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US Collection

# Fiber Cement: United States

September 2019



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# About This Report

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## Scope

This report forecasts to 2023 US fiber cement demand and shipments in metric tons. Total demand is segmented by application in terms of:

- siding (cladding)
- backerboard
- moulding and trim
- roofing and other applications such as ceilings, countertops, and firestop materials

Total demand is also segmented by market as follows:

- new residential
- residential renovation
- new nonresidential
- nonresidential renovation

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; shipments and the various segments are reported at five-year intervals for 2008, 2013, and 2018.

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

*Fiber Cement: United States* (FF60072) is based on *Global Fiber Cement*, 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
- 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

## About This Report

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

## Industry Codes

Table 6 | NAICS & SIC Codes Related to Fiber Cement

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
322219	Other paperboard container manufacturing	2655	Fiber cans, tubs, drums, and similar products

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 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

## About This Report

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 Fiber Cement*

### Freedonia Industry Studies

*Ceilings in the US*

*Countertops Market in the US*

*Global Cement*

*Global Housing*

*Global Roofing*

*Global Siding (Cladding)*

*Moulding & Trim in the US*

*Pipe: Products & Markets*

*Roofing Underlay Market in the US*

*Roofing: US Forecasts*

*Siding Market in the US*

*Windows & Doors in the US*

### Freedonia Focus Reports

*Architectural Services: United States*

*Cement: United States*

*Commercial Building Construction: United States*

*Construction: United States*

*Housing: United States*

*Wood Millwork: United States*

### Freedonia Custom Research

### Trade Publications

*Builder*

*Building Design & Construction*

*Engineering News-Record*

*Journal of Light Construction*

*Qualified Remodeler*

*Walls & Ceilings*

### Agencies & Associations

American National Standards Institute

APA – The Engineered Wood Association

ASTM International

International Code Council

## About This Report

Moulding & Millwork Producers Association  
National Association of Home Builders  
National Fire Protection Association  
National Tile Contractors Association  
North American Fiber Cement Association  
Portland Cement Association  
Stairbuilders and Manufacturers Association  
United States Census Bureau  
United States International Trade Commission  
Wood Component Manufacturers Association  
World Millwork Alliance