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Geosynthetics

US Industry Study with Forecasts for **2019 & 2024**

Study #3289 | June 2015 | \$5300 | 274 pages

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INDUSTRY STRUCTURE

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Growth will be driven by projected rebounds in spending on construction and transportation infrastructure, as well as from environmental regulations designed to prevent the contamination of groundwater.

US demand to grow 3.8% annually through 2019

US demand for geosynthetics is forecast to increase 3.8 percent annually to 1.3 billion square yards in 2019, valued at \$2.5 billion. Projected rebounds in construction spending and expenditures on transportation infrastructure will spark an acceleration in demand. Additional support for growth will come from environmental regulations that focus on preventing harmful materials from contaminating groundwater supplies.

Construction market to outpace infrastructure

Transportation infrastructure represents an important market for geosynthetics, as geotextiles and geogrids find significant use in the construction and repair of the nation's roads and highways. Through 2019, demand growth is expected to lag the overall average, in part due to uncertainty surrounding federal transportation infrastructure funding, which may cause new and reconstruction roadway projects to be put on hold. While geotextiles have long been used in the construction of roadways for their filtration properties, demand for geosynthetics in this market will grow as these products are increasingly used in other applications, including erosion control, roadside drainage, and the construction of retaining walls.

Construction (other than transportation infrastructure) is the largest market for

US Geosynthetics Demand, 2019 (1.3 billion square yards)



Nonwoven
Geotextiles

Woven & Knit
Geotextiles

Geomembranes

Geogrids

Other Geosynthetics

geosynthetics, representing about one-third of total demand in area terms. After a sluggish performance over the 2009-2014 period, growth will be driven by a rebound in building construction and an acceleration in spending for nonbuilding projects. Further bolstering growth will be the increased incorporation of geosynthetics into construction projects due to their ability to reduce long term maintenance costs and increase the lifespan of structures. Geosynthetics are expected to further displace traditional soil and aggregate alternatives in construction applications due to marketing efforts by geosynthetics producers designed to further spread awareness of the cost and performance benefits of geosynthetics.

Geomembranes to be fastest growing products

Geotextiles account for the largest share of geosynthetics demand by area due to their versatility in a wide variety of applications. In value terms, geomembranes account for the greatest share of total sales and are expected to register the fastest growth through the forecast period. Geomembranes find significant use as liners in landfills and are also used in CCP containment and water impoundment applications at shale oil and gas sites. More application-specific products -- geogrids, geonets, geosynthetic clay liners, and geofoams -- are also expected to grow, although from smaller bases.

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Sample Text, Table & Chart

PRODUCTS

Geogrids

Geogrids are made from connected ribs that intersect in regular intervals, creating openings that enable the geogrid to lock with surrounding soil, stone, or other material. Geogrids are made by extruding, punching, or stretching plastics -- most commonly HDPE or polypropylene -- in one or two directions. Geogrids can be made from coated woven or knit high strength polyesters as well as from polyester rods that are laser- or ultrasonically interlocking matrices.

In 2014, geogrids accounted for nine percent of total area demand. Demand for geogrids is forecast to expand

square yards in 2019, benefiting from greater use of these products in various reinforcement and stabilization applications. Geogrids are expected to find increasing use as a cost-effective alternative to deep excavation, chemical stabilization, and other methods of providing support to road beds, building foundations, and other structures. Geogrids are ideal for these applications due to their superior tensile strength and can retain heavy soil and sediment loads. The expected recovery of construction spending and forecast improvement of highway construction expenditures will also provide opportunities. Additionally, the growing scarcity of land and the increasing need to build structures on weak soils or to create steeply sloped vertical retaining walls will drive demand for geogrids.

Geogrids accounted for 17 percent of total demand in 2014. Value demand for geogrids is expected to rise 10 percent annually through 2019 to \$1.5 billion. This growth will largely be related to growth in highway construction. Demand for geogrids is expected to continue to rise, and at least a portion of raw material cost increases will also be bolstered by high

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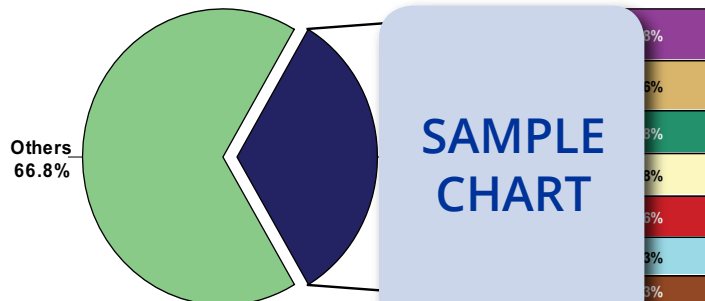
TABLE V-7
SOUTH GEOSYNTHETICS DEMAND BY SUBREGION & MARKET
 (million square yards)

Item	2004	2009	2014	2019	2024
Geosynthetics Demand % South					
South Geosynthetics Demand					
By Subregion:					
South Atlantic					
East South Central					
West South Central					
By Market:					
Construction					
Transportation Infrastructure					
Landfills					
Liquid Containment					
Other Markets					

Source: The Freedonia Group, Inc.

SAMPLE TEXT

CHART VI-1
US GEOSYNTHETICS MARKET SHARE, 2014
 (\$2.0 billion)



SAMPLE CHART

Sample Profile & Table, & Study Coverage

TABLE IV-3
CONSTRUCTION GEOSYNTHETICS DEMAND
 (million square yards)

Item	2004	2009	2014	2019	2024
Construction Expenditures (bil 2009\$) sq yd geosynthetics/000\$ construction					
Construction Geosynthetics Demand					
Geotextiles:					
Nonwoven					
Woven & Knit					
Geogrids					
Other Geosynthetics					
\$/sq yd Construction Geosynthetics (mil \$)					

Source: The Freedonia Group, Inc.

SAMPLE
TABLE

COMPANY PROFILES

Brawler Industries LLC
 11701 County Road 125 West
 Midland, TX 79701
 432-563-4005
<http://www.brawlerindustries.com>

Annual Sales:
 Employment:

Key Products: membranes

SAMPLE
PROFILE

Brawler Industries is a privately held manufacturer and installer of pit liners, tarps, covers, pond liners, and containment membranes for a wide variety of industrial applications. In May 2014, the Company acquired In-Line Plastics LLC (Houston, Texas), a privately held manufacturer of geosynthetic liner systems. Brawler Industries is owned by Tailwind Capital Group LLC (New York, New York), a private equity firm.

The Company is active in the US geosynthetics industry through the production of geosynthetics for the agriculture and energy markets, as well as through the acquisition of In-Line Plastics. Among Brawler Industries' agriculture products are BRAWLER pond and ditch liners, which are designed to strengthen and hold the form of irrigation systems, help contain runoff, capture rainfall, and conserve water. For the energy market, the Company manufactures pit/under rig and frac tank liners, and nonwoven geotextiles that are used under liners for cushioning in rocky environments.

In-Line Plastics' products encompass HERCUSCRIM reinforced liners, HERCULINE smooth geomembranes and HERCUTEX textured geomembranes. HERCUSCRIM reinforced liners are suitable for such

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STUDY COVERAGE

Geosynthetics is a Freedonia study that presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by product, market, and region of the US. The study also considers key market environment factors, assesses the industry structure, details company market share and profiles 36 competitors in the US geosynthetics industry.

Related Studies

Landscaping Products

Demand for landscaping products in the United States is forecast to grow 5.3 percent per year to \$8.2 billion in 2019. Decorative products will remain the largest segment, while hardscape products will continue as the fastest growing. Environmental concerns will favor products such as solar lighting and permeable pavers. This study analyzes the \$6.3 billion US landscaping products industry, with forecasts for 2019 and 2024 by product, market, end user, and US region. The study also evaluates company market share and profiles industry players.

#3300.....August 2015.....\$5300

Specialty Films

This study analyzes the US specialty film industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by function (e.g., barrier, microporous, safety and security, conductive and insulative, light control, biodegradable, water soluble), resin (e.g., polyolefins, polyester, nylon, polyvinyl butyral), and market (e.g., packaging, personal care products, electronics, transportation equipment, construction). The study also considers market environment factors, evaluates company market share and profiles industry competitors.

#3287.....August 2015.....\$5200

World Coated Fabrics

Global demand for coated fabrics will rise 4.6 percent per year to 6.5 billion square meters in 2019. The Asia/Pacific region will remain dominant, while the Central/South America and Africa/Mideast regions will grow the fastest from small bases. The dominant polymer-coated fabric segment will outpace rubber-coated types. This study analyzes the 5.2 billion square meter world coated fabric industry, with forecasts for 2019 and 2024 by product and market for six regions and 19 countries. The study also evaluates company market share and profiles industry players.

#3276.....June 2015.....\$6300

Coated Fabrics

US demand for coated fabrics is projected to advance 3.2 percent per year to 680 million square yards in 2018. The large motor vehicle market will drive gains, promoted by a higher number of air bags -- usually employing silicone-coated nylon -- per light vehicle. Smaller markets such as awnings, canopies and wall coverings will grow the fastest. This study analyzes the 580 million square yard US coated fabric industry, with forecasts for 2018 and 2023 by product, substrate and market. The study also evaluates company market share and profiles industry players.

#3176.....July 2014.....\$5300

World Geosynthetics

Global demand for geosynthetics is expected to rise 8.9 percent per year to 5.2 billion square meters in 2017. Developing regions will be the fastest growing markets, with the Asia/Pacific region remaining the largest. Construction will be the largest and fastest growing application, especially in the key China and US markets. This study analyzes the 3.4 billion square meter world geosynthetics industry, with forecasts for 2017 and 2022 by product, market, world region, and for 19 countries. The study also evaluates company market share and profiles industry players.

#3108.....December 2013.....\$6100

About The Freedonia Group

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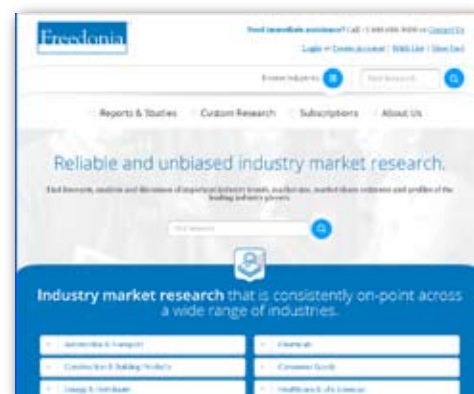
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