

INDUSTRIAL PATTERNS

Industry Structure Reference

Building Materials

First Edition

Based on the most recent U.S. Economic Census

Published by Green Shoot Research, a division of Green Shoot Capital Corp. · Calgary, Alberta, Canada

SAMPLE · FREE PREVIEW

About this sample

This document is a free preview of Building Materials Industry Structure Reference — First Edition, the inaugural edition of Industry Structure Reference, the second module of Industrial Patterns. The sample contains the front matter, the methodology summary, one headline section (§1 Population and composition), and the limitations section from the full edition. The full edition runs approximately 21 pages and describes industry structure for the US Building Materials peer set across seven dimensions.

Industry Structure Reference is anchored to the U.S. Economic Census and serves across the five-year census cycle. This First Edition is built on the most recent Economic Census (2022); the next edition publishes with the 2027 Economic Census release (~late 2028). The edition is available at industrialpatterns.com, individually or bundled with the current Building Materials Operating Benchmarks edition.

Edition

Building Materials Industry Structure Reference · First Edition
Industrial Patterns Module 2

Edition anchor

U.S. Economic Census 2022
Serves until the 2027 Economic Census release (~late 2028).

Peer set

14 subsegments · 46 six-digit NAICS codes · 5 segments
Same peer set as Operating Benchmarks; population counts reconcile across modules.

Publisher

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How to Read This Reference

This document is organized as a reference, not as a report. It is built to be used the way a practitioner uses it: find an industry by its NAICS code, then read its structural characteristics against its true peers. The Building Materials peer set comprises 14 subsegments spanning 46 six-digit NAICS codes, grouped into five structural segments — nonmetallic mineral manufacturing, wood product manufacturing, plastics product manufacturing, fabricated and architectural metals, and construction-materials distribution.

The reference describes industry structure across seven dimensions: how many firms and establishments exist and how the population is composed; how firms and establishments are distributed by size; how concentrated ownership of activity is; how the establishment population enters and exits; where activity is located; how the population is composed by legal form; and how labour is structured. Each dimension is presented as a distribution across the peer set, not a single average.

Where a figure cannot be shown for a given code — because the source suppresses it at that granularity, or publishes only at a coarser industry cell — the gap is noted at the point of use rather than left silent. This is a deliberate feature of a lookup tool: the reader should always know why a figure is or is not present.

Scope and intended use

What this is. A descriptive reference on the structural condition of US building-materials industries, computed from primary federal statistical sources at the most granular level each source permits. It is intended for diligence teams, operators, and advisors who need a defensible external description of a specific NAICS code's industry structure.

What this is not. It is not investment advice, not a forecast, not a valuation, and not a ranking. It describes structural characteristics; it does not recommend actions, predict outcomes, or assess attractiveness. Figures are point-in-time at the edition anchor and are not revised once an edition ships; subsequent revisions appear in the next edition. A single firm's figures should be read against its industry's distribution, never treated as a target.

Peer definition and methodology summary

The peer set is fixed across editions: 46 six-digit NAICS codes across 14 subsegments and five segments, reported on the NAICS 2022 classification. Seven structural dimensions describe the industry. Population, size structure, and geography draw on the US Census Economic Census, County Business Patterns (CBP), and Statistics of US Businesses (SUSB). Concentration and legal form draw on the Economic Census. Entry and exit dynamics draw on the Census Business Dynamics Statistics (BDS). Labour composition draws on the Economic Census.

Edition model

The Industry Structure Reference is anchored to the US Economic Census, which is conducted every five years (years ending in 2 and 7). One edition is published per census vintage and serves as the current reference across the five-year cycle, until the next census releases. This edition is built on the most recent Economic Census, with the annual structural sources (CBP, SUSB, BDS) drawn at the same anchor for internal coherence. The precise source vintages are recorded in the methodology appendix.

Classification note

The Economic Census reports on NAICS 2022, which is the reporting spine of this reference. The annually-published sources (CBP, SUSB, BDS) report on the prior NAICS vintage; they are reconciled to the 2022 spine through a frozen crosswalk, documented in the methodology appendix. Within this peer set the only material classification change is in engineered wood.

Cross-module consistency

Population counts in §1 — firms, establishments, employment, and receipts — are drawn from the Economic Census, the same source Operating Benchmarks uses for industry structure, so the two products reconcile on peer-set headcounts. This is by construction: the same peer set, reported from the same anchor, by the same publisher.

§1 — Population and composition

Structural dimension 1 of 7

The Building Materials peer set comprises 53,145 firms operating 72,684 establishments, employing approximately 1,789,038 people, with combined receipts of about \$1.18 trillion. The population is not evenly distributed across the five segments: distribution and fabricated metals carry the most firms, while plastics is the smallest segment by count. Establishments per firm — a descriptive measure of multi-location structure — tends to be highest in distribution and minerals, where multi-site operations are common, and lowest in fabricated metals, where single-establishment firms predominate.

1.1 Segment composition

The five structural segments and their peer-set counts, computed from the Economic Census 2022.

Segment	NAICS6	Firms	Estabs	Estab/firm	Employment	Receipts (\$B)
Minerals	18	9,381	15,307	1.63	424,459	164.8
Wood	13	12,278	14,265	1.16	437,757	172.4
Plastics	2	762	1,114	1.46	63,403	25.0
Metals	7	14,289	15,414	1.08	453,216	164.1
Distribution	6	16,435	26,584	1.62	410,203	653.3
Total	46	53,145	72,684	1.37	1,789,038	1,179.6

Observations

- Distribution is the largest segment by receipts (\$653B, ~55% of peer-set total), consistent with a fragmented wholesale layer between materials producers and the construction market.
- Wood is the second-largest segment by firm count (12,278); minerals leads on employees per firm via larger plant sizes.
- Plastics is the smallest segment on every measure (762 firms, 1,114 establishments, \$25B receipts), reflecting the narrow scoping to foam-product subsegments.

- Establishments-per-firm ranges from 1.08 (metals, single-establishment firms predominate) to 1.63 (minerals, multi-site operations common).

Interpretation boundary

Segment-level structural patterns describe the shape of the peer-set population — not the attractiveness of any segment for investment, nor the operating performance of any firm within a segment. The full edition reports six-digit code-level detail (§1.2) so that a reader benchmarking a specific firm can locate it precisely within its segment.

Methodology appendix (excerpt)

§8.1 Sources and vintages

Population, size, and geography: US Census Economic Census, County Business Patterns, and Statistics of US Businesses. Concentration and legal form: Economic Census. Entry/exit dynamics: Census Business Dynamics Statistics. Labour composition: Economic Census. The Economic Census is the slow-moving structural anchor and defines the edition; the annually-published sources are drawn at the same anchor for coherence. Precise vintages are recorded at ship and frozen.

Cross-product consistency. Population counts (§1) — firms, establishments, employment, and receipts — are drawn from the Economic Census, the same source Operating Benchmarks uses for industry structure, so the two products reconcile on peer-set headcounts. The size distributions (§2) use Statistics of US Businesses (firms by enterprise employment) and County Business Patterns (establishments by employment); those programs cover the population on slightly different bases, so the size sections are reported as shares of their own universe rather than as counts.

§8.2 Classification and the dual-vintage crosswalk

The reporting spine is NAICS 2022 (the Economic Census vintage). County Business Patterns, SUSB, and BDS publish on the prior NAICS vintage; each is filtered in its native vintage and mapped onto the 2022 spine through a frozen crosswalk, verified code-by-code. Within this peer set the only material change is engineered wood, where two prior-vintage codes combine into one on the 2022 spine. Establishment dynamics resolve only to four-digit NAICS, which the Business Dynamics Statistics does not publish below; that granularity seam is disclosed where the figures appear.

§8.3 Suppression, coverage, and missing data

Every withheld value is shown, never imputed. The Economic Census suppresses small cells (concentration and legal-form detail are not published for every code); County Business Patterns noise-infuses employment and payroll but publishes exact establishment counts; small state-industry cells are withheld at fine geography. Where a published sum falls short of a national total because small cells are withheld, a coverage ratio records the gap rather than filling it.

§8.4 Reproducibility and edition governance

Each edition is produced from a single parameterized pipeline and frozen at ship, so the published figures can be regenerated from the corresponding code and source vintages. The Economic Census anchor carries the edition across its five-year cycle;

the vintage underlying each figure is recorded in this appendix and at the head of each affected section.

§8.5 Distributional and descriptive posture

Every pattern is presented as a distribution across the peer set rather than a single average, because dispersion is itself a structural fact. The reference describes what is observed using phrasing such as "tends to," "is associated with," and "commonly observed," and avoids prescriptive, predictive, or evaluative language. It does not rank industries, score them, or characterize any structure as attractive. It is a reference on industry structure, not investment advice, a valuation, or a forecast, and its language is held to that posture throughout.

Limitations and closing

This reference is an industry-level document. It describes the structure of industries, not of individual firms, and a single firm's figures should be read against its industry's distribution rather than treated as a target. It is descriptive: it does not forecast, value, rank, or recommend.

Source granularity bounds what can be shown — establishment dynamics resolve to four-digit NAICS, firm age is not available by industry in public data, and the Economic Census suppresses small cells for concentration and legal form — and those bounds are disclosed at the point of use rather than papered over. Industry structure is otherwise reported at full six-digit detail, so that a code-level reader sees the size, dispersion, churn, ownership form, and competitive shape of the industry, not only its headline counts.

On the value of restraint

Industrial Patterns operates under a doctrine of restraint. The reference reports what the data supports observing, with stated limits on what it does not support. It does not rank industries by attractiveness, does not score them on any composite, and does not characterize any structure as good or bad. The reader's judgment, applied to honest data, is the basis on which a decision is made.

THE FULL EDITION

Building Materials Industry Structure Reference

First Edition · Approximately 21 pages · 46 six-digit NAICS codes

The full edition contains all seven structural dimensions: population and composition (with the complete six-digit NAICS detail table), size structure (firm and establishment distributions plus firm receipts-class distribution), structural concentration (top-N share and HHI by code), entry and exit dynamics (BDS-derived), geographic structure (state-level dispersion), organisational form (corporate vs. non-corporate composition), and labour composition (employment per establishment and payroll per employee by code), plus the methodology appendix, limitations and closing, and terms of sale and licensing.

Edition	Price
Industry Structure Reference (BM)	\$3,950
Bundle: ISR + OB 2024 (current)	\$5,950

Visit industrialpatterns.com/editions to purchase.

The edition is delivered as a PDF. Same edition is provided to every reader; no customization is offered. Bundle pricing covers ISR plus the current Operating Benchmarks edition (BM 2024); prior Operating Benchmarks editions are sold separately at their original publication prices.