



Freedonia Focus Reports
US Collection

Geosynthetics: United States

June 2020



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About This Report

Scope

This report forecasts to 2024 US geosynthetics demand in square meters. Total demand is segmented by product in terms of:

- geotextiles
- geomembranes
- geogrids
- geonets
- other products such as geosynthetic clay liners, preformed geocomposites, and geofoams

Total demand is also segmented by market as follows:

- building construction
- transportation infrastructure
- landfill
- mining
- other markets such as agriculture, liquid containment, and oil and gas construction

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; the various segments are reported at five-year intervals for 2009, 2014, and 2019.

Unless stated otherwise, “geotextiles” refers only to synthetic geotextiles, as natural fiber geotextiles are not included in the scope of this report. Plastic geopipes also are excluded.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Geosynthetics: United States (FF15021) is based on [Global Geosynthetics](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations

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- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | NAICS & SIC Codes Related to Geosynthetics

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
221310	Water supply and irrigation systems	1629	Heavy construction, NEC
237990	Other Heavy and Civil Engineering Construction	1794	Excavation work
238910	Site Preparation Contractors	2297	Nonwoven fabrics
313230	Nonwoven Fabric Mills	4971	Irrigation systems

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product

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lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Geosynthetics

Freedonia Industry Studies

Coated Fabrics

Construction Chemicals in the US

Global Cement

Global Cement & Concrete Additives

Global Construction Aggregates

Global Industrial Rubber Products Market

Global Membrane Separation Technologies

Global Mining Equipment

Global Nonwovens

Global Thermoplastic Elastomers

Global Water Treatment Equipment & Chemicals

Pipe: Products & Markets

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Cement & Concrete Additives: United States

Coated Fabrics: United States

Commercial Building Construction: United States

Construction: United States

COVID-19 Market Impact Analysis

Demographics: United States

Global Demographics

Industrial Rubber Products: United States

Mining & Quarrying: United States

Municipal Solid Waste: United States

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Trade Publications

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Roads & Bridges

Textile World

Waste Management World

World Highways

Agencies & Associations

Geosynthetica

Geosynthetic Materials Association

Industrial Fabrics Association International

International Geosynthetics Society

United Nations Statistics Division

United States Census Bureau

United States Environmental Protection Agency

United States International Trade Commission