



Freedonia Focus Reports  
US Collection

# Fiber Cement Products: United States

May 2018



CLICK TO ORDER  
FULL REPORT **BROCHURE** CLICK TO ORDER  
FULL REPORT

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

# Table of Contents

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>5</b>
Historical Trends	5
Key Economic Indicators	6
Trade	7
Environmental & Regulatory Factors	8
<b>3. Segmentation &amp; Forecasts</b>	<b>9</b>
Products	9
Siding	10
Backerboard	10
Moulding & Trim	11
Roofing & Other	12
Markets	13
New Residential	14
Residential I&R	14
New Commercial	14
Commercial I&R	15
<b>4. Industry Structure</b>	<b>16</b>
Industry Characteristics	16
Market Share	17
James Hardie	18
Elementia	18
Nichiha	18
<b>5. About This Report</b>	<b>19</b>
Scope & Method	19
Sources	19
Industry Codes	20
Resources	21

# List of Tables & Figures

---

Figure 1   Key Trends in US Fiber Cement, 2017 – 2022	4
Figure 2   US Fiber Cement Demand Trends, 2007 – 2017	5
Table 1   Key Indicators for US Fiber Cement Demand, 2007 – 2022 (2009US\$ bil)	6
Table 2   US Fiber Cement Trade, 2007 – 2022 (US\$ mil)	7
Figure 3   US Fiber Cement Demand by Product, 2007 – 2022 (mil sq ft)	9
Table 3   US Fiber Cement Demand by Product, 2007 – 2022 (mil sq ft)	9
Figure 4   US Fiber Cement Demand by Product, 2007 – 2022 (%)	11
Figure 5   US Fiber Cement Demand by Market, 2007 – 2022 (mil sq ft)	13
Table 4   US Fiber Cement Demand by Market, 2007 – 2022 (mil sq ft)	13
Figure 6   US Fiber Cement Demand by Market, 2007 – 2022 (%)	15
Figure 7   US Fiber Cement Market Share by Company, 2017 (%)	17
Table 5   Leading Suppliers to the US Fiber Cement Market by Product	17
Table 6   Industry Codes Related to Fiber Cement	20

# About This Report

---

## Scope & Method

This report forecasts to 2022 US fiber cement demand in square feet (5/16 inch basis) and nominal US dollars at the manufacturer level. Total demand in square feet is segmented by product in terms of:

- siding
- backerboard
- moulding and trim
- roofing and other

Total demand in square feet is also segmented by market as follows:

- new residential
- residential improvement and repair
- new commercial
- commercial improvement and repair

To illustrate historical trends, total demand in nominal US dollars is provided in an annual series from 2007 to 2017; total shipments, total demand in square feet, and the various segments are reported at five-year intervals for 2007, 2012, and 2017.

This report 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.

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

## Sources

*Fiber Cement Products: United States* (FF60072) is based on *Fiber Cement in the US*, a comprehensive industry study published by The Freedonia Group. Reported findings

## About This Report

represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international 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

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 | Industry Codes Related to Fiber Cement

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
322214	Fiber can, tube, drum, and similar products manufacturing	2655	Fiber cans, tubs, drums, and similar products

Source: US Census Bureau

## Copyright & Licensing

This publication is protected by copyright laws of the United States of America and international treaties. The entire contents of this publication are copyrighted by The Freedonia Group. A full description of copyright and subscription or licensing provisions is available on the final page of this publication.

## Resources

### The Freedonia Group

*Fiber Cement in the US*, May 2018

### Freedonia Industry Studies

*Moulding & Trim in the US*, March 2018

*Siding Market in the US*, January 2018

*Roofing: US Forecasts*, September 2017

*Roofing Underlay Market in the US*, November 2016

### Freedonia Focus Reports

*Construction: United States*

*Doors: United States*

*Housing: United States*

*Nonresidential Building Construction: United States*

*Prefabricated Housing: United States*

*Roofing: United States*

### Freedonia Custom Research

### Trade Publications

*Builder*

*Building Design+Construction*

*Engineering News-Record*

*Journal of Light Construction*

*Qualified Remodeler*

*Walls & Ceilings*

### Agencies & Associations

APA – The Engineered Wood Association

Moulding & Millwork Producers Association

National Association of Home Builders

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