Global siding demand to reach 4.8 billion square meters in 2013

World demand for siding products is forecast to grow 2.6 percent per year through 2013 to 4.8 billion square meters. That pace will mark an acceleration from the 2003-2008 experience, when sharp declines in residential construction in 2007 and 2008 reduced siding demand in key markets such as the US and Spain.

Residential construction market to drive growth in siding worldwide

Growth in siding demand through 2013 will be driven by advances in new residential construction, both in developing and industrialized countries. In the former, new housing will be needed to make an effort to reduce housing deficits in the face of population increases. In addition, rising personal income levels will make siding products more affordable, discouraging the use of single-layer construction methods. For industrialized countries, the anticipated recovery in housing construction will likely leave demand below its cyclical peak from the middle of the decade, but will nonetheless represent a substantial improvement from its depressed 2008 level.

Asia/Pacific region to post biggest gains in demand

The Asia/Pacific region will post the biggest gains in demand during the 2008-2013 period. Although many countries are set to experience strong growth in the Asia/Pacific region, China and India will account for the majority of new siding demand. Two important markets, Japan and Australia, are projected to experience below-average growth, partly moderating regional gains.

Fiber cement siding to be fastest growing product

Sales of fiber cement siding products are projected to expand at the market’s fastest rate from 2008 to 2013. Gains in less established markets, such as the Africa/Mideast region and Western Europe, will be complemented by strong growth in the Asia/Pacific region and North America, where fiber cement products have been used more frequently. The growing popularity of fiber cement siding is related to its low cost and range of performance features.

Study coverage

This new Freedonia industry study, World Siding (Cladding), is priced at $5800. It presents historical demand data for the years 1998, 2003 and 2008, plus forecasts for 2013 and 2018 by siding product (masonry and concrete, vinyl, metal, wood), market (residential buildings, nonresidential buildings, new construction, improvement and repair), world region (e.g., Asia/Pacific, North America, Western Europe) as well as for 31 major national markets. The study also considers market environment factors, assesses industry structure, evaluates company market share and profiles 35 participants in the global industry.
industry study with forecasts for 2013 & 2018

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Explanations that support each table's data and forecasts

### Sample Table

Historical data for 1998, 2003 and 2008 as well as Freedonia forecasts for 2013 and 2018; data illustrated with the aid of more than 90 tables and charts

#### Western Europe

**Netherlands: Siding Demand**

Sales of siding products in the Netherlands totaled 34.2 million square meters in 2008. While overall siding demand in Western Europe declined, the siding market in the Netherlands expanded 2.5 percent per year through 2008. Advances were driven by increases in both residential and nonresidential construction activity. The amount of newly added residential floor space, for example, increased five percent annually between 2003 and 2008. Nonresidential building construction expenditures grew two percent per year. Improvement and repair applications in the Netherlands accounted for two-fifths of product sales in 2008; the country’s large, aging building stock will continue to sustain high levels of improvement and repair spending.

Demand for siding products in 2013 will again be one of Western Europe’s fastest growing residential market segments, with the number of housing starts. With a larger number of residential construction activity in 2013, the demand for siding products will be hurt by the 2008 recession spending between 2008 and 2013. Improvement and repair applications will account for a considerable portion of nonresidential siding demand.

Historically, bricks have been the preferred type of siding in the Netherlands in both residential and nonresidential construction; brick and tile products accounted for 42 percent of siding sales in 2008. In the Netherlands, bricks are valued for their long lifespan, strength and appearance. Stucco and EIFS products, which are much cheaper than other types of siding, are also frequently used. Since 2003, sales of vinyl and fiber cement siding have grown considerably in the Netherlands. Vinyl and fiber cement products cost less than brick and tile, or metal siding, and offer a number of appealing qualities including easy installation (vinyl), resistance to warping (fiber cement), and an attractive.

### 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
Other Titles from The Freedonia Group

Gypsum Products in North America
This study analyzes the North American gypsum industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by product (e.g., gypsum board, cement additive, agricultural gypsum, fillers), market (residential, nonresidential and nonbuilding construction; industrial; agricultural) and country (US, Canada, Mexico). The study also considers market environment factors, details industry structures, evaluates company market share and profiles industry players.
#2516.................. 07/2009.................. $4700

Wall Coverings
US wall coverings demand will reverse 2003-2008 declines and grow 4.2% annually through 2013. Decorative tile and finished gypsum board will be the fastest growing segments, with the tile market matching wall paneling demand by 2013. Wallpaper will make a long-awaited recovery based on new and improved products. This study analyzes the $1.9 billion US wall coverings industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates market share and profiles industry players.
#2473.................. 05/2009.................. $4600

World Insulation
Global insulation consumption is projected to grow 3.8% yearly through 2012. The fastest growth will occur in developing Asian countries based on strong building construction activity and increasing production of insulated products. Foamed plastic will remain the largest segment while fiberglass gains market share. This study analyzes the $29.2 billion world insulation industry, with forecasts for 2012 and 2017 by material, market, world region and for 46 countries. It also evaluates company market share and profiles major players.
#2434................. 02/2009............... $5800

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

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