



Freedonia Focus Reports
Global Collection

Global Fiber Cement

September 2019



BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Global Overview & Forecasts	5
Demand by Market	5
Residential Buildings	6
Nonresidential Buildings	7
Demand by Application	9
Roofing	10
Siding (Cladding)	11
Backerboard	11
Moulding & Trim	12
Other Applications	12
3. Regional Segmentation & Forecasts	14
Regional Production Overview	14
Regional Demand Overview	16
North America	18
Western Europe	21
Asia/Pacific	24
Other Regions	27
Central & South America	28
Eastern Europe	28
Africa/Mideast	29
4. Industry Structure	31
Industry Characteristics	31
Market Share	32
James Hardie	32
Etex	33
Nichiha	33
5. About This Report	35
Scope	35
Sources	35
Industry Codes	36
Freedonia Methodology	36
Resources	38

List of Tables & Figures

Figure 1 Global Fiber Cement Market Outlook, 2018 – 2023	4
Figure 2 Global Fiber Cement Demand by Market, 2008 – 2023 (000 m tons)	5
Table 1 Global Fiber Cement Demand by Market, 2008 – 2023 (000 m tons)	5
Figure 3 Global Fiber Cement Demand by Market, 2008 – 2023 (%)	8
Figure 4 Global Fiber Cement Demand by Application, 2008 – 2023 (000 m tons)	9
Table 2 Global Fiber Cement Demand by Application, 2008 – 2023 (000 m tons)	9
Figure 5 Global Fiber Cement Demand by Application, 2008 – 2023 (%)	13
Figure 6 Global Fiber Cement Shipments by Region, 2008 – 2023 (000 m tons)	14
Table 3 Global Fiber Cement Shipments by Region, 2008 – 2023 (000 m tons)	14
Figure 7 Global Fiber Cement Shipments by Region, 2008 – 2023 (%)	15
Figure 8 Global Fiber Cement Demand by Region, 2008 – 2023 (000 m tons)	16
Table 4 Global Fiber Cement Demand by Region, 2008 – 2023 (000 m tons)	16
Figure 9 Global Fiber Cement Demand by Region, 2008 – 2023 (%)	17
Figure 10 North America: Fiber Cement Demand by Market, 2008 – 2023 (000 m tons)	18
Figure 11 North America: Fiber Cement Demand by Application, 2008 – 2023 (000 m tons)	18
Table 5 North America: Fiber Cement Demand by Market & Application, 2008 – 2023 (000 m tons)	20
Figure 12 Western Europe: Fiber Cement Demand by Market, 2008 – 2023 (000 m tons)	21
Figure 13 Western Europe: Fiber Cement Demand by Application, 2008 – 2023 (000 m tons)	21
Table 6 Western Europe: Fiber Cement Demand by Market & Application, 2008 – 2023 (000 m tons)	23
Figure 14 Asia/Pacific: Fiber Cement Demand by Market, 2008 – 2023 (000 m tons)	24
Figure 15 Asia/Pacific: Fiber Cement Demand by Application, 2008 – 2023 (000 m tons)	24
Table 7 Asia/Pacific: Fiber Cement Demand by Market & Application, 2008 – 2023 (000 m tons)	26
Figure 16 Other Regions: Fiber Cement Demand by Region, 2008 – 2023 (000 m tons)	27
Figure 17 Other Regions: Fiber Cement Demand by Application, 2008 – 2023 (000 m tons)	27
Table 8 Other Regions: Fiber Cement Demand by Region & Application, 2008 – 2023 (000 m tons)	30
Table 9 NAICS & SIC Codes Related to Fiber Cement	36
Table 10 HS Codes Related to Fiber Cement	36

About This Report

Scope

This report forecasts to 2023 global demand for fiber cement by market, application, and major world region in metric tons. Market segments include:

- residential buildings
- nonresidential buildings

Reported applications encompass:

- roofing
- siding (cladding)
- backerboard
- moulding and trim
- other applications such as walls and pipe

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

To illustrate historical trends, world, market, application, and regional demand (including market and application segments) are provided for 2008, 2013, and 2018. Finally, global shipments are segmented by major world region and provided for 2008, 2013, 2018, and 2023.

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 Fiber Cement (FW60072) is based on *Global Fiber Cement*, 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
- 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

About This Report

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 Fiber Cement

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
322219	Other paperboard container manufacturing	2655	Fiber cans, tubs, drums, and similar products

Source: US Census Bureau

Table 10 | HS Codes Related to Fiber Cement

HS Code	Definition
6811	Articles of asbestos-cement & cellulose fiber cement
2523	Portland cement, aluminous cement, slag cement, supersulphate cement and similar hydraulic cements, whether or not colored or in the form of clinkers

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

About This Report

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

Global Fiber Cement

Freedonia Industry Studies

Ceilings in the US

Countertops Market in the US

Commercial Roofing in the US

Global Countertops

Global Housing

Global Roofing

Global Siding (Cladding)

Moulding & Trim in the US

Pipe: Products & Markets

Roofing Underlay Market in the US

Roofing: US Forecasts

Siding Market in the US

Windows & Doors

Freedonia Focus Reports

Construction: United States

Fiber Cement: United States

Global Housing

Commercial Building Construction: United States

Wood Millwork: 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

Eurostat

Germany Federal Statistical Office

Moulding & Millwork Producers Association

About This Report

National Association of Home Builders
National Bureau of Statistics of China
Natural Resources Canada
National Tile Contractors Association
North American Fiber Cement Association
Portland Cement Association
Stairbuilders and Manufacturers Association
UNdata
United States Census Bureau
United States International Trade Commission
Wood Component Manufacturers Association
World Millwork Alliance