

## NEW Industry forecasts for 2012 & 2017

# World Roofing

Study # 2368

June 2008

\$5800

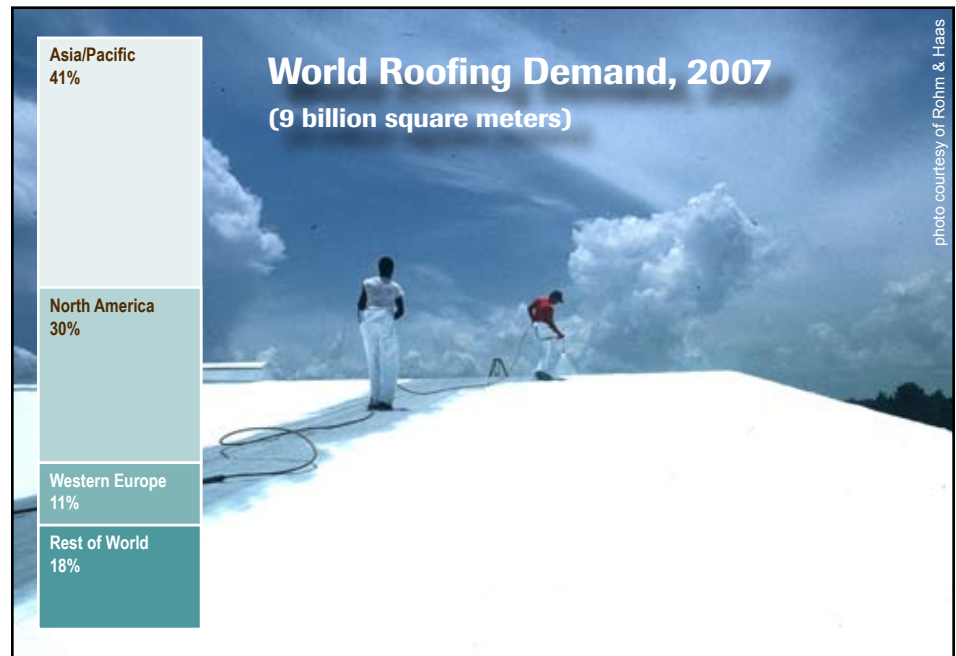
### Global roofing demand to reach 10 billion square meters in 2012

Global roofing demand is forecast to expand 2.9 percent per annum through 2012 to 10 billion square meters, with a value of \$65 billion. Demand will be driven by accelerating growth in the two largest markets: the US and China. The US market is expected to expand as housing construction recovers from its current slump. Chinese demand will benefit from advances in the residential market, which will be driven by rising per capita income levels.

### Emerging Asian markets to record fastest gains

The emerging economies of Asia, including China, will record the fastest growth in demand for roofing materials through 2012. Rapid population growth in countries such as India, the Philippines and Malaysia will generate demand for housing, while strong economic expansion in China, India and Malaysia spurs demand in the nonresidential market.

As measured by area, China is expected to become the largest single market for roofing by 2012, surpassing the US. The Chinese market is forecast to grow four percent per year over that period, reaching 2.7 billion square meters. Demand for low-slope roofing materials (e.g., modified bitumen, elastomeric and plastic membranes) will offer above average gains, benefiting from strong demand in the nonresidential market.



### Nonresidential construction to pace bituminous segment

In 2007, bituminous roofing was the most widely used roofing material in the global market. This status stems from the popularity of bituminous shingles in the US and Canada, and the widespread use of low-slope bituminous roofing materials in China and Western Europe. Going forward, the fastest growing markets for bituminous roofing are expected to be the nonresidential construction markets of Asia and Eastern Europe.

### Plastic, elastomeric roofing to be fastest growing overall

Plastic and elastomeric roofing materials are projected to post the fastest gains through 2012, each from a relatively

small base. Plastic roofing (e.g., thermoplastic polyolefin, PVC, spray polyurethane foam) will see its greatest gains the US market, where it is expected to supplant built-up roofing. Demand for elastomeric roofing (e.g., ethylene propylene diene monomer and chlorosulfonated polyethylene) will be driven by gains in the Chinese and other Asian markets.

### Study coverage

This new Freedonia industry study, *World Roofing*, is priced at \$5800. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by product, world region and for 30 countries. The study also considers market environment factors, evaluates market share and profiles industry competitors.

## Introduction

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

- General
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- World Building Construction Expenditures
  - Residential Building
  - Nonresidential Building
- World Demographic Overview
  - Population
  - Households
- Legislation & Regulatory Considerations
- Materials & Technology Trends

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  - Metal Roofing
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  - Fiber Cement & Other Roofing
- Roofing Production by Region
- International Trade in Roofing Products

### NORTH AMERICA

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- Canada
- Mexico

### WESTERN EUROPE

- Western Europe
- Germany
- France
- Spain
- United Kingdom
- Italy
- The Netherlands
- Belgium
- Other Western Europe

### ASIA/PACIFIC

- Asia/Pacific
- China

- Japan
- India
- Indonesia
- Australia
- Thailand
- South Korea
- Philippines
- Malaysia
- Taiwan
- Other Asia/Pacific

### OTHER REGIONS

- Latin America
  - Brazil
  - Argentina
  - Other Latin America
- Eastern Europe
  - Russia
  - Poland
  - Ukraine
  - Czech Republic
  - Other Eastern Europe
- Africa/Mideast
  - Iran
  - Turkey
  - South Africa
  - Other Africa/Mideast

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\* Tables for each country and region feature historical data (1997, 2002, 2007) plus forecasts (2012, 2017) for the following:  
**Roofing Demand & Supply**  
**Roofing Demand by Market**  
**Roofing Demand by Product**  
(chart, for each region)  
**plus macroeconomic indicators**

### INDUSTRY STRUCTURE

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### This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

#### OVERVIEW

##### Elastomeric Roofing

Global demand for square meters in 2012 on tion and reroofing activity tomeric roofing in low-slo buildings. In China, for e post annual gains through

**SAMPLE PAGE**  
Explanations that support each table's data and forecasts

million onstruct- relas- office- pected to ters.

In the industrialized countries, gains for elastomeric roofing will be circumscribed by competition with alternative single-ply roofing materials, such as plastic membrane roofing and modified bitumen roofing. Among plastic membrane materials, strong challenges will be presented by thermoplastic polyolefins (TPO). (TPO roofing, which exhibits both elastomeric and thermo- plastic properties, is classified as a plastic membrane for purposes of this study.) Growth for elastomeric roofing in industrialized countries will also be limited by the more advanced state of infrastructure, which constrains the growth of new building construction. Some opportunities will nonetheless exist for increased penetration of elastomeric roofing in the United Kingdom, where traditional t share.

**COMPANY PROFILES**  
Profiles for 41 competitors in the roofing industry worldwide such as BBMG Group, Etex Group, Monier Group and Saint-Gobain

noset membrane roofing or rubber based on compounded rubber DM (ethylene propylene diene SPE (chlorosulfonated polyeth- es as it is exposed to ultraviolet

#### ASIA/PACIFIC

Demand for roofing materi percent per year through 2012 to sents a slight deceleration from the construction markets recovered fr crisis. Over the forecast period, r performance expected of the non

**SAMPLE TEXT**  
Data illustrated with the aid of more than 100 tables and charts

pre- ng financial ng

Through 2012, the fastest g tial roofing market. Nonresidential continue its recovery from the 1997 East Asian financial crisis, benefiting demand for roofing in new construction. Demand in the larger residential roofing segment, however, will slow somewhat as population growth and household formation decelerates through 2012.

Both EPDM and CSPE membranes are typically reinforced with polyester produced in thicknesses from about 75 to 150 millimeters. EPDM accounts the majority of elastomeric roofing. In North America, CSPE is often known the tradename HYPALON for DuPont Dow Elastomers' chlorosulfonated ethylene membrane. Other elastomeric materials in lesser use include prene and polyisobutylene.

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### Freedonia's methods involve:

- Establishing consistent economic and market forecasts
- Using input/output ratios, flow charts and other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts and end-users
- Researching a proprietary database that includes trade publications, government reports and corporate literature

**TABLE VI-9**  
**INDONESIA -- ROOFING DEMAND BY MARKET**  
(million square meters)

Item	1997	2002	2007	2012	2017
Population (millions)					
GDP/capita					
Gross Domestic Product (bil 2006\$)					
sq m roofing/capita					
sq m roofing/mil \$ GDP					
Roofing Demand by Market					
Residential:					
New					
Reroofing					
Nonresidential:					
New					
Reroofing					

**SAMPLE TABLE**  
Historical data for 1997, 2002 and 2007 as well as Freedonia forecasts for 2012 and 2017

Source: The Freedonia Group, Inc.

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# Other Titles from The Freedonia Group

## Construction Outlook in China

This study analyzes the outlook for construction in China. It presents historical expenditures data for the years 1997, 2002 and 2007 and forecasts for 2012 and 2017 by construction market (residential building, nonresidential building, nonbuilding); application (new, building additions and alterations, maintenance and repair); and by Chinese geographic region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles major contractors.

#2356..... 07/2008.....\$5100

## Roofing

US roofing demand will reach 280 million squares in 2012 based on a recovery in home building and an increase in nonresidential construction. Reroofing will remain the largest market while new roofing applications outpace them. Roofing tile and plastic roofing will see the fastest gains by type, but asphalt shingles will remain dominant. This study analyzes the \$13.7 billion US roofing industry, with forecasts for 2012 and 2017 by product, market and region. The study also details market share and profiles major players.

#2339..... 04/2008.....\$4700

## Prefabricated Housing

US demand for prefabricated housing will reach 185,000 units in 2011, despite projected declines in US single-family housing starts. Manufactured housing will remain the dominant segment while shipments of pre-cut homes will grow the fastest. The Midwest region will be the fastest growing market. This study analyzes the \$8.6 billion US prefabricated housing industry, with forecasts for 2011 and 2016 by product and regional market. It also evaluates company market share and profiles leading players.

#2296..... 01/2008.....\$4400

## World Housing

Global housing demand will rise 2.1% yearly through 2011. The fastest unit gains will be in the Africa/Mideast region (led by Nigeria) and in Mexico, while China will lead growth in value terms. Rural-to-urban migration in developing regions will spur new housing demand to exceed new household formation. This study analyzes the 52.2 million unit global housing industry, with forecasts for 2011 and 2016 by type, region and for 22 national markets. It also considers market environment trends and indicators.

#2270..... 12/2007.....\$5100

## 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.

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## TITLE

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