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Global Collection



Global Construction Chemicals

October 2019



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About This Report

Scope

This report forecasts to 2023 global demand for construction chemicals by product, market, and major world region in nominal US dollars at the manufacturer level. Product segments include:

- protective coatings and sealers
- caulks and adhesives
- cement and concrete additives
- polymer flooring
- grouts and mortars
- asphalt additives
- sprayed polyurethane foam
- other products such as putty, strippers, and specialized cleaning products

Reported markets encompass:

- building construction
- nonbuilding construction

World regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, market, and regional demand (including product and market segments) are provided for 2008, 2013, and 2018.

Excluded from the report are house paints, decorative stains, and other products that are primarily decorative; factory applied coatings such as those used on metal building or bridge components, prefabricated housing materials, woodwork, or furniture; and adhesives used in the manufacturing of construction materials.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2018.

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

Global Construction Chemicals (FW35053) is based on *Global Construction Chemicals*, a

About This Report

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 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 9 | NAICS & SIC Codes Related to Construction Chemicals

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
325180	Other basic inorganic chemical manufacturing	2819	Industrial inorganic chemicals, NEC
325199	All other basic organic chemical manufacturing	2851	Paints and allied products
325510	Paint and coating manufacturing	2869	Industrial organic chemicals, NEC
325520	Adhesive manufacturing	2891	Adhesives and sealants
325998	All other miscellaneous chemical product and preparation manufacturing	2899	Chemical preparations, NEC

Source: US Census Bureau

Table 10 | HS Codes Related to Construction Chemicals

HS Code	Definition
3204.17	Pigments and preparations based on synthetic organic coloring matter, whether or not chemically defined
3214	Glaziers' putty, grafting putty, resin cements, caulking compounds and other mastics; painters' fillings; non-refractory surfacing preparations for facades, indoor walls, floors, ceilings or the like
3506.10	Prepared glues or other prepared adhesives; products suitable for use as glues or adhesives, put up for retail sale as glues or adhesives, not exceeding a net weight of 1 kg, NEC
3506.91	Prepared adhesives; based on polymers of heading 3901 to 3913 or on rubber
3506.99	Other prepared glues and prepared adhesives
3903.11	Styrene polymers in primary forms; expandable polystyrene
3903.19	Styrene polymers in primary forms; other than expandable polystyrene
3909	Amino-resins, phenolic resins, and polyurethanes in primary forms
3909.50	Polyurethanes, in primary forms

Source: United Nations Statistics Division

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.

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Resources

The Freedonia Group

Global Construction Chemicals

Freedonia Industry Studies

Adhesives & Sealants in the US

Asphalt Market Forecasts

Commercial Roofing

Commercial Windows & Doors Market in the US

Construction Chemicals in the US

Global Bulk Packaging

Global Flooring

Global Hard-Surface Flooring

Global Housing

Global Nonwovens

Global Pressure Sensitive Tapes

Global Silicones Market

Global Windows & Doors

Insulation Market in the US

Moulding & Trim in the US

Paint & Coatings: US Market Forecasts

Paving Asphalt Market in the US

Pipe: Products & Markets

Protective & Specialty Coatings Market in the US

Residential Roofing

Residential Windows & Doors Market in the US

Silicones Market in the US

Wood Coatings Market in the US

Freedonia Focus Reports

Construction Aggregates: United States

Global Thermoplastic Elastomers

Housing: Canada

Polyethylene: United States

Pressure Sensitive Tapes: United States

Thermoplastic Elastomers: Canada

Thermoplastic Elastomers: United States

Freedonia Custom Research

Trade Publications

Adhesives & Sealants Industry

Concrete Construction

The Concrete Producer

Construction Europe

Global Cement Magazine

Global Gypsum Magazine

International Construction

The Journal of Light Construction

TileLetter

Spray Foam Magazine

Walls & Ceilings

Agencies & Associations

Adhesive and Sealant Council

American Coatings Association

American Concrete Institute

American Society of Civil Engineers

Asia Regional Adhesive Council

British Adhesives and Sealants Association

China Adhesives and Tape Industry Association

Eurostat

FEICA (Association of the European Adhesive and Sealant Industry)

Japanese Adhesive Industry Association

Korea Adhesive Industry Association

Polyurethane Foam Association

The Portland Cement Association

Statistics Canada

Taiwan Synthetic Resins and Adhesives Industrial Association

UN Comtrade

United States Census Bureau

United States Department of Energy

United States Environmental Protection Agency

United States Green Building Council

United States International Trade Commission