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Roofing

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

Study #2814 | November 2011 | \$5100 | 378 pages



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Gains through 2015 will represent a turnaround from the decline experienced between 2005 and 2010, driven by a rebound in building construction expenditures from a low 2010 base.

US demand to rise 5.7% annually through 2015

US demand for roofing is forecast to rise 5.7 percent per year to 263 million squares in 2015, valued at \$24.4 billion. This pace represents a turnaround from the outright decline experienced between 2005 and 2010. Advances will be driven by a rebound in building construction expenditures from a depressed 2010 base.

New residential market to see over 20% annual gains

The new residential market will see annual demand gains of over 20 percent through 2015 as housing starts rise from their low 2010 levels. However, the residential reroofing market will continue to account for the largest share of roofing demand in 2015. Those homeowners who delayed or canceled renovation projects -- such as the replacement of roofs -- during the 2007-2009 recession will go forward with their plans.

Roofing demand in the nonresidential market will experience modest gains, but a bright spot will be the new construction segment, which is expected to advance 7.5 percent annually through 2015. Rebounding office and commercial and institutional construction spending will drive advances. In particular, increasing demand for such structures as educational and healthcare facilities, retail sites and office buildings will promote roofing demand.

US Roofing Demand, 2015 (263 million squares)



Environmentally friendly products to support demand

In both the residential and nonresidential markets, roofing demand will also be supported by consumer interest in environmentally friendly products. Such items as light-colored roofing tiles and membranes, metal roofs, roofing made from recycled materials, vegetative roofs and integrated photovoltaic roofing will see increasing use. Consumers will install these roofing materials to reduce energy costs and minimize urban heat-island effects. Demand will also be supported by the efforts of state and local governments to pass laws mandating the use of these products in new and renovation construction.

Laminated asphalt shingles to double market share

Demand in the dominant asphalt shingle segment will rise over seven percent per year through 2015 as residential building construction expenditures rebound. Laminated asphalt shingles, which accounted for 40 percent of shingle demand in 2000, are projected to total 85 percent of demand in 2015. Demand for laminated shingles will be spurred by their superior aesthetic and performance qualities. In the long term, increasing use of laminated shingles will constrain replacement demand, as these products can have lifespans more than twice that of conventional asphalt shingles.

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Sample Text, Table & Chart

PRODUCTS

Metal Roofing

Demand for metal roofing is forecast to increase through 2015. Metal roofing demand is expected to reach 19.1 million squares. This is a turnaround from the decline experienced between 2005 and 2010. Construction expenditures dropped during this period. Advances will be driven by the rebound in housing starts from their low 2010 base.

The market will lead gains. Metal roofing market grew between 2000 and 2010 as construction professionals and homeowners opted to use metal shingles, tile and panels instead of traditional materials, such as asphalt shingles. Metal roofing tiles are lighter per square than asphalt shingles and are more durable. Metal roofing is seen as being more environmentally friendly. Metal roofs can be considered cool roofs because of their reflective properties. Through 2015, metal roofing demand in the new residential market will be driven by the expected rise in housing starts. Further growth will come from the remodeling market, as homeowners install metal roofs because of their performance and environmental properties. However, the higher cost of metal shingles and tiles compared to asphalt shingles will prevent more rapid growth going forward.

The nonresidential market, which accounted for the large majority of metal roofing demand in 2010, will continue to do so in 2015. Metal roofing demand in nonresidential building construction applications is projected to grow 2.7 percent annually to 19.1 million squares. Gains will be spurred by rising construction expenditures. Increasing construction of office and commercial, institutional and industrial structures will drive advances.

Growing awareness of the benefits of cool roofing in both residential and nonresidential building construction applications will

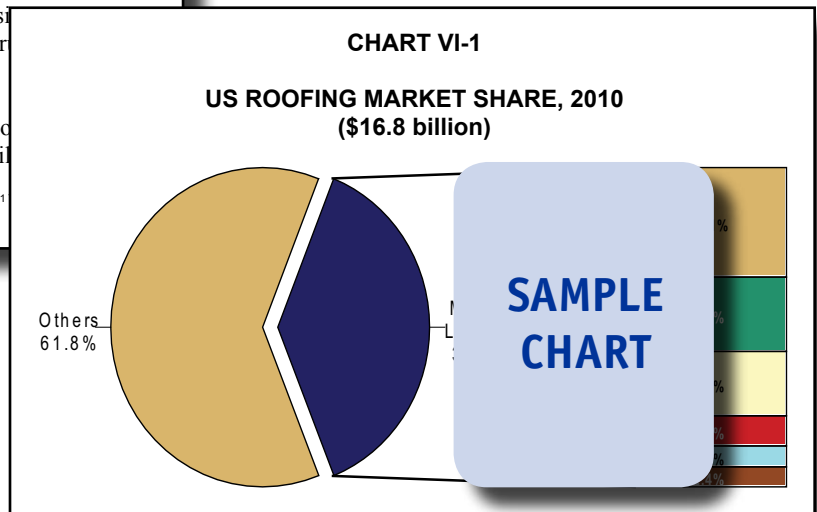
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TABLE IV-3
NEW RESIDENTIAL ROOFING DEMAND BY PRODUCT
 (million squares)

Item	2000	2005	2010	2015	2020
Residential Bldg Construction (bil 2005\$)	1.0	1.0	1.0	1.0	1.0
New Private Housing Starts (000 units)	1.5	1.5	1.5	1.5	1.5
squares/mil \$ construction	1.5	1.5	1.5	1.5	1.5
squares/housing start	1.6	1.6	1.6	1.6	1.6
New Residential Roofing Demand	2.0	2.0	2.0	2.0	2.0
Asphalt Shingles	1.0	1.0	1.0	1.0	1.0
Bituminous Low-Slope Roofing	0.5	0.5	0.5	0.5	0.5
Metal Roofing	0.5	0.5	0.5	0.5	0.5
Elastomeric Roofing	0.5	0.5	0.5	0.5	0.5
Roofing Tile	0.0	0.0	0.0	0.0	0.0
Plastic Roofing	0.4	0.4	0.4	0.4	0.4
Wood Shingles & Shakes	1.1	1.1	1.1	1.1	1.1
Other Roofing Materials	0.5	0.5	0.5	0.5	0.5
% new	0.0	0.0	0.0	0.0	0.0
Residential Roofing Demand	15.1	16.2	16.4	16.6	16.5

SAMPLE TABLE



Sample Profile, Table & Forecast

COMPANY PROFILES

ATAS International Incorporated

6612 Snowdrift Road
 Allentown, PA 18106
 610-395-8445
<http://www.atas.com>

Annual Sales:
 Employment:

Key Products:

ATAS International is a leading manufacturer of natural metal products for residential and commercial applications. The Company's products include metal roofing, gutters, downspouts, soffits, curved panels, column covers, vent screens, rainware, ventilation, framing systems and accessories. ATAS operates manufacturing facilities in Allentown, Pennsylvania (2); Mesa, Arizona; and Maryville, Tennessee.

The Company is active in the US roofing industry through the production of metal roofing materials for residential and nonresidential construction. Among the metal roofing products manufactured by ATAS are panel systems, shingles, shakes and tiles. The Company produces all metal roofing materials with HYLAR 5000 or KYNAR 500 polyvinylidene difluoride finishes for increased protection. HYLAR 5000 is made by the Solvay Solexis SpA subsidiary (Italy) of Solvay SA (Belgium), while KYNAR 500 is a product of Arkema SA (France).

Panels -- ATAS's metal roof panel systems are sold under such tradenames as DUTCH SEAM, GRAND SERIES, MULTI PURPOSE, FIELD-LOK, MONARCH and PC brand names. DUTCH SEAM panels

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**SAMPLE
PROFILE**

TABLE V-6

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

Item	2000	2005	2010	2015	2020
Northeast Construction Exp (bil 2005\$)	220.0	220.0	220.0	220.0	220.0
squares/mil \$ construction	220.0	220.0	220.0	220.0	220.0
Northeast Roofing Demand	220.0	220.0	220.0	220.0	220.0
By Subregion:					
New England	220.0	220.0	220.0	220.0	220.0
Middle Atlantic	220.0	220.0	220.0	220.0	220.0
By Market:					
Residential	220.0	220.0	220.0	220.0	220.0
New	220.0	220.0	220.0	220.0	220.0
Reroofing	220.0	220.0	220.0	220.0	220.0
Nonresidential	220.0	220.0	220.0	220.0	220.0
New	220.0	220.0	220.0	220.0	220.0
Reroofing	220.0	220.0	220.0	220.0	220.0
By Product:					
Asphalt Shingles	220.0	220.0	220.0	220.0	220.0
Bituminous Low-Slope	220.0	220.0	220.0	220.0	220.0
Elastomeric & Plastic Roofing	220.0	220.0	220.0	220.0	220.0
Metal Roofing	220.0	220.0	220.0	220.0	220.0
Roofing Tile	220.0	220.0	220.0	220.0	220.0
Other Roofing	220.0	220.0	220.0	220.0	220.0
% Northeast Roofing Demand	220.0	220.0	220.0	220.0	220.0

**SAMPLE
TABLE**

"Demand for roofing in the Northeast is forecast to grow 4.3 percent per year to 42.5 million squares in 2015. Residential building construction applications are expected to see the more rapid gains. Advances will be led by the new housing market, which will see double-digit growth as housing starts rebound. Residential reroofing demand is forecast to advance ..."

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OTHER STUDIES

World Siding (Cladding)

This study analyzes the world siding industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (e.g., masonry and concrete, metal, vinyl, wood), market (residential buildings, nonresidential buildings), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2834December 2011 \$6100

Asphalt

US demand for asphalt is forecast to rise 7.4 percent annually through 2015, driven primarily by a recovery in new residential construction. Paving products will remain the dominant type and grow the fastest, led by the key asphalt cement segment, as well as by smaller volume products such as emulsified asphalt and polymer-modified asphalts. This study analyzes the 24.4 million metric ton US asphalt industry, with forecasts for 2015 and 2020 by product, market and US region. The study also evaluates company market share and profiles industry players.

#2793 October 2011 \$5100

Green Building Materials

US demand for green building materials is projected to expand 13 percent annually through 2015. The largest value gains will be from concrete products featuring recycled content (e.g., fly ash, blast furnace slag), which will surpass floor coverings to become the largest green building material segment by 2015. This study analyzes the \$38.7 billion US green building material industry, with forecasts for 2015 and 2020 by product, market and US region. The study also evaluates company market share and profiles industry participants.

#2733April 2011 \$4900

Molding & Trim

US demand for molding and trim is forecast to grow ten percent annually through 2014, driven by a rebound in new residential construction expenditures. Despite competition from plastics and wood-plastic composites, wood will remain the leading material. Other products such as exterior trim will outpace molding and stairwork. This study analyzes the \$6.3 billion US molding and trim industry, with forecasts for 2014 and 2019 by material, product and market. It also evaluates company market share and profiles industry players.

#2729 February 2011 \$4900

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

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