Outdoor Noise Barriers

US Industry Study with Forecasts for 2019 & 2024

Study #3334 | September 2015 | $5200 | 207 pages
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US demand to rise 3.7% annually through 2019

Demand for outdoor noise barriers in the US is forecast to rise 3.7 percent annually to 9.5 million square feet in 2019, valued at $191 million. Advances will be spurred by population growth in rural and suburban areas. As home builders take advantage of lower land costs and the promise of convenient highway access to erect residences and commercial structures in proximity to highways and roads, state departments of transportation (DOTs) will erect outdoor noise barriers alongside highways to mitigate loud noises and enhance the quality of life for those in surrounding buildings.

Concrete highway barriers to remain dominant types

Concrete products dominate noise barrier demand, with 92 percent of the total in 2014. Transportation construction professionals often specify concrete because of its moderate cost, ready availability, and sound absorbing qualities. Precast concrete panels -- which accounted for the largest share of outdoor noise barrier demand in 2014 -- will continue to take share from other concrete products, such as concrete masonry units and formed-in-place concrete. Precast concrete panels can be mass-produced to meet specific performance and aesthetic requirements. Indeed, state DOTs are expected to increasingly specify precast panels that resemble more attractive materials, such as brickwork or dressed stone.

Metal products account for the second-largest share of outdoor noise barriers, primarily due to their extensive use in airports. However, plastic noise barriers are anticipated to see the most rapid demand growth -- after concrete -- because transparent plastic panels allow travelers and the owners of structures located along highways to view wildlife and surrounding scenic vistas.

Highways account for the vast majority of outdoor noise barrier installations in the US. DOTs generally install noise barriers along highways and roads because of their moderate cost compared to other sound mitigation strategies and their proven ability to reduce traffic noise. Moreover, once installed, outdoor noise barriers seldom require replacement or repair, providing long-term savings. This is an advantage over such sound-reducing products as rubberized asphalt paving materials, which are not only initially more expensive, but often require maintenance after just a decade of use.

Airports held the second largest share of outdoor noise barrier demand in 2014. Noise barriers -- such as metal ground runup enclosures -- are often installed in and around airports to reduce jet engine noise. However, concerns about security and visibility often encourage airport managers to opt for sound mitigation strategies other than noise barriers.
The Northeast region consists of two subregions: New England and the Middle Atlantic. Historically, the region’s economy was based in manufacturing. Through the latter half of the 20th century and into the early years of the new millennium, manufacturing activity declined in importance, as many producers relocated to areas with lower production 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 to take manufacturing’s place include high technology and financial services. Shale gas production has become important in the Middle Atlantic (especially in Pennsylvania). Because of the shifting focus on these newer industries, as well as some revival in manufacturing activity (due in part to a shift toward higher value products), the region’s economy is forecast to grow 4.1 percent per year through 2019. Nevertheless, population growth in the Northeast will be significantly slower than that in the South and West, a continuation of a long term trend.

Demand for outdoor noise barriers in the Northeast is projected to rise at a faster pace than that of the South; 3.0 percent annually to 810,000 square feet in 2019, the least rapid pace of all US regions. The Northeast region saw a high level of outdoor noise barrier construction in the 1990s and the first decade of the 21st century. Thus, going forward, it will be unlikely that additional barriers will need to be erected in the region, as most of these barriers are fairly new and will not be likely to require replacement or repairs due to normal wear and damage. Below-average population growth in the region will also serve to restrain demand for outdoor noise barriers in the Northeast. As fewer people are expected to move to areas that were once rural and sparsely populated, there will be less impetus to request the installation of outdoor noise barriers near residences.

### TABLE III-2
**OUTDOOR NOISE BARRIER DEMAND BY VALUE**

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nonbuilding Construction Expend (bil $)</td>
<td>164</td>
<td>267</td>
<td>281</td>
<td>360</td>
<td>455</td>
</tr>
<tr>
<td>$ barrier/mil expend</td>
<td>793</td>
<td>436</td>
<td>511</td>
<td>531</td>
<td>525</td>
</tr>
<tr>
<td>Outdoor Noise Barrier Demand (mil $)</td>
<td>130</td>
<td>116</td>
<td>144</td>
<td>191</td>
<td>239</td>
</tr>
<tr>
<td>Concrete</td>
<td>118</td>
<td>102</td>
<td>125</td>
<td>168</td>
<td>210</td>
</tr>
<tr>
<td>Metal</td>
<td>9.5</td>
<td>8.7</td>
<td>11.5</td>
<td>14.0</td>
<td>17.1</td>
</tr>
<tr>
<td>Wood</td>
<td>1.9</td>
<td>0.6</td>
<td>0.7</td>
<td>0.8</td>
<td>0.9</td>
</tr>
<tr>
<td>Other</td>
<td>0.4</td>
<td>4.5</td>
<td>6.4</td>
<td>8.2</td>
<td>10.5</td>
</tr>
<tr>
<td>$/sq ft</td>
<td>14</td>
<td>16</td>
<td>18</td>
<td>20</td>
<td>22</td>
</tr>
<tr>
<td>Outdoor Noise Barrier Demand (000 sq ft)</td>
<td>9330</td>
<td>7300</td>
<td>7895</td>
<td>9490</td>
<td>10660</td>
</tr>
</tbody>
</table>

Addendum:
- Outdoor Noise Barrier Coatings (mil $) 6.8 6.0 6.8 8.8 10.7
- Outdoor Noise Barrier Supports (mil $) 3.3 2.5 3.1 4.2 5.2

Source: The Freedonia Group, Inc.

### TABLE V-9
**WEST OUTDOOR NOISE BARRIER DEMAND**

<table>
<thead>
<tr>
<th>(thousand square feet)</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Urban Highways (000 miles)</td>
<td>198</td>
<td>225</td>
<td>250</td>
<td>273</td>
<td>293</td>
</tr>
<tr>
<td>sq ft barrier/mile</td>
<td>15.1</td>
<td>5.7</td>
<td>9.1</td>
<td>10.1</td>
<td>10.7</td>
</tr>
<tr>
<td>West Outdoor Noise Barrier Demand (000 sq ft)</td>
<td>2981</td>
<td>1290</td>
<td>2279</td>
<td>2770</td>
<td>3145</td>
</tr>
<tr>
<td>By Subregion: Mountain</td>
<td>2503</td>
<td>376</td>
<td>1284</td>
<td>1565</td>
<td>1785</td>
</tr>
<tr>
<td>Pacific</td>
<td>478</td>
<td>914</td>
<td>995</td>
<td>1205</td>
<td>1360</td>
</tr>
<tr>
<td>By Market: Highway</td>
<td>2895</td>
<td>1190</td>
<td>2203</td>
<td>2686</td>
<td>3054</td>
</tr>
<tr>
<td>Other Nonbuilding</td>
<td>83</td>
<td>98</td>
<td>74</td>
<td>81</td>
<td>88</td>
</tr>
<tr>
<td>Building Construction</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>% West</td>
<td>32.0</td>
<td>17.7</td>
<td>28.9</td>
<td>29.2</td>
<td>29.5</td>
</tr>
</tbody>
</table>

Outdoor Noise Barrier Demand 9330 7300 7895 9490 10660

Source: The Freedonia Group, Inc.
Faddis Concrete Products manufactures concrete and metal noise barriers, fencing, lintels and security products for residential, commercial and industrial applications. The Company is privately held.

The Company’s highway noise barriers are sold through the ACOUSTACRETE, STONEWALL, ANGLEWALL, ACOUSTAL, and ACOUSTACLEAR product lines. Faddis makes ACOUSTACRETE noise barrier panels using its proprietary ACOUSTACRETE absorptive concrete, a durable product produced from recycled aggregates and specialty Portland cement mixtures. This material eliminates sound reflections from single walls and reverberations between opposing parallel walls. Panels made using ACOUSTACRETE concrete feature noise reduction coefficients (NRCs) of 0.70 or higher, and can be fastened to existing surfaces with concrete anchors and widths up to 24 feet. ACOUSTACRETE noise barrier panels are available in a wide variety of patterns and colors, including brick, field stone, tree bark, graphic design, fluted, and ashlar stone styles. These barriers are suitable for such applications as highways, railroads, airports, power plants, industrial facilities, and ballistic practice and testing areas. In addition, ACOUSTACRETE barriers are available in 6-, 7-, and 8-foot heights for use as screen wall and fencing noise barriers.

TABLE IV-2

HIGHWAY MARKET FOR OUTDOOR NOISE BARRIERS

(Thousand square feet)

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban Highway Mileage (000 miles) sq ft barrier/mile</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Highway Noise Barrier Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Product:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Concrete</td>
<td>8712</td>
<td>6715</td>
<td>7151</td>
<td>8653</td>
<td>9739</td>
</tr>
<tr>
<td>Metal</td>
<td>92</td>
<td>52</td>
<td>94</td>
<td>109</td>
<td>122</td>
</tr>
<tr>
<td>Wood</td>
<td>239</td>
<td>75</td>
<td>79</td>
<td>85</td>
<td>90</td>
</tr>
<tr>
<td>Other</td>
<td>27</td>
<td>243</td>
<td>331</td>
<td>383</td>
<td>429</td>
</tr>
<tr>
<td>By Application:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Replacement</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$/sq ft</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Highway Noise Barrier Demand (mil $)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% highway</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outdoor Noise Barrier Demand (mil $)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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market share and profiles industry players.
and US region. The study also evaluates company
with forecasts for 2018 and 2023 by material, market
ylates the 717 million linear foot US fencing industry,
building construction expenditures. This study ana
segment, based on strong gains in nonresidential
residential market will outpace the leading residential
Metal will remain the dominant material while plastic
to $9.0 billion in 2018, totaling 875 million linear feet.
US demand for fencing will rise 7.0 percent per year

#3373

World Siding (Cladding)
The global siding market is projected to grow 4.2
percent yearly through 2019 to 5.9 billion square me-
ters, valued at $80 billion. North America will post the
fastest market gains while the Asia/Pacific region will
account for half of additional global demand. Metal, 
viny, stucco and EIFS siding will grow the fastest. This 
study analyzes the 4.8 billion square meter world 
siding industry, with forecasts for 2019 and 2024 by 
product and market/application for six world regions 
and 20 major countries. The study also evaluates 
company market share and profiles industry players.

#3327 ... September 2015 ................. $6500

World Housing
Worldwide construction of new housing units is 
forecast to increase 3.0 percent annually to 2.3 billion 
units in 2019. North America and Western Europe will 
see the fastest growth from a depressed 2014 base. 
On a global basis, new construction of multifamil-
ity units will outpace single-family units. This study 
analyzes the 2.1 billion unit world housing industry, 
with existing stock and new unit forecasts presented 
for 2019 and 2024 by type in six world regions and 20 
major countries. The study also considers economic 
trends, demographics, and other market factors.

#3312 ... July 2015 ................. $5900

World Fiber Cement
World demand for fiber cement products is forecast to 
rise 4.4 percent annually to 32.6 million metric tons in 
2019. Molding and trim and siding will be the fastest 
growing applications, based on fiber cement’s ability 
to look like wood but last longer. North America will 
be the fastest growing regional market. This study 
analyzes the 2.63 million metric ton world fiber ce-
ment industry, with demand forecasts for 2019 and 
2024 by market and application in 6 world regions 
and 19 countries. The study also evaluates company 
market share and profiles industry players.

#3273 ... May 2015 ................. $6300

Fencing
US demand for fencing will rise 7.0 percent per year 
to $9.0 billion in 2018, totaling 875 million linear feet. 
Metal will remain the dominant material while plastic 
and composite fencing will grow the fastest. The non-
residential market will outpace the leading residential 
segment, based on strong gains in nonresidential 
building construction expenditures. This study ana-
yzes the 717 million linear foot US fencing industry, 
with forecasts for 2018 and 2023 by material, market 
and US region. The study also evaluates company 
market share and profiles industry players.

#3224 ... November 2014 ................. $3300

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