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# Roofing

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US Industry Study with Forecasts for **2014 & 2019**

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Study #2603 | February 2010 | \$4900 | 379 pages

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*Demand for green roofing products, such as composite shingles and photovoltaic roofing, is forecast to advance more than four percent annually through 2014.*

## US demand to reach 275 million squares in 2014

Demand for roofing is forecast to grow 2.4 percent per year through 2014 to 274.5 million squares. While gains will be modest, they will represent a reversal of the declines over the 2004-2009 period. Advances will be driven by an expected rebound in housing starts from the depressed levels in 2009. Although housing starts will remain below the level reached in 2005, the recovery will fuel above-average gains in the residential roofing market through 2014.

## Roofing tile, green roofing to be fastest growing products

Demand in the dominant asphalt shingles segment will rise through 2014, fueled by rebounding housing starts. Laminated asphalt shingles, which totaled only one-third of the shingle market in 1999, are projected to account for 80 percent of asphalt shingle demand in 2014. Demand for laminated shingles will continue to be driven by their superior aesthetic and performance qualities. In the long term, the increasing use of laminated shingles will constrain replacement demand, as these products can have lifespans more than twice that of conventional asphalt shingles.

Roofing tile and other roofing products are anticipated to see the most rapid demand gains through 2014, reflecting the low 2009 base. Demand for roofing tile will be driven by the rebound in housing starts and the continued

## US Roofing Demand, 2009 (243.5 million squares)



increase in the population of the West and the South regions where roofing tile is most commonly used. Demand for green roofing products, such as composite shingles and photovoltaic roofing, is forecast to advance more than four percent annually through 2014. Gains will be led by rising interest in environmentally friendly roofing products that reduce building utility costs.

## Residential market to remain dominant

The residential reroofing market will continue to account for the largest overall share of roofing demand in 2014. Total residential roofing demand accounted for just under 60 percent of the

market in 2009, with reroofing applications representing the vast majority of residential roofing sales. Demand in the residential reroofing segment will post minimal gains through 2014, reflecting a return to normal levels from the high base of 2009, which was due to the heavy pattern of storm activity the US experienced in 2008. Advances will also be checked by the ongoing shift from conventional to laminated asphalt shingles, which do not have to be replaced as frequently. Demand for roofing in the nonresidential building construction market is forecast to remain constant through 2014. Increasing construction expenditures in the office and commercial and institutional construction markets will promote gains.

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## Sample Text, Table & Chart

### PRODUCTS

**Modified Bitumen Membranes** -- Consumption of modified bitumen membranes is forecast to increase to 51 million squares in 2014. Gains in demand will be driven by their performance properties, such as durability and ease of installation. Builders and architects will specify modified bitumen for structures while creating roofs that are more durable. Advances will be promoted by the construction market, as rapid increases in multifamily construction drive demand for low-slope roofing products. Gains will also be derived from nonresidential building construction market, as many properties will opt to install modified bitumen membranes on their structural renovation projects to create more durable roofs. Finally, use of self-adhesive and cold-applied membranes, especially BUR systems, will contribute to demand growth. More rapid advances will be restrained by competition from other flexible roofing materials, such as ethylene propylene diene monomer and thermoplastic membranes.

The primary polymers used to modify bitumen for these membranes are styrene-butadiene-styrene (SBS) and atactic polypropylene. Less commonly, other materials such as styrene-ethylene-butadiene (SEBS) polymer or styrene-butadiene rubber can be used as a modifier. SBS is a styrenic block copolymer that creates a polymer network within the asphalt, imparting a rubber-like property that enables the membrane to better resist aging and weathering. SBS modified membranes can be applied with hot-mop bitumen, torches or cold-applied adhesives, and feature low-temperature flexibility.

SBS modified membranes account for the larger share of sheet roofing materials consumed, with nearly 58 percent of total consumption in 2009. Use of SBS modified membranes is projected to rise 4 percent per year to 51 million squares in 2014. These types of membranes

94

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SAMPLE  
TEXT

TABLE V-6

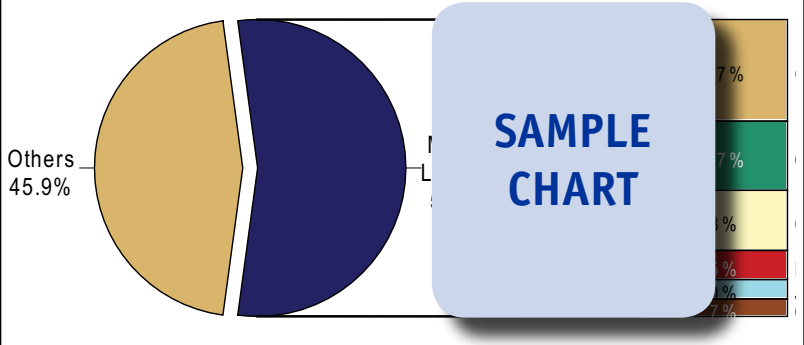
NORTHEAST ROOFING DEMAND  
 BY REGION, SUBREGION & PRODUCT  
 (million squares)

Item	1999	2004	2009	2014	2019
Northeast Construction Expend (bil 2007\$)	225	225	225	225	225
squares/mil\$ construction	0.9	0.9	0.9	0.9	0.9
Northeast Roofing Demand	0	0	0	0	0
By Subregion:					
New England	5	5	5	5	5
Middle Atlantic	5	5	5	5	5
By Market:					
Residential	0	0	0	0	0
New	1	1	1	1	1
Reroofing	9	9	9	9	9
Nonresidential	0	0	0	0	0
New	4	4	4	4	4
Reroofing	6	6	6	6	6
By Product:					
Asphalt Shingles	4	4	4	4	4
Bituminous Low-Slope	2	2	2	2	2
Elastomeric & Plastic Roofing	1	1	1	1	1
Metal Roofing	0	0	0	0	0
Roofing Tile	6	6	6	6	6
All Other Roofing	7	7	7	7	7
% northeast	8	8	8	8	8
Roofing Demand	22	22	22	22	22

SAMPLE  
TABLE

CHART VI-1

US ROOFING MARKET SHARE, 2009  
 (\$15.9 billion)

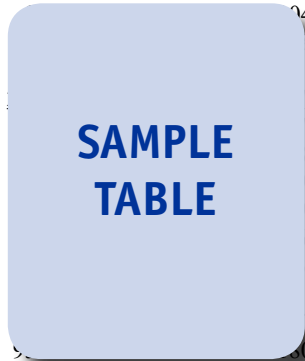


SAMPLE  
CHART

## Sample Profile, Table & Forecast

**TABLE IV-1**  
**ROOFING DEMAND BY MARKET**  
(million squares)

Item	1999	2004	2009	2014	2019
Building Construction (bil 2005\$) squares/mil \$ construction					041 85
Roofing Demand					.0
Residential:					.5
New					.5
Reroofing					.0
Nonresidential:					.5
New					.0
Reroofing					.5
\$/square					73
Roofing Demand (mil \$)					00



**COMPANY PROFILES**

**Henry Company**  
 909 North Sepulveda Boulevard, Suite 650  
 El Segundo, CA 90245  
 310-955-9200  
 http://www.he

Annual Sales:  
 Employment:

Key Products: and green roof-  
 ing systems, a

Henry Co... products for roof-  
 ing, sealing and paving applications. Henry Company operates through  
 three primary divisions: Henry Building Products, Resin Technology  
 Company and Bakor Incorporated. The Company has a central produc-  
 tion complex in Ontario, California.

The Company participates in the US roofing industry primarily  
 through the Henry Building Products and Resin Technology Company  
 divisions. In addition, Henry Company's Bakor Incorporated division  
 manufactures building envelopes and related products for the North  
 American roofing market.

**Henry Building Products Division** -- Roofing materials from  
 the Henry Building Products division encompass roll roofing, roofing  
 membranes, metal and green roofing systems, protective and cool roof  
 coatings, and roofing accessories. The division's roll roofing products  
 are made from a nonwoven fiberglass mat coated in heavy-duty asphalt  
 or styrene-butadiene-styrene (SBS) modified bitumen. Specific prod-  
 ucts include HE604 ply and base sheets, which are made with heavy-  
 duty asphalt and designed for built-up roofing (BUR) systems; HE605

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“Demand for roofing in new nonresiden-  
 tial building construction applications is  
 forecast to advance 1.4 percent annually  
 to 23 million squares in 2014. Gains  
 will be restrained by declining industrial  
 construction expenditures, as builders  
 and property owners cancel or reduce the  
 scope of construction projects. Advances  
 will be primarily derived from rising  
 demand for office and commercial struc-  
 tures, as well as by continuing construc-  
 tion of hospitals, nursing homes and  
 other care facilities, as well as schools  
 and educational facilities.”  
 --Section IV, pg. 171

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#2643 ..... 05/2010..... \$5800

**Siding**

This study analyzes the US siding industry. It presents historical demand data (1999, 2004, 2009) and forecasts for 2014 and 2019 by siding material (e.g., vinyl, stucco, wood, brick, fiber cement, metal panels), market (residential, nonresidential), application (new construction, improvement and repair) and US geographic region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2623 ..... 04/2010..... \$4900

**World Asphalt**

This study analyzes the global asphalt industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by asphalt product (e.g., paving, roofing), world regional market (e.g., Asia/Pacific, North America, Western Europe) and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2602 ..... 03/2010..... \$5900

**Asphalt**

US consumption of asphalt products will reach 30.8 million tons in 2013. Demand gains will derive primarily from the recovery of new residential construction from its weak 2008 levels, benefiting both roofing and paving products. The dominant paving product segment will benefit from increased government spending on highway and road construction. This study analyzes the US asphalt product industry, with forecasts for 2013 and 2018 by type, market and region. It also evaluates market share and profiles industry players.

#2544 ..... 10/2009..... \$4800

**Roofing in China**

Demand for roofing materials in China is forecast to rise 4.1% per annum through 2012, fueled by rising building construction expenditures. Elastomeric and plastic roofing will see the best prospects, while concrete and clay tiles, and built-up and asphalt roll roofing will remain the dominant roofing materials. This study analyzes the 2.2 billion square meter roofing industry in China, with forecasts for 2012 and 2017 by product, market and region. It also evaluates company market share and profiles industry players.

#2445 ..... 02/2009..... \$5100

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