Construction Chemicals

US Industry Study with Forecasts for 2013 & 2018

Study #2569 | January 2010 | $4700 | 285 pages
# Table of Contents

## EXECUTIVE SUMMARY

## MARKET ENVIRONMENT

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## APPLICATIONS

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## PRODUCTS

<table>
<thead>
<tr>
<th>General</th>
<th>Protective Coatings &amp; Sealers</th>
<th>Functions</th>
<th>Rustproofing</th>
<th>Waterproofing</th>
<th>Other Functions</th>
<th>Types</th>
<th>Urethane</th>
<th>Epoxy</th>
<th>Acrylic</th>
<th>Alkyd</th>
<th>Silicone</th>
<th>Bituminous</th>
<th>Other Protective Coatings &amp; Sealers</th>
<th>Substrates</th>
<th>Metal Substrates</th>
<th>Masonry &amp; Concrete Substrates</th>
<th>Wood &amp; Other Substrates</th>
<th>Suppliers</th>
<th>Caulks &amp; Adhesives</th>
<th>Types</th>
<th>Polyurethane</th>
<th>Bituminous</th>
<th>Elastomeric</th>
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<td>89</td>
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<td>91</td>
<td>92</td>
</tr>
</tbody>
</table>

## INDUSTRY STRUCTURE

<table>
<thead>
<tr>
<th>General</th>
<th>Market Share</th>
<th>Industry Restructuring</th>
<th>Competitive Strategies</th>
<th>Marketing &amp; Distribution</th>
<th>169</th>
<th>173</th>
<th>176</th>
<th>178</th>
<th>181</th>
</tr>
</thead>
</table>

## COMPANY PROFILES

<table>
<thead>
<tr>
<th>Akzo Nobel</th>
<th>Ardex GmbH</th>
<th>BASF SE</th>
</tr>
</thead>
<tbody>
<tr>
<td>185</td>
<td>191</td>
<td>194</td>
</tr>
</tbody>
</table>
List of Tables/Charts

(continued from previous page)

10 Nonresidential Building Improvement & Repair Expenditures
11 Nonresidential Building Stock
12 Nonbuilding Construction Expenditures
13 Public Highway Spending
14 Nonbuilding Construction Stock
15 On-Site Construction Chemicals
Cht On-Site Construction Chemicals Market Trends, 1998-2008
16 Metal Coatings & Sealers Demand in On-Site Construction by Application & Market
17 Masonry & Concrete Coatings & Sealers Demand in On-Site Construction
18 Wood & Other Coatings & Sealers Demand in On-Site Construction
19 Caulks & Adhesives Demand in On-Site Construction by Application & Market
20 Caulks & Adhesives Demand in On-Site Construction by Type
21 Polyurethane Caulks & Adhesives Demand in On-Site Construction
22 Bituminous Caulks & Adhesives Demand in On-Site Construction
23 Elastomeric Caulks & Adhesives Demand in On-Site Construction
24 Silicone Caulks & Adhesives Demand in On-Site Construction
25 Acrylic Caulks & Adhesives Demand in On-Site Construction
26 Epoxy Caulks & Adhesives Demand in On-Site Construction
27 Other Caulks & Adhesives Demand in On-Site Construction
Cht Caulks & Adhesives Market Share by Company, 2008
28 Cement & Asphalt Additives Demand in On-Site Construction by Application, Market & Type
29 Cement Additives Demand in On-Site Construction by Market
30 Asphalt Additives Demand in On-Site Construction by Product & Market
31 Grout & Mortar Demand in On-Site Construction by Application, Market & Type
32 Polymer Flooring Demand by Application & Market
33 Sprayed Polyurethane Foam Demand by End Use, Application & Market
34 Other On-Site Construction Chemicals Demand by Market & Application

APPLICATIONS

1 On-Site Construction Chemicals Demand by Market & Application
14 Other Protective Coatings & Sealers Demand in On-Site Construction
15 Protective Coatings & Sealers Demand in On-Site Construction by Substrate
16 Metal Coatings & Sealers Demand in On-Site Construction
17 Masonry & Concrete Coatings & Sealers Demand in On-Site Construction
3 Wood & Other Coatings & Sealers Demand in On-Site Construction
Cht Protective Coatings & Sealers Market Share by Company, 2008
4 Office & Commercial Building: On-Site Construction Chemicals Demand
5 Other Nonresidential: On-Site Construction Chemicals Demand
6 New Nonresidential Building: On-Site Construction Chemicals Demand
7 Improvement & Repair Nonresidential Building: On-Site Construction Chemicals Demand
8 Residential Building: On-Site Construction Chemicals Demand
9 Exterior Residential: On-Site Construction Chemicals Demand
10 Decks & Porches: On-Site Construction Chemicals Demand
11 Roofs: On-Site Construction Chemicals Demand
12 Driveways & Sidewalks: On-Site Construction Chemicals Demand
13 Other Exterior: On-Site Construction Chemicals Demand
14 Interior: On-Site Construction Chemicals Demand
15 Flooring: On-Site Construction Chemicals Demand
16 Other Interior: On-Site Construction Chemicals Demand
17 New Residential Construction: On-Site Construction Chemicals Demand
18 Improvement & Repair Residential: On-Site Construction Chemicals Demand
19 Nonbuilding Construction: On-Site Construction Chemicals Demand by Segment & Application
20 Roads & Bridges: Construction Chemicals Demand
21 Other Nonbuilding: On-Site Construction Chemicals Demand
22 New Nonbuilding: On-Site Construction Chemicals Demand
23 Improvement & Repair Nonbuilding: On-Site Construction Chemicals Demand

INDUSTRY STRUCTURE

1 On-Site Construction Chemicals
Cht On-Site Construction Chemicals Sales by Company, 2008
2 Selected Acquisitions & Divestitures
3 Selected Cooperative Agreements

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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.

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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Demand for chemical additives in on-site construction applications for cement, concrete and asphalt is projected to increase 3.4 percent per year to $1.4 billion in 2013. Demand for cement and asphalt additives is tied directly to trends in the production and use of cement (concrete) and asphalt, which in turn are heavily influenced by trends in the construction industry. Cement and asphalt are widely used in construction applications such as buildings, as well as in public projects such as highways and dams.

Basic concrete is composed of two substances: aggregate and cement. Aggregates are either fine or coarse and are typically sand, gravel, crushed stone or crushed slag. The aggregate is held together by cement, which acts as a binding paste. Chemical additives are typically added to the formulation to improve performance characteristics, such as slump retention, pumping and the appearance of the cured product. Demand for cement and asphalt additives is 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 concentrating on cement additives and DuPont focusing on additives for the asphalt industry. Other significant suppliers of cement additives include Italcementi’s Axim subsidiary, LANXESS, RPM’s Euclid operation, Rockwood Pigments (Rockwood Holdings) and Sika. Other suppliers of asphalt additives include DEXCO, ExxonMobil, Huntsman, ICL Performance Products, Innophos and Kraton. To a lesser extent, companies such as BASF also offer both cement and asphalt additives.

### TABLE III-31

<table>
<thead>
<tr>
<th>Item</th>
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<th>2013</th>
<th>2018</th>
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<td>$ grout &amp; mortar/000$ construction</td>
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<td>Improvement &amp; Repair</td>
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### CHART V-1

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

**SAMPLE TABLE**

**SAMPLE TEXT**

**SAMPLE CHART**
Sample Profile, Table & Forecast

COMPANY PROFILES

Jones-Blair Company
2728 Empire Central
Dallas, TX 75235
214-353-1600
http://www.jones-blair.com

Annual Sales: $100 million (estimated)
Employment: 500 (estimated)
Key Products: elastomeric coatings for wall coating, waterproofing, flooring and roofing applications

Jones-Blair produces decorative and protective coatings for wood, metal, concrete, and plastic; and elastomeric coatings 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.

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.

TABLE IV-8

<table>
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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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### Order Form

#### Construction Chemicals

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</table>

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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 2016 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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