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Roofing

US Industry Study with Forecasts for **2017 & 2022**

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INDUSTRY STRUCTURE

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Gains in roofing demand will be spurred by increases in building construction activity, especially for products installed on residences, such as asphalt shingles and roofing tiles.

US demand to rise 3.5% annually through 2017

US demand for roofing is projected to rise 3.5 percent annually to 268 million squares in 2017, valued at \$27.2 billion. This will be a rebound from the declines seen between 2007 and 2012 when roofing demand fell as a result of a steep drop in building construction. Going forward, increases in building construction activity will spur gains in roofing demand, especially for products installed on residences, such as asphalt shingles and roofing tiles.

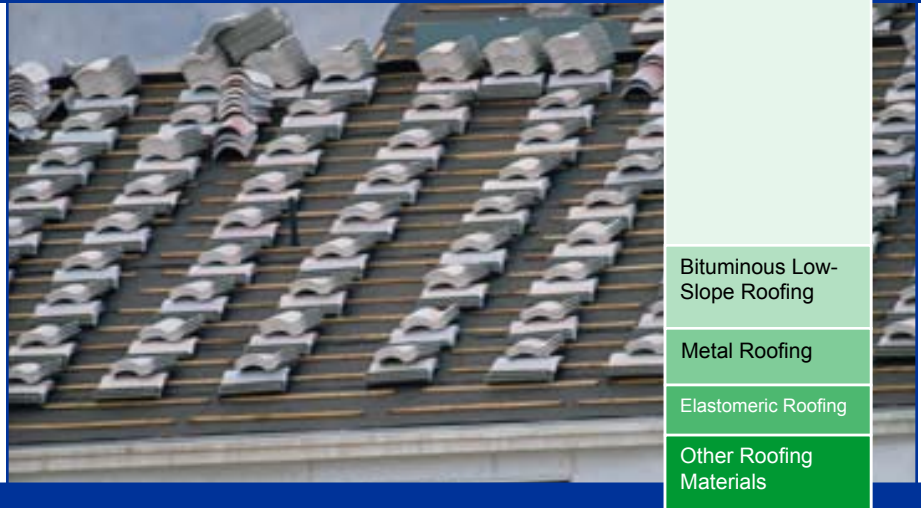
New building construction to drive gains

In both the residential and nonresidential markets, new building construction will drive gains. Roofing demand in the new housing segment is expected to rise at double-digit annual rates through 2017 as housing starts rise from their low 2012 base. In the nonresidential market, sharp growth in office and commercial construction spending and gains in institutional and industrial construction expenditures are expected to boost low-slope roofing demand.

Reroofing demand to remain strong

Reroofing activity accounts for the larger share of roofing demand in the US. This was especially so in 2012, when new construction was at a depressed level and damage caused by Hurricane Sandy

US Roofing Demand, 2017 (268 million squares)



and other storms during that year led many home and building owners to replace damaged or torn away roofing. Reroofing demand in both the residential and nonresidential markets through 2017 will remain strong, supported by a more favorable lending environment, as property owners who put off renovation projects -- such as roof replacement -- will be able to undertake them.

Asphalt shingles to remain dominant product

Asphalt shingles accounted for the largest share of roofing demand in 2012, indicative of their dominant position in the residential market. Through 2017, demand for asphalt shingles is forecast

to rise at an above average annual rate, spurred by rebounding housing starts. Gains will also be boosted by continuing consumer interest in laminated asphalt shingles, which are perceived as better able to improve a home's appearance.

Roofing tiles to lead gains

Roofing tiles are expected to see the most rapid growth of all roofing products through 2017. Advances will be driven by a rebound in residential building construction activity in the West and South, where tiles are most often installed. Demand will also be supported by interest in these products because of their favorable aesthetics and ability to be used on cool roofs.

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Sample Text, Table & Chart

REGIONS

Northeast

The Northeast region consists of two subregions: New England and the Middle Atlantic. Historically, the region's economy was manufacturing. Through the latter half of the 20th century and early years of the new millennium, manufacturing activity declined in importance, as many producers relocated to areas with lower costs (either the South or overseas). As a result, economic growth in the Northeast lagged that in the South and West.

In recent years, GDP growth in the Northeast has begun to catch up to that in the sunbelt regions. Industries that have sprung up in the Northeast's place include high technology and financial services. Natural gas production has become important in the Middle Atlantic region (due to Pennsylvania). Because of the shifting focus on these new industries, as well as some revival in manufacturing activity (due to the cheap natural gas made available through shale gas production), the Northeast is forecast to grow faster than the other three regions. This will be due to the declines seen between 2007 and 2012, when roofing as building construction expenditures declined. Going forward, the housing market will lead advances, rising at a double-digit rate fueled by increasing housing completions. Residential roofing was at a high level in 2012 as the region recovered from the damage caused by Hurricane Sandy and other hurricanes. Homeowners' spending for roofing in residential reroofing applications is projected to grow at a 2.5 percent annually through 2017, reaching 22.2 million dollars.

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SAMPLE TEXT

TABLE III-1

ROOFING DEMAND BY PRODUCT
(million squares)

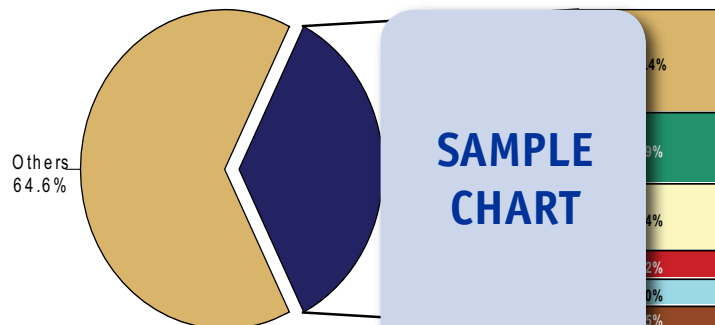
Item	2002	2007	2012	2017	2022
Building Constr Expend (bil 2005\$) squares roofing/mil \$ bldg constr					
Roofing Demand by Product					
Asphalt Shingles					
Bituminous Low-Slope Roofing					
Metal Roofing					
Elastomeric Roofing					
Plastic Roofing					
Roofing Tile					
Wood Shingles & Shakes					
Other Roofing Materials					
\$/square					
Roofing Demand (mil \$)					
- net imports					
Roofing Production (mil \$)					

SAMPLE TABLE

percent per year in real (infla-
 with growth in the other three
 ulation growth in the Northeast
 n of a long term trend.

CHART VI-1

US ROOFING MARKET SHARE, 2012
(\$20.2 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-1
ROOFING DEMAND BY MARKET
(million squares)

Item	2002	2007	2012	2017	2022
Bldg Construction Expenditures (bil 2005\$) squares roofing/mil \$ bldg constr					
Roofing Demand					
Residential:					
New					
Reroofing					
Nonresidential:					
New					
Reroofing					
\$/square					
Roofing Demand (mil \$)					

SAMPLE
TABLE

COMPANY PROFILES

ATAS International Incorporated

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

Annual Sales:
 Employment:

Key Products:

ATAS International is a manufacturer of architectural metal products for residential and institutional applications. The Company's products include metal roofing, wall and ceiling panels, soffits, mansards, framing systems, equipment screens, rainware, column covers, crown molding, edge trim, and accessories.

The Company participates in the US roofing industry via the manufacture of metal roofing for residential and nonresidential building construction applications. ATAS International's metal roofing includes panel systems, shingles, shakes, and tiles. The Company produces all metal roofing with KYNAR 500 or HYLAR 5000 polyvinylidene difluoride finishes for increased protection. KYNAR 500 is manufactured by Arkema SA (France), while HYLAR 5000 is produced by the Solvay Specialty Polymers Italy SpA subsidiary of Solvay SA (Belgium). Manufacturing operations for ATAS International are conducted at plants in Allentown, Pennsylvania (2); Mesa, Arizona; and Maryville, Tennessee.

Panels -- ATAS International manufactures metal roof panel systems in standing seam, batten seam, curved panel, and through-fastened types. Standing seam roof panels are marketed through the DUTCH

SAMPLE
PROFILE

STUDY COVERAGE

This Freedonia study, **Roofing**, offers historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for roofing demand (sales) in millions of squares by product, market and region of the US. The study also details market environment factors, examines industry structure, assesses company market share and profiles 35 active competitors in the US industry.

OTHER STUDIES

World Housing

This study analyzes the world housing industry. It presents historical demand data for 2002, 2007, and 2012, and forecasts for 2017 and 2022 by housing type (single-family, multifamily), world region and major country. The study also considers market environment factors such as world economic trends, demographics, and housing construction expenditures. #3087 October 2013 \$5700

Asphalt

US demand for asphalt is forecast to increase 3.7 percent annually to 27.9 million tons in 2017. Paving products will remain the dominant application and will grow the fastest, driven in the short term by federal highway funding. Demand for asphalt roofing products will be spurred by the rebound in building construction expenditures. This study analyzes the 23.3 million ton US asphalt industry, with forecasts for 2017 and 2022 by product, market and region. The study also evaluates company market share and profiles industry players. #3062 August 2013 \$5300

Green Building Materials

US green building materials demand is forecast to increase 11 percent annually to \$86.6 billion in 2017. Permeable pavement and structural products (e.g., recycled concrete, FSC-certified lumber) will grow the fastest. Exterior products such as energy-efficient windows and green roofing will remain the largest segment. This study analyzes the \$51.8 billion US green building material industry, with forecasts for 2017 and 2022 by product, market and US region. The study also considers market environment factors and profiles industry participants. #2995 February 2013 \$5100

World Roofing

World demand for roofing materials is forecast to grow 3.8 percent annually through 2016 to 11.7 billion square meters. The US and China will jointly account for nearly 60 percent of global gains in roofing volume demand. The dominant bituminous products segment will post the fastest growth. This study analyzes the 9.7 billion square meter world roofing industry, with forecasts for 2016 and 2021 by product, market, world region and major country. The study also evaluates company market share and profiles industry participants. #2896 June 2012 \$6300

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

About The Freedonia Group

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