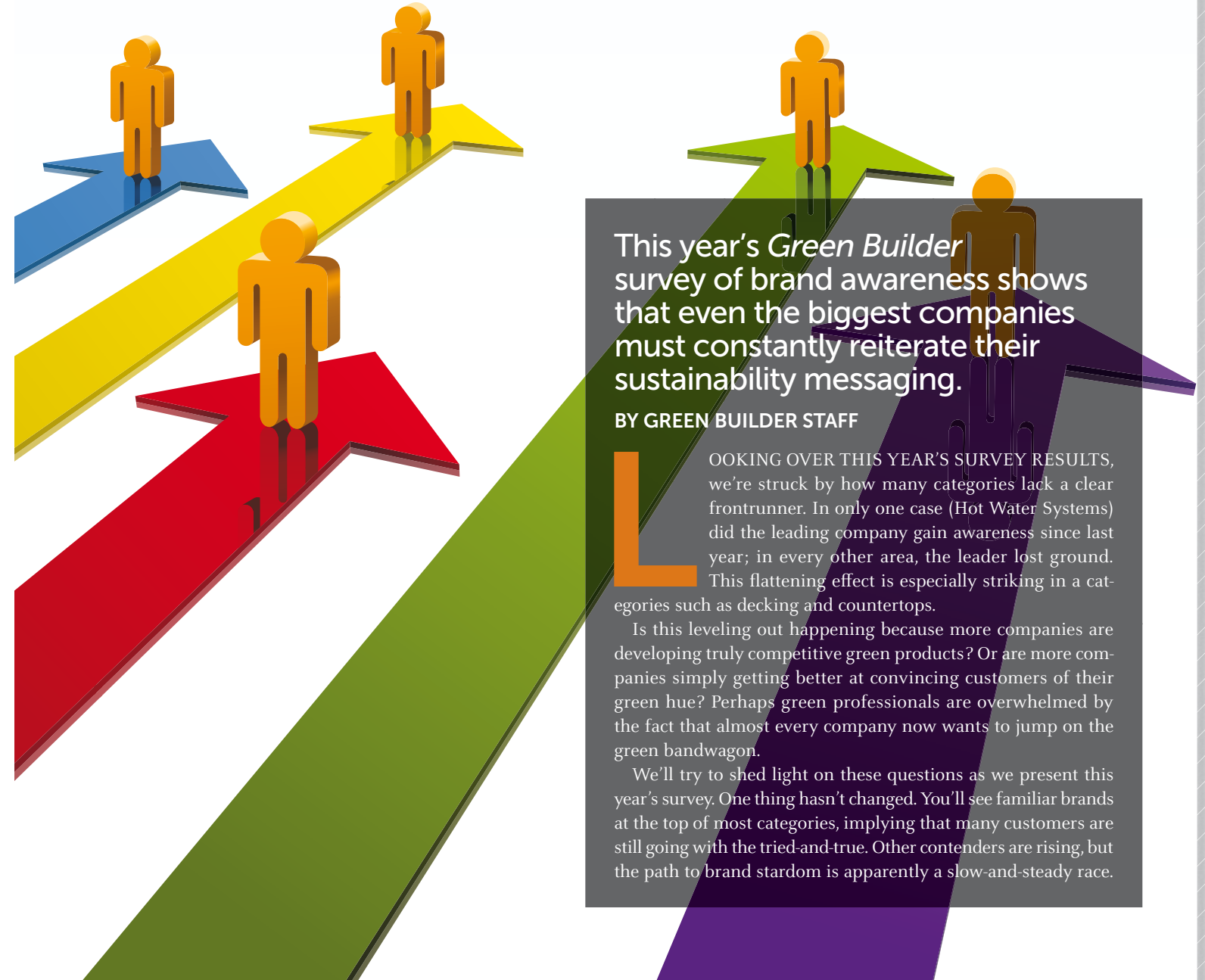




Holding Their Ground



This year's *Green Builder* survey of brand awareness shows that even the biggest companies must constantly reiterate their sustainability messaging.

BY GREEN BUILDER STAFF

LOOKING OVER THIS YEAR'S SURVEY RESULTS, we're struck by how many categories lack a clear frontrunner. In only one case (Hot Water Systems) did the leading company gain awareness since last year; in every other area, the leader lost ground. This flattening effect is especially striking in a categories such as decking and countertops.

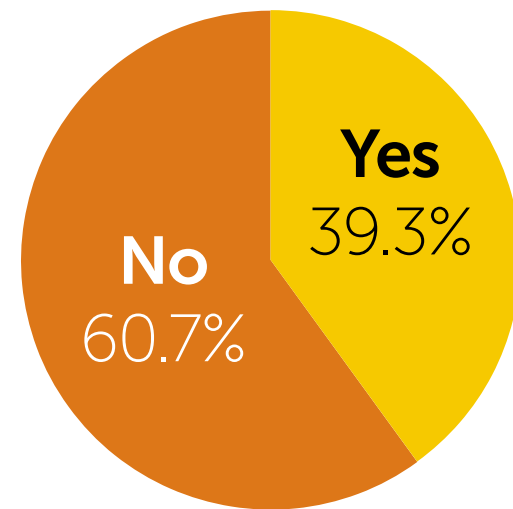
Is this leveling out happening because more companies are developing truly competitive green products? Or are more companies simply getting better at convincing customers of their green hue? Perhaps green professionals are overwhelmed by the fact that almost every company now wants to jump on the green bandwagon.

We'll try to shed light on these questions as we present this year's survey. One thing hasn't changed. You'll see familiar brands at the top of most categories, implying that many customers are still going with the tried-and-true. Other contenders are rising, but the path to brand stardom is apparently a slow-and-steady race.

2014 READERS' CHOICE SURVEY RESULTS

Our latest survey of green professionals shows which green branding efforts are reaching this hard-to-win group's loyalty.

Do you currently use the **HERS** Index for your projects?



Which company offers the greenest **LIGHTING** products?

Cooper Lighting	7.2%
Progress	3.9%
Kichler	3.9%
Halo	6.8%
Cree	20.2%
Juno Lighting Group	3.3%
SYLVANIA	17.9%
Phillips	31.6%

THE LED FACTOR. We're not surprised to see Sylvania and Cree doing well this year. Both have introduced new variations on LED technology and marketed them heavily. Phillips may be the heavyweight in the category, but the shift to LED technology is opening the door to shifting loyalties.

Phillips 31.6%
Cree 20.2%

Which company offers the greenest **INSULATION** products?

Owens Corning	20.3%
Dow	5.5%
Johns Manville	6.8%
BASF	11.6%
Icynene	10.9%
Bio-Based	10.3%
CertainTeed	5.8%
GreenFiber	13.5%
NuWool	6.1%

ALWAYS THINKING. Owens Corning retains its leadership position, but lost a little ground to smaller companies such as GreenFiber since last year's survey. Spray foam's brand position remains about the same as a year ago.

Owens Corning 20.3%

Which company offers the greenest **ROOFING** products?

Boral Roofing	7.5%
EnviroShake	15.6%
DaVinci	3.9%
GAF	10.4%
EcoStar	11.7%
TAMKO	4.9%
Owens Corning	16.3%
CertainTeed	16.6%
Custom-Bilt Metals	4.9%

DISCONNECT. Overall, pros don't perceive a major difference in the sustainability of modified asphalt shingles, recycled rubber roofing, clay tile and standing seam metal roofs. Clearly, they need more and better information.

CertainTeed 16.6%

Which company offers the greenest **STRUCTURAL SYSTEM** products?

Boise Cascade (EWP)		19.5%
iLevel Timberstrand (EWP)		15.1%
GP (EWP)		4.0%
Norbord (EWP)		5.0%
Reward Wall Systems (ICF)		6.4%
Logix (ICF)		5.0%
Nudura (ICF)		5.0%
Owens Corning PinkFormXtra (ICF)		11.4%
R-Control (SIP)		6.4%
Premiere Building Systems (SIP)		12.4%

Boise Cascade (EWP) 19.5%

HEAD TO HEAD. What we think we're seeing here is a reflection of how pros operate. They develop loyalty to one system: SIPs, engineered wood or ICFs, and stick with it.

Which company offers the greenest **SIDING** products?

BASF (EIFS)		13.1%
Omega Stucco		3.5%
DryVit		5.1%
James Hardie (fiber cement)		27.6%
Nichiha (fiber cement)		3.8%
Eldorado Stone (manufactured stone)		4.5%
Boral (brick and manufactured stone)		6.4%
CertainTeed Cedarboards		10.6%
LP Smartside		9.3%
KlipTech EcoClad		9.9%

James Hardie (fiber cement) 27.6%

AUSSIES TAKE IT. Australian company James Hardie has pounded its green durability message home for decades, and as a result, their brand positioning is among the strongest in the industry. Otherwise, green pros see other siding options as similar in their green attributes. It's interesting to note that Cedarboards is an insulated vinyl product. There's room for some brand delineation here if a company can create the right messaging.

Which company offers the greenest **COUNTERTOP** products?

Eco by Cosentino		16.2%
DeNova Quartz		5.8%
PaperStone		11.7%
IceStone		6.8%
Caesarstone		12.0%
Zodiaq		6.1%
Cambria		7.4%
LG		5.2%
WilsonArt		7.8%
Formica		9.7%

Eco by Cosentino 16.2%
Caesarstone 12%

SMART GROWTH. Caesarstone's emphasis on green has paid off—although Cosentino still owns the top spot.











Which company offers the greenest **HEATING, VENTILATION** and **AIR CONDITIONING** products?

Trane		15.9%
WaterFurnace		6.7%
Carrier		13.7%
Rheem		6.7%
Lennox		13.3%
Daikin		5.4%
Bosch		6.3%
Panasonic (fans and ERVs)		6.0%
LG		7.3%
Mitsubishi		9.5%

Trane 15.9%

EARNED RESPECT. The big HVAC brands have earned their place in the buyer's mind with decades of R&D, outreach and pursuit of excellence. Perhaps more than any other category, there are few companies here that haven't worked hard at improving their products in ways that reduce environmental impacts.









Which company offers the greenest **HOT WATER SYSTEM**?

A. O. Smith		7.1%
Bradford White		3.2%
Marathon (storage tanks)		2.3%
Velux (solar)		7.7%
Rheem (tankless)		13.2%
Rinnai (tankless)		16.4%
Noritz		3.5%
Bosch (geothermal; tankless)		25.7%
Heliodyne (solar)		4.5%
GE (hybrid)		11.3%

DOUBLE DOSE. Bosch's manufacture of both geothermal and tankless products appears to be helping them tell their hot water story.

Bosch 25.7%










Which company offers the greenest **DECKING** products?

TimberTech		8.9%
CertainTeed EverNew		7.9%
Trex		38.3%
Fiberon		3.3%
Perrenial Wood		5.9%
Viance EcoLife		11.6%
MoistureShield		4.0%
GeoDeck		10.2%

STILL ON TOP. Trex earned their composite decking position with years of staying the course, and by using 100% recycled content. No clear second place brand has yet emerged.

Trex 38.3%











Which company offers the greenest **PAINT** and **COATING** products?

YOLO Colorhouse		4.2%
Valspar		13.3%
Sherwin-Williams		31.4%
Benjamin Moore		15.9%
Glidden		4.9%
Mythic		5.2%
PPG		3.9%
Dunn-Edwards		4.5%
Behr		13.9%

MOMENTUM. Although they're now offering more eco-friendly products, Sherwin Williams is fairly new to the niche. But their brand clout apparently is enough to overshadow even well-deserving non-toxic brands such as Mythic.

Sherwin-Williams 31.4%













Which company offers the greenest **WINDOW** and/or **DOOR** products?

Milgard		3.4%
Marvin		10.3%
Andersen		22.5%
Pella		22.2%
Serious Windows		4.7%
Ply Gem		2.8%
JELD-WEN		9.1%
Therma-Tru		6.9%
Simonton		3.4%
Weather Shield		3.1%

CONTENDER. Pella is giving Andersen a real run for its green brand leadership this year. Last year, Andersen held about a 10 percent lead over Pella. What changed? We're also wondering why Serious Windows and Milgard, two firms with extremely high performance products, are not gaining more "mental" share of the market.

Andersen 22.5%









Which company offers the greenest **PHOTOVOLTAIC SYSTEM** products?

UniSolar		8.7%
SunPower		19.1%
CertainTeed		3.4%
LG		13.1%
Panasonic		7.4%
Sanyo		3.0%
Bosch Thermotechnology		18.5%
SunEdison		6.4%
Sharp		5.0%
Namaste		3.7%
SunLogics		9.7%
Hanwha Solar		2.0%

BOSCH BONANZA. SunPower held a sizeable 10 percent lead over Bosch last year in the mind of green pros. Not any more. The company's serious marketing investments in the U.S. are paying off.








Sun-Power 19.1%

Which company offers the greenest **SOLAR THERMAL** products?

Bosch		21.2%
Rheem		10.1%
Heliodyne		9.2%
LG		11.1%
Velux		13.1%
AET Solar		4.6%
SunMaxx Solar		14.4%
Solar US		10.5%








JUST RIGHT. Bosch's messaging apparently is exactly what solar hot water installers and builders want to hear.

Which company offers the greenest **PLUMBING FIXTURE** products?

Kohler		34.4%
Delta		10.0%
Moen		15.4%
Grohe		3.5%
Hansgrohe		4.8%
American Standard		6.8%
Toto		17.7%






CONSISTENT VOICE. With water-saving messaging that cuts across all product categories, Kohler's brand megaphone is getting through loud and clear.

Which company offers the greenest **BUILDING WRAP** products?

Tyvek HomeWrap		42.8%
Pactiv GreenGuard		15.1%
Typar HouseWrap		7.6%
Dow Weathermate		8.6a%
Owens Corning PinkWrap		11.5%
CertainTeed		6.3%
Benjamin Obdyke HydroGap		4.3%








ONE LEADER. Although new and improved building wraps continue to hit the market, DuPont Tyvek continues to leverage its brand name and keep it synonymous with green construction. Typar, on the other hand, lost a few brand percentage points since last year's survey. What's driving Pactiv's rising popularity when compared with other wraps?

Which company offers the greenest **VENTILATION FANS**?

Broan NuTone		31.4%
Panasonic		37.8%
Delta Breez		11.4%
Fantech		10.5%
Air King		8.9%









SHARING THE LOVE. This is the first time we've broken out the ventilation fan category, and it lands about as we expected, with Panasonic leading and Broan NuTone not far behind. Other brands haven't been as serious or as effective at marketing to the green niche.

Which company offers the greenest **CABINET and SHELVING** products?

Merillat		11.4%
Armstrong		14.7%
Evergreen		12.4%
KraftMaid		17.7%
IKEA		23.7%
Wellborn		6.0%
Timberlake		9.4%











IKEA INVASION. American cabinet manufacturers have been able to get by with fairly lackluster green messaging until now. Swedish manufacturer Ikea is now seen as the "greenest" cabinet company in the U.S. by architects, builders, CKDs and so on. That ought to put a little urgency into the board rooms of the nation's cabinet and shelving makers.

Which company offers the greenest **FLOORING** products?

Mohawk		17.4%
Mullican		2.3%
Shaw		15.5%
Crossville Tile		8.4%
Interface		9.7%
Armstrong		31.9%
Forbo		8.7%
Tiles of Italy		6.1%

MESSAGING THAT WORKS. Armstrong has been aggressively pursuing the green market, and their message is getting through. It's interesting to note that Interface, another company with strong green messaging, is not making major brand headway. It could be that their primary product—synthetic carpet—is just inherently too far afield from what professionals want in a green home.

Which company offers the greenest **APPLIANCE** products?

Whirlpool		13.8%
GE		20.5%
Kenmore		4.2%
Bosch		18.3%
KitchenAid		5.1%
Miele		4.5%
Electrolux		4.8%
SubZero/Wolf		3.5%
LG		14.7%
Samsung		7.1%

VAGUELY DIFFERENT. Aside from the top couple of brands, appliances are not widely differentiated in the minds of professionals when it comes to green features.

GE 20.5%
Bosch 18.3%
LG 14.7%

Rate how easy it is to access **SUSTAINABLE PRODUCTS** in each product category.

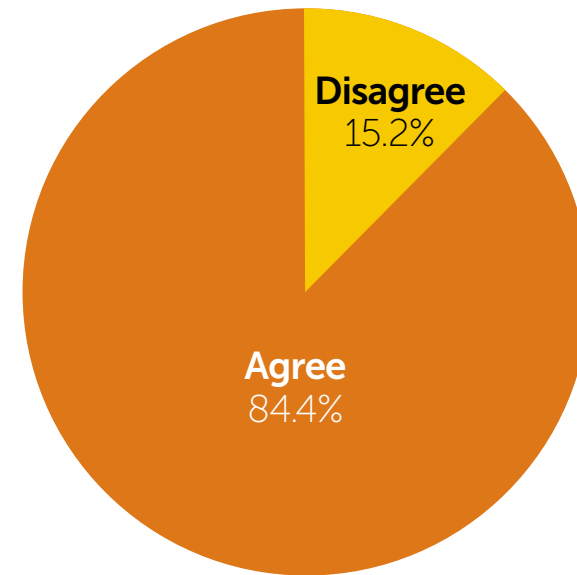
1=Most Green Options;
2=Some Green Options;
3=Fewest Green Options

	1	2	3
Roofing	25.4%	58.0%	16.6%
Structure	29.4%	51.4%	19.3%
Siding	30.8%	57.2%	12.0%
Insulation	55.4%	32.8%	11.8%
HVAC	48.3%	41.6%	10.1%
Windows	52.0%	37.2%	10.7%
Appliances	56.5%	35.4%	8.2%
Faucets	34.0%	50.7%	15.3%
Fixtures	30.0%	53.2%	16.7%
Countertops	31.3%	53.1%	15.6%
Cabinets	23.1%	57.1%	19.7%
Paints and Adhesives	37.8%	44.3%	17.9%
Lighting	62.7%	28.5%	8.8%

EASY ACCESS. Good news. Unlike years past, it's now easy to find at least some green options in every category of building materials and systems.

Insulation
(most green options)
55.4%

WHEN SPECIFYING GREEN PRODUCTS AND MATERIALS, I TYPICALLY START WITH A KNOWN BRAND AND GO FROM THERE.



Do you agree or disagree with the following statements?

	Agree	Disagree
It's getting easier to tell sustainable brands from ones that are simply "greenwashing."	49.8%	50.2%
The quality of eco-friendly products is generally improving from year to year.	92.7%	7.3%
Brand is more important than price when it comes to choosing between two similar green products.	47.0%	53.0%
I tend to assume a green product will be of higher quality if I know and trust the brand.	74.6%	25.4%
When specifying green products and materials, I typically start with a known brand and go from there.	84.8%	15.2%

BRAND MATTERS. One reason pros often start with known, trusted brands is because they're fed up with greenwashing.

Do you agree or disagree with the following statements?

	Agree	Disagree
I try new green brands all the time. That's the only way to see if they work.	49.1%	50.9%
My experience with newer green brands has been good. They usually live up to their product literature.	62.4%	37.6%
We need more innovation and experimentation from the manufacturer side, when it comes to green building science.	92.4%	7.6%
We have enough brands. It's more important to improve the technologies we have.	63.1%	36.9%

My experience with newer green brands has been good.
(agree) **62.4%**

What are the most significant factors that influence your brand loyalty?

(Choose your top three, in no ranking order)

Factor	Percentage
Quality	84.4%
Performance	84.0%
Price	51.0%
Design/Aesthetics	24.8%
Sustainable attributes	18.4%
Advanced/New product features	6.8%
Warranty	14.6%
Brand reputation	8.2%
Dealer/Distributor recommendation	0.7%
Consumer recommendation/preference	3.7%
Corporate sustainable initiatives	2.7%

NOT JUST PRICE. Although terms such as quality may mean different things to different architects or builders, it's good to see that performance and quality outweigh price when it comes to brand loyalty. This may, however, be more a function of our *Green Builder* pro readership, which tends to be a bit more sophisticated and green-conscious than the general trade audience.

Which categories are most influenced by green building and sustainability considerations? (Choose your top three, in no ranking order)

Roofing	21.1%
Structure	17.7%
Siding	8.2%
Insulation	47.3%
HVAC	45.2%
Windows	43.5%
Appliances	31.3%
Faucets	3.7%
Plumbing Fixtures	14.6%
Countertops	4.1%
Cabinets	3.1%
Paints and Adhesives	17.0%
Lighting	33.7%
Hot water systems	21.8%
Decking	2.7%
Flooring	7.8%

TOP THREE. The leading categories are obvious. Don't read too much into the low scores of other categories, however. Respondents were only allowed to pick their top three green categories, so they may never have gotten past windows.

Insulation
47.3%
HVAC 45.2%
Windows
43.5%

How do you know if a brand is authentic or greenwashing?

I research the brand by reviewing the company's website	18.5%
I research the brand by using third-party sources	71.6%
I feel it in my gut	5.1%
I trust the company's claims	3.1%
I don't care if the company is greenwashing	1.7%

TRANSLATION. By "third-party sources," we're assuming they mean magazine articles, blogs, online reviews and trade contractor advice.

I research the brand by using third-party sources
71.6%

Who makes the final decisions about brand specification for your projects?

Builder	10.5%
Contractor	9.1%
Architect/designer	27.5%
Homeowner/buyer/consumer	52.9%

PEOPLE POWER. Here's the reason we think a "push-pull" approach is the best strategy for upselling green amenities to clients. Especially in the new construction/custom home market, it's the architect and the homebuyers calling the shots on green product choices.

Homeowner/
buyer/consumer
52.9%
Architect/
designer 27.5%

Pick the one brand that you associate most strongly with sustainable products and environmental stewardship.

Bosch	12.1%
Dow	2.9%
Mohawk	2.5%
Shaw	1.9%
Whirlpool	2.9%
Kohler	2.5%
GE	7.3%
LG	7.0%
Hanwha Solar	2.9%
Owens Corning	6.1%
Weyerhaeuser	6.7%
Boise Cascade	5.7%
Uponor	1.6%
CertainTeed	3.5%
Trane	2.2%
DuPont	4.1%
Boral	2.2%
Pella	1.9%
Panasonic	2.9%
Armstrong	1.9%
BASF	7.6%
Icynene	4.1%
Siemens	6.1%

ON THE MOVE. It's no accident that Bosch owns the overall mental green space of green professionals. The brand in all its permutations (appliances, solar, automotive and more) is seen as high quality with high performance.

Bosch 12.1%