

World Roofing

Industry Study with Forecasts for 2020 & 2025

Study #3399 | May 2016 | \$6600



New building construction, building codes to impact worldwide demand

Size and growth of the world roofing market depend on building construction activity, as roofing materials are used on new buildings as well as in repair and reroofing of existing structures. New building construction and the types of new buildings influence demand for roofing materials on new structures, while the stock of existing buildings supports demand for replacement roofing. In many areas, residential and nonresidential buildings tend to have a different mix of materials, due to aesthetic concerns and construction methods, impacting roofing demand and distribution among materials.

A variety of other factors influence demand for roofing as well as the types of roofing used, including local, regional, and national building codes; concerns about the environmental impact of roofing materials; raw material and product pricing trends; new materials and products; local climate conditions; and local aesthetic preferences.

Growth in developed regions to offset projected slowdown in China, other developing countries

Going forward, accelerating growth in developed regions, including North America and Western Europe, will offset

an expected slowdown in demand growth in China, the world's largest market for roofing materials. China's boom in new building construction is expected to taper after a decade of robust growth; however, roofing demand in the country is still expected to register healthy growth. Many other developing countries, including India, Indonesia, and Iran can also expect strong advances, especially in the nonresidential market.

Roofing demand in developed regions is expected to improve after several years of weakness following the global economic recession. In North America and Western Europe, a recovery in new housing construction will be a particularly important driver of advances in roofing material demand.

Study coverage

This study analyzes the world roofing industry. It presents historical data (2005, 2010 and 2015) plus forecasts (2020 and 2025) in square meters and in value for supply and demand, as well as demand by product and market, for 6 regions and 18 countries. The study also considers market environment factors, assesses industry structure, analyzes company market share and profiles industry competitors such as Beijing Oriental Yuhong Waterproof Technology, Berkshire Hathaway (Johns Manville), Etex, GAF Materials, Monier, Owens Corning, Saint-Gobain and Wienerberger.

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Tables for each region/country offer historical demand data (2005, 2010, 2015) plus forecasts (2020, 2025) for:

Roofing Supply & Demand

Roofing Demand by Product

Roofing Demand by Market

... plus macroeconomic Indicators

Charts include:

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1 World Roofing Market Share, 2015

TABLE IV-1

NORTH AMERICA: ROOFING SUPPLY & DEMAND

Item	2005	2010	2015	2020	2025
Population (mil persons)					
per capita GDP					
Gross Domestic Product (bil 2014\$)					
Building Construction Expend (bil 2014\$)					
Residential					
Nonresidential					
m ² roofing/capita					
m ² roofing/mil \$ GDP					
m ² roofing/000\$ construction					
Roofing Demand (mil m ²)					
\$/m ²					
Roofing Demand (mil \$)					
net exports					
Roofing Shipments (mil \$)					

Source: The Freedonia Group

NORTH AMERICA

North America: Roofing Supply & Demand

Demand for roofing materials in North America totaled 22 percent of the global total. North America is the second largest regional market for roofing material after the Asia/Pacific region. While demand for roofing materials in 2015 was higher than the 2010 level, it remained below the 2005 peak. Roofing demand declined between 2005 and 2010 largely due to a downturn in residential construction activity in the region and experienced a spotty recovery through 2015. The US dominated regional roofing demand -- accounting for 85 percent of the market -- reflecting the country's large economy, population, construction activity and stock of existing buildings. Overall, declines in the US market which bottomed out in 2014, were mitigated by growth in Canada and Mexico, which did not experience the same intense economic recession over that time period.

Through 2020, demand for roofing materials in the United States will grow at an average annual rate of five percent. The market will post a net import of roofing materials. The region will remain a net importer of roofing products, but a sharp decrease in imports to the US due to the housing market collapse led to the region showing a trade surplus between 2008 and 2013, as US manufacturers sought out overseas markets for their products in the face of depressed domestic demand. However, by 2015, the region was again a small net importer.

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TABLE IV-2

**NORTH AMERICA: ROOFING DEMAND BY PRODUCT
(million square meters)**

Item	2005	2010	2015	2020	2025
Roofing Demand					
Bituminous:					
Shingles & Plates					
Low-Slope Bituminous					
Tile:					
Concrete					
Clay					
Metal					
Fiber Cement					
Elastomeric					
Plastic					
Other					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Related Studies

World Construction Aggregates

World demand for construction aggregates will rise 5.2 percent annually to 51.7 billion metric tons in 2019. Crushed stone, recycled concrete, fly ash, and slag will grow at twice the pace of sand and gravel. Hydraulic concrete will remain the largest application. Gains will be fastest in the Asia/Pacific market. This study analyzes the 40.2 billion metric ton world construction aggregate industry, with forecasts for 2019 and 2024 by product and application for six regions and 22 major countries. The study also evaluates company market share and profiles industry players.
#3389..... March 2016..... \$6300

Siding

US siding demand is forecast to rise 5.6 percent annually to 100 million squares in 2019, valued at \$10.7 billion. Gains will be driven by a rebound in housing completions and an acceleration in the residential replacement market. Vinyl siding will remain the largest category by volume, but will lose market share to stucco and fiber cement siding. This study analyzes the 76.2 million square US siding industry, with forecasts for 2019 and 2024 by material, market and region. The study also evaluates company market share and profiles industry participants.
#3374..... January 2016..... \$5500

World Asphalt (Bitumen)

Through 2019, global demand for asphalt is projected to expand 2.8 percent per year to 122.5 million metric tons. The Asia/Pacific region has overtaken North America as the largest regional market, and will continue to record the fastest advances. Asphalt roofing products will outpace the dominant paving products segment. This study analyzes the 107 million metric ton world asphalt (bitumen) industry, with forecasts for 2019 and 2024 by product for six world regions and 18 major countries. The study also evaluates company market share and profiles industry players.
#3351..... November 2015..... \$6500

Insulation

US insulation demand will rise 6.6 percent annually through 2019 to \$10.3 billion. The residential market will grow the fastest, while the nonresidential market will recover from recent declines. Fiberglass and foamed plastic insulation will continue to claim the vast majority of the market, with foamed plastic growing slightly faster than fiberglass. This study analyzes the \$7.5 billion US insulation industry, with forecasts for 2019 and 2024 by product, market and US region. The study also evaluates company market share and profiles industry participants.
#3332..... September 2015..... \$5400

Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

About The Freedonia Group

The Freedonia Group 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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