

# Roofing Distribution in the US

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## Industry Study with Forecasts for 2021

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Study #3497 | March 2017 | \$4900

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Growth in US roofing distributors' sales will be aided by:

- an overall increase in building construction activity
- the increasing role that small- and medium-sized contractors play in roof installation, as these firms mostly purchase roofing from distributors
- distributors' efforts to carry more high-value products, such as laminated asphalt shingles and metal products

### Residential market to lead gains

The residential market accounted for the larger share of roofing distributors' sales in 2016 and will post rapid sales growth through 2021. Strong gains in housing starts and rising homeowner interest in home renovation projects will boost roof installation jobs.

### Severe weather boosted sales for distributors in 2016

The South region of the US experienced a number of severe weather events in 2016. Hailstorms in Texas, tornadoes and thunderstorms in Alabama and Mississippi, and the winds and rains of Hurricane Matthew late in the year caused widespread roof damage. Distributors saw sharp sales gains as contractors ordered large quantities of material to make repairs. Further severe weather outbreaks will support future distributors' sales, as most repair jobs are performed by small-sized local roofing contractors.

### Market share gains by industry leaders spurred by acquisitions

Leading roofing distributors have used acquisitions to increase sales by adding locations and entering new regional markets. For example, ABC Supply's purchase of Norandex Building Materials gave ABC Supply over 100 new locations across the US. Beacon Roofing Supply's acquisitions of Woodfeathers and American Building & Roofing expanded its hold in the Pacific Northwest. Four roofing distributors -- ABC Supply, Beacon Roofing Supply, Allied Building Products, and SRS Distribution -- accounted for the vast majority of roofing sales in the US.

### Study coverage

**Roofing Distribution** presents historical demand data plus forecasts for 2021 by sales channel (roofing distributors and direct sales), market (residential and commercial), and product type (asphalt shingles, roofing tile, metal roofing, wood shingles and shakes, bituminous membranes, plastic, elastomeric, and other). Sales of roofing are discussed at the subregional level, with further analysis provided for state markets. The leading roofing distributors in each subregion and state are identified. Roofing distributors discussed in the study include ABC Supply, Allied Building Products, Beacon Roofing Supply, BlueLinx, Builders' FirstSource, GulfEagle Supply, Home Depot, Lowe's, and SRS Distribution.

## OVERVIEW

### Roofing Demand Trends by Market

Demand for roofing in the US is forecast to annually grow by 1.5% through 2021. Growth will be boosted by such factors as:

- particularly those of single-family housing construction expenditures
- renovation and improvement projects, such as reroofing.

and at the manufacturers' level is forecast to grow by 1.5 billion in 2021. Gains will be driven by increasing use of high-value materials, especially in the residential market. Such products as laminated asphalt shingles, metal shingles and panels, and concrete and clay roofing tiles are chosen because of their aesthetic and performance properties, such as superior resistance to winds, moisture, and impacts.

Demand for roofing in area terms fell between 2011 and 2015 as a result of a decline in reroofing activity, particularly in the residential market. However, in value terms, roofing demand rose sharply during this period due to a significant increase in the use of higher cost laminated asphalt shingles in place of traditional three-tab shingles. Consumers (particularly homeowners looking to improve the look and durability of their roofs) showed a willingness to add laminated shingles, despite their higher cost. Demand for laminated asphalt shingles was boosted by their favorable aesthetic and performance properties, such as:

- a textured, three-dimensional appearance that enhances the curb appeal of a home
- their ability to be made to look like slate or wood shingles and shakes
- enhanced resistance to damage caused by the elements

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Table 3-4 | New England: Residential Roofing Distributors' Sales by Product Type, 2006 - 2021 (million dollars)

Item					% Compound Annual Growth		
	2006	2011	2016	2021	06-11	11-16	16-21
New England Residential Roofing Demand % sold by distributors							
New England Res Roofing Distributors' Sales							
Asphalt Shingles							
Metal Roofing							
Wood Shingles & Shakes							
Other Steep-Slope Products							
Low-Slope Roofing							

Source: The Freedonia Group

Figure 8-4 | East South Central: Roofing Distributors' Sales by State, 2016 (million dollars)



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

Table 4-5 | Middle Atlantic: Commercial Roofing Distributors' Sales by Product, 2006 - 2021 (million dollars)

Item					% Compound Annual Growth		
	2006	2011	2016	2021	06-11	11-16	16-21
New England Commercial Roofing Demand % sold by distributors							
New England Comm Roofing Distributors' Sales							
Bituminous							
Low-Slope Metal							
Elastomeric							
Plastic							
Other Products							
Steep-Slope Roofing							

Source: The Freedonia Group

# The Freedonia Group

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- Siding Market in the US
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Study with historical data plus forecasts for 2021

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March 2017

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## Related Studies

### Roofing Underlay in the US

US demand for roofing underlays is forecast to rise 3.4 percent per year to 215 million squares in 2020. Synthetic underlay usage will exhibit rapid gains, overtaking asphaltic products as the most often used underlay in the US. New residential building construction applications will grow the fastest, though residential reroofing will remain the leading market. This study assesses the 181.1 million square US market, with demand forecasts for 2020 and 2025 by product and application. The study also examines the market environment and analyzes company market share.

#3473..... November 2016 ..... \$4900

### 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 will rise 4.4 percent per year to 147 million squares in 2020. Homeowners will respond to improved lending conditions and engage in previously delayed reroofing projects. Asphalt will remain the leading roofing material, while metal roofing and roofing tiles will exhibit 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 analyzes company market share.

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

### World Roofing

Global demand for roofing materials will 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. This study presents historical demand data (2005, 2010, 2015) plus forecasts (2020, 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 industry players worldwide.

#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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