

Roofing Underlay Market in the US

US Industry Study with Forecasts for 2020 & 2025

Study #3473 | November 2016 | \$4900



Synthetic underlays to see strong gains, overtaking asphaltic types

Synthetic underlay usage will experience rapid gains through 2020, overtaking asphaltic products as the underlays most often installed in the US. Demand for synthetic roofing underlays will be spurred by their favorable performance properties. Synthetic underlays are highly resistant to tearing and moisture, with the vast majority featuring “self-healing” properties that minimize the incidence of leaks. In addition, many synthetic underlays feature peel-and-stick backings and slip-resistant surfaces that reduce the time and expense of installation.

Demand for asphaltic roofing underlays is forecast to fall due to the heavy competition from synthetic products. However, the low per-square cost of asphaltic products and high level of contractor familiarity will support demand going forward.

Residential building construction to remain dominant market

Residential building construction applications accounted for nearly three-quarters of roofing underlay demand in 2015. The new housing segment is expected to see the more rapid growth through 2020 on the strength of solid increases in single-family housing starts. Most of these residences have steep-slope roofs and are required by building codes to have underlays to protect roof decks from moisture-related damage.

The residential reroofing market will remain the leading application for roofing underlays. The nation's large number of older homes with roofs at or near the end of their expected product lifespans will aid reroofing demand for underlays. In many cases, roofing contractors will also replace old or worn underlays with synthetic membranes.

Commercial construction applications accounted for just over one-fourth of underlay demand in 2015, supported by the many office, retail, and institutional structures with steep-slope roofs. Nearly all of these roofs include underlays. Going forward, the increasing use of low-slope metal roofing in commercial structures will stimulate demand. Roofing underlays are often specified with metal roofing to impart additional protection to roof decks from damage caused by moisture and ultraviolet radiation

Study coverage

This Freedonia industry study analyzes the \$1.2 billion US roofing underlay industry. It presents historical demand data (2005, 2010, and 2015) plus forecasts (2020 and 2025) by product (asphaltic and synthetic), market (new and reroofing, residential and commercial), and barrier property (water-resistant and waterproof). Asphaltic underlays are further detailed in terms of product type (#15 roofing felt, #30 roofing felt, and #40 roofing felt, and other) and backing material (fiberglass, organic, and plastic), while synthetic underlays are discussed in terms of polymer (polypropylene and all other). The study also evaluates company market share and competitive analysis on US industry competitors.

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REGIONS

Northeast

The Northeast region consists of two subregions: New England and the Middle Atlantic. Historically, the region's economy was based on manufacturing. Through the latter half of the 20th century and into the early years of the new millennium, manufacturing activity decreased 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 in manufacturing's place include high technology and financial services. Natural gas production has become important in the Middle Atlantic (especially in Pennsylvania). Focus on these newer industries in Pennsylvania, New Jersey, and New York has helped shift the region's economic growth. Never slow, the Northeast trend.

The Northeast is anticipated to see an increase in reroofing applications, which accounted for the larger share of underlay demand in the region in 2015, will continue to do so going forward. Factors supporting underlay use in the reroofing segment include:

- The region's large number of older homes and commercial structures with roofs nearing the end of their product lifespan
- Harsh, wet winters that cause freeze/thaw cracking that can prematurely degrade roofing

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TABLE VI-1

ROOFING UNDERLAY DEMAND BY MARKET (million squares)

Item	2005	2010	2015	2020	2025
Roofing Demand sqsq underlay/sqs roofing					
Roofing Underlay Demand Residential Commercial					
\$/square Roofing Underlay Demand (mil \$)					

SAMPLE TABLE

Source: The Freedonia Group

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ASPHALTIC ROOFING UNDERLAY DEMAND BY PRODUCT TYPE

Item	2005	2010	2015	2020	2025
Asphaltic Roofing Underlays (mil sqs) #15 Roofing Underlays #30 Roofing Underlays Other Roofing Underlays					
\$/sq #15 roofing underlay \$/sq #30 roofing underlay \$/sq other roofing underlay					
Asphaltic Roofing Underlays (mil \$) #15 Roofing Underlays #30 Roofing Underlays Other Roofing Underlays					

SAMPLE TABLE

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

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Related Studies

World Drywall & Building Plaster

Global demand for drywall is forecast to rise 4.0 percent per year through 2020 to 10.0 billion square meters. Over one-third of new drywall demand generated between 2015 and 2020 will be in China. Worldwide demand for building plaster is projected to rise 3.7 percent yearly to 37.1 million metric tons in 2020. This world study details the 8.2 billion square meter drywall market and the 31 million metric ton building plaster market, with forecasts by market for 2020 and 2025 in 6 regions and 21 countries. The study also assesses the industry structure and evaluates market share.

#3464..... October 2016 \$6300

Commercial Roofing

US demand for commercial roofing products is forecast to advance 1.6 percent yearly through 2020 to 110 million squares, valued at \$7.8 billion. Reroofing applications will continue to account for the majority of demand, as many of these products feature enhanced performance properties or serve as cool roofing to lower utility bills. The study offers historical data plus demand forecasts for 2020 and 2025 by product, application and US region. The study also examines the market environment, assesses the industry structure, and analyzes company market share.

#3452..... September 2016 \$4900

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, as metal roofing and roofing tiles will see the fastest gains. This study details the 121 million square US market for roofing, providing forecasts for 2020 and 2025 by type, market, US region, and distribution channel. The study also reviews the 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 advances than the nonresidential market, largely due to decelerating residential construction in China. The study presents historical demand data (2005, 2010, 2015) plus forecasts for 2020 and 2025 by product, material and system in six world regions and 19 major countries. The study also considers market environment factors, evaluates company market share and profiles global players.

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

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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

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