Construction Chemicals

US Industry Study with Forecasts for **2013 & 2018**

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APPLICATIONS

INDUSTRY STRUCTURE

Construction Chemicals

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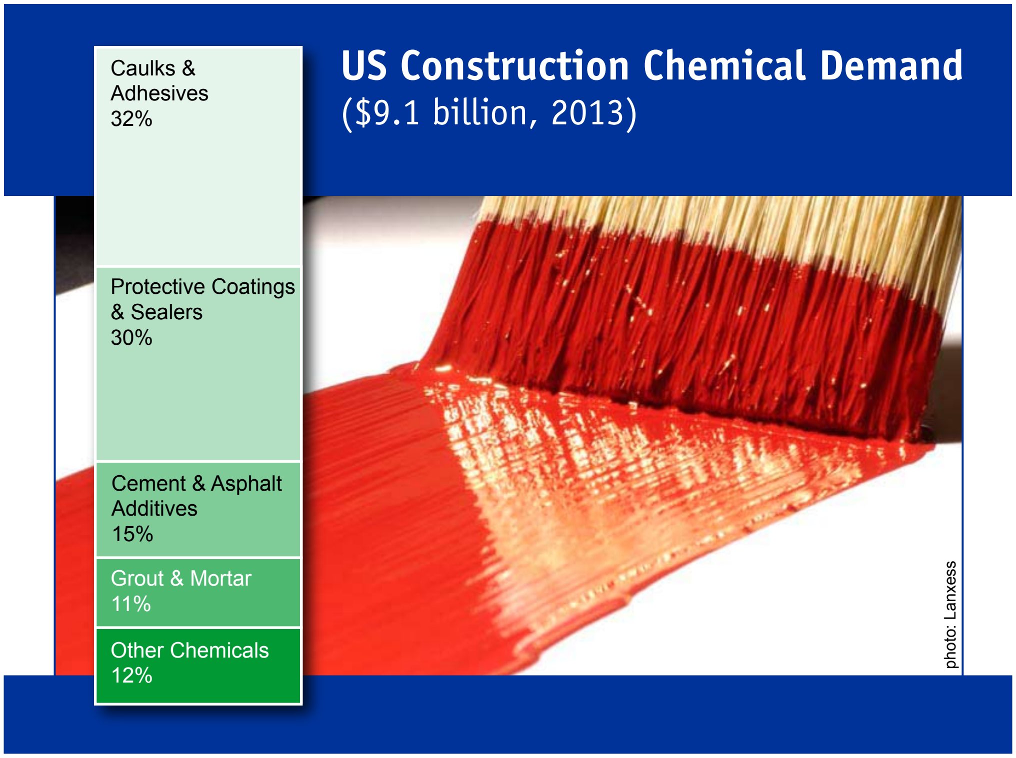
Construction chemical demand will benefit from a rebound in the key new housing market, a shift to higher value products and solid levels of residential improvement and repair spending.

US demand to increase 3.4% yearly through 2013

Demand for construction chemicals used in on-site applications is forecast to increase 3.4 percent per year in the US to $9.1 billion in 2013. A rebound in the housing market will promote growth, as the residential segment is a key outlet for construction chemicals. Demand will also benefit from a shift to higher value products and solid levels of residential improvement and repair spending. A significant deceleration in nonresidential building activity will limit aggregate gains.

Residential market to outpace nonresidential

The residential building market will offer the strongest opportunities for on-site construction chemical growth. Gains will be promoted as new residential construction expenditures rise from a depressed base and completions of new single-family homes rebound. In addition, new homes are more likely to include multiple bathrooms, a greater number of windows, or larger kitchens and decks, which will create increased requirements for on-site construction chemicals including coatings and sealers, grouts and mortars, and caulks and adhesives. Improvement and repair applications will also provide opportunities, supported by favorable growth in the residential improvement and repair market, the gradual aging of the housing stock and the fact that many homeowners enjoy remodeling older homes.



US Construction Chemical Demand
($9.1 billion, 2013)

Demand gains in nonresidential building applications will be checked by declining construction spending in the industrial sector and the lodging and commercial sector, which include such construction chemical-intensive businesses as manufacturing plants, warehouses, refineries, hotels, shopping malls, restaurants and retail stores. Slightly offsetting this sluggishness will be rising construction spending in the institutional sector, as more hospitals, nursing homes, schools and university dormitories are built. In the nonbuilding market, gains will be driven by an increasing focus on better performing materials in road and bridge construction, commonly achieved through the use of cement and asphalt additives.

Caulks, adhesives to benefit from market trends

The large protective coatings and sealers segment will register below-average gains, primarily due to a sharp deceleration in nonresidential building construction. The nonresidential building segment is a key market for protective coatings and sealers as they are widely used in the harsh environments of industrial and commercial settings. In contrast, the residential building segment is of greater importance to caulk and adhesive products. As a result, demand for caulks and adhesives will benefit from an expected rebound in the new housing market, as well as increasing remodeling and repair activity.

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Sample Text, Table & Chart

TABLE III-31

GROUT & MORTAR DEMAND IN ON-SITE CONSTRUCTION BY APPLICATION, MARKET & TYPE (million dollars)

Item	1998	2003	2008	2013	2018
Construction Expenditures (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ grout & mortar/000$ construction	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Grout & Mortar Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Application:					
New Construction	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Improvement & Repair	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Building	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Residential	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nonresidential	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nonbuilding	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Type:					
Polymer-Based	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cement-Based	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% grout & mortar	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Construction Chemical Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

PRODUCTS

Cement & Asphalt Additives

Demand for chemical additives in on-site constructi
for cement, concrete and asphalt is projected to increase
. Demand for cement and asp
he production and use of cem
crete) and asphalt, which in t
onstruction industry. Cemen
onstruction applications such
ings, as well as in public proj
es and dams.

SAMPLE TEXT

Basic concrete is composed of two substances: aggr
ment. Aggregates are either fine or coarse and are typica
crushed stone or crushed slag. The aggregate is held tog
which acts as a binding paste. Chemical additives are ty
the formulation to improve performance characteristics, s
retention, pumping and the appearance of the cured prod
generally produced by taking asphalt binder and mixing it with aggregate, modifiers and other additives. Asphalt additives are used to improve various performance characteristics of the asphalt product, such as fatigue cracking resistance, lower temperature susceptibility, impact resistance and moisture sensitivity.

Suppliers offering cement and asphalt additives tend to focus on only one segment. Leading suppliers of cement and asphalt additives include BASF, DuPont and Grace, with BASF and Grace conc
cement additives and DuPont focusing on additives for the a
try. Other significant suppliers of cement additives include I
Axim subsidiary, LANXESS, RPM's Euclid operation, Rock
Pigments (Rockwood Holdings) and Sika. Other suppliers o
additives include DEXCO, ExxonMobil, Huntsman, ICL Pe
Products, Innophos and Kraton. To a lesser extent, compani

100

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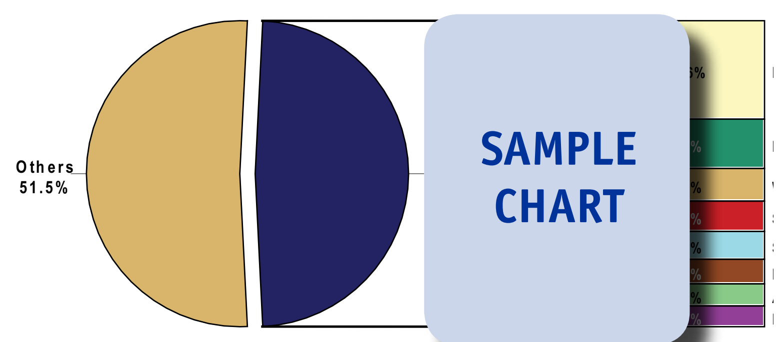
CHART V-1

ON-SITE CONSTRUCTION CHEMICALS MARKET SHARE BY COMPANY, 2008 ($7.7 billion)



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Sample Profile, Table & Forecast

TABLE IV-8

RESIDENTIAL BUILDING: ON-SITE CONSTRUCTION CHEMICALS DEMAND BY LOCATION & APPLICATION (million dollars)

Item	1998	2003	2008	2013	2018
Residential Building Construction (bil $)	3…				…22
$ chemicals/000$ construction	4…				…1
Residential Building Chemicals Demand					…0
By Location:					
Exterior	8…				…0
Interior	…				…0
By Application:					
New Construction	…				…0
Improvement & Repair	…				…0
% residential	2…				…5
Construction Chemicals Demand	494…				…00

SAMPLE TABLE

COMPANY PROFILES

Jones-Blair Company
2728 Empire Central
Dallas, TX 75235
214-353-1600
http://www.jone…

Annual Sales:
Employment:

Key Products: … …terproofing,
flooring and r…

Jones-Blair pr… …for wood, metal, concrete… …and waterproofing compounds for use in flooring, roofing and other construction applications. The privately held company operates through two divisions: Jones-Blair Industrial Coatings and Neogard.

SAMPLE PROFILE

The Company competes in the construction chemical industry through the Neogard division, a leading producer of elastomeric coatings for the construction industry. The company manufactures coatings used in wall coating, waterproofing, flooring and roofing applications.

Manufacturing is conducted by Neogard at a complex in Dallas, Texas. Neogard produces wall coatings under the NEOFLEX brand name for the protection of exterior masonry walls. These coatings are intended to keep out moisture and protect against damage. Furthermore, these coatings accommodate thermal expansion or contraction forces without difficulty, and can be used to cover cracks and other surface imperfections while preventing further deterioration. Waterproofing coatings from the company are liquid-applied elastomeric compounds that form seamless, stretchable films designed for maximum flexibility

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"Demand for on-site construction chemicals in exterior residential applications is projected to increase 6.9 percent per year to $1.5 billion in 2013. Gains will benefit from a rebound in new housing construction. In addition, the large installed base of housing that exhibits relatively frequent maintenance requirements will present opportunities for on-site construction chemicals through 2013. Further growth will be limited as consumer design trends feature materials with lower maintenance requirements."
--Section IV, pg. 145-6

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Other Studies

World Architectural Paint

Global demand for architectural paints will rise 3.6% yearly through 2013. The fastest gains will arise in emerging markets, mostly in Asia. The North American market will benefit from a recovery in the US housing market. Water-based formulations will continue to gain market share. This study analyzes the $42 billion world architectural paint industry, with forecasts for 2013 and 2018 by market, end-user, formulation, world region and for 23 countries. It also evaluates company market share and profiles industry participants.

#2604 .... March 2010................... $5800

Specialty Adhesives

US specialty adhesives demand will rise 4.4% yearly through 2013. Strong growth in the medical product and automotive markets will fuel gains in the dominant manufacturing segment. The on-site construction market will grow the fastest. Cyanoacrylates and radiation-cured acrylic adhesives will be the fastest growing types. This study analyzes the $2.4 billion US specialty adhesives industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry competitors.

#2561 .... October 2009 .... $4700

Wood Protection Coatings & Preservatives

US demand for wood protection products is forecast to increase 2.2% per year through 2013. Higher value formulations will continue to gain market share, primarily due to environmental and performance issues. Interior wood applications will achieve the best gains, promoted by a rebound in both housing starts and remodeling. This study analyzes the $2.7 billion US wood protection industry, with forecasts for 2013 and 2018 by product, application and market. It also evaluates market share and profiles industry players.

#2509 .... July 2009.................... $4800

Waxes

Demand for waxes in the US is forecast to reach $2.5 billion in 2013. Value gains will be based on a shift to more expensive types. Volume growth will be driven by use of waxes in building boards, coatings, adhesives, plastics and rubber. Petroleum waxes will stay the largest market but will lose share to faster growing synthetic and natural types. This study analyzes the 2.3 billion pound US wax industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2456 ....April 2009 .... $4600

Construction Chemicals in China

Demand for construction chemicals in China will expand 10.1% annually through 2012. Caulks and adhesives will remain the largest segment, followed by cement and asphalt additives. Protective coatings and sealers will be the fastest growing types. The nonresidential building construction market will offer the best opportunities. This study analyzes the 24.6 billion yuan construction chemical market in China, with forecasts for 2012 and 2017 by product, market and region. It also evaluates market share and profiles industry players.

#2420 ....December 2008 .... $5100

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