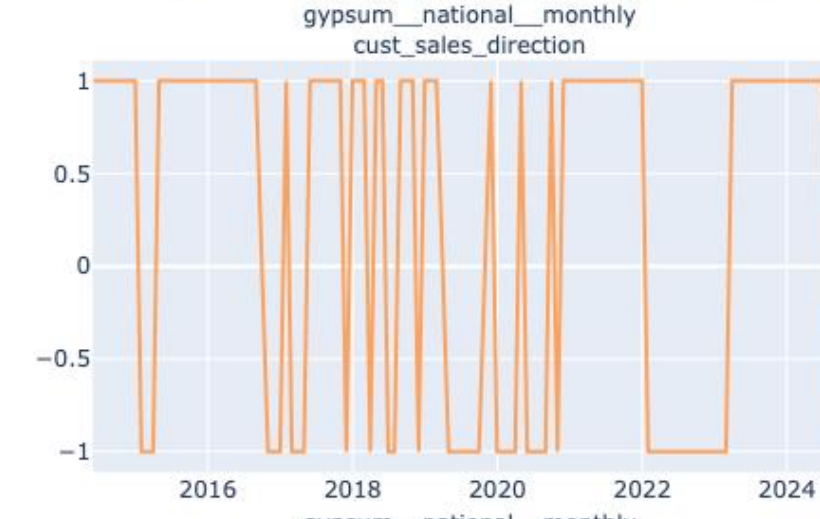
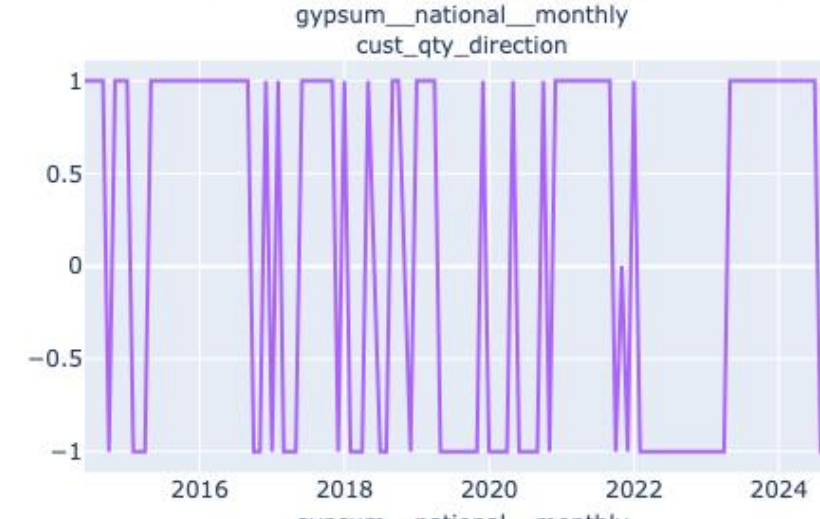
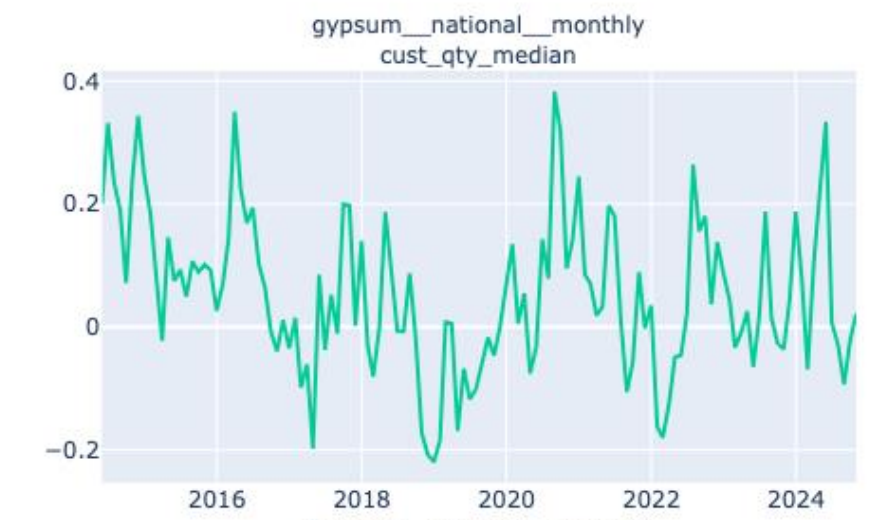
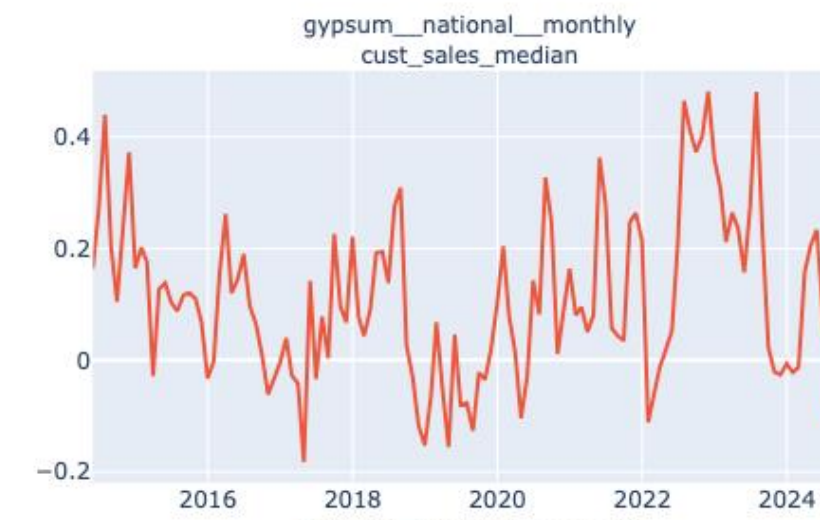
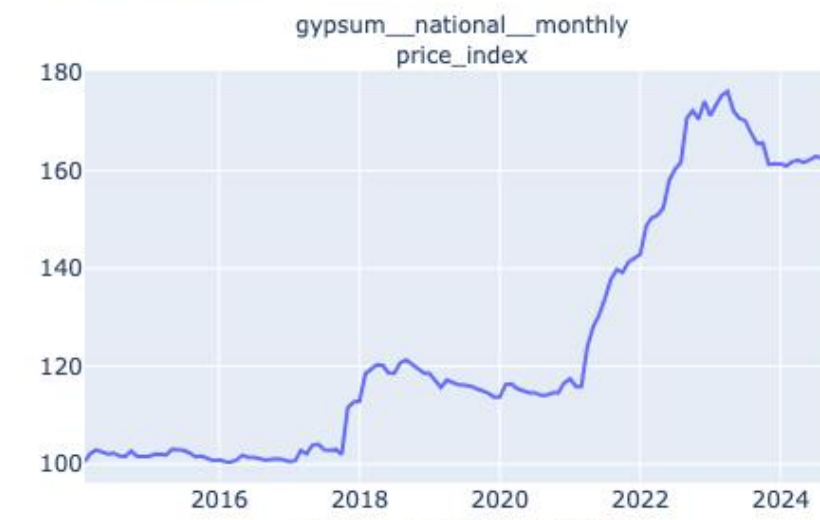


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INSIGHTS

GYPSUM

Diagnostics

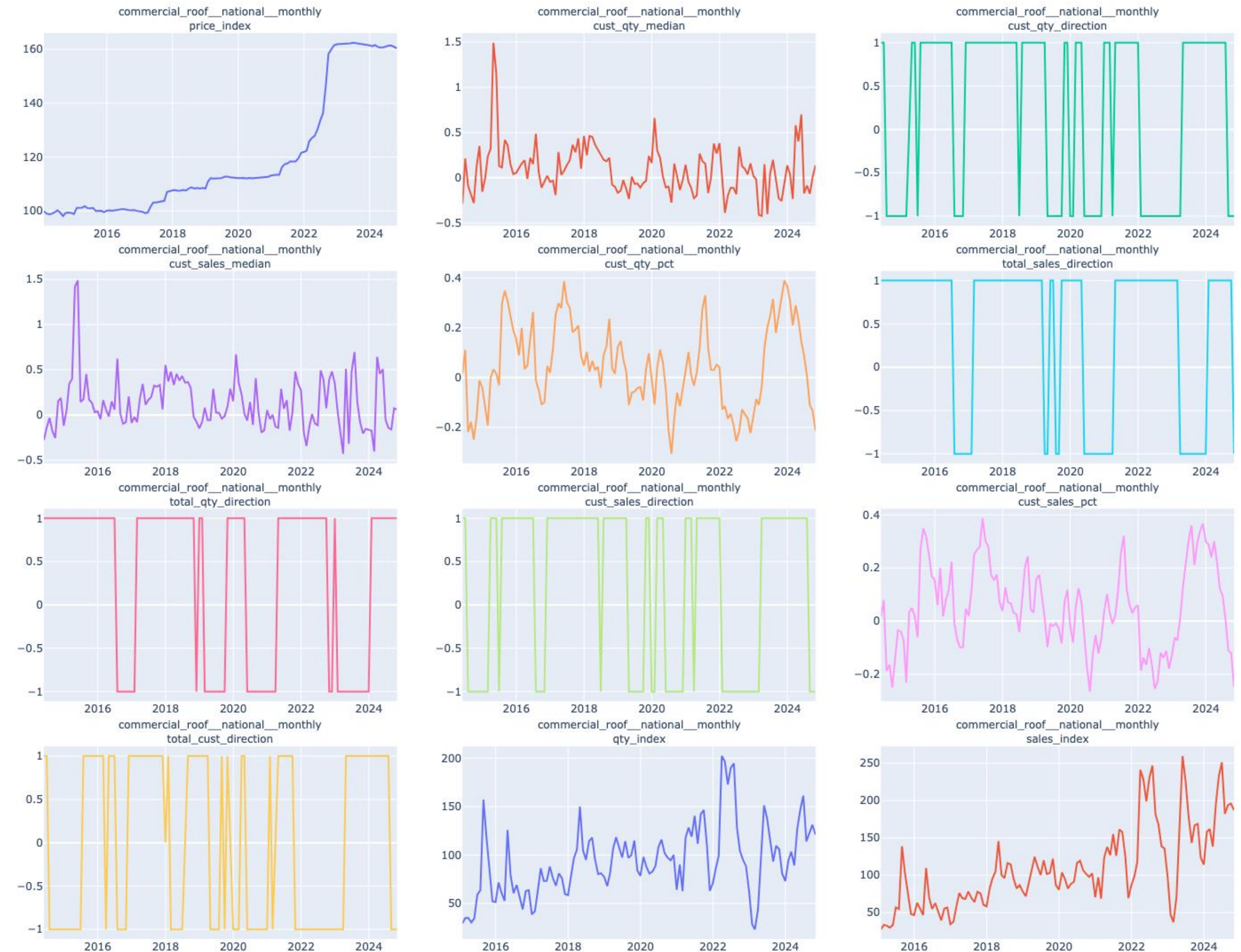


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INSIGHTS

COMMERCIAL Gypsum

Diagnostics

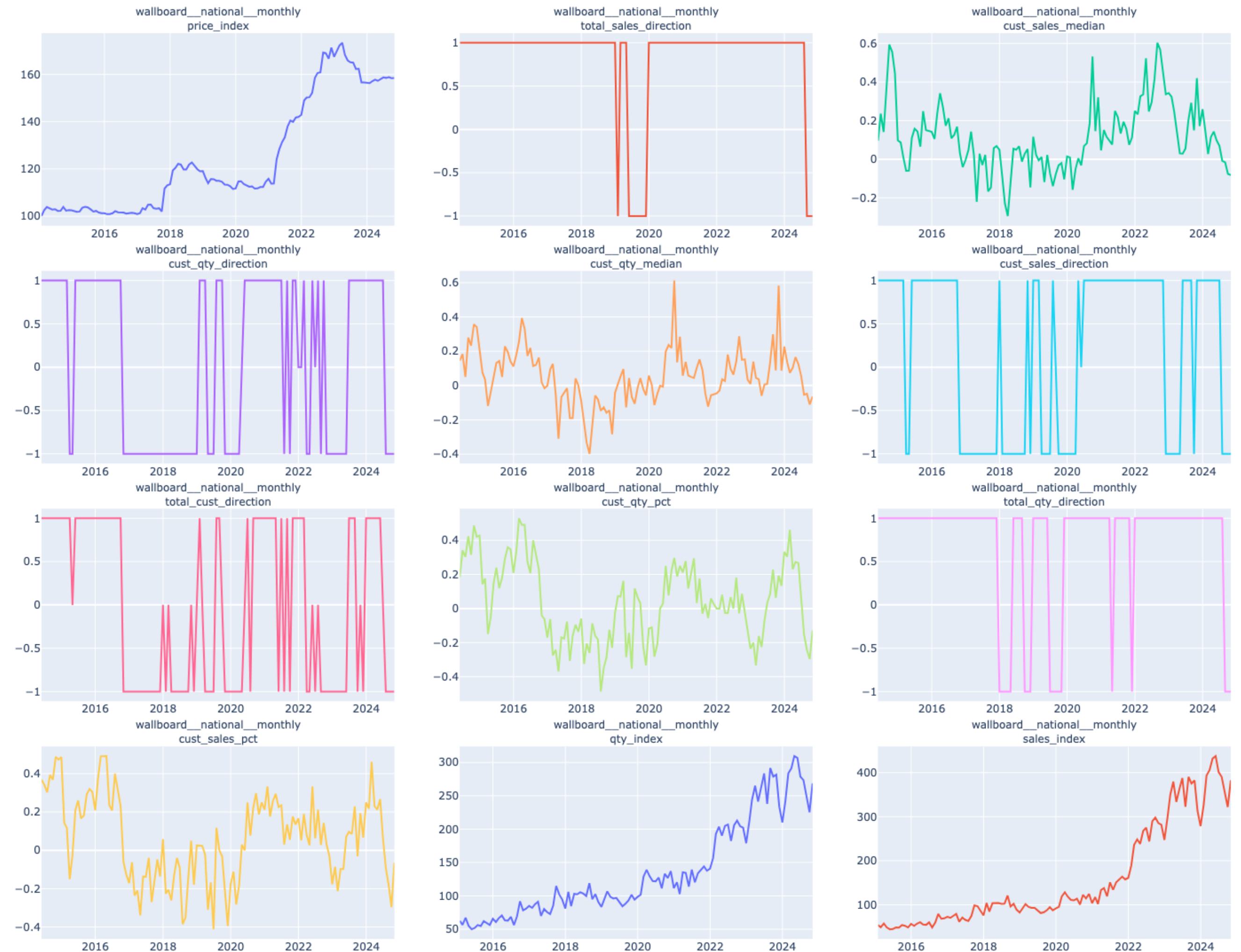


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INSIGHTS

WALLBOARD

Diagnostics



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