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Brick & Block

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

Study #2652 | September 2010 | \$4800 | 245 pages



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As residential construction rebounds through 2014, demand for clay brick will improve considerably over the weak performance of 2009, but will still be below the record level of 2004.

US demand to rise 11.8% annually through 2014

Demand for brick and block products is projected to increase nearly twelve percent annually from a weak 2009 base to 12.4 billion units in 2014, valued at \$8 billion. The expected recovery in building construction, specifically residential construction, will drive growth.

Clay brick to outpace concrete brick and block

Consumption of clay brick products tends to be concentrated in residential markets, reflecting the heavy use of clay brick as a siding material in new home construction. In 2009, demand for clay brick was very low -- less than one-half the 2004 level -- due to the ongoing severe contraction in new housing construction. As residential construction (particularly new single-family housing) rebounds through 2014, demand for clay brick will benefit, advancing 15 percent annually to 8.2 billion units in 2014, a considerable improvement over the weak performance of 2009 but still below the record level of 2004.

Concrete products to also gain from housing recovery

Demand for concrete brick and block products is projected to increase 6.9 percent annually to 4.3 billion units in 2014. Although the majority of demand will remain concentrated in nonresidential markets, the most significant growth

Common
Clay Brick
52%

Other Clay Brick 5%

Structural
Concrete Block
30%

Other Concrete
Brick & Block
13%

US Brick & Block Demand, 2009 (7.1 billion units)



opportunities will derive from the recovery in the housing market. This will benefit concrete brick (used in siding, paving and landscaping applications) and concrete pavers. Much slower gains will occur in structural and decorative concrete block products, which are more heavily reliant on nonresidential construction.

Price increases to be less dramatic through 2014

Aggregate brick and block pricing rose sharply in the 2004-2009 time frame, reflecting high energy costs. While average prices for each product group will rise through 2014, these increases will be less dramatic than in the previous

period. However, because growth through 2014 will be heavily concentrated in lower unit cost clay brick, aggregate prices will remain flat.

Several hundred manufacturers of brick and block products are active in the US industry. The vast majority of these are relatively small producers who tend to market their products over a limited geographic area. Nevertheless, there are a small number of very large competitors who compete on a regional or national scale through the use of multiple plants located throughout the country. In 2009, the eight largest suppliers to the US brick and block market held an aggregate share of 41 percent.

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Sample Text, Table & Chart

PRODUCTS

Structural Concrete Block

Demand for structural concrete block is projected to increase 9 percent annually to 1.9 billion units by 2019. Growth will derive from residential markets, which will account for a small portion of total demand. Commercial markets will continue to grow in some quarters and are a primary focus of this report. Demand is exclusively structural, rather than a siding material.

SAMPLE TEXT

A number of different structural concrete block products are available, with the exact dimensions and styles varying slightly from manufacturer to manufacturer. In general, structural block is divided into three categories -- lightweight, medium weight and normal weight. These distinctions are based on different weight per volume ratios, a result of using different raw materials and production methods. For example, an 8-inch-by-8-inch-by-24-inch lightweight unit weighs only 35 pounds, while a smaller (8-inch-by-8-inch-by-16-inch) medium weight unit weighs 50 pounds. By switching to lightweight units, builders can improve productivity, reduce worker injuries, lower costs and shorten construction times.

Concrete block masonry units possess very good insulation qualities, due to their hollow core construction, so that the two sides of the block are separated by an air cavity. These voids can also be filled with insulation, such as plastic foam or perlite, either at the factory or on site, in order to improve the insulation characteristics of the wall. In some cases, the assembled walls are also filled with concrete, which improves both the structural and insulation qualities of the product.

77

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TABLE VI-5

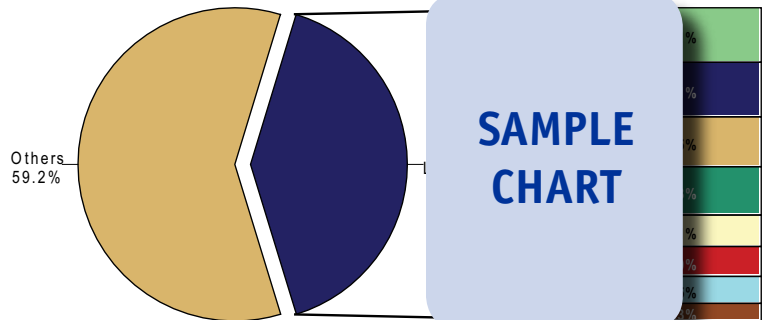
FENCING DEMAND FOR BRICK & BLOCK

Item	1999	2004	2009	2014	2019
Construction Expenditures (bil 2005\$)	10	10	10	10	10
units/000\$ construction	7	7	7	7	7
Brick & Block in Fencing (mil units)	5	5	5	5	5
Clay Brick	0	0	0	0	0
Concrete Brick & Block	5	5	5	5	5
\$/unit	0	0	0	0	0
Brick & Block in Fencing (mil \$)	0	0	0	0	0
Clay Brick	0	0	0	0	0
Concrete Brick & Block	0	0	0	0	0
% fencing	5	5	5	5	5
Brick & Block Demand (mil units)	124	124	124	124	124

SAMPLE TABLE

CHART VIII-1

US BRICK & BLOCK MARKET SHARE (\$4.6 billion, 2009)

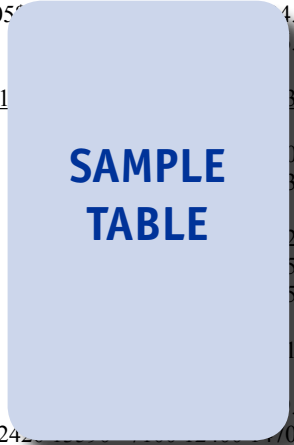


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VII-6
NORTHEAST BRICK & BLOCK DEMAND
(million units)

Item	1999	2004	2009	2014	2019
Northeast Construction Expend (bil 2005\$ units/000\$ construction)				4.5	4.4
Northeast Brick & Block Demand	1			30	
By Subregion:					
New England				10	
Middle Atlantic				30	
By Market:					
Residential				20	
Nonresidential Building				55	
Nonbuilding				55	
Northeast Brick/Block Demand (mil \$)				10	
% Northeast				7	
Brick & Block Demand (mil units)	124			1700	



COMPANY PROFILES

Pine Hall Brick Company Incorporated
 2701 Shorefair Drive
 Winston-Salem, NC 27105
 336-721-7500
 http://www.pinehallbrick.com

Annual Sales
 Employment:
 Key Products

SAMPLE PROFILE

Pine Hall Brick Company produces standard and specialty bricks. These products are suitable for use in the construction of residential, institutional, educational, commercial and other structures. Pine Hall Brick is privately held.

The Company participates in the US brick and block industry through the production and marketing of face and specialty bricks, and pavers. Pine Hall's face bricks are made using clay and are available in red, pink, orange, burgundy, brown/tan and grey/white colors. Among these products are CLASSIC series bricks, which are straight-edge bricks that have been fired at temperatures greater than 2,000 degrees Fahrenheit; GUILDCRAFT oversized, rough-textured types; OLD WORLD bricks with rounded edges; HERITAGE styles that have handcrafted textures and an antique look; TIDEWATER oversized tumbled varieties; VINTAGE COLLECTION oversized, simulated tumbled bricks, which are designed to be an economical alternative to tumbled bricks; and TRADITIONAL bricks. Furthermore, the Company makes THINCLAD thin veneer face bricks that are 1/2-inch thick and engineered for kitchen, wine cellar and other projects that can't handle the depth of full-size bricks. Specialty bricks from Pine Hall include splay and bullnose stretchers, ogees, watertables, sills, traditional and mitered

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"Consumption of brick and block in nonresidential markets in the Northeast region is forecast to expand 3.2 percent annually to 560 million units in 2014. Nonresidential markets will continue to be the largest outlet for brick and block in the Northeast, accounting for 46 percent of regional demand in 2014. The size of the nonresidential market in the Northeast reflects the region's significance in office, commercial and institutional building, coupled with a relatively high preference toward full basements in new home construction, all of which will benefit demand for concrete block."
 --Section VII, pg. 150

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OTHER STUDIES

World Housing

Global demand for new housing will rise 3% yearly to 2014. North America, Western Europe and Japan will grow the fastest from steep recent declines. Among developing areas, the Asia/Pacific region will build the most new units while the Africa/Mideast region grows the fastest. The global housing stock will rise 1.8% yearly. This study analyzes the 1.9 billion unit world housing industry, with forecasts for 2014 and 2019 by type, world region and for 22 countries. It also considers market environment influences on demand.

#2692 September 2010..... \$5300

Fencing

Demand for fencing in the US is forecast to expand 2.9% yearly to 2014, based on a rebound in housing completions. Residential buildings will be the fastest growing market and remain the largest. Plastic and composite fencing will be the most rapidly growing material type. This study analyzes the 737 million linear foot US fencing industry, with forecasts for 2014 and 2019 by material type, market and geographic region. It also evaluates company market share and profiles industry players.

#2682 September 2010..... \$5900

Cement & Concrete Additives

US cement and concrete additive demand will rise 9.9% yearly through 2014. The residential building market will grow the fastest, followed by highway and street uses based on continued federal transportation funding. Chemical additives will remain the largest segment, while mineral and fiber additives lead gains. This study analyzes the \$1.9 billion US cement and concrete additive industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.

#2657 July 2010..... \$4800

Siding

Demand for siding in the US is forecast to grow 6.5% annually through 2014, driven by a rebound in housing completions from depressed levels in 2009. Fiber cement, stucco and brick siding will see the most rapid advances. Vinyl siding will remain the largest segment and will continue to supplant wood. This study analyzes the 74 million square US siding industry, with forecasts for 2014 and 2019 by material, market and US region. It also evaluates company market share and profiles industry players.

#2623 April 2010 \$4900

Landscaping Products

US landscaping product demand is forecast to grow 6.1% yearly through 2013 based on a recovery in the housing market. Decorative products will benefit from the relatively low market penetration of water features. Hardscapes will see favorable growth as consumers value pavers, stones and boulders for patios, walkways and surrounds. This study analyzes the \$5.6 billion US landscaping product industry, with forecasts for 2013 and 2018 by type, market, end use and region. It also evaluates market share and profiles industry players.

#2488 April 2009 \$4700

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