World Fiber Cement

Industry Study with Forecasts for 2019 & 2024

Study #3273 | May 2015 | $6300 | 267 pages
Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

Overview.......................................................... 15
General.............................................................. 4
World Economic Overview................................. 4
Recent Historical Trends...................................... 5
World Economic Outlook.................................... 6
Personal Income Trends...................................... 9
World Demographic Overview........................... 12
Household Formation Patterns............................ 14
World Building Construction Outlook............... 16
Relationship to Fiber Cement Demand................. 19
Residential Buildings........................................ 22
Nonresidential Buildings.................................... 25
Regulatory & Environmental Issues.................... 26
Building Codes.................................................. 27
Asbestos Regulations.......................................... 29

OVERVIEW

General.............................................................. 32
Demand by Region............................................. 33
Demand by Application...................................... 37
Roofing............................................................. 39
Siding............................................................... 41
Molding & Trim.................................................. 43
Other Applications............................................. 45
Demand by Market............................................. 47
Shipments by Region.......................................... 54
International Trade............................................ 55

NORTH AMERICA

Overview.......................................................... 58
Fiber Cement Supply & Demand........................ 59
Fiber Cement Demand by Application................ 61
United States.................................................... 63
Canada............................................................ 68
Mexico............................................................. 72

WESTERN EUROPE

Overview.......................................................... 78
Fiber Cement Supply & Demand........................ 79
Fiber Cement Demand by Application................ 81
Germany.......................................................... 83
France............................................................. 88
Italy................................................................. 94
United Kingdom............................................... 100
Spain............................................................... 105
Other Western Europe........................................ 109

ASIA/PACIFIC

Overview.......................................................... 115
Fiber Cement Supply & Demand........................ 116
Fiber Cement Demand by Application................ 118
China............................................................... 120
India.............................................................. 126
Japan............................................................... 131
Indonesia......................................................... 137
Australia.......................................................... 141
South Korea..................................................... 146
Other Asia/Pacific.............................................. 150

OTHER REGIONS

Central & South America.................................... 156
Overview.......................................................... 156
Fiber Cement Supply & Demand......................... 157
Fiber Cement Demand by Application................ 159
Brazil.............................................................. 161
Other Central & South America.......................... 167
Eastern Europe.................................................. 171
Overview.......................................................... 171
Fiber Cement Supply & Demand......................... 173
Fiber Cement Demand by Application................ 175
Russia............................................................. 177
Poland............................................................. 182
Other Eastern Europe........................................ 186
Africa/Mideast................................................... 190
Overview.......................................................... 190
Fiber Cement Supply & Demand......................... 192
Fiber Cement Demand by Application................ 194
Turkey............................................................. 196
Iran................................................................. 200
Other Africa/Mideast.......................................... 204

INDUSTRY STRUCTURE

General.............................................................. 210
Industry Composition....................................... 211
Market Share..................................................... 214
Product Development & Manufacturing............... 217
Marketing........................................................ 219
Distribution....................................................... 221
Mergers & Acquisitions...................................... 222

COMPANY PROFILES

Beijing New Building Materials......................... 225
Building Materials Corporation of America........... 226
Cembrí Holding............................................... 227
Compañía Industrial el Volcán......................... 228
CSR Limited..................................................... 230
Elementia SA.................................................... 232
Etex Group....................................................... 236
Everest Industries............................................ 242
Foshan Sanle Building Materials....................... 243
Hardie (James) Industries................................. 244
Hekim Yapı AŞ............................................... 248
Hume Cemboard Industries............................... 248
Sendirian Berhad............................................. 249
Landini SpA..................................................... 251
Lato JSC.......................................................... 252
Mahaphant Fibre Cement................................. 253
Nichiha Corporation......................................... 255
Saint-Gobain.................................................... 257
Shandong Lutai Building Material Science and Technology Group...... 259
Siam Cement................................................... 260
SVK................................................................. 261
swisspor Management...................................... 263
Visaka Industries.............................................. 264
Zhejiang Hailong New Materials....................... 266
Zhejiang HeaderBoard Building Materials............ 267

List of Tables/Charts

EXECUTIVE SUMMARY

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

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region....... 9
2 World Per Capita Gross Domestic Product by Region..... 11
3 World Population by Region......................... 14
4 World Households by Region......................... 16
5 World Building Construction Expenditures by Region..... 18
6 World Residential Building Construction Expenditures by Region....... 21
7 World Nonresidential Building Construction Expenditures by Region..... 24

OVERVIEW

1 World Fiber Cement Demand by Region............... 36
2 World Fiber Cement Demand by Region, 2014........... 37
3 World Fiber Cement Demand by Application........... 38

(continued on following page)
### List of Tables/Charts

(continued from page 2)

<table>
<thead>
<tr>
<th>Table/Chart Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cht World Fiber Cement Demand by Application, 2014</td>
<td>39</td>
</tr>
<tr>
<td>3 World Roofing Demand for Fiber Cement by Region</td>
<td>41</td>
</tr>
<tr>
<td>4 World Siding Demand for Fiber Cement by Region</td>
<td>43</td>
</tr>
<tr>
<td>5 World Molding &amp; Trim Demand for Fiber Cement by Region</td>
<td>45</td>
</tr>
<tr>
<td>6 World Other Fiber Cement Products Demand by Region</td>
<td>47</td>
</tr>
<tr>
<td>7 World Fiber Cement Demand by Market 49</td>
<td>55</td>
</tr>
<tr>
<td>8 World Fiber Cement Shipments by Region</td>
<td>57</td>
</tr>
<tr>
<td>9 World Fiber Cement Flows by Region</td>
<td></td>
</tr>
<tr>
<td><strong>NORTH AMERICA</strong></td>
<td></td>
</tr>
<tr>
<td>1 North America: Fiber Cement Supply &amp; Demand</td>
<td>61</td>
</tr>
<tr>
<td>2 North America: Fiber Cement Demand by Application</td>
<td>62</td>
</tr>
<tr>
<td>Cht North America: Fiber Cement Demand by Application, 2014</td>
<td>63</td>
</tr>
<tr>
<td>3 United States: Fiber Cement Supply &amp; Demand</td>
<td>66</td>
</tr>
<tr>
<td>4 United States: Fiber Cement Demand by Application</td>
<td>68</td>
</tr>
<tr>
<td>5 Canada: Fiber Cement Supply &amp; Demand</td>
<td>71</td>
</tr>
<tr>
<td>6 Canada: Fiber Cement Demand by Application</td>
<td>72</td>
</tr>
<tr>
<td>7 Mexico: Fiber Cement Supply &amp; Demand</td>
<td>76</td>
</tr>
<tr>
<td>8 Mexico: Fiber Cement Demand by Application</td>
<td>77</td>
</tr>
<tr>
<td><strong>WESTERN EUROPE</strong></td>
<td></td>
</tr>
<tr>
<td>1 Western Europe: Fiber Cement Supply &amp; Demand</td>
<td>81</td>
</tr>
<tr>
<td>2 Western Europe: Fiber Cement Demand by Application</td>
<td>82</td>
</tr>
<tr>
<td>Cht Western Europe: Fiber Cement Demand by Application, 2014</td>
<td>83</td>
</tr>
<tr>
<td>3 Germany: Fiber Cement Supply &amp; Demand</td>
<td>87</td>
</tr>
<tr>
<td>4 Germany: Fiber Cement Demand by Application</td>
<td>88</td>
</tr>
<tr>
<td>5 France: Fiber Cement Supply &amp; Demand</td>
<td>92</td>
</tr>
<tr>
<td>6 France: Fiber Cement Demand by Application</td>
<td>94</td>
</tr>
<tr>
<td>7 Italy: Fiber Cement Supply &amp; Demand</td>
<td>98</td>
</tr>
<tr>
<td>8 Italy: Fiber Cement Demand by Application</td>
<td>99</td>
</tr>
<tr>
<td>9 United Kingdom: Fiber Cement Supply &amp; Demand</td>
<td>103</td>
</tr>
<tr>
<td>10 United Kingdom: Fiber Cement Demand by Application</td>
<td>104</td>
</tr>
<tr>
<td>11 Spain: Fiber Cement Supply &amp; Demand</td>
<td>108</td>
</tr>
<tr>
<td>12 Spain: Fiber Cement Demand by Application</td>
<td>109</td>
</tr>
<tr>
<td>13 Other Western Europe: Fiber Cement Supply &amp; Demand</td>
<td>113</td>
</tr>
<tr>
<td>14 Other Western Europe: Fiber Cement Demand by Application</td>
<td>114</td>
</tr>
<tr>
<td><strong>ASIA/PACIFIC</strong></td>
<td></td>
</tr>
<tr>
<td>1 Asia/Pacific: Fiber Cement Supply &amp; Demand</td>
<td>118</td>
</tr>
<tr>
<td>2 Asia/Pacific: Fiber Cement Demand by Application</td>
<td>119</td>
</tr>
<tr>
<td>Cht Asia/Pacific: Fiber Cement Demand by Application, 2014</td>
<td>120</td>
</tr>
<tr>
<td>3 China: Fiber Cement Supply &amp; Demand</td>
<td>124</td>
</tr>
<tr>
<td>4 China: Fiber Cement Demand by Application</td>
<td>125</td>
</tr>
<tr>
<td>5 India: Fiber Cement Supply &amp; Demand</td>
<td>129</td>
</tr>
<tr>
<td>6 India: Fiber Cement Demand by Application</td>
<td>131</td>
</tr>
<tr>
<td>7 Japan: Fiber Cement Supply &amp; Demand</td>
<td>135</td>
</tr>
<tr>
<td>8 Japan: Fiber Cement Demand by Application</td>
<td>136</td>
</tr>
<tr>
<td>9 Indonesia: Fiber Cement Supply &amp; Demand</td>
<td>140</td>
</tr>
<tr>
<td>10 Indonesia: Fiber Cement Demand by Application</td>
<td>141</td>
</tr>
<tr>
<td>11 Australia: Fiber Cement Supply &amp; Demand</td>
<td>144</td>
</tr>
<tr>
<td>12 Australia: Fiber Cement Demand by Application</td>
<td>145</td>
</tr>
<tr>
<td>13 South Korea: Fiber Cement Supply &amp; Demand</td>
<td>149</td>
</tr>
<tr>
<td>14 South Korea: Fiber Cement Demand by Application</td>
<td>150</td>
</tr>
<tr>
<td>15 Other Asia/Pacific: Fiber Cement Supply &amp; Demand</td>
<td>154</td>
</tr>
<tr>
<td>16 Other Asia/Pacific: Fiber Cement Demand by Application</td>
<td>155</td>
</tr>
<tr>
<td><strong>OTHER REGIONS</strong></td>
<td></td>
</tr>
<tr>
<td>1 Central &amp; South America: Fiber Cement Supply &amp; Demand</td>
<td>159</td>
</tr>
<tr>
<td>2 Central &amp; South America: Fiber Cement Demand by Application</td>
<td>160</td>
</tr>
<tr>
<td>3 Brazil: Fiber Cement Supply &amp; Demand</td>
<td>161</td>
</tr>
<tr>
<td>4 Brazil: Fiber Cement Demand by Application</td>
<td>166</td>
</tr>
<tr>
<td>5 Other Central &amp; South America: Fiber Cement Supply &amp; Demand</td>
<td>170</td>
</tr>
<tr>
<td>6 Other Central &amp; South America: Fiber Cement Demand by Application</td>
<td>171</td>
</tr>
<tr>
<td>7 Eastern Europe: Fiber Cement Supply &amp; Demand</td>
<td>175</td>
</tr>
<tr>
<td>8 Eastern Europe: Fiber Cement Demand by Application</td>
<td>176</td>
</tr>
<tr>
<td>9 Russia: Fiber Cement Supply &amp; Demand</td>
<td>180</td>
</tr>
<tr>
<td>10 Russia: Fiber Cement Demand by Application</td>
<td>181</td>
</tr>
<tr>
<td>11 Poland: Fiber Cement Supply &amp; Demand</td>
<td>184</td>
</tr>
<tr>
<td>12 Poland: Fiber Cement Demand by Application</td>
<td>185</td>
</tr>
<tr>
<td>13 Other Eastern Europe: Fiber Cement Supply &amp; Demand</td>
<td>189</td>
</tr>
<tr>
<td>14 Other Eastern Europe: Fiber Cement Demand by Application</td>
<td>190</td>
</tr>
<tr>
<td>15 Africa/Mideast: Fiber Cement Supply &amp; Demand</td>
<td>194</td>
</tr>
<tr>
<td>16 Africa/Mideast: Fiber Cement Demand by Application</td>
<td>195</td>
</tr>
<tr>
<td>17 Turkey: Fiber Cement Supply &amp; Demand</td>
<td>196</td>
</tr>
<tr>
<td>18 Turkey: Fiber Cement Demand by Application</td>
<td>199</td>
</tr>
<tr>
<td>19 Iran: Fiber Cement Supply &amp; Demand</td>
<td>200</td>
</tr>
<tr>
<td>20 Iran: Fiber Cement Demand by Application</td>
<td>204</td>
</tr>
<tr>
<td>21 Other Africa/Mideast: Fiber Cement Supply &amp; Demand</td>
<td>208</td>
</tr>
<tr>
<td>22 Other Africa/Mideast: Fiber Cement Demand by Application</td>
<td>209</td>
</tr>
<tr>
<td><strong>INDUSTRY STRUCTURE</strong></td>
<td></td>
</tr>
<tr>
<td>1 World Fiber Cement Sales by Company, 2014</td>
<td>213</td>
</tr>
<tr>
<td>Cht World Fiber Cement Market Share, 2014</td>
<td>214</td>
</tr>
<tr>
<td>2 Selected Acquisitions &amp; Divestitures</td>
<td>223</td>
</tr>
</tbody>
</table>
Demand will benefit from fiber cement’s increasing market penetration, based in part on its ability to mimic the appearance of wood while offering greater durability in key applications such as siding.

World demand to rise 4.4% annually through 2019

Through 2019, world demand for fiber cement products is projected to expand 4.4 percent per year to 32.6 million metric tons. While building construction spending, which is the primary driver of fiber cement product demand, is forecast to slow between 2014 and 2019 — especially in the previously rapidly growing Asia/Pacific region — demand will benefit from fiber cement’s increasing market penetration in its various applications. For example, fiber cement’s ability to mimic the appearance of wood while offering greater durability will boost demand in siding applications.

Molding & trim to be fastest growing application

Fiber cement is used primarily in roofing, siding, and molding and trim applications. Demand for these products varies considerably among regions and countries, with additional uses including backerboard, ceilings, countertops, firestop materials, and interior wall cladding. For example, fiber cement roofing is extremely popular in Brazil and India but accounts for only a very small share of total roofing demand in the US. Through 2019, the fastest growth in fiber cement product demand is projected in the molding and trim segment. Fiber cement molding and trim is used primarily in exterior applications. Demand will benefit from fiber cement’s superior performance attributes (such as the ability to withstand harsh weather conditions without rotting or warping, low maintenance requirements, and fireproof characteristics) that will allow fiber cement to gain market share from other materials, such as wood products.

In 2014, roofing comprised the largest market for fiber cement products. Brazil and India are the largest markets for fiber cement roofing products as asbestos based products, which are lower cost, are popular in these countries. However, growing health concerns about products made from asbestos will slow growth in these markets going forward, and fiber cement roofing will lose share in Brazil and India to concrete and clay tile products, which are less expensive than fiber cement roofing products made without asbestos. As a result, demand gains for fiber cement roofing are forecast to be below average through 2019.
Other Regions

Russia: Fiber Cement Supply & Demand -- Demand for fiber cement products in Russia totaled 760,000 metric tons in 2014, making it the largest market in Eastern Europe, accounting for 58 percent of regional demand. Per capita demand for these products is above the regional average, reflecting the higher standards of living and developed construction sector in the country. Between 2009 and 2014, fiber cement product demand in Russia rose 2.2 percent per year, with growth in residential construction spending boosted demand. However, overall gains were limited by declining nonresidential construction activity, which restricted growth in nonresidential construction applications.

Fiber cement product demand in Russia is forecast to advance 1.3 percent annually to 810,000 metric tons in 2019, a deceleration from the rate seen between 2009 and 2014. Residential construction is projected to slow construction spending and demand for fiber cement products, such as siding and molding and trim, in residential construction applications. However, nonresidential construction activity is expected to rebound, boosting demand in new nonresidential construction applications.

Shipments of fiber cement from factories in Russia totaled 970,000 metric tons in 2014, accounting for 64 percent of regional output. During the 2009-2014 period, shipments fell as demand gains for fiber cement in the country slowed. Russia maintained a trade surplus equivalent to 22 percent of demand in 2014.

Fiber cement shipments from Russia plants are forecast to rise 1.5 percent per annum to 1.0 million metric tons, in line with expected demand gains. Local producers will benefit from growing demand in nearby trade partners. As a result, the country’s trade surplus is expected to expand.

### Table VI-3

**CHINA: FIBER CEMENT SUPPLY & DEMAND**

(Thousand metric tons)

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
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<td>Population (millions)</td>
<td>1296</td>
<td>1330</td>
<td>1363</td>
<td>1393</td>
<td>1410</td>
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<tr>
<td>GDP/capita</td>
<td>5250</td>
<td>8770</td>
<td>12840</td>
<td>17380</td>
<td>22660</td>
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<tr>
<td>Gross Domestic Product (bil 2013$)</td>
<td>6803</td>
<td>11664</td>
<td>17500</td>
<td>24210</td>
<td>31950</td>
</tr>
<tr>
<td>m ton fiber cement/000 persons</td>
<td>0.8</td>
<td>1.7</td>
<td>2.8</td>
<td>4.0</td>
<td>5.4</td>
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<tr>
<td>m ton fiber cement/mil $ GDP</td>
<td>0.16</td>
<td>0.20</td>
<td>0.22</td>
<td>0.23</td>
<td>0.24</td>
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<td>Fiber Cement Demand by Market</td>
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<tr>
<td>Residential:</td>
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<td></td>
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<tr>
<td>New</td>
<td>573</td>
<td>1206</td>
<td>1585</td>
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<td>Improvement &amp; Repair</td>
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<td>182</td>
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<tr>
<td>Fiber Cement Shipments</td>
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</tr>
</tbody>
</table>

Source: The Freedonia Group, Inc.
Sample Profile & Table, & Study Coverage

COMPANY PROFILES

Hekim Yapı AŞ
E-5 Karayolu Uzeri Egemen Sokak, No. 11
Guzelyali 34903 Pendik / Istanbul
Turkey
90-216-493-0493
http://www.hekimyapi.com

Annual Sales: $85 million (estimated)
Employment: 550 (estimated)
Key Products: fiber cement sheets and planks, among other products

Hekim Yapı is a privately held manufacturer of fiber cement sheets and planks, among other products, for building applications. The Company is a subsidiary of Hekim Holding AŞ (Turkey).

The Company is involved in the world fiber cement industry via the production and sale of fiber cement sheets, planks, and accessories designed for exterior and interior construction applications. Specific products include HEKIMBOARD and TURKSIDING fiber cement panels which are used in various cladding end uses. HEKIMBOARD cellulose fiber-reinforced autoclaved fiber cement sheets are cement- and silica-based products that are available with smooth or cedar texture surfaces. These sheets are engineered to be fire retardant, non-melting, and water resistant. Other products in the HEKIMBOARD line include siding engineered to duplicate the appearance and texture of natural stone cladding. Hekim Yapı’s TURKSIDING fiber cement sheets are structurally similar to Hekim Yapı’s HEKIMBOARD products, but feature more embellished surfaces for use as a decorative exterior façade.

Additional products from the Company include HEKIMPANEL fiber cement sandwich façade panels, which provide maximum heating,
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Title ____________________________

Company _________________________

Division __________________________

Street ____________________________

City/State/Zip ______________________

Country __________________________

Phone ____________________________

Fax ______________________________

Email ______________________________

Signature __________________________

__________________________________

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Signature __________________________

__________________________________
Profiling the US Brick, Block & Pavers Industry: Forecasts to 2018 and 2023

Introduction

This study analyzes the $5.8 billion US brick, block and pavers market, with forecasts for 2018 and 2023. The market will grow from $5.0 billion in 2013 to $5.8 billion in 2018. The US demand for precast concrete products is forecast to rise 6.4 percent per year to $12.2 billion in 2018. The dominant structural and architectural building component segments will grow the fastest, as they rebound from previous steep declines. The residential market will see average gains in precast concrete roofing tiles, sidings and fencing. This study analyzes the $8.9 billion US precast concrete products industry, with forecasts for 2018 and 2023. The study also evaluates company market share and profiles industry participants.

World Cement

This study analyzes the world cement industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by type (blended, portland, market (residential, nonresidential, nonbuilding, nonconstruction) and US region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

Bricks, Blocks & Pavers

The paver industry, with forecasts for 2018 and 2023 by product, material, market, application and US region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

Asphalt

This study analyzes the US asphalt industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by use (paving, roofing), product (e.g., asphalt cement, asphalt emulsions, cutback asphalt, asphalt shingles, modified bitumen roofing membranes, mopping asphalts, standard asphaltic roofing felts, market (e.g., residential, nonresidential, nonbuilding, nonconstruction) and US region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

Precast Concrete Products

US demand for precast concrete products is forecast to rise 6.4 percent per year to $12.2 billion in 2018. The dominant structural and architectural building component segments will grow the fastest, as they rebound from previous steep declines. The residential market will see average gains in precast concrete roofing tiles, sidings and fencing. This study analyzes the $8.9 billion US precast concrete products industry, with forecasts for 2018 and 2023 by product, market and US region. The study also evaluates company market share and profiles industry competitors.

Roofing

The study analyzes the US roofing industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., asphalt shingles, bituminous low-slope roofing, metal roofing, elastomeric roofing, plastic roofing, roofing tile, wood shingles and shakes), market (e.g., residential, nonresidential) and US region. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry players.

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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 capitalized 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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