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# World Roofing

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Industry Study with Forecasts for **2016 & 2021**

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Study #2896 | June 2012 | \$6300 | 405 pages

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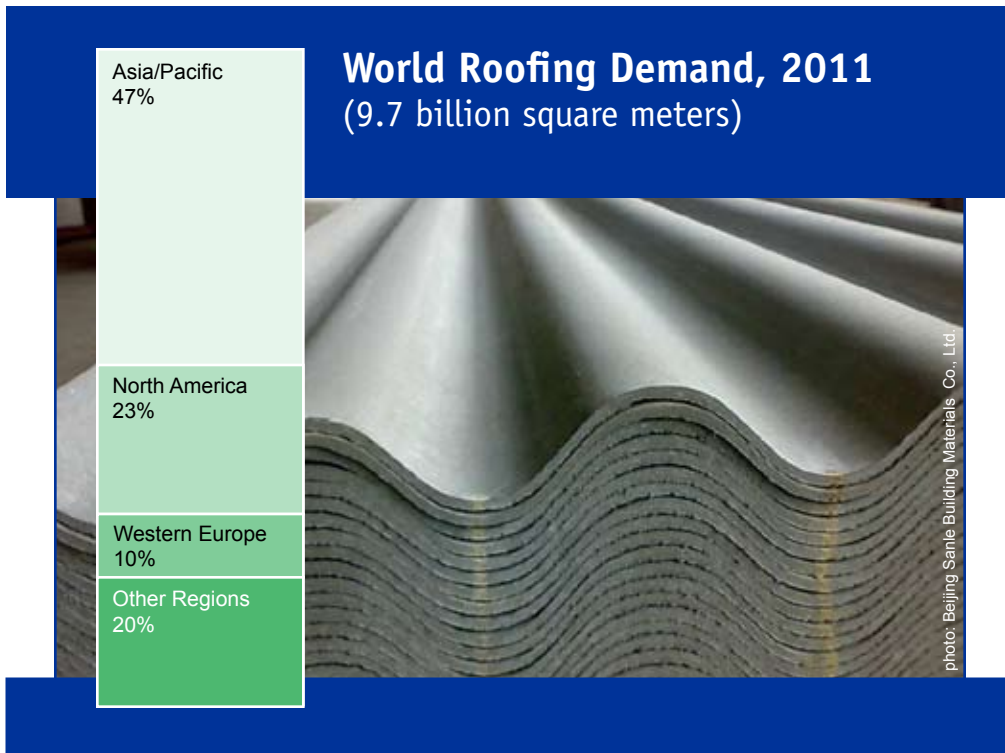
*Gains in roofing demand will be fueled by a major uptick in residential building construction activity as construction industries in major developed nations rebound from their recent weakness.*

## World demand to rise 3.8% annually through 2016

World demand for roofing materials is forecast to grow 3.8 percent annually through 2016 to 11.7 billion square meters, a substantial acceleration from the lethargic performance of the market during the 2006-2011 period. Gains in demand will be fueled by a major uptick in residential building construction activity as construction industries in major developed nations, such as the US, rebound from their recent weakness. Further growth will be supported by continued gains in developing markets, particularly in Asia.

## US, China to jointly account for most gains

Two countries, the US and China, will jointly account for nearly 60 percent of global gains in roofing demand in square meters through 2016. China, the world's largest market for roofing products in 2011, will continue its trend of strong growth and account for more than 30 percent of world market gains. The US, which experienced a collapse in new housing construction beginning in 2006, will rebound significantly, but in 2016 the US roofing market will still be slightly below 2006 levels. Strong growth is also expected in a number of smaller roofing markets, including those in India, Indonesia, and South Africa. Although some developed countries will see fast, rebound-fueled growth similar to the US, market gains will typically be slower than in developing areas. In fact, Western



Europe will be the slowest growing regional roofing market through 2016.

## Bituminous products to post fastest gains

Bituminous products will post the fastest growth through 2016, primarily due to the heavy usage of asphalt shingles in the rebounding US market. The US, which uses shingles far more intensively than most other nations, will account for almost 80 percent of worldwide growth in demand for these products, thanks to a major recovery in new single-family housing construction. Demand for concrete roofing tiles will also show strong growth, particularly in the developing Asia/Pacific region, where con-

crete tiles account for the largest share of roofing demand.

## New residential construction market to lead gains

A recovery in residential construction in major developed countries will allow the new residential roofing market to post the fastest growth through 2016. Growth will be somewhat slower in the nonresidential markets, where a steadier recent historical trend will lead to a less significant recovery effect. Gains in nonresidential roofing demand will still be stronger compared to the 2006 to 2011 period and will be headed by expansion in developing markets throughout the Asia/Pacific and Africa/Mideast regions.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### India: Roofing Supply & Demand

In 2011, demand for roofing materials in India totaled 5 billion square meters, valued at \$3.5 billion. In area terms, India's market is the third largest in the world, behind only China and the US. India's high demand for roofing materials is a reflection of its population of 1.2 billion, which accounts for 17 percent of the world's population. However, per capita roofing material use in the country is extremely low due to widespread poverty and a large average household size. Urban reforms and large-scale industrialization have helped to speed up the country's housing market, and India's 4.9 percent growth in demand from 2006 to 2011 was the second fastest of the world's national markets, trailing only Indonesia.

India's economy is expected to continue its rapid development. Building construction expenditures are forecast to accelerate in 2016. The Indian roofing market will be the second fastest growing in the world, rising from 5 billion square meters in 2011 to 6 billion square meters in 2016.

India is the largest roofing market in the Asia/Pacific region, with 2011 production valued at \$3.5 billion. In parts of the developing world, India produces much of the roofing industry production. The country had a neutral trade balance in 2011. Among the larger export markets are Canada, South Africa, the UK, and the US.

Production of roofing by facilities in India is forecast to grow at a 10 percent annual pace, reaching \$5.4 billion in 2016. Output growth will slightly exceed growth in domestic value demand, will be supported in part by largely favorable export sales conditions, and the country will return to a trade surplus in roofing materials.

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**SAMPLE TEXT**

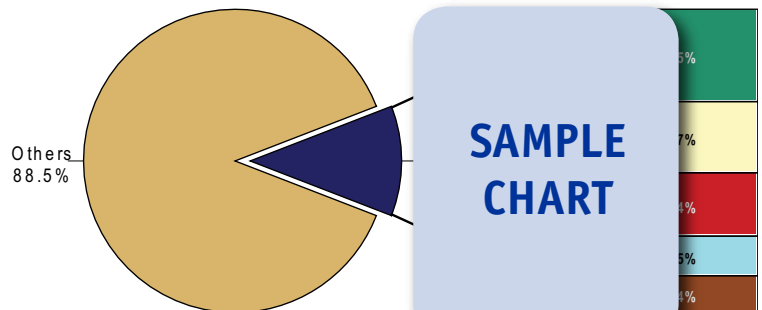
**TABLE VI-7**  
**INDIA:**  
**ROOFING SUPPLY & DEMAND**

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010\$)	200	250	300	350	400
per capita GDP 2030					
Population (million persons)	10	11	12	13	14
Bldg Construction Expend (bil 2010\$):					
Residential					
Nonresidential					
m2 roofing/mil \$ GDP					
m2 roofing/capita					
m2 roofing/000\$ construction					
Roofing Demand (mil m2)					
\$/m2					
Roofing Demand (mil \$)					
net exports					
Roofing Production (mil \$)	1500	2000	2500	3100	3700

**SAMPLE TABLE**

**CHART VIII-1**

**WORLD ROOFING MARKET SHARE BY COMPANY**  
 (\$78.8 billion, 2011)

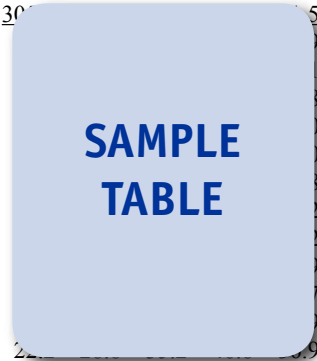


**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE VI-8**  
**INDIA: ROOFING DEMAND BY PRODUCT**  
 (million square meters)

Item	2001	2006	2011	2016	2021
Roofing Demand	30				5
Bituminous:					
Shingles & Plates					
Built-Up & Roll					
Modified Bitumen					
Tile:					
Concrete					
Clay					
Metal					
Fiber Cement					
Elastomeric					
Plastic					
Other					



### COMPANY PROFILES

#### Uralita SA

Paseo de Recoletos, 3  
 28004 Madrid  
 Spain  
 34-91-594-90  
<http://www.uralita.com>

Revenues: \$  
 Geographic F  
 European Un  
 Employment



Key Products. roofing products

Uralita is a producer and distributor of building materials and chemicals. The Company is 79.1-percent owned by Nefinsa SA (Spain). Uralita operates in four segments: Piping Systems, Roof Tiles, Interior Solutions, and Corporate.

The Company participates in the world roofing industry through the Roof Tiles segment, which had sales of \$63 million in 2011. The segment manufactures ceramic, concrete and clay roofing tiles, bricks, and other construction materials. In Spain, the Roof Tiles segment primarily comprises Tejas Cobert SA, a joint venture that is 53 percent owned by Uralita and 47 percent owned by Monier Group GmbH (Germany). Tejas Cobert produces and sells ceramic, concrete, and clay tiles; and other roofing products under the COBERT brand name. The company's tiles are made in interlocking and curved styles, and are produced in a broad array of colors.

Tejas Cobert conducts production activities in Spain and Portugal. In Spain, the company has ceramic roofing tile plants in Albacete and

"India has seen steady growth in roofing demand for both residential and nonresidential applications throughout the recent past. Compared to the previous five years, the acceleration in roofing demand growth from 2011 to 2016 will be stronger in the residential market. The new residential market will account for 37 percent of roofing demand growth through 2016. Gains in residential roofing demand will be aided by government efforts to improve housing conditions in rural areas, including such programs as ..."  
 --Section VI, pg. 172

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**OTHER STUDIES**

**Construction Outlook in China**

This study analyzes the construction industry in China. It presents historical demand data for the years 2001, 2006 and 2011, and forecasts for 2016 and 2021 by type (new construction, additions and alterations, maintenance and repairs), market (residential building, nonresidential building, nonbuilding) and region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2898 ..... June 2012 ..... \$5500

**Siding**

Demand for siding in the US is forecast to advance 8.4 percent per year through 2016 to 96.5 million squares. Brick, stucco and fiber cement siding will see the most rapid demand gains. The South and West regions -- where these materials are most often installed -- are forecast to see the strongest growth in population and housing activity. This study analyzes the 64.5 million square US siding industry, with forecasts for 2016 and 2021 by siding material, market and US region. The study also evaluates company market share and profiles industry players.

#2875 ..... April 2012 ..... \$5100

**World Asphalt**

Global consumption of asphalt is forecast to advance 4.1 percent annually from a very weak base to 119.5 million metric tons in 2015. Gains will be most rapid in North America. Massive infrastructure projects in China and India will continue to drive strong growth in the Asia/Pacific region. This study analyzes the 98 million metric ton world asphalt industry, with forecasts for 2015 and 2020 for primary asphalt, asphalt products, world region and for 24 major countries. The study also evaluates company market share and profiles industry participants.

#2847 ..... February 2012 ..... \$6100

**Roofing**

US roofing demand will rise 5.7 percent yearly 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

**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

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