Brick & Block

US Industry Study with Forecasts for **2012 & 2017**

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US Industry Study with Forecasts for ***2012 & 2017***

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Growth will be greatest in concrete products, reflecting stronger growth in key nonresidential building markets, while clay brick will benefit from a recovery in residential building activity.

US demand to reach 15.9 billion units in 2012

Demand for brick and block products is projected to increase 2.2 percent annually to 15.9 billion units in 2012, valued at $7.9 billion. Growth will be greatest in concrete products, reflecting stronger growth in key nonresidential building markets. Demand for clay brick products will benefit from a recovery in residential building activity, especially in new single-family housing, rising from a weak 2007 base.

Clay brick to remain dominant based on strength in siding applications

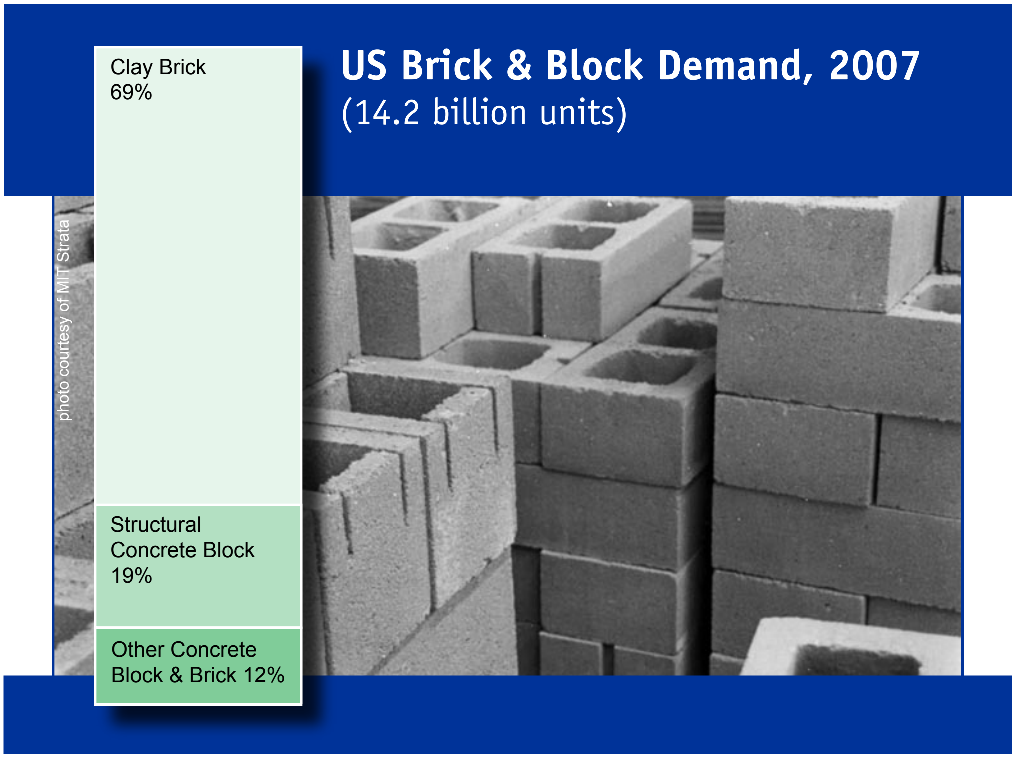
Consumption of clay brick is forecast to increase 1.8 percent annually to 10.8 billion units in 2012, valued at $2.6 billion. Clay brick remains a very popular siding (nonstructural) material, in spite of its initial cost, which is higher than other siding materials. Gains will derive primarily from rebounding opportunities in new residential markets, enhanced by more moderate gains in both residential and nonresidential improvements and repairs, as well as nonbuilding uses.

Pavers, decorative block to lead gains in concrete

Concrete block and brick demand, which is heavily dependent upon the nonresidential market, will post gains of 3.2 percent per year to 5.1 billion units in 2012. Structural concrete block is the dominant product type, accounting for nearly two-thirds of demand in 2007. These products are commonly used as structural wall and foundation materials in both residential and nonresidential markets. Decorative concrete block products, such as split-face block (which has the appearance of cut stone), will post above-average gains, as will concrete pavers, which are available in many colors and patterns, and are growing in popularity in landscaping.

Fencing, paving uses among best opportunities

On an application basis, the bulk of demand for brick and block products consists of siding materials and structural products. Siding materials (particularly clay brick) are primarily aesthetic features, while structural products (principally concrete block) are load-bearing materials that may also double as siding. Smaller applications include chimneywork, paving, sewer construction and landscaping. The fastest growth will be for products used in fencing and other applications (such as paving and landscaping), reflecting increasing nonresidential building activity and a growing emphasis on landscaping and pedestrian thoroughfare paving as an alternative to concrete paving.



Sample Text, Table & Chart

TABLE VII-8

SOUTH BRICK & BLOCK DEMAND
(million units)

Item	1997	2002	2007	2012	2017
South Construction Expend (bil 2000$)	2				12
brick & block units/000$ construction					9
South Brick & Block Demand	1				5
By Subregion:					
South Atlantic	1				0
East South Central					0
West South Central					5
By Market:					
Residential	1				0
Nonresidential					0
Nonbuilding					5
South Brick & Block Demand (mil $)	1				5
% South					1
Brick & Block Demand (mil units)	11574	12900	14230	15900	17350

SAMPLE TABLE

PRODUCTS

Clay Brick

Consumption of clay brick is projected to increase 1.8 p
annually from a weak 2007 l … 2012
$2.6 billion. Gains will deri … ng op
in new residential markets, … gain
residential and nonresidenti … pplic
well as nonbuilding uses. D … l bui
soften from a relatively stro … yclica
in that market segment.

SAMPLE TEXT

Demand for clay brick is heavily concentrated in siding
tions, which accounted for more than 90 percent of total dem
2007. Once widely used as a structural building material, bri
used exclusively as a siding (non-load bearing) material, wit
concrete block generally providing the structural support. As
material, brick is also facing increasing competition from other materi-
als, such as wood products and vinyl siding. Chimneywork (fireplaces and chimneys) still accounts for a significant portion of total demand, although the decreasing importance of fireplaces as home features and replacement with competing materials will continue to hinder growth. Demand in fencing and landscaping and paving applications will continue to expand.

Growth in siding applications will benefit from the increasing availability of specialty clay bricks which have been colored or imprinted with different patterns, offering greater product selection to home builders. In addition, the growing selection of products for use in landscaping and fencing will also benefit demand. In particular, the growing range of products offered through garden centers and home improvement outlets give do-it-yourselfers a greater range of lawn and garden decorating options. For example, clay brick products used in landscaping are now

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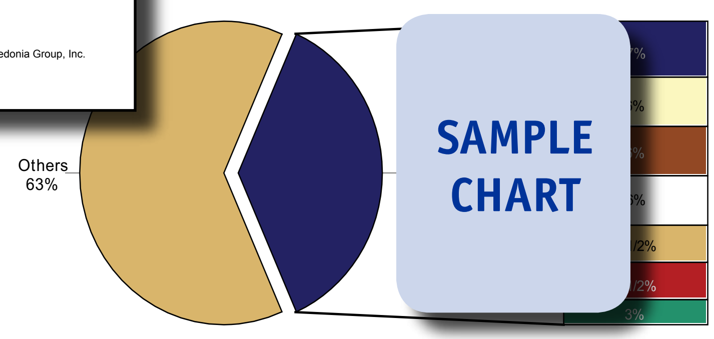
CHART VIII-1

BRICK & BLOCK MARKET SHARE, 2007
($6.5 billion)



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Sample Profile, Table & Forecast

TABLE V-4

RESIDENTIAL IMPROVEMENT & REPAIR MARKET FOR BRICK & BLOCK (million units)

Item	1997	2002	2007	2012	2017
Res Improvement & Repair (bil 2000$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
units/000$ construction	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Residential I&R Brick & Block	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Siding	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Chimneywork	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Structural	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Fencing	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other Applications	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$/unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Res I&R Brick & Block (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% improvement & repair	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Residential Brick & Block (mil units)	[illegible]	[illegible]	[illegible]	[illegible]	11085

SAMPLE TABLE

COMPANY PROFILES

Jenkins Brick Company
201 6th Street North
Montgomery, AL 36101
334-834-2210
http://www.je[illegible]

Annual Sales: [illegible]
Employment: [illegible]

Key Products: [illegible]

SAMPLE PROFILE

Jenkins B[illegible]ile, granite and stone produ[illegible]The Company is privately owned.

The Company is active in the US brick and block industry through the production and sale of clay bricks. Jenkins Brick manufactures approximately 30 types of bricks in a range of brown, red, pink and white hues with smooth, textured or wirecut faces. Bricks are offered through such product lines as ASPEN, CLOISTER, INVERNESS, MENAWA, SHAMROCK GRAY and WOODBURY.

Jenkins Brick conducts manufacturing activities at plants in Moody, Coosada and Montgomery (2), Alabama, which have a combined annual production capacity of 326 million bricks. According to the Company, the Moody facility is the first of its type to be built next to a landfill with the specific purpose of using landfill gas as fuel to power its kilns. The 247,000-square-foot plant obtains 40 percent of its energy from landfill gas and accounts for the production of 136 million bricks annually. In addition, Jenkins Brick operates a central warehouse in Montgomery, Alabama, and approximately 20 distribution yards in Alabama, Georgia, Florida, South Carolina and Tennessee.

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"Consumption of brick and block products in other applications is projected to increase 3.7 percent per year to 1.8 billion units in 2012, valued at $1.4 billion. Gains will primarily derive from increasing use of bricks and blocks in landscaping and non-road paving uses, in both residential and nonresidential markets. More traditional uses, such as roadway paving and sewer brick, are mature and relatively small, and will post little growth."

--Section VI, pg. 118

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Other Studies

World Cement

Global demand for cement will grow 5.3% annually through 2012, driven by strong increases in construction activity in developing countries. The rate of growth in China, the largest market, will moderate considerably but remain above the world average. The second largest market, India, will grow the fastest. This study analyzes the 2.8 billion metric ton world cement industry, with forecasts for 2012 and 2017 by type, market, world region and for 46 countries. It also evaluates company market share and profiles 44 major players.

#2325 .... 04/2008..................... $5800

Decorative Tile

US decorative tile demand will grow 4.3% annually through 2011. The dominant flooring market will lead gains as consumer preferences shift away from carpets and rugs. Nonresidential flooring will be particularly strong based on better appreciation of tile's advantages over other high-end flooring materials. This study analyzes the 3.2 billion square foot decorative tile industry, with forecasts for 2011 and 2016 by product, application and market. It also evaluates market share and profiles major producers.

#2285 .... 01/2008..................... $4500

World Asphalt

Global demand for asphalt will reach 123 million metric tons in 2011. Most developed areas will register relatively slow gains while developing countries post much more robust advances. Gains in China and India, however, are decelerating. Paving products will remain dominant and outpace roofing and other asphalt products. This study analyzes the 661 million barrel world asphalt industry, with forecasts for 2011 and 2016 by product, world region and 20 countries. It also details market share and profiles major firms.

#2274 .... 01/2008..................... $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

World Siding (Cladding)

Global demand for exterior siding (or cladding) will grow 3.8% yearly through 2010 based on a pickup in nonresidential building construction. Metal, concrete and stone, and fiber cement siding will grow the fastest. China, India and Russia will lead gains, while growth rates in developed countries will be slower. This study analyzes the 4.3 billion square meter world siding industry for 2010 and 2015 by product, market, world region and for 31 countries. It also evaluates market share and profiles major producers.

#2159 .... 02/2007..................... $5500

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