INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Construction Chemicals

US Industry Study with Forecasts for **2018 & 2023**

Study #3239 | January 2015 | $5200 | 275 pages

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EXECUTIVE SUMMARY

MARKET ENVIRONMENT

PRODUCTS

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Gains will be driven by a rebound in building construction, more government spending on infrastructure, and an ongoing shift toward higher value formulations to comply with regulations.

US demand to rise 8.2% annually through 2018

US demand for construction chemicals used in on-site applications is projected to grow 8.2 percent per year through 2018 to $12.1 billion. Gains will be primarily driven by double-digit increases in building construction expenditures, supported by healthy economic growth and improved consumer finances. Increased economic activity and greater government investment in the aging infrastructure of the US will also support healthy consumption of construction chemicals in nonbuilding applications. While overall growth will be underpinned by the strong increases in construction spending, the product mix will also continue to shift toward new, higher value formulations and technologies to comply with environmental regulations and more stringent building codes.

Housing recovery to boost residential market

Following several years of recovery, the US housing market will see a jump in new residential construction activity. Consumer preference for greater numbers of windows, for larger kitchens, and for decks will boost consumption of grouts and mortars, caulks and adhesives, and coatings and sealers. Demand for on-site construction chemicals in residential improvement and repair applications will also rise as more financially secure consumers invest in updating and maintaining their homes.

Nonresidential market to also increase rapidly

Nonresidential building construction activity is also expected to increase rapidly through 2018. Healthy economic growth will support a rebound in both the industrial and office and commercial sectors, with increased construction of manufacturing plants, warehouses, refineries, hotels, shopping malls, restaurants, and retail stores all helping to drive nonresidential construction chemicals demand. Cement and asphalt additives will experience some of the fastest growth due to strong expansion in new nonresidential construction expenditures, as will caulks and adhesives. Sprayed polyurethane foams will benefit from tightening building codes that require increased energy efficiency.

Nonbuilding market to be driven by road repairs

Greater economic activity will also require increased investment in infrastructure, both public and private, particularly for the US' aging transportation network. This will lead to healthy growth in nonbuilding construction chemicals demand, especially for cement and asphalt additives and coatings. Growing demand for chemical additives and coatings will also result from the increasing use of new concrete technologies that offer superior performance and ease of placement.

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Sample Text, Table & Chart

PRODUCTS

Metal Substrates -- Demand for protective coatings a
used in on-site construction applications on metal substrates
to increase … billion.
be boosted … l constr
the outrigh … iod, as
constructio … lers. A
ing deman … er valu
with strong … further g
will be the … d) metal
construction applications.

SAMPLE TEXT

Coatings used to protect metal range from comparativel
sive acrylics and urethanes to higher value epoxies, which ar
used in more demanding environments where substrates enc
harsher conditions. Most of the protective coatings on metal
to secure the substrate from corrosion. Although the largest market for metal coatings on construction materials is for factory-applied coatings, there is a significant market for on-site applied coatings. This is true for new construction applications, but is particularly the case for improvement and repair operations, as factory-coated metal construction materials are typically recoated on-site rather than being replaced by entirely new materials.

Urethanes and acrylics are the most common water-based coatings utilized on metal, while alkyds are the dominant solvent-borne metal coatings. Alkyds enjoy a competitive advantage against other coatings and sealers in many applications, as they are relatively inexpensive and effective as general purpose coatings. Epoxies tend to be fav
plications where stronger performance is required, such as in
to reinforce concrete structures. Many applications include a
of one type of product as primer, followed by a second coat
product to finish (such as an epoxy-acrylic pairing), although

72

TABLE III-2

PROTECTIVE COATINGS & SEALERS DEMAND IN ON-SITE CONSTRUCTION BY MARKET & APPLICATION (million dollars)

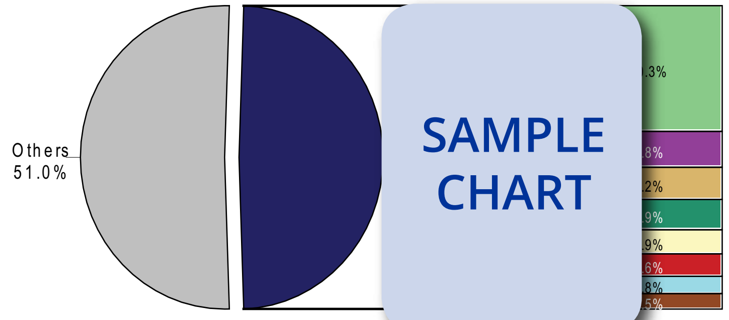
Item	2003	2008	2013	2018	2023
Construction Expenditures (bil $)					
$ coatings/000$ construction					
Protective Coatings & Sealers Demand					
By Market:					
Building					
Residential					
Nonresidential					
Nonbuilding					
By Application:					
New Construction					
Improvement & Repair					
% coatings & sealers					
Construction Chemicals Demand					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

CHART V-1

ON-SITE CONSTRUCTION CHEMICALS MARKET SHARE BY COMPANY, 2013 ($8.1 billion)



SAMPLE CHART

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Sample Profile & Table, & Study Coverage

TABLE IV-2

RESIDENTIAL BUILDING: ON-SITE CONSTRUCTION CHEMICALS DEMAND BY LOCATION & APPLICATION (million dollars)

Item	2003	2008	2013	2018	2023
Residential Building Construction (bil $)					
$ chemicals/000$ construction					
Residential Building Chemicals Demand					
By Location:					
Exterior					
Interior					
By Application:					
New Construction					
Improvement & Repair					
% residential					
Construction Chemicals Demand					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

COMPANY PROFILES

Gardner-Gibson Incorporated
4161 East 7th Avenue
Tampa, FL 33605
813-248-2101
http://www.ga

Annual Sales:
Employment:

Key Products: ing materials, and adhesives

SAMPLE PROFILE

Gardner-Gibson, a member of the Gardner Industries Incorporated group (Tampa, Florida), is one of the largest US private producers of adhesives and sealants. The Company is privately held.

The Company is involved in the US construction chemicals industry through the production of a wide range of compounds sold under the GARDNER, SHUR-STIK, STA-KOOL, DYNAMITE, BLACK JACK, and SILVER DOLLAR brand names. Specific items in these product lines include cements, coatings, sealants, patching materials, caulks, and adhesives.

Gardner-Gibson's GARDNER product line includes cements and coatings used to repair roofs and driveways. GARDNER roof cements are made of asphaltic emulsions with fiberglass or other fiber reinforcements. A specific item is the GARDNER LEAK STOPPER rubberized cement, which is designed to fill deep cracks, thereby preventing more leaks and further roof damage. GARDNER LEAK STOPPER cements are formulated with the Company's proprietary PENETREX compounds that promote the formation of complete, durable, watertight bonds with existing substrates. Among Gardner-Gibson's GARDNER

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STUDY COVERAGE

Construction Chemicals, the 275-page Freedonia study available for $5200, presents historical demand data (2003, 2008, 2013) plus forecasts (2018, 2023) by product and application. In addition, this study considers key market environment factors, examines the industry structure, analyzes company market share and profiles 31 competitors in the US industry.

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Related Studies

Hard Surface Flooring

This study analyzes the US hard surface flooring industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by flooring product (e.g., vinyl, rubber, linoleum, tile, laminate, wood) and market (e.g., residential buildings, nonresidential buildings, transportation equipment). The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry competitors.

#3284 .... April 2015 .... $5300

Adhesives & Sealants

US demand for adhesives and sealants is forecast to increase 2.8 percent per year to 6.4 billion pounds in 2019, valued at $12.8 billion. Reactive adhesives and sealants will be the fastest growing types. The construction market will lead gains, while the manufacturing and assembly market will remain the largest segment. This study analyzes the 5.6 billion pound US adhesives and sealants industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry players.

#3257 .... February 2015 .... $5400

Wood Protection Coatings & Preservatives

Demand for wood protection coatings and preservatives will rise 4.5 percent per year through 2018 to $4.8 billion. Gains will be driven by a rebound in residential construction. The dominant coatings segment will continue to outpace preservatives. Wood furniture applications will provide the best growth opportunities. This study analyzes the $3.9 billion US wood protection coatings and preservatives industry, with forecasts for 2018 and 2023 by product, application and market. The study also evaluates company market share and profiles industry players.

#3150 .... June 2014 .... $5100

World Paint & Coatings

Global demand for paint and coatings will rise 5.2 percent annually to 51.6 million metric tons in 2017, valued at $186 billion. The Asia/Pacific region will remain the largest and fastest growing market and account for half of global demand by 2017. The key architectural segment will accelerate from the 2007-2012 period. This study analyzes the 40 million metric ton world paint and coatings industry, with forecasts for 2017 and 2022 by formulation, market, world region, and for 23 countries. The study also evaluates company market share and profiles industry players.

#3135 .... March 2014 .... $6200

Silicones

US demand for silicones is forecast to climb 4.7 percent annually to $4.3 billion in 2018, with volume rising 3.2 percent per year to 900 million pounds. Silicone elastomers will grow the fastest, overtaking fluids as the leading product type. The construction and medical markets will be the fastest growing segments, while the industrial market will remain dominant. This study analyzes the $3.4 billion US silicones industry, with forecasts for 2018 and 2023 by product, market and application. It also evaluates company market share and profiles industry players.

#3138 .... March 2014 .... $5100

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

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