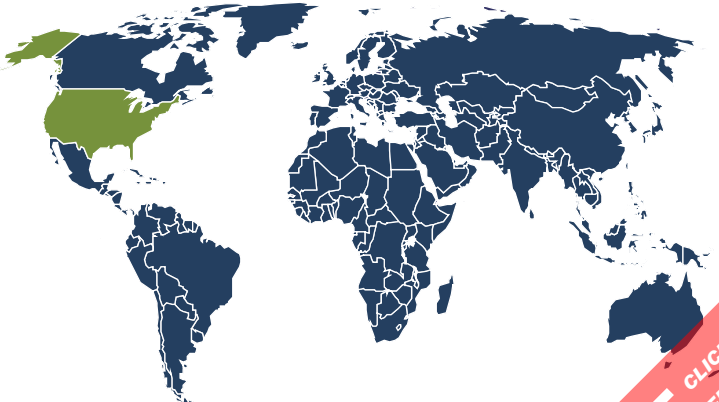




Freedonia Focus Reports  
US Collection

# Commercial Roofing: United States

September 2020



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

# Table of Contents

---

|   |           |
|---|-----------|
| <b>1. Highlights</b>                                  | <b>3</b>  |
| <b>2. Market Environment</b>                          | <b>5</b>  |
| Historical Trends                                     | 5         |
| Key Economic Indicators                               | 7         |
| Impact of COVID-19 on the Commercial Roofing Industry | 8         |
| Supply & Demand                                       | 9         |
| Trade   | 9         |
| Effects of Tariffs on Trade                           | 10        |
| <b>3. Segmentation &amp; Forecasts</b>                | <b>11</b> |
| Products  | 11        |
| Plastic   | 12        |
| Bituminous  | 13        |
| Metal   | 14        |
| Asphalt Shingles                                      | 15        |
| Rubber  | 16        |
| Other Products  | 17        |
| Markets   | 19        |
| New   | 20        |
| Reroofing   | 20        |
| <b>4. Industry Structure</b>                          | <b>23</b> |
| Industry Characteristics                              | 23        |
| Market Share  | 24        |
| Carlisle Construction Materials                       | 25        |
| Johns Manville  | 26        |
| GAF Materials   | 26        |
| <b>5. About This Report</b>                           | <b>27</b> |
| Scope   | 27        |
| Sources   | 27        |
| Industry Codes  | 28        |
| Freedonia Methodology                                 | 28        |
| Resources   | 30        |

# List of Tables & Figures

---

|   |    |
|---|----|
| Figure 1   Key Trends in the US Commercial Roofing Market, 2019 – 2024                | 4  |
| Figure 2   US Commercial Roofing Demand Trends, 2009 – 2019                           | 5  |
| Table 1   Key Indicators for US Commercial Roofing Demand, 2009 – 2024 (2012US\$ bil) | 7  |
| Table 2   US Commercial Roofing Trade, 2009 – 2019 (US\$ mil)                         | 9  |
| Figure 3   US Commercial Roofing Demand by Product, 2009 – 2024 (mil sq)              | 11 |
| Table 3   US Commercial Roofing Demand by Product, 2009 – 2024 (mil sq)               | 11 |
| Figure 4   US Commercial Roofing Demand by Product, 2009 – 2024 (%)                   | 18 |
| Figure 5   US Commercial Roofing Demand by Market, 2009 – 2024 (mil sq)               | 19 |
| Table 4   US Commercial Roofing Demand by Market, 2009 – 2024 (mil sq)                | 19 |
| Figure 6   US Commercial Roofing Demand by Market, 2009 – 2024 (%)                    | 22 |
| Figure 7   US Commercial Roofing Market Share by Company, 2019 (%)                    | 24 |
| Table 5   Leading Suppliers to the US Commercial Roofing Market                       | 25 |
| Table 6   NAICS & SIC Codes Related to Commercial Roofing                             | 28 |

# About This Report

---

## Scope

This report forecasts to 2024 US commercial roofing demand in area terms (squares), as well as total demand and shipments in nominal US dollars at the manufacturer level. Total demand in squares is segmented by product in terms of:

- plastic
- bituminous
- metal
- asphalt shingles
- rubber
- other products such as spray polyurethane foam, liquid-applied roof coatings, and vegetative (green) roofing

Total demand in squares is also segmented by market as follows:

- new
- reroofing

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

Excluded from the scope of this report are such related products as roofing underlays, flashings, and coatings used as repair and restorative compounds and used as a structure's primary roofing material.

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

*Commercial Roofing: United States* (FF60091) is based on [Commercial Roofing](#), 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

## About This Report

- 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 | NAICS & SIC Codes Related to Commercial Roofing

| NAICS/SCIAN 2017                              |   | SIC                                |  |
|---|---|------------------------------------|--|
| North American Industry Classification System |   | Standard Industrial Classification |  |
| 238160  | Roofing Contractors   | 1761                               | Roofing, Siding, & Sheet Metal Work                  |
| 321113  | Sawmill Products  | 2429                               | Special Product Sawmills, Not Elsewhere Classified   |
| 324122  | Asphalt Shingle & Coating Materials Manufacturing             | 2952                               | Asphalt Felts & Coatings                             |
| 325510  | Paint & Coating Manufacturing                                 | 3069                               | Fabricated Rubber Products, Not Elsewhere Classified |
| 326299  | All Other Rubber Product Manufacturing                        | 3086                               | Plastic Foam Products                                |
| 327120  | Clay Building Material and Refractories Manufacturing         | 3259                               | Structural Clay Products, Not Elsewhere Classified   |
| 327390  | Other Concrete Product Manufacturing.                         | 3272                               | Concrete Products, Except Block and Brick            |
| 327991  | Cut Stone & Stone Product Manufacturing                       | 3281                               | Cut Stone and Stone Products                         |
| 332311  | Prefabricated Metal Building & Component Manufacturing        | 3444                               | Sheet Metal Work                                     |
| 332322  | Sheet Metal Work Manufacturing                                | 3448                               | Prefabricated Metal Buildings & Components           |
| 423330  | Roofing, Siding, and Insulation Material Merchant Wholesalers | 5033                               | Roofing, Siding, & Insulation Materials              |

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

## About This Report

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 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.

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Resources

### The Freedonia Group

*Commercial Roofing*

### Freedonia Industry Studies

*Asphalt Shingles Market in the US*

*Building Envelope in North America*

*Ceilings*

*Commercial Insulation Market in the US*

*Global Housing*

*Global Insulation*

*Global Roofing*

*Green (Vegetative) Roofing*

*Gutters & Downspouts in the US*

*Insulation*

*Liquid-Applied Roof Coatings*

*Low-Slope Roofing*

*Moulding & Trim*

*Prefabricated Housing*

*Residential Roofing*

*Roofing*

*Roofing Accessories*

*Roofing Distributors in the US*

*Siding*

*Solar Roofing in the US*

### Freedonia Focus Reports

*Architectural Services: United States*

*Asphalt Shingles: United States*

*Ceilings: United States*

*Commercial Building Construction: United States*

*Construction: United States*

*Fabricated Metal Products: United States*

*Housing: United States*

*Metal Roofing: United States*

*Moulding & Trim: United States*

*Roofing: United States*

*Siding: United States*

### Freedonia Custom Research

### **Trade Publications**

*Builder*

*Engineering News-Record*

*Journal of Light Construction*

*Metal Construction News*

*Metal Roofing*

*Qualified Remodeler*

*Remodeling*

*Roofing Contractor*

*Western Roofing, Insulation, & Siding*

### **Agencies & Associations**

Asphalt Roofing Manufacturers Association

Cool Roof Rating Council

EPDM Roofing Association

Metal Building Manufacturers Association

Metal Construction Association

Metal Roofing Alliance

National Roofing Contractors Association

Spray Polyurethane Foam Alliance

United States Census Bureau

United States Department of Energy

United States Environmental Protection Agency

United States Green Building Council

United States International Trade Commission