

US outlook for

Asphalt Products & Markets

with forecasts to 2005 and 2010

New study finds:

- *US demand for asphalt is forecast to advance two percent per annum through 2005 to 42.7 million tons, requiring 219 million barrels of primary asphalt.*
- *Reroofing demand will offer the best opportunities for gains over the forecast period. Asphalt shingles and modified bitumen roofing will post the fastest advances through 2005.*
- *Four companies held nearly 35 percent of total US asphalt refining capacity as of January 2001: Marathon Ashland Petroleum, BP, ChevronTexaco and CITGO.*

Freedonia Industry Study #1486

Asphalt Products & Markets

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Asphalt Products & Markets, a new study from The Freedonia Group, provides you with an in-depth analysis of major trends in the industry and the outlook for product segments and major markets -- critical information to help you with strategic planning.

This brochure gives you an indication of the scope, depth and value of Freedonia's new study, *Asphalt Products & Markets*. Ordering information is included on the back page of the brochure.

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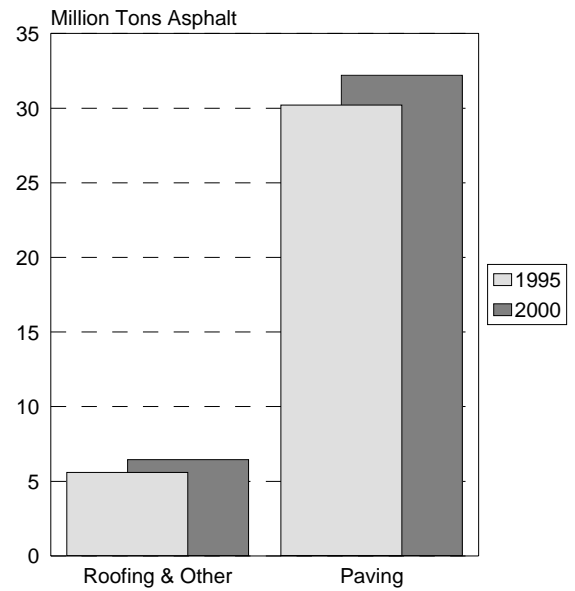
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Study Highlights

- US demand for asphalt is forecast to advance two percent per annum through 2005 to 42.7 million tons, requiring 219 million barrels of primary asphalt.
- Advances in paving applications will be driven by federal, state and local highway construction and maintenance programs, with funding in part from the Transportation Equity Act of the 21st Century (TEA-21).
- Reroofing demand will offer the best opportunities for gains over the forecast period. Asphalt shingles and modified bitumen roofing will post the fastest advances through 2005.
- Among regional markets, the South will remain the largest user of asphalt, due to above-average population increases and slightly better economic prospects, generating demand for highway expansions and repair, as well as providing a better environment for building construction activity.
- Four companies held nearly 35 percent of total US asphalt refining capacity as of January 2001: Marathon Ashland Petroleum, BP, ChevronTexaco and CITGO.

Study Highlights

Asphalt Products Demand, 1995 Versus 2000



Asphalt Demand by Product

(thousand tons asphalt content)

Item	1995	2000	2005	2010	% Annual Growth	
					00/95	05/00
Total Construction Expend (bil 1996\$)	569.6	706.5				1.4
tons asphalt/mil \$ expend	63					
Asphalt Products Demand	35800					
Paving	30200					
Roofing & Other	5600					
bbls/ton	5.1					
Primary Asphalt Demand (mil bbls)	182.2					
\$/ton	215					
Asphalt Products Shpts (mil \$)	7680	14,000				5.0

SUMMARY TABLE

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Market Environment/ Technology & Regulatory Issues

These Sections discuss factors influencing asphalt products demand, including petroleum industry and construction trends, as well as regulatory issues.

This information provides you with an understanding and an analysis of the climate in which the asphalt products industry operates.

MARKET ENVIRONMENT

Asphalt Product Pricing Trends

Prices of asphalt roofing and paving products depend upon both construction-related demand conditions and the price of primary asphalt, which is itself linked to the price of petroleum. In 1992, asphalt prices fell sharply from their peak in 1990. The past two-decade period has been characterized by depressed construction activity in the U.S. and abroad, however, asphalt cement prices rose steadily through 1997. Pricing fell slightly in 1998 and remained

SAMPLE PAGE

an climbing again, but increases in 2000 were due to rising construction activity.

TECHNOLOGY & REGULATORY ISSUES

Regulations

Numerous raw materials used in manufacturing asphalt paving and roofing materials are subject to regulation as hazardous materials. Organic solvents used to reduce the viscosity of asphalt emulsions are regulated as volatile organic compounds (VOCs). Concerns about VOC emissions from asphalt emulsions relative to cutback asphalts in residential and commercial applications. The Environmental Protection Agency (EPA) has taken action to restrict the manufacture and use of cutback asphalts for paving or maintaining roads, streets, highways and parking lots. Cutback asphalt can only be manufactured and applied if it is to be used at an ambient temperature of less than 50 degrees Fahrenheit and be used as a penetrating prime coat, a sand seal coat or a tack coat. Other uses and application of cutback asphalt are prohibited.

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Hot-mix asphalt plants have been subject to increasingly stringent regulations on emissions. New drying and processing technologies have been developed to avoid the "blue smoke" emissions from recycling asphalt pavements in hot-mix plants. Regulations in some states on the handling of water from wet scrubber anti-pollution equipment may make this form of control prohibitively expensive and lead to a switch to baghouses to capture fine particles. Other environmental regulations require investments at hot-mix asphalt plants to control storm water runoff. In addition, new hot-mix asphalt plants must reduce stack emissions of

upstream price of primary asphalt in residential and commercial applications. A variety of alternatives to asphalt paving products help to reduce price swings in product price that are due to construction activity and crude oil prices.

Asphalt paving and roofing prices have risen, however, pricing gains will be offset by decreases and price volatility for asphalt. More pronounced for asphalt paving is the percent annual growth rate, while asphalt paving product prices are up nearly five percent growth rate since 1990s, while asphalt paving product prices in terms of 1990s.

Products

The Product Sections provide demand for historical years and forecast growth to 2005 and 2010.

This information helps you:

- Analyze your company's growth potential in the industry.
- Outline your strategic plans for five and ten years out.
- Establish sales goals.

PRIMARY ASPHALT SUPPLY & DEMAND

Paving Asphalts

Paving asphalt comprises asphalt cements, asphalt emulsions and cutback asphalts, three products that differ in the method used to reduce the viscosity of the refined asphalt and that can be modified to alter its performance characteristics. Also included are asphalt block pavers, asphalt-based pavement modifiers, geotextiles and crack fillers.

Demand for paving asphalt is expected to advance 2.2 percent per year through 2005, representing 1.5 percent of total primary asphalt demand. Paving asphalt demand is projected to reach 21 million tons by 2005, a six-year increase (approximately 40 percent) in feedstock for highways and bridges, as well as mass transit and demonstration projects. TEA-21 will expire at the end of the 2003 fiscal year. However, the enactment is being considered for reauthorization, which would positively impact the paving asphalt segment in the longer term. In inflation-adjusted terms, nonbuilding construction expenditures are expected to accelerate over 1995-2000 levels, posting 3.3 percent gains annually through 2005 that will be driven primarily by construction of highways and streets. Maintenance projects on existing roads will also contribute to healthy gains for paving asphalt. Despite the positive outlook for paving asphalt, this segment will continue to face anti-sprawl sentiment and environmental concerns which will generate opposition to

Asphalt Modified Bitumen Roofing -- Roofing Demand

(thousand tons)

Item	1990	1995	2000	2005	2010
Nonres Bldg Constr Expend (bil 1996\$)	219.0	200.1	210.0	220.0	230.0
squares/000\$ expend	0.05	0.05	0.05	0.05	0.05
Asphalt Mod Bit Shpts (mil sq)	11.6	11.6	11.6	11.6	11.6
squares/ton asphalt	24.4	24.4	24.4	24.4	24.4
Mod Bit Asphalt Content (000 tons)	475	522	570	618	666
\$/square	42.7	37.9	33.1	28.3	23.4
\$/ton asphalt	1040	1040	1040	1040	1040
Asphalt Mod Bit Shpts (mil \$)	495	495	495	495	495
% mod bit	14.2	14.2	14.2	14.2	14.2
Asphalt Roofing Prdt Shpts (mil \$)	3495	3995	4495	4995	5495

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Markets

The Market Sections analyze trends and consider the threats and opportunities in each of the major markets for asphalt products.

The information presented will help you:

- Focus your sales and marketing efforts on high growth areas.
- Propose new areas for development.

ASPHALT MARKETS BY REGION

West - Pacific Region

The Pacific subregion consists of Alaska, California, Hawaii, Oregon and Washington. This area saw even faster population growth than the Mountain states over the past several decades, providing a larger base. This was not the case in the 1990s, however, as the region experienced a period of economic restructuring. Growth in the Pacific subregion had kept pace with population growth in a relatively prosperous environment. However, decreased federal spending on defense contracts and increased competition from overseas electronic components suppliers adversely affected these important industries, and resulted in layoffs, plant closings and increased unemployment in parts of the subregion. Following an extended restructuring period in the early and mid 1990s, the diverse and technologically advanced economy of the area was able to absorb most of these dislocations.

Nonresidential Building Replacement & Maintenance -- Asphalt Demand

(thousand tons asphalt content)

Item	1990	1995	2000	2005	2010
Nonres Bldg R & I Expend (bil 1996\$)	111.7	115.9	120.0	125.0	130.0
tons/mil \$ expend	33	37	40	43	45
Nonresidential Bldg R & M Demand	3705	3800	3900	4000	4100
Roofing Products:	1555	1600	1650	1700	1750
Asphalt Shingles	310	320	330	340	350
Asphalt Built-Up Roofing	780	805	830	855	880
Modified Bitumen Roofing	320	335	350	365	380
Roll Roofing	25	25	25	25	25
Other Roofing	120	120	120	120	120
Paving & Other Asphalt Products	2150	2200	2250	2300	2350
% replacement & maintenance	50.2	51.0	51.8	52.5	53.2
Nonres Bldg Asphalt Demand	7375	7415	7455	7495	7535

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Industry Structure

Gain a better understanding of your competition and analyze your company's position in the industry with information about:

- industry composition
- market share
- manufacturing
- * product development
- marketing & distribution
- mergers & acquisitions
- cooperative agreements

INDUSTRY STRUCTURE

Marketing & Distribution

Asphalt is a fairly mature product that is considered commodity in nature. Therefore, performance and price are key considerations when developing a marketing campaign. Marketing strategies include advertisements in industry trade publications and on the Internet, as well as the use of videos, brochures, instructional materials and press releases for a particular asphalt mix, additive or roofing material.

SAMPLE PAGE

In the paving segment, distinctive performance characteristics, such as flexibility, durability, strength and appearance, can be highlighted in magazine advertisements, Internet website postings, informational news articles, press releases or technical papers. Each venue reaches a different audience, allowing the firm to disseminate information regarding its product development (or enhancement in many cases) to a broader range of individuals. Other marketing strategies include the outsourcing of marketing functions. A number of asphalt producers are also integrated petroleum refiners, which in many cases combine marketing and refining operations into one segment or a joint venture. For example, BP is active in the asphalt industry through its Refining and Marketing segment. Marathon Ashland Petroleum (Ashland and USX) and Equilon (Royal Dutch/Shell and ChevronTexaco) joint ventures function as both refiners and marketers of petroleum products, including asphalt.

In the asphalt roofing segment, price, performance, ease of installation and appearance are important considerations in marketing of the product. This segment faces stiffer competition from other materials than asphalt paving products. As a result, marketing aimed at product differentiation is more important to asphalt roofing manufacturers. However, these firms also employ many of the same methods as asphalt paving producers (e.g., advertisements, trade magazines, the Internet, press releases, etc.), as well as other avenues such as

Company Profiles

The Profiles Section analyzes 29 companies active in the U.S. asphalt products market. These profiles represent a sampling or cross-section of the types of companies involved in the industry.

Divisions, subsidiaries, joint ventures, etc., are discussed under appropriate parent companies.

Sources for profiles included:

- Information provided by key staff members in the respective companies
- Annual reports
- 10-K reports
- Security analysts reports
- Corporate product literature

COMPANY PROFILES

Hood Companies

15 Professional Parkway
Hattiesburg, MS 39402
601-582-4486

Atlas Roofing Corporation
802 Highway 19 North, Suite 190
Meridian, MS 39307
601-484-8900
<http://www.atlasroofing.com>

Hood is a holding company consisting of Atlas Roofing Corporation, Hood Industries Incorporated, McQuesten Company, Southern Bag Corporation LLC and QPF LLC. The privately-held company has estimated a revenue of \$100 million. Hood employs approximately 4,800.

The Company is active in the US asphalt industry through Atlas Roofing Corporation subsidiary. Atlas Roofing is a global manufacturer of roofing and insulation products, with shingle-production centers in Hampton, Georgia; Meridian, Mississippi; Franklin, Ohio; Ardmore, Oklahoma; Quakertown, Pennsylvania; and Daingerfield, Texas.

Atlas Roofing manufactures asphalt-fiberglass shingles, as well as roofing felts and roll-roofing products for residential applications. The company's shingles are marketed through the PINNACLE, CHALET, PLAINSMAN, GLASSMASTER and WEATHERMASTER product lines. Standard features of Atlas' shingles include T-LOK designs, which feature interlocking patterns for maximum wind resistance; self-sealing adhesive strips; and laminated surfaces with dark granules for a three-dimensional appearance.

PINNACLE shingles are offered in three varieties and are laminated for durability and to protect against fire and the elements. CHALET and PLAINSMAN three-

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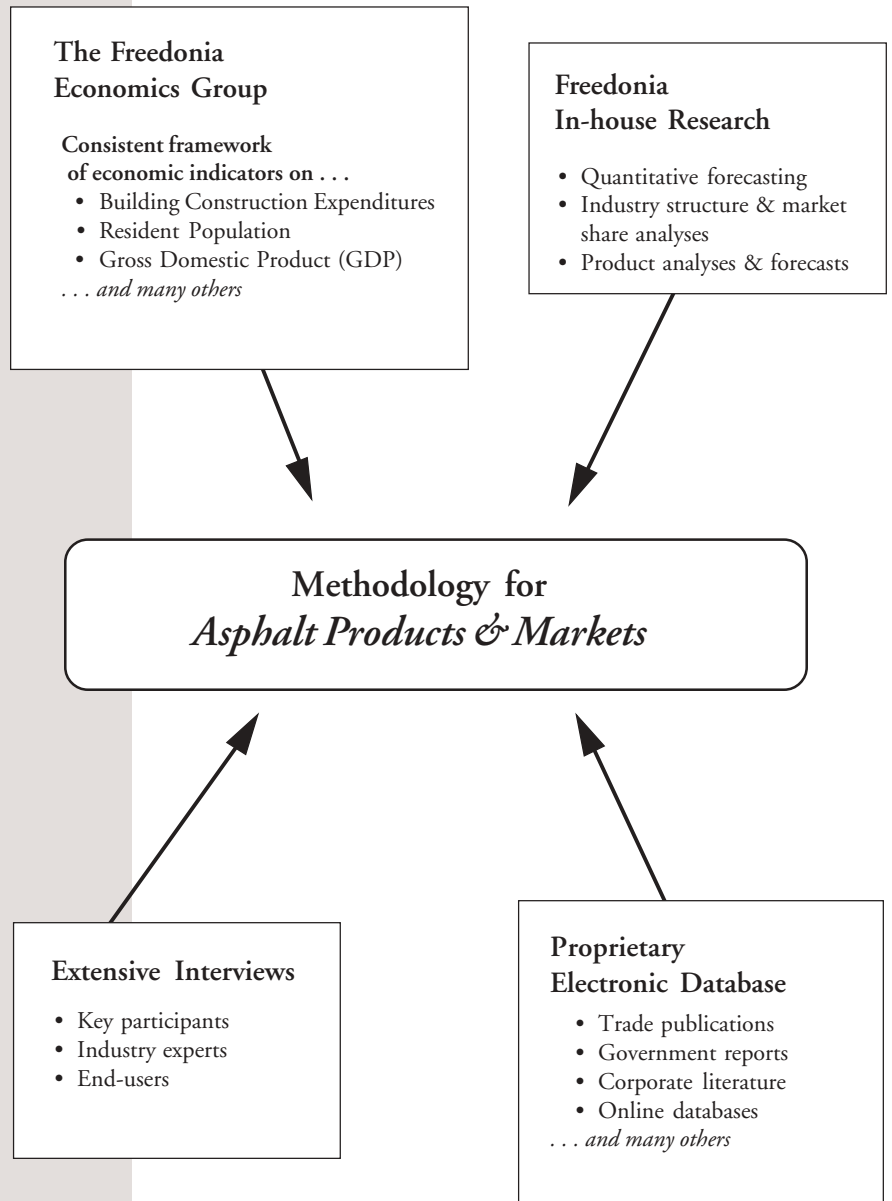
Companies Profiled

Ashland Incorporated
Marathon Ashland Petroleum LLC
Vitina Rock Company
Berkshire Hathaway Incorporated
Johns Manville Corporation
Bouygues Group
Branscome Incorporated
Colas Incorporated
BP plc
Bridgestone Corporation
Firestone Building Products Company
ChevronTexaco Corporation
Caltex Corporation
Equilon Enterprises LLC
Equiva Trading Company
Conoco Incorporated
KC Asphalt
CRH plc
Des Moines Asphalt and Paving
Dolomite Group
Hallet Materials
Mount Hope Rock Products
Northern Ohio Paving Company
Oldcastle Materials Incorporated
Shelly Company
Thompson-McCully
DuPont (EI) de Nemours
El Paso Corporation
Coastal Corporation
Eloor Corporation
Elk Corporation
Exxon Mobil Corporation
Dexco Polymers
Fortum Corporation
G-I Holdings Incorporated
Building Materials Corporation of America
GAF Corporation
Hanson plc
Aggrock Quarries Incorporated
Davon Incorporated
Tufco Ready Mix Incorporated

Hood Companies
Atlas Roofing Corporation
Koch Industries Incorporated
KC Asphalt
NK Asphalt Partners
Vulcan-Koch Asphalt Marketing LLC
Lafarge SA
Owens Corning
Petroleos de Venezuela SA
CITERCO
CITGO Petroleum Corporation
Royal Dutch/Shell Group of Companies
Equilon Enterprises LLC
Equiva Trading Company
Shell Oil Company
RPM Incorporated
Tremco Group
Saint-Gobain
CertainTeed Corporation
Tanko Roofing Products Incorporated
Total Fina Elf SA
United Refining Company
Vulcan-Koch Asphalt Marketing LLC
USX Corporation
Marathon Ashland Petroleum LLC
Marathon Oil Company
Valero Energy Corporation
Huntway Refining Company
Ultramar Diamond Shamrock Corporation
Vulcan Materials Company
Tarmac America Incorporated

Forecasting Methodology

Freedonia does not just collect and reprint data; Freedonia develops data. Our analysts thoroughly investigate an industry by extensively interviewing key industry participants and analyzing information from sources such as associations, government and trade literature. Once this research is complete, Freedonia establishes one set of forecasts. All writing, editing and forecasting is done in-house to assure quality and consistency. In cases where data does not exist, Freedonia develops the data based on input/output ratios, bills of materials and flow charts. The following chart summarizes Freedonia's methodology:



About The Freedonia Group

Advantages of Freedonia Reports

The Freedonia Group, Inc. is a leading international industry study/database company.

Since 1985, Freedonia has published over 1,600 titles covering areas such as chemicals, coatings and adhesives, building materials, plastics, industrial components and equipment, health care, packaging, household goods, security, and many other industries.

Freedonia has produced a wide variety of titles, including:

- *Nonresidential Prefabricated Building Systems*
- *Roofing*
- *Siding*
- *World Asphalt*

Because Freedonia is a reliable information source, our forecasts are cited in numerous publications such as *The Wall Street Journal*, *RSI (Roofing Siding Insulation)*, *National Home Center News* and *Purchasing*.

In-house operations

Because all of our staff work at the same location, interaction between analysts and departments provides a strong system of checks and balances.

Consistency

Our Economics Group develops indicators that are used by all analysts. Therefore, every Freedonia study is based on a consistent set of economic assumptions (GDP, resident population, building construction expenditures, etc.)

Reliable forecasts

Because all of our forecasts consider the environment in which a product or industry is operating, as well as threats and opportunities to the market, Freedonia forecasts are reliable indicators of future performance.

One-on-one interviews

All studies are produced by conducting interviews with key industry participants and end-users.

Proprietary electronic database

Freedonia's analysts can tap into an extensive in-house electronic database containing corporate literature (including private company information), trade publications, government reports and many other sources of information.

About Our Customers

Freedonia's clients include major US and international companies in the manufacturing, services, consulting and financial sectors.

Typical purchasers of Freedonia studies :

- **Key Executives**
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- **Market Researchers**
- **Financial Analysts**
- **Information Centers**
- **New Product Developers**
- **Merger & Acquisition Specialists**

Since 1985 we have provided research to customers ranging in size from global conglomerates to one person consulting firms. More than 90% of the industrial companies in the Fortune 500 use Freedonia research to help with their strategic planning.

Some of Freedonia's customers in the asphalt products market include: BP, CertainTeed, CITGO, Oldcastle, Owens Corning, and Vulcan Materials.

Other Titles From Freedonia

For more information about these or other Freedonia titles, please contact us at:

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World Asphalt

This study investigates the global market for primary asphalt (bitumen) and related products (e.g., paving, roofing). It presents historical data (1990, 1995 and 2000) and forecasts to 2005 and 2010 by type, geographic region and key individual country. Primary asphalt is generally refined from crude petroleum, but naturally occurring deposits of asphalt (native asphalt) also can be exploited. The study also identifies and profiles the major industry participants and discusses key strategic competitive variables.

#1507. 1/02. \$4,500

Cement & Concrete Additives

The US cement and concrete additive market will grow 6.7% annually through 2005. Gains in concrete will be driven by higher performance requirements, increasing use in building materials, and growing federal highway spending. Synthetic fiber additives, superplasticizers and specialty accelerators will be among the fastest growing types. This study analyzes the \$901 million US cement and concrete additives industry to 2005 and 2010 by product and market. It also details market share and profiles key firms.

#1465. 9/01. \$3,900

Prefabricated Housing

US demand for manufactured, panelized, modular and precut housing will outpace site-built housing through 2005, when prefabricated will account for 30% of all housing starts. The cost advantages of factory production such as improved scheduling, bulk purchasing of materials, and insulation from weather delays, will aid demand. This study analyzes the \$17 billion US prefabricated housing industry to 2005 and 2010 by product and region. It also presents market share data and profiles leading producers.

#1458. 8/01. \$3,600

Nonresidential

Prefabricated Building Systems

US demand for nonresidential prefabricated building systems will rise to \$11.5 billion in 2005. Metal buildings will remain dominant, aided by separately-sold components used with non-metal framing. Modular buildings will lead other types as innovations allow for more complex, multistory facilities with various facades. This study analyzes the US nonresidential prefabricated building systems industry to 2005 and 2010 by type, market and region. It also details market share and profiles key companies.

#1443. 8/01. \$3,600

Glass Fibers

Demand for glass fibers in the US will reach 6.8 billion pounds in 2005. Best opportunities are expected for textile glass in reinforced plastics applications based on advantages over competitive materials (e.g., light weight, corrosion resistance, favorable cost/performance profile). Demand for fiberglass insulation will slow due to decelerating housing starts. This study analyzes the \$5.4 billion US glass fiber industry to 2005 and 2010 by product and market. It also details market share and profiles key companies.

#1428. 6/01. \$3,700

Siding

Demand for exterior cladding in the US will reach 109 million squares in 2005. Fiber cement will be the star performer, experiencing unit gains of nearly 5% annually and continuing to wrest market share from wood and vinyl. However, vinyl will remain the market leader, benefiting from expenditures on residential remodeling. This study analyzes the \$8.6 billion US siding industry to 2005 and 2010 by material, market and region. It also profiles selected industry participants and presents market share data.

#1413. 4/01. \$3,700

Roofing

The best opportunities in roofing will be found in reroofing applications, which account for three-quarters of demand. Thermoplastic membrane roofing will grow the fastest, with thermoplastic polyolefin (TPO) making inroads against built-up roofing and elastomeric roofing. Asphalt shingles will remain the dominant roofing material. This study analyzes the \$9.6 billion US roofing industry to 2005 and 2010 by product, market, and geographic region. It also profiles key companies and presents market share data.

#1394. 3/01. \$3,700

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