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World Roofing

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

Study #2368 | June 2008 | \$5800 | 392 pages

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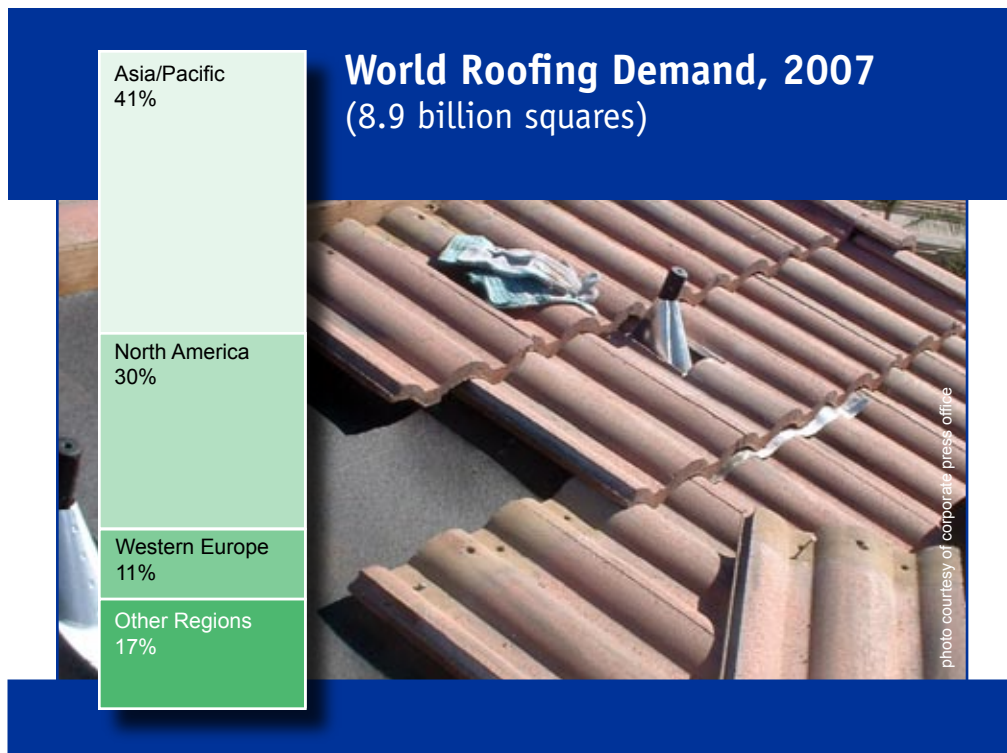
Demand will be driven by accelerating growth in the two largest markets -- the US and China -- based on a recovery in US housing construction and growth in the Chinese residential market.

Global demand to rise 2.9% yearly through 2012

Global roofing demand is forecast to expand 2.9 percent per annum through 2012 to 10.3 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 the downturn that began in 2006. Chinese demand will benefit from advances in the residential market, which will be driven by rising per capita income levels. In general, the developing regions of the world are expected to outpace the developed markets.

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.

The Chinese market is forecast to grow 4.1 percent per year through 2012, reaching 2.7 billion square meters, and surpassing the US as the world's largest roofing market by area. 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.



Plastic, elastomeric roofing to grow the fastest

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. Tile roofing was the second largest segment of world roofing demand in 2007, with one-third of total roofing area. Concrete tile accounted for the largest share, with nearly 60 percent of

the total. Tile's prominence comes from its ubiquity in the Asia/Pacific region and Western Europe. The fastest gains for tile are expected to come from the smaller Africa/Mideast region, where it is the most widely used roofing material.

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 in 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 China and other Asian markets.

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Sample Text, Table & Chart

ASIA/PACIFIC

to increase housing supply. Over the longer term, South Korea's prospect of an aging labor force, slow productivity growth in the service sector, and labor market rigidities that have encouraged short-term contracting of labor rather than permanent hiring with the North Korean dictatorship can also affect long-term growth. The December 2007 election of Lee Myung-bak to a four-year term as South Korea's president may result in some modifications to the regime in North Korea and its nuclear weapons program.

South Korea: Roofing Demand by Market

Demand for roofing materials in South Korea is forecast to grow in 2012 on annual growth of 1.2%, well above the 2002-2007 average of 0.5%. While the residential roofing market is expected to see a decline in demand, the greater gains will come from the nonresidential roofing market.

Over the period, the nonresidential roofing market in South Korea is projected to outpace the residential roofing markets. A projected acceleration in economic growth through 2012 will spur construction of office, commercial and industrial facilities, generating strong demand for new roofing.

New residential roofing demand has experienced significant volatility over the past decade. In the wake of the 1997 East Asian financial crisis, housing construction fell to half of its 1997 peak, resulting in a sharp decrease in new residential roofing demand. Demand rebounded as housing construction reached another peak in 2002. Demand declined again as housing construction contracted in 2003 and 2004. Going forward, the recovery of the South Korean housing market is expected to provide significant growth opportunities for roofing demand.

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TABLE VI-13

SOUTH KOREA -- ROOFING DEMAND BY PRODUCT (million square meters)

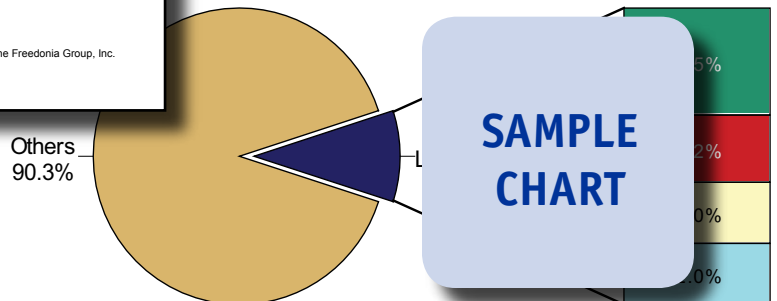
Item	1997	2002	2007	2012	2017
Population (millions)	44.7	46.7	48.7	50.7	52.7
GDP/capita	10,000	12,000	14,000	16,000	18,000
Gross Domestic Product (bil 2006\$)	447	560	680	812	950
sq m roofing/capita	6	6	6	6	6
sq m roofing/mil \$ GDP	0.13	0.13	0.13	0.13	0.13
Roofing Demand by Market					
Residential:					
New	1.1	1.1	1.1	1.1	1.1
Reroofing	0.0	0.0	0.0	0.0	0.0
Nonresidential:					
New	0.9	0.9	0.9	0.9	0.9
Reroofing	0.1	0.1	0.1	0.1	0.1

SAMPLE TABLE

SAMPLE TEXT

CHART VIII-1

WORLD ROOFING MARKET SHARE, 2007 (\$54 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Isola as

Prestemoen 9
 Porsgrunn 39
 Norway
 47-3557-5700
 http://www.is

Revenues: \$
 Employment
 Key Products

**SAMPLE
 PROFILE**

Isola is a leading European producer of waterproofing materials applied to roofs, foundations, walls, floors and such civil engineering projects as tunnels. The privately held company operates through subsidiaries in Denmark, Sweden, Finland, the Czech Republic, Germany, Hungary and Poland.

The Company participates in the world roofing industry through the production of a range of roofing materials for installation over flat and pitched roof decks. For flat roofs, Isola makes roofing membranes to be sold under such brand names as MESTERTEKK, ELASTOFOL, DOBBELT LAG and PLATON DE25. MESTERTEKK single-layer roofing membranes are constructed of polyester felt that is backed with aluminum foil and impregnated with styrene-butadiene-styrene (SBS) modified bitumen. The upper membrane surface features a coating of slate granules and the underside is coated with plastic film. These membranes, which can be used for both flat and sloped roofs, are engineered for enhanced strength, elasticity and resistance to harsh weather conditions common in the Nordic region. Isola's ELASTOFOL roofing membranes are made from thermoplastic elastomer modified bitumen, and are engineered for improved tensile strength; and resistance to wind, punctures and tearing.

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TABLE VI-13

SOUTH KOREA -- ROOFING DEMAND BY MARKET (million square meters)

Item	1997	2002	2007	2012	2017
Building Construct Expend (bil 2006\$)	17	21	28	31	36
sq m roofing/000\$ construct	0	0	0	0	0
Roofing Demand by Product	8	9	11	11	11
Tile:					
Concrete				0	0
Clay				9	9
Bituminous:	4	4	4	1	1
Shingles & Plates	2	2	2	1	1
Built-Up & Roll				5	5
Modified Bitumen				5	5
Metal				2	2
Elastomeric				3	3
Plastic				7	7
Fiber Cement				8	8
Other				1	1
\$/sq m	0	0	0	91	91
Roofing Demand (mil \$)	0	0	0	60	60
net exports				5	5
Roofing Production (mil \$)	5	5	5	245	245

**SAMPLE
 TABLE**

"Demand for tile roofing in South Korea is projected to increase 2.4 percent per year through 2012 to 15 million square meters. Clay tile will continue to maintain a larger market share than will concrete tile. A wide range of tile roofing products is offered in South Korea, from tiles similar to those used in Western Europe to *kiwa* (clay tile) designs used for centuries in traditional Korean architecture. Companies that offer *kiwa* include ..."

--Section VI, pg. 167

OTHER STUDIES

Siding

Demand for siding materials in the US will exceed 115 million squares in 2012. Gains will derive largely from a recovery in residential construction, particularly in single-family housing. Demand in the key vinyl siding segment will be moderated by competition from fiber cement siding. Stucco and related materials will also outpace vinyl. This study analyzes the \$10.4 billion US siding industry, with forecasts for 2012 and 2017 by material, market and region. It also evaluates market share and profiles industry players.
 #2376.....07/2008..... \$4700

Brick & Block

US demand for brick and block will reach \$7.9 billion in 2012. Growth will be greatest in concrete products, reflecting stronger growth in key nonresidential building markets. Demand for clay brick will benefit from a recovery in residential building activity, especially in new single-family housing. This study analyzes the 14.2 billion unit US brick and block industry, with forecasts for 2012 and 2017 by product, market, application and US geographic region. It also evaluates company market share and profiles major players.
 #2331.....05/2008..... \$4500

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

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 Housing

Global housing demand will rise 2.1% yearly through 2011. The fastest unit gains will be in the Africa/Middle-east 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

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