

# Commercial Roofing

## US Industry Study with Forecasts for 2020 & 2025

Study #3452 | September 2016 | \$4900



### Plastic roofing overtakes bituminous roofing

Plastic roofing is now the leading commercial roofing material installed in the US, and will post above-average gains in demand through 2020. Demand for plastic roofing will be supported by its ease of installation, favorable performance properties, and suitability for use as cool roofing. Concerns about the shortage of trained installers will cause contractors to continue to expand the use of products with peel-and-stick backings, especially plastic (TPO) and elastomeric products.

### Cool roofing gains attention

Cool roofing will play a key role in the selection of roofing materials, particularly in the South and West, where summers are longer and hotter. White- and light-colored membranes and metal products will benefit. Building professionals will continue to look at the roof as part of the building envelope and see it is a key element in reducing energy use. In addition to cool roofing, roofing with attached insulation or waterproofing membranes will exhibit solid gains.

### Bituminous membranes to face strong competition

Bituminous membranes, which have seen their share of the US commercial roofing market drop in the face of strong competition from single-ply roofing, will continue to experience falling demand through 2020. Declines in

the number of built-up roofing (BUR) systems installed on newly erected buildings will affect demand. The reroof segment will continue to support bituminous roofing demand, as there is a large stock of structures with installed BUR systems. As these roofing products become damaged or worn, roofing professionals will generally opt for such products as self-adhering polymer-modified bituminous membranes as a replacement material.

### Steep-slope roofing products to exhibit good growth

Demand for steep-slope roofing materials used in commercial applications is forecast to advance at a more rapid pace than that for low-slope roofing through 2020. Use of these roofing products -- primarily asphalt shingles and metal shingles and tiles -- will be driven by rising office, retail, and lodging construction spending. Many low-rise structures in this market segment incorporate residential features to create more aesthetically pleasing exteriors.

### Study coverage

This study analyzes the US commercial roofing market. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by roofing material (plastic, elastomeric, bituminous membrane), product (low-slope, steep-slope), market (new, reroofing, building type) and US region. In addition, the study assesses key market environment factors, examines the industry structure and analyzes company market share.

## CONTENTS SUMMARY

### Executive Summary

### Market Environment

### General Roofing Trends

- Roofing Market Outlook
- Pricing Trends
- International Activity & Foreign Trade
- Regulatory & Environmental Considerations
  - Building Codes
  - ENERGY STAR
  - Cool Roofing
  - LEED & Other Systems
  - Solar Energy

### Commercial Roofing Overview

- Product Types
  - Low-Slope
  - Steep-Slope
- Historical Market Volatility
- Key Product Trends
  - Popularity of Single-Ply Membranes
  - Cool Roofing Products
  - Insulated Roofing Materials
- Key Drivers of Demand
  - Growth in New Nonresidential Construction Activity
  - Reroofing Activity
  - Increasing Use of Single-Ply Roofing Systems
  - Storm-Related Reroofing Activity
- Installation Costs

### Plastic Roofing

- Demand by Resin Type
  - TPO
  - PVC
  - Other Resins
- Demand by Region
- Demand by Market
- Product Development Efforts
- Market Share

### Bituminous Membranes

- Demand by Product Type
  - Polymer-Modified Bitumen Membranes
  - Standard Roofing Felts
- Demand by Region
- Demand by Market
- Product Development Efforts
- Market Share

### Elastomeric Roofing

- Demand by Resin Type
  - EPDM
  - Other Resins
- Demand by Region
- Demand by Market
- Product Development Efforts
- Market Share

### Low-Slope Metal Roofing

- Demand by Type
  - Standing Seam
  - Metal Panels
- Demand by Region
- Demand by Market
- Product Development Efforts
- Market Share

### Other Low-Slope Roofing Products

- Demand by Type

- Tensioned Fabric
- Vegetative Roofing
- All Other Products
- Demand by Region
- Demand by Market
- Product Development Efforts
- Market Share

### Steep-Slope Roofing Products

- Demand by Type
  - Asphalt Shingles
  - Metal Products
  - Other
- Demand by Region
- Demand by Market
- Product Development Efforts
- Market Share

### Markets

- New
  - Market Forecast
  - Demand by Slope
  - Demand by Region
- Reroofing
  - Market Forecast
  - Demand by Slope
  - Demand by Region
- Demand by Building Type
  - Office, Retail, & Lodging
  - Institutional
  - Industrial
  - Transportation & Other

### Regions

- Regional Demographic & Economic Trends
- Regional Commercial Roofing Demand
  - Northeast
  - Midwest
  - South
  - West

### Distribution Channels

- Specialty Retailers
- Direct Sales
- Other Channels

### Industry Structure

- Market Share
- Competitive Strategies
- Manufacturing
- Marketing
- Mergers & Acquisitions
- Cooperative Agreements

## TABLES SUMMARY

### Executive Summary

- 1 Summary Table

### General Roofing Trends

- 1 Roofing Demand by Construction Sector
- 2 Selected Commercial Roofing Product Prices
- 3 US Commercial Roofing Products Foreign Trade

### Commercial Roofing Overview

- 1 Commercial Roofing Demand by Slope
- 2 Commercial Roofing Market, 2005-2015
- 3 Installation Costs of Selected Roofing Products

### Plastic Roofing

- 1 Plastic Roofing Demand by Product Type
- 2 TPO Roofing Demand
- 3 PVC Roofing Demand

- 4 Other Plastic Roofing Products Demand
- 5 Plastic Roofing Demand by Region
- 6 Plastic Roofing Demand by Market

### Bituminous Membranes

- 1 Bituminous Membrane Demand by Product Type
- 2 Polymer-Modified Bitumen Membrane Demand by Material Type & Surface
- 3 Polymer-Modified Bitumen Membrane Demand by Product Type
- 4 Standard Roofing Felt Demand by Material Type & Surface
- 5 Bituminous Membrane Demand by Region
- 6 Bituminous Membrane Demand by Market

### Elastomeric Roofing

- 1 Elastomeric Roofing Demand by Product Type
- 2 EPDM Roofing Demand
- 3 Other Elastomeric Resins Roofing Demand
- 4 Elastomeric Roofing Demand by Region
- 5 Elastomeric Roofing Demand by Market

### Low-Slope Metal Roofing

- 1 Low-Slope Metal Roofing Demand by Product Type
- 2 Low-Slope Metal Roofing Demand by Region
- 3 Low-Slope Metal Roofing Demand by Market

### Other Low-Slope Roofing Products

- 1 Other Low-Slope Roofing Products Demand by Product Type
- 2 Other Low-Slope Roofing Products Demand by Region
- 3 Other Low-Slope Roofing Products Demand by Market

### Steep-Slope Roofing Products

- 1 Steep-Slope Roofing Products Demand by Product Type
- 2 Steep-Slope Roofing Products Demand by Region
- 3 Steep-Slope Roofing Products Demand by Market

### Markets

- 1 Commercial Roofing Demand by Market
- 2 New Commercial Roofing Demand by Product Type
- 3 New Commercial Roofing Demand by Region
- 4 Commercial Reroofing Demand by Product Type
- 5 Commercial Reroofing Demand by Region
- 6 Commercial Roofing Demand by Building Type
- 7 Office, Retail, & Lodging Roofing Demand by Application & Product
- 8 Institutional Roofing Demand by Application & Product
- 9 Industrial Roofing Demand by Application & Product
- 10 Transportation & Other Roofing Demand by Application & Product

### Regions

- 1 Population by Region
- 2 Gross Domestic Product by Region
- 3 Construction Expenditures by Region
- 4 Commercial Roofing Demand by Region
- 5 Northeast: Roofing Demand by Subregion & Product
- 6 Midwest: Roofing Demand by Subregion & Product
- 7 South: Roofing Demand by Subregion & Product
- 8 West: Roofing Demand by Subregion & Product

### Industry Structure

- 1 US Commercial Roofing Sales by Company, 2015
- 2 Selected Acquisitions & Divestitures

### BITUMINOUS MEMBRANES

**Demand by Surface** -- Standard roofing felts are offered in several models with both smooth surfaces and those with a top layer of mineral or ceramic granules. Smooth-surfaced and other standard membranes accounted for the larger share of standard roofing felt demand in 2015 with 68 percent. These products are used as base and mid-ply layers in BUR systems and are often used in conjunction with polymer-modified bitumen membranes as base sheets. Demand for these membranes is anticipated to fall through 2020, indicative of the decrease in installation of BUR systems.

Granule-surfaced roofing felts are used as cap sheets on multiple roofing systems and as the primary roofing material on commercial structures where only a modest level of protection against the elements is needed. These membranes have comparable performance properties as smooth-surface felts, with the layer of granule surfacing serving to deflect sunlight, keeping structures cooler in summer months while minimizing degradation caused by exposure to ultraviolet radiation. Demand for granule-surface membranes is expected to decline through 2020 as competition from light-colored white or light-colored thermoplastic

### Demand by Region

The South was the largest roofing market in 2015 with 36 percent of total demand. Traditionally seen as a region with high resistance to moisture, the South's lengthy coastline means that many areas are subject to severe storms that bring heavy rainfalls and high winds. Many structures have BUR systems with several plies to ensure maximum protection against moisture. Through 2020, though, demand for bituminous

©2016 by MarketResearch.com, Inc. - All rights reserved

TABLE XI-2

### NEW COMMERCIAL ROOFING DEMAND BY PRODUCT TYPE (million squares)

Item	2005	2010	2015	2020	2025
New Commercial Roofing Demand					
Low-Slope Roofing Products:					
Plastic Roofing					
Bituminous Membranes					
Elastomeric Roofing					
Metal Roofing					
Other Products					
Steep-Slope Roofing Products					
\$/square					
New Commercial Roofing Demand (mil \$)					

Source: The Freedonia Group

TABLE V-2

### TPO ROOFING DEMAND (million squares)

Item	2005	2010	2015	2020	2025
Plastic Roofing Demand					
% TPO roofing					
TPO Roofing Demand					
\$/square					
TPO Roofing Demand (mil \$)					

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

### Residential Roofing

US demand for residential roofing is forecast to rise 4.4 percent per year to 147 million squares in 2020, valued at \$10.4 billion. Homeowners will respond to improved lending conditions and engage in previously delayed reroofing projects. Asphalt will remain the top roofing material, while metal roofing and roofing tiles will post the fastest gains. This study details the 121 million square US market for roofing, giving forecasts for 2020 and 2025 by type, market, US region, and distribution channel. The study also reviews industry structure and evaluates company market share.

#3436..... August 2016..... \$4900

### World Roofing

Global demand for roofing materials is forecast to rise 2.9 percent per year through 2020 to 13.8 billion square meters, valued at \$124 billion. The residential market will see slower gains than the nonresidential market, largely due to decelerating residential construction in China. This study presents historical demand data (2005, 2010, 2015) plus forecasts (2020, 2025) by product, material and system in six regions and 19 major countries. The study also considers market environment factors, evaluates company market share and profiles industry players worldwide.

#3399..... May 2016..... \$6600

### 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

### Roofing

US demand for roofing is projected to advance 3.9 percent annually to 252 million squares in 2019, valued at \$21.4 billion. Asphalt shingles will remain dominant while roofing tiles, metal roofing, and plastic roofing will grow the fastest. The new building construction market will outpace reroofing, and residential roofing demand will outpace nonresidential. This study analyzes the 208 million square US roofing industry, with forecasts for 2019 and 2024 by product, market and US region. The study also evaluates company market share and profiles industry players.

#3293..... June 2015..... \$5500

## Contact Freedonia

1.800.927.5900 (US & Canada)

+1 440.684.9600 (Int'l)

email: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

website: [freedoniagroup.com](http://freedoniagroup.com)

## 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:

Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

## The Freedonia Group is a division of MarketResearch.com

## About MarketResearch.com

With offices in London, New York City, and Washington D.C., [MarketResearch.com](http://MarketResearch.com) is the leading provider of global market intelligence products and services. With research reports from more than 720 top consulting and advisory firms, [MarketResearch.com](http://MarketResearch.com) offers instant online access to the world's most extensive database of expert insights on industries, companies, products, and trends.



Market  
Research.com

[Click here to purchase study online](#)