



Freedonia Focus Reports
US Collection

Roofing Accessories: United States

May 2019



BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	5
Historical Trends	5
Key Economic Indicators	7
Roofing Accessories Pricing Trends	8
Effects of Tariffs on Trade	10
3. Segmentation & Forecasts	12
Products	12
Underlayment	13
Roofing Compounds	14
Fasteners	15
Cover Boards	15
Flashing	16
Other Accessories	17
Markets	19
Residential	20
Commercial	20
4. Industry Structure	22
Industry Characteristics	22
Market Share	23
Carlisle Construction Materials	23
GAF Materials	24
Owens Corning	25
5. About This Report	26
Scope	26
Sources	26
Industry Codes	27
Freedonia Methodology	28
Resources	29

List of Tables & Figures

Figure 1 Key Trends in the US Roofing Accessories Market, 2018 – 2023	4
Figure 2 US Roofing Accessories Demand Trends, 2008 – 2018	6
Table 1 Key Indicators for US Roofing Accessories Demand, 2008 – 2023 (US\$ bil)	7
Table 2 Roofing Accessories Pricing Trends, 2008 – 2023	9
Figure 3 US Roofing Accessories Demand by Product, 2008 – 2023 (US\$ mil)	12
Table 3 US Roofing Accessories Demand by Product, 2008 – 2023 (US\$ mil)	12
Figure 4 US Roofing Accessories Demand by Product, 2008 – 2023 (%)	17
Figure 5 US Roofing Accessories Demand by Market, 2008 – 2023 (US\$ mil)	19
Table 4 US Roofing Accessories Demand by Market, 2008 – 2023 (US\$ mil)	19
Figure 6 US Roofing Accessories Demand by Market, 2008 – 2023 (%)	21
Figure 7 US Roofing Accessories Market Share by Company, 2018 (%)	23
Table 5 NAICS & SIC Codes Related to Roofing Accessories	27

About This Report

Scope

This report forecasts to 2023 US roofing accessories demand in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- underlayment
- roofing compounds
- fasteners
- cover boards
- flashing
- other accessories such as drains, vents, and stacks; battens; and snow guards

Total demand is also segmented by market as follows:

- residential
- commercial

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

Excluded from the scope of the report are such related products as mopping asphalts used as part of an installed bituminous roofing system, LARCs and other products used as primary roofing, acoustical board, and wallboard. Solar panels and related components of solar panel systems, such as clamps, purlins, inverters, and other devices used to connect the panel to a structure's electrical grid, are also not included in this report.

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

Roofing Accessories: United States (FF60114) is based on *Roofing Accessories*, 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
- trade associations and their publications

About This Report

- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group
- conversations with industry figures, such as contractors and the key personnel of industry participants

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 Roofing Accessories

NAICS 2017 North American Industry Classification System		SIC Standard Industrial Classification	
238160	Roofing Contractors	1761	Roofing, Siding, & Sheet Metal Work
321113	Sawmill Products	2429	Special Product Sawmills, NEC
324122	Asphalt Shingle & Coating Materials Manufacturing	2851	Paints, Varnishes, Lacquers, Enamels, & Allied Products
325510	Paint & Coating Manufacturing	2891	Adhesives & Sealants
325520	Adhesive Manufacturing	2952	Asphalt Felts & Coatings
326150	Urethane and Other Foam Product (Except Polystyrene) Manufacturing	3069	Fabricated Rubber Products, NEC
326199	All Other Plastic Products Manufacturing	3086	Plastic Foam Products
326299	All Other Rubber Product Manufacturing	3089	Plastic Products, NEC
327120	Clay Building Material and Refractories Manufacturing	3229	Pressed & Blown Glass & Glassware, NEC
327212	Other Pressed & Blown Glass & Glassware Manufacturing	3259	Structural Clay Products, NEC
327390	Other Concrete Product Manufacturing	3272	Concrete Products, Except Block & Brick
327420	Gypsum	3275	Gypsum Products
327991	Cut Stone & Stone Product Manufacturing	3281	Cut Stone & Stone Products
327993	Mineral Wool Manufacturing	3296	Mineral Wool
331222	Steel Wire Drawing	3315	Steel Wire and Related Products
332311	Prefabricated Metal Building & Component Manufacturing	3444	Sheet Metal Work
332322	Sheet Metal Work Manufacturing	3448	Prefabricated Metal Buildings & Components
423330	Roofing, Siding, & 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 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

Roofing Accessories

Freedonia Industry Studies

Asphalt Market Forecasts

Asphalt Shingles Market in the US

Ceilings Market in the US

Commercial Insulation Market in the US

Commercial Roofing

Construction Chemicals in the US

Green (Vegetative) Roofing

Gutters & Downspouts in the US

Insulation Market in the US

Liquid-Applied Roof Coatings in the US

Low-Slope Roofing Market in the US

Metal Roofing Market in the US

Moulding & Trim in the US

Polyurethane Market in the US

Prefabricated Housing Market in the US

Residential Insulation Market in the US

Residential Roofing

Roofing Distribution in the US

Roofing Distributors in the US

Roofing: US Forecasts

Roofing Underlay Market in the US

Siding Distribution in the US

Siding Distributors in the US

Siding Market in the US

Solar Roofing Market in the US

Freedonia Focus Reports

Commercial Roofing: United States

Commercial Windows & Doors: United States

Housing: United States

Insulation: United States

Liquid-Applied Roof Coatings: United States

Low-Slope Roofing: United States

Metal Roofing: United States

Residential Roofing: United States

About This Report

Roofing Distribution: United States

Roofing: United States

Siding Distribution: 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

Single Ply Roofing Industry

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