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Global Collection

# Global Roofing

February 2019



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# About This Report

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## Scope

This report forecasts to 2022 global demand for roofing by product, market, and major world region in square meters. Product segments include:

- bituminous
- tile
- metal
- fiber cement
- plastic
- rubber
- other (e.g., bamboo, thatch, solar roofing, green roofing)

Reported markets encompass:

- residential
- nonresidential

Major 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 2007, 2012, and 2017.

For the purposes of this report, demand for roofing products is measured in terms of total roof area covered, not the total amount of material used.

Materials used as underlayment for other roofing products and roofing accessories, such as metal flashings, snow guards, and vents, are not included in the scope of this report.

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

*Global Roofing* (FW60038) is based on 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 9 | NAICS & SIC Codes Related to Roofing

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
324122	Asphalt Shingle & Coating Materials Manufacturing	2952	Asphalt Felts & Coatings
332311	Prefabricated Metal Building & Component Manufacturing	3069	Fabricated Rubber Products, Not Elsewhere Classified
332322	Sheet Metal Work Manufacturing	3444	Sheet Metal Work
		3448	Prefabricated Metal Buildings & Components
		5033	Roofing, Siding, & Insulation Materials

Source: US Census Bureau

Table 10 | HS Codes Related to Roofing

HS Code	Definition
2517	Pebbles, gravel, broken or crushed stone, of a kind commonly used for concrete aggregates, for road metalling or for railway or other ballast, shingle and flint, whether or not heat-treated; macadam of slag, dross or similar industrial waste, whether or not heat-treated
441850	Shingles & shakes of wood, including cellular wood panels
690510	Roofing tiles, ceramic
730890	Structures (excluding prefabricated buildings of heading 94.06) and parts of structures (e.g., bridges and bridge-sections, lock-gates, towers, lattice masts, roofs, roofing frame-works, doors and windows and their frames and thresholds for doors, shutters, balustrades, pillars and columns) of iron/steel (excluding of 7308.10-7308.40); plates, rods, angles, shapes, sections, tubes and the like, prepared for use in structures, of iron/steel

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.

## About This Report

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 Roofing*

### Freedonia Industry Studies

*Commercial Roofing*

*Commercial Windows & Doors Market in the US*

*Fiber Cement in the US*

*Global Construction Machinery*

*Global Filters*

*Global Housing*

*Global HVAC Equipment*

*Global Insulation*

*Global Off-Road Equipment Technology*

*Global Power Tools*

*Global Siding (Cladding)*

*Global Windows & Doors*

*Gutters & Downspouts in the US*

*Insulation Market in the US*

*Low-Slope Roofing Market in the US*

*Metal Roofing Market in the US*

*Residential Roofing*

*Residential Windows & Doors Market in the US*

*Rigid Bulk Packaging*

*Roofing Accessories*

*Roofing Underlay Market in the US*

*Roofing: US Forecasts*

*Siding Market in the US*

*US HVAC Market Forecasts*

*World Drywall & Building Plaster*

### Freedonia Focus Reports

*Commercial Roofing: United States*

*Fiber Cement: United States*

*Global Insulation*

*Global Siding*

*Insulation: 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: United States*

*World Fiber Cement Products*

**Freedonia Custom Research**

## Trade Publications

*Builder*

*Engineering News-Record*

*Journal of Light Construction*

*Metal Construction News*

*Metal Roofing*

*Qualified Remodeler*

*Remodeling*

*Roofing Contractor*

## Agencies & Associations

Asphalt Roofing Manufacturers Association (US and Canada)

Canada Roofing Contractors Association

China National Building Waterproof Association

Cool Roof Rating Council

Eurostat

Germany Roofing Contractors Association

International Federation for the Roofing Trade

International Green Roof Association

Metal Building Manufacturers Association (US)

Metal Construction Association (US)

Metal Roofing Alliance (US)

Metal Roofing and Cladding Association of Australia

National Roofing Contractors Association (US)

Statistics Canada

The National Federation of Roofing Contractors Limited (United Kingdom)

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

World Bank