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World Roofing

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

Study #2656 | July 2010 | \$6100 | 459 pages

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INDUSTRY STRUCTURE

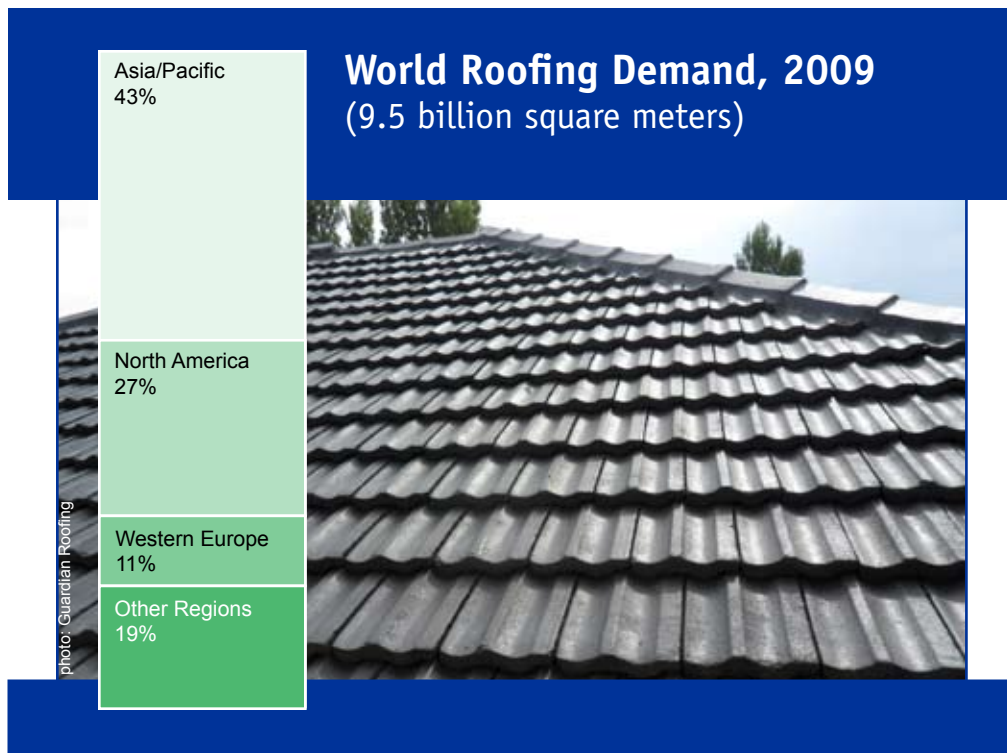
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Market advances will be driven by an acceleration in residential building construction activity, based on a rebound in large developed world countries and healthy sales in industrializing nations.

Global demand to grow 3.1% yearly through 2014

Global demand for roofing materials is projected to grow 3.1 percent annually through 2014 to 11.1 billion square meters, a noticeable improvement from the market gains registered during the recession-impacted 2004-2009 period. Product sales will expand at a faster pace in dollar terms, rising 4.5 percent per year because of an expected increase in average roofing prices. Market advances will be driven by an acceleration in residential building construction activity, supported by both a rebound in spending in large developed world countries such as Japan and the US, and by healthy sales environments in a number of industrializing nations.

China alone will account for 35 percent of all additional demand through 2014, strengthening its position as the largest roofing market in area terms. Growth is also expected to be healthy in lower-volume developing world markets like Turkey, India, Hungary, Nigeria and Pakistan. The sales outlook for Eastern Europe is somewhat uneven, with some countries expected to register above-average market gains, while roofing demand will expand at a subpar rate in others. Nevertheless, a substantial share of the residential building stock in the region remains in need of repair or replacement, which will provide some impetus to future sales. Although advances will generally be not as strong as in developing nations, roofing demand in developed parts of the world will climb as



well, fueled by renewed strength in new housing construction expenditures. In a few industrialized countries, most notably Spain, growth through 2014 will be similar to gains in developing areas, reflecting an upturn in building construction after a period of decline.

Concrete roofing tiles to be fastest growing type

Global roofing sales are dominated by bituminous and tile products, which together account for over 70 percent of all roofing demand in area terms. Concrete roofing tiles will post the fastest market increases of any major product type through 2014, stimulated by above-average growth in building construction

in developing Asian nations, where concrete tile accounts for the largest single share of roofing sales, and supported by rising standards of living, which are making concrete products more affordable. Asphalt shingle and plate and modified bitumen roofing demand will climb at the next fastest rates. Suppliers of asphalt shingles and plates will benefit from renewed strength in new single-family housing construction in the US and Canada, with competitive inroads against other steep-slope roofing materials in the smaller but fast-growing Chinese market also boosting product demand. Sales of modified bitumen roofing will be spurred by inroads in markets now served by built-up and roll roofing, aided by new products.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Roofing Outlook & Suppliers

Demand for roofing in India is expected to increase and grow by 2.5 million square meters, among the world. Gains will be driven by increasing to stimulate new building construction and roofing sales. Government initiatives in rural areas through such as the Housing Finance Scheme and Pradhan Mantri Awas Yojana will contribute to future roofing advances. Increases will be dampened to some degree by competition for investment funding due to generally healthy and construction market climates in other parts of the Asia region. The most robust sales growth will be posted by classified bitumen and plastic roofing, although tile products (a particular) will remain the most commonly used roofing

**SAMPLE
TEXT**

Production of roofing by facilities in India is forecast to expand at a 6.5 percent annual pace, reaching \$4.0 billion in 2014. Output gains, which will approximate growth in domestic demand, will be supported in part by largely favorable export sales conditions, and the country's trade surplus in roofing materials will increase. However, India's strong market advances will also attract some competition from foreign suppliers, which will constrict industry output growth through 2014.

Notable Indian roofing product manufacturers include Annex International, GK Roofings India, Global Impex, Hyderabad Sahyadri Industries and Visaka Industries. Participation by multinationals in the local roofing industry is largely limited and distribution operations, although BlueScope Steel (through a venture arrangement with Tata Steel) and Monier both have the nation.

178

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TABLE VI-8

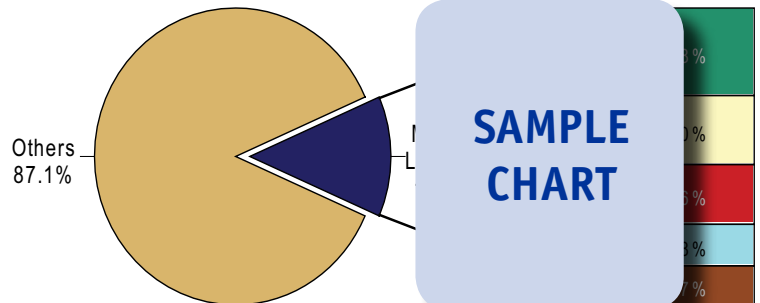
INDIA ROOFING DEMAND BY PRODUCT
(million square meters)

Item	1999	2004	2009	2014	2019
Asia/Pacific Roofing Demand	20	25	30	35	40
% India	2	3	4	5	6
India Roofing Demand	0	1	2	3	4
Bituminous:	0	0	0	0	0
Shingles & Plates	0	0	0	0	0
Built-Up & Roll	0	0	0	0	0
Modified Bitumen	0	0	0	0	0
Tile:	0	0	0	0	0
Concrete	0	0	0	0	0
Clay	0	0	0	0	0
Metal	0	0	0	0	0
Elastomeric	0	0	0	0	0
Plastic	0	0	0	0	0
Fiber Cement	0	0	0	0	0
Other	0	0	0	0	0

**SAMPLE
TABLE**

CHART VIII-1

WORLD ROOFING MARKET SHARE BY COMPANY
(\$63.1 billion, 2009)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-9
INDIA ROOFING DEMAND BY MARKET
 (million square meters)

Item	1999	2004	2009	2014	2019
Roofing Demand					
Residential:					
New					
Reroofing					
Nonresidential:					
New					
Reroofing					

**SAMPLE
TABLE**

COMPANY PROFILES

Nucor Corporation

1915 Rexford Road
 Charlotte, NC 28211
 704-366-7
 http://ww

Sales: \$
 Employ

Key Pro... panels and systems

Nucor an... - and cold-rolled steel products. The Company operates through four segments: Steel Mills, Steel Products, Raw Materials and All Other.

The Company is active in the world roofing industry through the Steel Products segment, which posted 2009 sales of \$2.7 billion. Through this segment, Nucor manufactures steel roof and floor decks, metal building components, steel joists, and cold- and hot-rolled steel. The segment includes the operations of the Company's Vulcraft Corporation, American Buildings Company, Kirby Building Systems Incorporated and Gulf States Manufacturers Incorporated subsidiaries, all of which manufacture roofing materials, among other products.

Vulcraft (Florence, South Carolina) produces steel roof decks and steel joists for a wide range of construction applications. The company's steel roof decks are available in prime painted, galvanized or uncoated black finishes. Specific products include CELLULAR DECK roof decks, which are insulated galvanized roof decks for use in acoustical ceiling applications.

**SAMPLE
PROFILE**

"Output of roofing materials by plants in the Asia/Pacific region will climb 5.9 percent annually to \$28.7 billion in 2014, approximating increases in demand in dollar terms and rising enough to provide the region with a trade surplus in these products. Industry production will be stimulated by growing product demand regionwide and supported by an expansion in manufacturing capacity in China, India, South Korea and elsewhere."

--Section VI, pg. 164-5

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

Construction Outlook in China

Construction expenditures in China are expected to grow 9.1% annually through 2014. Nonbuilding construction will be the fastest growing sector, based on state spending on China's transportation infrastructure. Nonresidential building demand growth will slightly outpace the residential sector. This study analyzes the 7.8 trillion yuan construction industry in China, with forecasts for 2014 and 2019 by type, market and region. It also evaluates company market share and profiles industry participants.

#2647 May 2010..... \$5300

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

World Asphalt

Global asphalt demand is forecast to rise 2.1% annually through 2013. China and India will remain among the fastest growing markets. The rest of the Asia/Pacific region will outpace the mature West European and North American markets. Asphalt roofing will grow faster than the dominant paving sector. This study analyzes the 97 million metric ton world asphalt industry, with forecasts for 2013 and 2018 by product, region and for 54 countries. It also evaluates company market share and profiles industry participants.

#2602 April 2010 \$5900

Roofing

Demand for roofing in the US is forecast to reverse previous declines and grow 2.4% per year through 2014. The residential market will remain dominant and grow the fastest, led by new construction applications. Roofing tile will be the fastest growing product segment, while asphalt shingles remain dominant. This study analyzes the 244 million square US roofing industry, with forecasts for 2014 and 2019 by product, market and region. It also evaluates company market share and profiles industry players.

#2603 February 2010..... \$4900

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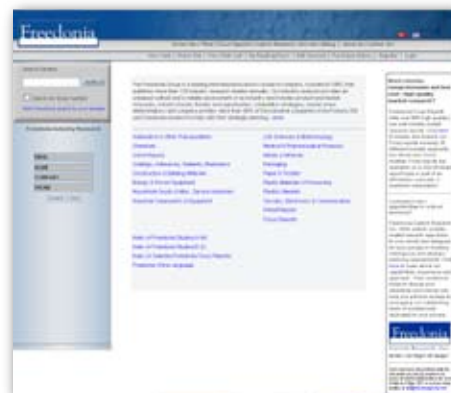
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