

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table  
& Chart 5](#)

[Sample Profile, Table &  
Forecast 6](#)

[Order Form & Corporate  
Use License 7](#)

[About Freedonia,  
Custom Research,  
Related Studies, 8](#)



# Asphalt

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US Industry Study with Forecasts for **2015 & 2020**

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Study #2793 | October 2011 | \$5100 | 333 pages

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## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General .....	4
Macroeconomic Environment.....	5
Demographic Trends .....	9
Construction Trends.....	13
Building Construction.....	17
Residential Construction.....	19
New.....	20
Housing Completions.....	22
Housing Stock.....	27
Improvements & Repairs .....	31
Nonresidential Construction .....	32
New.....	33
Improvements and Repairs .....	35
Nonbuilding Construction.....	36
Highway Mileage.....	38
Public Highway Spending .....	39
Petroleum Industry Trends.....	42
Primary Asphalt Market Trends .....	44
Primary Asphalt Market Seasonality.....	47
Asphalt Products Pricing Trends.....	49
Competitive Materials .....	52
Foreign Trade .....	54
Primary Asphalt.....	54
Asphalt Products .....	57

### TECHNOLOGY & REGULATORY ISSUES

General .....	59
Technology .....	59
Primary Asphalt.....	59
Paving Products.....	61
Hot-Mix Asphalt.....	61
Asphalt Patch Technologies.....	62
Bituminous Surface Treatment.....	62
Thin Membrane Surface Treatment.....	63
Granular Pavement .....	64
Composite Pavements .....	64
Open Grade Friction Courses.....	64
Stone-Matrix Asphalt .....	65
Warm-Mix Asphalt Paving .....	66
Low Energy Asphalt .....	68
Superpave.....	68
Perpetual Pavements.....	69
Competing Paving Technologies.....	70
Asphalt Modifiers.....	71
Roofing Asphalt Technologies .....	73
Environmental & Regulatory Issues .....	74
Recycling .....	74
Environmental Issues .....	77
Government Road Construction Activity.....	81

SAFETEA-LU.....	81
ARRA.....	82
Highway Trust Fund.....	82

### PRIMARY ASPHALT SUPPLY & DEMAND

General .....	84
Supply & Demand.....	87
Primary Asphalt Types.....	89
Primary Asphalt Demand by Use .....	91
Paving Asphalts.....	93
Asphalt Cement.....	97
Asphalt Emulsions .....	98
Cutback Asphalt.....	98
Other Paving Asphalts.....	99
Roofing Asphalts .....	99
Other Asphalts.....	101

### ASPHALT PRODUCTS

General .....	103
Demand Drivers .....	107
Paving Products .....	110
Asphalt Cement.....	113
Asphalt Emulsions.....	116
Cutback Asphalt .....	119
Other Asphalt Paving Products.....	121
Roofing Products.....	123
Asphalt Shingles.....	126
Roofing Asphalts .....	129
Modified Asphalt Roofing Membranes.....	132
Standard Asphaltic Roofing Felts .....	135
Other Asphalt Roofing Products.....	139
Other Asphalt Products.....	141
Construction Products .....	142
Nonconstruction Products .....	145

### MARKETS

General .....	147
Construction .....	148
Residential Building.....	152
New.....	155
Improvement & Repair .....	158
Nonresidential Building .....	161
New.....	164
Improvement & Repair .....	165
Nonbuilding.....	167
New.....	169
Improvement & Repair .....	171
Nonconstruction Markets.....	173

### REGIONS

General .....	176
Macroeconomic Overview.....	177
Demographic Trends .....	180
Construction Trends.....	183
Housing Trends.....	185
Primary Asphalt Capacity by Region .....	188
Regional Asphalt Demand.....	191
Northeast.....	193
New England .....	195
Middle Atlantic .....	197
Midwest.....	199
East North Central.....	201
West North Central .....	203
South.....	205
South Atlantic.....	208
East South Central.....	210
West South Central.....	212
West.....	214
Mountain .....	216
Pacific.....	218

### INDUSTRY STRUCTURE

General .....	222
Industry Concentration .....	223
Primary Asphalt Market Share.....	224
Asphalt Paving Products Market Share .....	229
Asphalt Roofing Products Market Share.....	233
Manufacturing .....	237
Product Development.....	239
Marketing & Distribution .....	241
Acquisition & Divestiture Activity.....	245
Cooperative Agreements.....	246

### COMPANY PROFILES

Alon USA Energy.....	249
American Gilsonite.....	251
BASF SE.....	253
Berkshire Hathaway.....	255
Bouygues SA .....	258
BP plc.....	261
Bridgestone Corporation.....	263
Building Materials Corporation of America.....	265
CHS Incorporated.....	268
ConocoPhillips.....	269
CRH plc.....	271
Delek US Holdings.....	278
DuPont (EI) de Nemours.....	279
Ergon Incorporated .....	280
Exxon Mobil .....	284
Fortifiber Corporation .....	286

(continued on following page)

## Table of Contents

### COMPANY PROFILES

(continued from previous page)

HeidelbergCement AG .....	288
Henry Company.....	289
HollyFrontier Corporation .....	292
Hood Companies .....	294
Koch Industries .....	296
Lafarge SA .....	297
Marathon Petroleum .....	299
Murphy Oil.....	301
NuStar Energy.....	303
Owens Corning.....	305
Road Science.....	309
Royal Dutch Shell.....	311
RPM International.....	313
Saint-Gobain .....	318
Sinclair Oil Corporation .....	321
TAMKO Building Products.....	322
Unique Paving Materials.....	326
United Refining .....	327
Valero Energy .....	328
Vulcan Materials .....	330
Western Emulsions .....	331
Ziegler Chemical & Mineral .....	333

## List of Tables/Charts

### EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

### MARKET ENVIRONMENT

1 Macroeconomic Indicators .....	9
2 Population & Households.....	13
3 Construction Expenditures .....	16
4 Building Construction Expenditures .....	19
5 Residential Building Construction Expenditures .....	22
6 New Housing Indicators .....	27
7 Housing Stock by Type .....	30
Cht Year of Construction of Housing Stock, 2010 .....	30
8 Residential Improvement & Repair Expenditures .....	32
9 Nonresidential Building Construction Expenditures .....	35
10 Nonresidential Building Improvement & Repair Expenditures .....	36
11 Nonbuilding Construction Expenditures.....	38

12 US Highway Mileage .....	39
13 Public Highway Spending .....	41
14 Petroleum Products Supply & Demand.....	44
15 Primary Asphalt Market, 2000-2010.....	46
Cht Primary Asphalt Market, 2000-2010.....	47
Cht Asphalt Market Seasonality .....	48
16 Asphalt Products Pricing.....	52
17 Asphalt Products Foreign Trade.....	58
Cht Primary Asphalt Foreign Trade, 2010.....	56

### PRIMARY ASPHALT SUPPLY & DEMAND

Cht Primary Asphalt Flow Chart .....	86
1 Primary Asphalt Supply & Demand.....	89
2 Demand for Primary Asphalt by Use.....	92
Cht Primary Asphalt Demand by Use, 2010.....	93
3 Paving Demand for Primary Asphalt.....	97
4 Roofing Demand for Primary Asphalt.....	101
5 Demand for Primary Asphalt in Other Uses .....	102

### ASPHALT PRODUCTS

1 Asphalt Demand by Product .....	105
Cht Asphalt Demand by Product, 2010.....	106
2 Paving Products Demand for Asphalt.....	112
Cht Paving Products Demand for Asphalt by Type, 2010 .....	113
3 Asphalt Cement Demand for Asphalt.....	116
4 Asphalt Emulsions Demand for Asphalt ..	119
5 Cutback Asphalt Demand for Asphalt .....	121
6 Other Asphalt Paving Products Demand for Asphalt.....	123
7 Roofing Products Demand for Asphalt .....	125
Cht Roofing Products Demand for Asphalt by Type, 2010 .....	126
8 Asphalt Shingles Demand for Asphalt .....	128
9 Roofing Asphalts Demand for Asphalt .....	131
10 Modified Asphalt Roofing Membranes Demand for Asphalt.....	135
11 Standard Asphaltic Roofing Felts Demand for Asphalt.....	139
12 Other Asphalt Roofing Products Demand for Asphalt.....	141
13 Other Products Demand for Asphalt .....	142

### MARKETS

1 Asphalt Demand by Market.....	148
2 Asphalt Demand in Construction Markets	151
Cht Asphalt Demand in Construction Markets, 2010 .....	152
3 Residential Markets for Asphalt.....	155
4 New Residential Market for Asphalt .....	158
5 Residential Improvement & Repair Market for Asphalt.....	161

6 Nonresidential Building Markets for Asphalt .....	163
7 New Nonresidential Building Market for Asphalt .....	165
8 Nonresidential Building Improvement & Repair Market for Asphalt.....	167
9 Nonbuilding Construction Markets for Asphalt .....	169
10 New Nonbuilding Construction Market for Asphalt .....	170
11 Nonbuilding Improvement & Repair Market for Asphalt.....	173
12 Asphalt Demand in Nonconstruction Markets .....	175

### REGIONS

1 Gross Domestic Product by Region.....	180
2 Population by Region.....	183
3 Construction Expenditures by Region.....	185
4 Regional Housing Indicators .....	187
5 US Primary Asphalt Capacity by Region, 2010 .....	190
Cht US Primary Asphalt Capacity by Region, 2010 .....	191
6 Asphalt Demand by Region & Type .....	192
Cht Asphalt Demand by Region, 2010.....	193
7 Northeast Asphalt Demand.....	195
8 New England Asphalt Demand .....	197
9 Middle Atlantic Asphalt Demand .....	198
10 Midwest Asphalt Demand.....	201
11 East North Central Asphalt Content .....	203
12 West North Central Asphalt Content.....	205
13 South Asphalt Demand.....	207
14 South Atlantic Asphalt Demand .....	210
15 East South Central Asphalt Demand.....	212
16 West South Central Asphalt Demand .....	214
17 West Asphalt Demand .....	216
18 Mountain Asphalt Demand .....	218
19 Pacific Asphalt Demand .....	221

### INDUSTRY STRUCTURE

1 US Primary Asphalt Capacity by Producer, 2010 .....	225
Cht Primary Asphalt Capacity by Producer, 2010 .....	229
2 Asphalt Paving Products Sales by Company, 2010.....	232
Cht Asphalt Paving Products Market Share, 2010 .....	233
3 Asphalt Roofing Products Sales by Company, 2010.....	236
Cht Asphalt Roofing Products Market Share, 2010 .....	237
4 Selected Acquisitions & Divestitures.....	246
5 Selected Cooperative Agreements.....	247

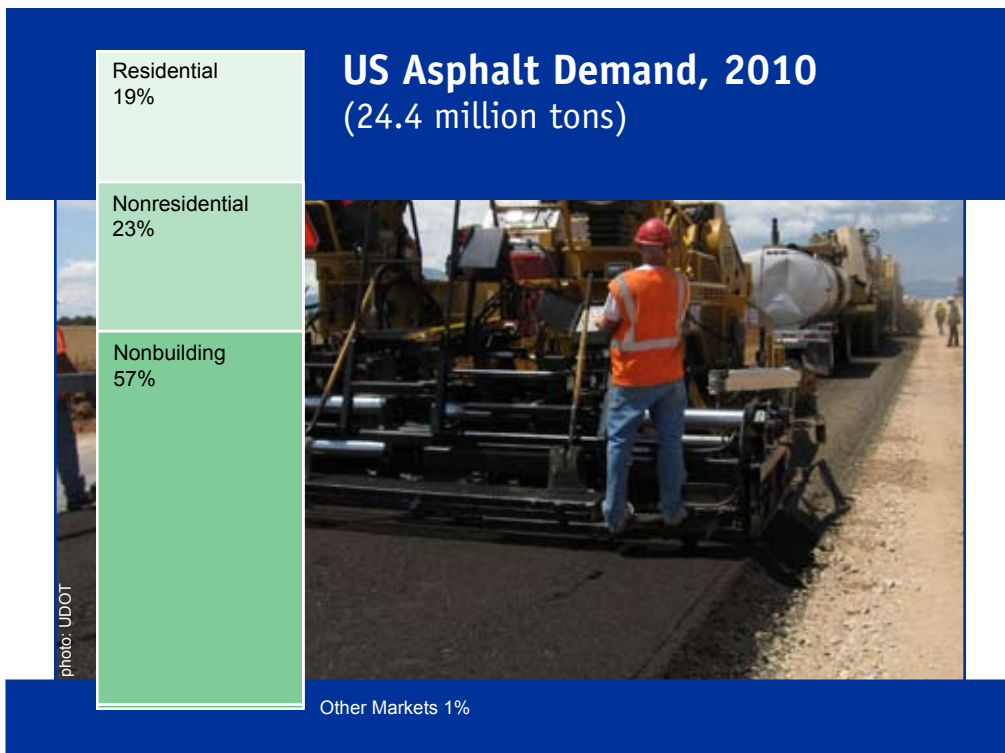
*Growth in US demand for asphalt is expected to result primarily from the recovery of new residential construction from its weak 2010 levels, benefiting both roofing and paving products.*

## US demand to rise 7.4% annually through 2015

US demand for asphalt is forecast to increase 7.4 percent annually to nearly 35 million tons in 2015. This is equivalent to 191 million barrels of primary asphalt, the vast majority of which is refined petroleum asphalt. The expected growth represents a rebound from the 2005-2010 period, when consumption declined sharply due to the recession and a collapse in building construction. Growth will result primarily from the recovery of new residential construction from its weak 2010 levels, benefiting both roofing and paving products. Gains will be moderated slightly by slower than average growth in both residential and nonresidential improvement and repair applications.

## Paving asphalt products to outpace roofing types

Paving products accounted for 80 percent of asphalt consumption in 2010. Demand for asphalt paving products will benefit from an expected increase in federal and state spending on highway and road construction. Growth will advance from a weak 2010 base, when high asphalt prices led to a rollback in paving activity and a greater emphasis on repair as opposed to replacement of roads. As the growth in paving asphalt prices moderates, the volume of paving asphalt consumed will expand. Overall, demand for asphalt in paving uses is forecast to increase 7.8 percent annually to 28.5 million tons in 2015.



Among the different types of asphalt paving products, emulsified asphalt will benefit from the use of in-place recycling and environmental factors, largely at the expense of cutback asphalts. Continuing adoption of performance-based specifications for road projects will generate demand for polymer-modified asphalts. Nevertheless, asphalt cement will continue to be the dominant asphalt paving product. Asphalt cement provides the best combination of economy, versatility and long-term performance.

Demand for asphalt in roofing and other applications is forecast to rise 5.6 percent annually to 6.3 million tons in 2015. This will be a considerable improvement from the very weak levels of

2010. Growth will reflect a recovery in construction of single-family housing, which will benefit asphalt roofing used in steep slope applications, primarily asphalt shingles. Demand will also benefit from the growing consumption of modified asphaltic membranes in low-slope roofing applications, although much of this is a replacement for conventional built-up asphaltic roofing, which uses greater quantities of asphalt per square of roof surface. Gains will also reflect a recovery in nonresidential building activity, which was negatively impacted by the recession, although not as dramatically as residential construction. Finally, growth opportunities will continue to exist in maintenance and repair applications.

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## Sample Text, Table & Chart

### PRIMARY ASPHALT SUPPLY & DEMAND

#### Supply & Demand

Demand for primary asphalt paving products increased annually from a weak 2010 base to 15.1 billion tons in 2011, marked improvement over the previous year. Demand was strong when demand for asphalt suffered a sharp decline due to the collapse of the construction industry in 2009. However, the construction of new residential and commercial buildings, along with the construction of new residential and commercial buildings, dropped demand for asphalt roofing products, particularly asphalt shingles. Other main markets, nonresidential building and nonbuilding (road construction) -- also contracted, although not as severely as the residential market.

The rising cost of crude petroleum in recent years has led to higher prices for primary asphalt, and in turn, higher costs for asphalt products. In the road construction sector, rising petroleum prices led to increased costs across the board. In addition to higher costs for asphalt paving products, the prices paid for reinforcing steel and concrete (both of which are very energy intensive in their manufacture) went up as well. Finally, higher petroleum prices pushed up fuel costs, which are significant in major construction projects such as road building and repair.

This has had a particularly significant impact on asphalt paving products, since most road repair and construction activity is conducted through government agencies, and budgets for such work are limited and set in advance. In general, if asphalt paving products prices rise from year to year, budgets generally do not increase to compensate for those higher costs; instead, the miles of road which are built or repaired are reduced. To stretch road construction budgets, governments tend to cancel some projects and concentrate more on repair work and full replacement, which reduces paving asphalt consumption. This was the case through most of the 2005-2010 time frame, as crude oil prices and primary asphalt prices rose sharply. Going forward, it is

87

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**SAMPLE  
TEXT**

TABLE V-2

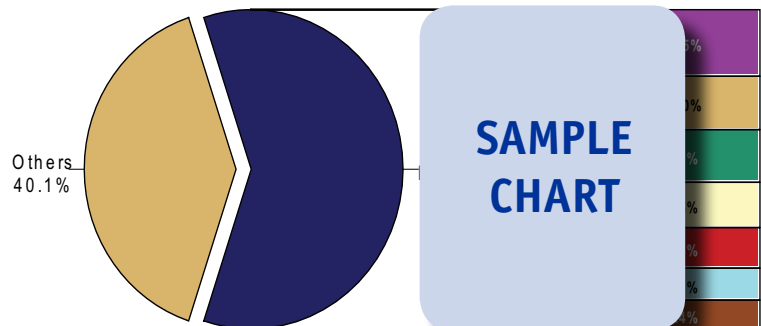
PAVING PRODUCTS DEMAND FOR ASPHALT  
(thousand tons)

Item	2000	2005	2010	2015	2020
Highway Expenditures (bil 2005\$)					181
tons asphalt/mil \$ expenditures					6
Asphalt Demand in Paving Products	2				0
Asphalt Cement	2				0
Asphalt Emulsions					0
Cutback Asphalt					0
Other Asphalt Paving Products					0
Primary Paving Asphalt (mil bbls)					1
% paving					0
Asphalt Demand	3				0
Addendum:					
Primary Paving Asphalt Demand (mil \$)					0

**SAMPLE  
TABLE**

CHART VIII-1

PRIMARY ASPHALT CAPACITY BY PRODUCER, 2010  
(266 million barrels)



**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Fortifiber Corporation

300 Industrial Drive  
 Fernley, NV 89408  
 775-333-6400  
<http://www.fo>

Annual Sales:  
 Employment:

Key Products: moisture control flash-  
 ing systems, s... ers

Fortifiber produces and distributes building protection systems, paper packaging systems and coated paper for battery composites. The privately held company operates through two main groups: Fortifiber Building Systems and Fortifiber Industrial Products.

The Company competes in the US asphalt industry via the Fortifiber Building Systems group (Fernley, Nevada), which manufactures and markets building products and systems engineered to prevent water intrusion and reduce moisture damage to residential and commercial structures. These products are sold under the FORTIFIBER umbrella brand name and include asphalt-based moisture control flashing systems, flooring underlays, scribing papers and weather-resistive barriers.

Fortifiber Building Systems' moisture control flashing systems are flashing and sealing materials that keep moisture from entering into wall modules via windows. Among these products are FORTIFLASH self-adhesive waterproof membranes, which consist of styrene-butadiene-styrene asphalt cores laminated to cross-laminated HDPE films. These membranes are used to seal vertical and non-horizontal areas, including sills, pans, gaps, shelves and other wall protrusions.

**SAMPLE  
PROFILE**

TABLE VII-6

### ASPHALT DEMAND BY REGION & TYPE (thousand tons asphalt content)

Item	2000	2005	2010	2015	2020
Construction Expenditures (bil 2005\$) tons asphalt/mil \$ construction					
Asphalt Demand					
By Region:					
Northeast					
Midwest					
South					
West					
By Type:					
Paving					
Roofing & Other					
tons paving/highway mile					
Highway Mileage (000 miles)	3,325	4,010	4,601	4,120	4,185

**SAMPLE  
TABLE**

"The West region is expected to post the fastest gains over that period, with yearly increases of 8.2 percent to 7.3 million tons in 2015. Favorable population and economic growth and construction trends will drive gains in the region. The South will experience average growth through 2015, while the Northeast and Midwest regions will trail overall gains. Paving demand will benefit as ..."

--Section VII, pg. 191

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**OTHER STUDIES**

**World Cement**

This study analyzes the world cement industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by type (e.g., blended, portland), market (e.g., ready-mix concrete, construction contractors, consumer, concrete products), world region and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2805 ..... November 2011 ..... \$6300

**Roofing**

US roofing demand will rise 5.7% annually through 2015. New homes will be the fastest growing market, while residential reroofing remains the largest segment. Roofing tile, asphalt shingles and wood shingles and shakes will lead gains. Environmentally friendly roofing products will be supported by both consumer demand and government mandates. This study analyzes the 200 million square US roofing industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles industry players.

#2814 ..... November 2011 ..... \$5100

**Cement & Concrete Additives**

US cement and concrete additive demand will rise 9.9 percent 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

**World Roofing**

Global roofing demand will grow 3.1 percent annually through 2014. China alone will claim over a third of all new demand, strengthening its position as the largest roofing market in square meter terms. Concrete tile will be the fastest growing type based on dominance in developing Asian nations. This study analyzes the 9.5 billion square meter world roofing industry, with forecasts for 2014 and 2019 by product, market, world region and for 56 countries. It also evaluates company market share and profiles industry participants.

#2656 ..... July 2010 ..... \$6100

**World Asphalt**

Global asphalt demand is forecast to rise 2.1 percent 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

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