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Asphalt

US Industry Study with Forecasts for **2011 & 2016**

Study #2242 | November 2007 | $4500 | 307 pages

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Asphalt

US Industry Study with Forecasts for ***2011 & 2016***

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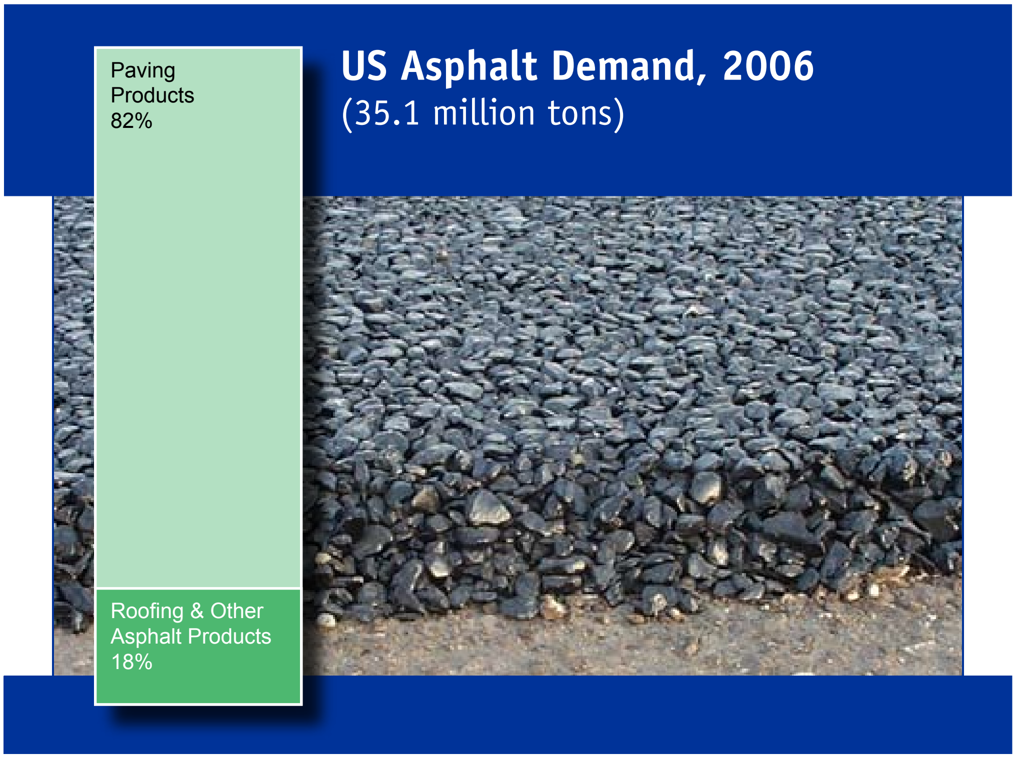
In paving markets, US demand for asphalt will rebound through 2011 from a low 2006 base, reflecting some moderation in asphalt pricing from historically high 2006 levels.



US demand to grow 1.7% annually through 2011

US demand for asphalt is forecast to advance 1.7 percent annually to more than 38 million tons in 2011. This is equivalent to 211 million barrels of primary asphalt, the vast majority of which is refinery asphalt. In paving markets, demand will rebound from a low 2006 base, reflecting some moderation in asphalt pricing from historically high 2006 levels. In roofing products, demand is expected to slow through 2011, primarily due to weak prospects in new single family home construction.

Dominant paving segment to outpace roofing uses

Paving products accounted for more than 80 percent of overall asphalt demand in 2006. Gains for paving products will be driven by increased federal and state spending on highway and road construction. Gains will proceed from a relatively weak 2006 base, when extremely high asphalt prices led to a rollback in paving activity. Overall, demand for asphalt in paving applications is forecast to increase 1.8 percent annually to 31.5 million tons in 2011.

Consumption of asphalt in roofing and other applications is projected to expand 1.4 percent annually to 6.7 million tons in 2011. This represents a deceleration from the growth posted in the 2001-2006 period, reflecting an expected decline in new single family home construction, which will negatively impact asphalt roofing for steep slope applications, primarily asphalt shingles. Nevertheless, strongly improving prospects for asphalt low slope roofing products in nonresidential markets will partially offset the weakness in new residential markets. Growth opportunities will also continue to present themselves in maintenance and repair applications in both residential and nonresidential markets.

Asphalt products to outperform primary asphalt

Demand for products that utilize asphalt is expected to increase 3.9 percent per year to over $18 billion in 2011. Among paving products, emulsified asphalt will benefit from the use of in-place recycling, microsurfacing and chip seal technologies. Continuing adoption of performance-based specifications for road projects will generate demand for polymer-modified asphalts. However, asphalt cement will continue to be the dominant asphalt paving product.

Among asphalt roofing products, the best opportunities will be in modified asphalt membranes, which are increasingly replacing standard roofing felts in flat roof applications. Asphalt shingle demand will continue to benefit from use in maintenance and repair applications, although prospects in new housing will weaken.

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Sample Text, Table & Chart

TABLE VII-6

**ASPHALT DEMAND BY REGION & TYPE
(thousand tons asphalt content)**

Item	1996	2001	2006	2011	2016
Construction Expend (bil 2000$)	718	828	878	980	1090
tons asphalt/mil $ construction	46.1	42.8	40.0	39.0	38.3
Asphalt Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Region:					
Northeast	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Midwest	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
South	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
West	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Type:					
Paving	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Roofing & Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
tons paving/highway mile	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Total Highway Mileage (000 miles)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

ASPHALT MARKETS

Nonresidential Building Construction

Through 2011, demand for asphalt employed in constru[illegible] 5 percent per [illegible] average, bu[illegible] ial and indu[illegible] cularly large [illegible] pportunities f[illegible] products in both paving and roofing applications. With the r[illegible] the office, commercial and industrial segments and continued in institutional construction expenditures, asphalt demand in ing construction applications will offer better prospects over period.

SAMPLE TEXT

Compared to residential building markets, asphalt paving products generate a larger weight of asphalt demand in nonresidential building markets. Asphalt paving materials are used extensively in parking areas and walkways associated with nonresidential building construction. In particular, demand is dominated by parking lots built adjacent to shopping malls, office buildings and other industrial, commercial and institutional structures. In general, although concrete dominates demand for multilevel parking structures, asphalt is the primary surfacing material used in ground level lots. Demand for asphalt in paving materials for the nonresidential construction market is projected to increase 2.8 percent per year to 6.0 million tons in 2011.

Consumption of asphalt in roofing products intended for use in nonresidential construction markets is forecast to increase 1.9 percent annually to 3.6 million tons in 2011. Among asphalt roofing products, built-up roofing products, including standard roofing felts, modified roofing membranes and roofing asphalt have a far more substantial role than in residential building.

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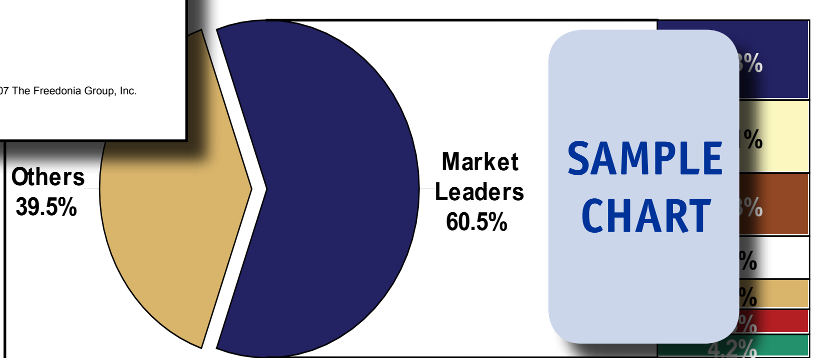
CHART VIII-3

**...LT ROOFING PRODUCT MARKET SHARE, 2006
($8.4 billion)**



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Sample Profile, Table & Forecast

TABLE V-2

PAVING PRODUCTS -- ASPHALT DEMAND BY TYPE
(thousand tons)

Item	1996	2001	2006	2011	2016
Capital & Maint Hwy Expend (bil 2000$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].3
tons asphalt/mil $ highways	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]7
Asphalt Demand in Paving Products	28[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Asphalt Cement	25[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Asphalt Emulsions	1[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Cutback Asphalt	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Other Asphalt Paving Products	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Primary Asphalt in Paving (mil bbls)	1[illegible]	[illegible]	[illegible]	[illegible]	[illegible].9
% paving	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].7
Asphalt Demand	33[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Addendum:					
Primary Paving Asphalt Shpts (mil $)	312[illegible]	[illegible]	[illegible]	[illegible]	9600

SAMPLE TABLE

COMPANY PROFILES

American Gilsonite Company
350 Cambridge Avenue
Palo Alto, CA 94306
650-289-9252
http://www.americangilsonite.com

Annual Sales: [illegible]
Employment: [illegible]

Key Products [illegible]

America[illegible] known as uintaite, and asph[illegible] to the asphalt paving, ink ar[illegible] cal industries. The Company [illegible]

SAMPLE PROFILE

The Company is active in the US asphalt industry through the manufacture and sale of GILSONITE asphaltum. Asphaltum is a naturally occurring hydrocarbon resin similar in appearance to asphalt and coal. This brittle and lightweight resin softens in high temperatures and can be easily converted to powder form. GILSONITE asphaltum is used in more than 160 products to improve various performance qualities. Major applications include roofing materials, paving-grade asphalt, paints, varnishes, printing inks, drilling fluids, oilwell cements and foundry sands.

In roofing materials, GILSONITE is used to reduce the penetration of base asphalt without causing excessive aging or oxidation. The resin ensures that roofing membranes retain flexibility, resist high temperatures and do not soften over time, thereby reducing the risk of tears and leaks. Asphaltum is also used to improve the adhesion and pliability of patching compounds for roofing applications. GILSONITE asphaltum

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"Paving demand for asphalt cement is forecast to grow 1.7 percent annually through 2011 to 28.8 million tons. Measured by value, demand for asphalt cement is projected to increase 3.3 percent annually through 2011 to $6.8 billion. While volume growth is expected to reverse declines experienced from 2001 to 2006, value gains for asphalt cement will decelerate as ..."

--Section V, pg. 92

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Other Studies

World Asphalt

This study analyzes the world market for asphalt. It presents historical demand data (1996, 2001, 2006) and forecasts for 2011 and 2016 by product (e.g., paving asphalt, roofing asphalt); world region (North America, Western Europe, Asia/Pacific, Latin America, Eastern Europe, Africa/Mideast); and for key countries within these regions. The study also discusses foreign trade, regional production capabilities, market share, cooperative agreements and product developments, and profiles major players.

#2274 .... 12/2007..................... $5500

World Construction Aggregates

Global construction aggregates demand will rise 4.7% annually through 2011. India, China, Indonesia and Thailand will lead gains. Infrastructure repair and maintenance will drive demand in developed areas. Land use concerns will benefit aggregates made of recycled and waste materials. This study analyzes the $139 billion world construction aggregates industry, with forecasts for 2011 and 2016 by type, market, application, world region and for 23 countries. It also evaluates market share and profiles major players.

#2272 .... 12/2007..................... $5200

Gypsum Products in North America

Demand for gypsum products in the US, Canada and Mexico will reach 54.6 metric tons in 2011. Nonresidential buildings will offer the best opportunities and help offset weakness in the key residential construction market. Synthetic gypsum will continue to supplant mined gypsum for use in calcined gypsum products. This study analyzes the North American gypsum industry, with forecasts for 2011 and 2016 by product, market and country. It also evaluates company market share and profiles major producers.

#2225 .... 08/2007..................... $4500

Asphalt in China

Demand for asphalt in China will rise 6% annually through 2010, driven by strong gains in road and building construction. Paving applications will outpace roofing and remain dominant. Asphalt shingles and modified bitumen membranes will gain market share in roofing while asphalt built-up and roll types will lose ground. This study analyzes the ¥23.3 billion Chinese asphalt market to 2010 and 2015 by product, market and region. It also evaluates company market share and profiles leading competitors.

#2167 .... 03/2007..................... $4900

Roofing in China

Demand for roofing materials in China will rise 4.4% annually, outpacing all other major economies in the world. Concrete and clay tiles and bituminous roofing will remain the dominant types, while elastomeric and plastic membranes lead gains. The nonresidential building market will grow more rapidly than the residential segment. This study analyzes the ¥40 billion Chinese roofing industry to 2010 and 2015 by product, market and region. It also evaluates company market share and profiles major producers.

#2148 .... 12/2006..................... $4900

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