

New construction

2006-07

Annual Market Survey

- Other single plies
- Spray polyurethane foam
- Liquid-applied
- Metal—structural
- Metal—architectural
- APP-modified bitumen
- SBS-modified bitumen
- Clay tile
- Concrete tile
- Fiberglass
- Asphalt

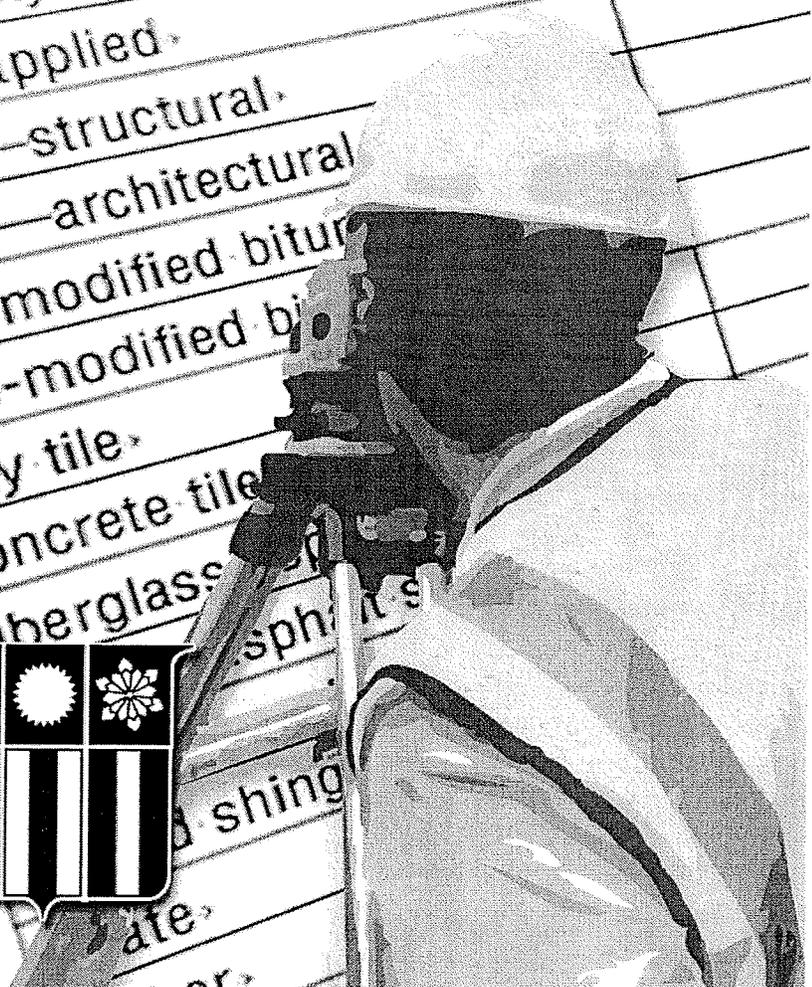
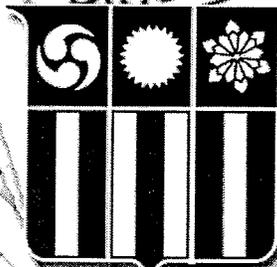


Table of Contents

Introduction	1
Background	1
Regional Data	1
Respondent Details	1
Roof System Percentages	2
Percentages of Low-slope Roofing Sales by Roof System Type	2
Percentages of Steep-slope Roofing Sales by Roof System Type	2
Percentages of Low-slope Insulation and Roof Deck Installation by Material Type	3
Percentages of Low-slope Insulation Installation by Material Type	3
Percentages of Roof Deck Installation by Material Type	3
Percentages of Roof Cover-board Insulation	3
Regional Data	
New England	4
Mid-Atlantic	6
South Atlantic	8
East North Central	10
East South Central	12
West North Central	14
West South Central	16
Mountain	18
Pacific	20
Alaska, Hawaii, Puerto Rico and U.S. Virgin Islands (A,H, PR and VI)	22
Historical Data	
Low-slope	24
Steep-slope	25

Introduction

For its 2006-07 market survey, NRCA gathered information about roofing contractors' experiences and material usage, including overall sales volume trends, as well as sales of types of roof systems for low- and steep-slope new construction, reroofing, repair and maintenance work.

Background

In April 2007, NRCA mailed survey questionnaires to about 3,000 NRCA member roofing contractors to obtain data and compare contractors' experiences in 2006 with their experiences in—and expectations for—2007. NRCA received 399 responses for a response rate of 13 percent, a slightly lower rate than in 2006 but sufficient enough to provide information for a general view of the market. NRCA's market survey is not a statistically valid analysis of the U.S. roofing market; it is only a summary of feedback provided by contractors with respect to trends in sales volumes and the types of roof systems installed.

Regional Data

Responses were categorized by the following U.S. regions:

New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont

Mid-Atlantic: New Jersey, New York and Pennsylvania

South Atlantic: Delaware; Florida; Georgia, Maryland; North Carolina; South Carolina; Virginia; Washington, D.C.; and West Virginia

East North Central: Illinois, Indiana, Michigan, Ohio and Wisconsin

East South Central: Alabama, Kentucky, Mississippi and Tennessee

West North Central: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota

West South Central: Arkansas, Louisiana, Oklahoma and

Texas

Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming

Pacific: California, Oregon and Washington

Alaska, Hawaii, Puerto Rico and U.S. Virgin Islands (A, H, PR and VI)

Respondent Details

The respondents' sales volumes for 2006 and 2007 averaged \$8,455,150 and \$8,697,806, respectively. These volumes were almost double of what was reported for 2004-2005 (\$4,483,433). Although regionally there were variances in the annual sales volume projections from 2006 to 2007 (see figure below), all but three regions had optimistic views for an expected overall average increase of sales for 2007.

When looking at the breakout of roofing work performed (low-slope vs. steep-slope), the results were similar to those reported in the 2004-05 report (66.56 percent low-slope and 33.44 percent steep-slope). The 2006-07 survey revealed only a slight change from the earlier report. For 2006, respondents identified 66.52 percent of their roofing sales as being low-slope (3:12 or less) and 33.48 percent as being steep-slope (greater than 3:12), and their predictions for 2007 were identical.

When broken down into new construction, reroofing, and repair and maintenance work, the low-slope figures reported for 2006 held were in line with the projections for 2007, as well as with figures reported in 2004-05. On average, for 2006, respondents reported 28 percent of their low-slope work as being new construction, 60 percent of their work as reroofing, and 12 percent of their work as repair and maintenance work. The steep-slope figures reported for 2006 also were in line with 2007 projections; respondents reported an average of 29 percent of their steep-slope work was in new construction, 60 percent was reroofing, and 11 percent was repair and

Regional sales volumes

Region	2006 reported average of annual sales volume (in millions of dollars)	2007 projected average of annual sales volume (in millions of dollars)	2006-07 percentage of projected increase in sales volume
New England	\$5.767	\$6.192	7.37%
Mid-Atlantic	\$4.113	\$4.382	6.54%
South Atlantic	\$8.070	\$7.548	-6.47%
East North Central	\$18.730	\$19.814	5.79%
East South Central	\$6.274	\$5.831	-7.06%
West North Central	\$5.476	\$5.526	0.91%
West South Central	\$8.039	\$8.561	6.49%
Mountain	\$7.411	\$7.935	7.07%
Pacific	\$8.761	\$9.281	5.94%
A, H, PR and VI	\$3.625	\$3.300	-8.97%
All Regions	\$8.455	\$8.698	2.87%

maintenance work.

Roof System Percentages

As in the 2004-05 Market Survey report, the 2006-07 survey results for low-slope roof systems show EPDM as the market leader in 2006 with a reported 27 percent share for new construction and a 25 percent share for reroofing work. In second place for 2006 were TPO systems, with a 16 percent share of new construction and a 14 percent share of the re-

roofing work. As such, TPO systems surpassed SBS-polymer-modified bitumen systems, the second-place system reported for 2004-05. The projections reported for 2007 in the types of roof systems used for low-slope roofing were similar with regard to percentages (see figure below).

2006 and projected 2007 low-slope roofing sales by roof system type				
Material type	2006		2007	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	15.77%	17.01%	14.32%	16.69%
BUR—coal tar (hot-applied)*	0.49%	0.65%	0.39%	0.51%
BUR—cold process*	1.83%	2.77%	1.74%	3.16%
EPDM	27.03%	24.85%	26.90%	24.32%
PVC	5.71%	6.27%	6.16%	6.83%
TPO	16.26%	14.06%	18.15%	14.61%
Spray polyurethane foam	2.09%	2.86%	2.04%	3.14%
Metal—structural	1.56%	1.03%	1.43%	1.05%
Metal—architectural	7.98%	4.86%	8.45%	5.28%
APP-polymer-modified bitumen	7.69%	8.49%	7.02%	7.59%
SBS-polymer-modified bitumen	11.63%	13.82%	11.56%	13.17%
Other	1.97%	3.35%	1.83%	3.62%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

On average, fiberglass asphalt shingles appear to dominate both categories (new construction and reroofing) in the 2006 steep-slope market and are projected to do so in 2007, as well.

Architectural metal roof systems hold a steady second across the board.

2006 and projected 2007 steep-slope roofing sales by roof system type				
Roof system type	2006		2007	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	47.49%	58.24%	44.37%	56.98%
Organic asphalt shingle	1.03%	1.30%	1.05%	1.16%
Clay tile	4.22%	3.41%	4.63%	3.38%
Concrete tile	8.44%	5.74%	9.02%	5.36%
Wood shingle/shake	2.53%	3.75%	2.11%	3.59%
Slate	4.35%	4.58%	5.07%	4.93%
Metal—architectural	28.09%	17.55%	29.55%	18.25%
Metal shingle	1.01%	2.10%	1.79%	2.57%
Spray polyurethane foam	1.10%	0.89%	1.09%	0.97%
Fiber-cement	23.00%	0.37%	0.22%	0.42%

Percentages of Low-slope Insulation and Roof Deck Installation by Material Type

Polyisocyanurate has the largest share of the 2006 low-slope insulation market at 65.90 percent, and forecasts indicate it will

continue to take the majority share for 2007. Wood fiberboard, perlite and expanded polystyrene (EPS) combined take the minority share of the market.

2006 and projected 2007 low-slope insulation installation by material type				
Insulation type	2006		2007	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	8.17%	8.24%	7.74%	8.44%
Extruded polystyrene (XPS)	1.26%	1.49%	1.22%	1.43%
Fiberglass	0.38%	0.21%	0.34%	0.29%
Cellular glass	0.02%	0.03%	0.04%	0.03%
Mineral fiber	0.46%	0.95%	0.52%	0.93%
Perlite	9.26%	11.90%	9.17%	10.91%
Polyisocyanurate	65.90%	58.84%	66.42%	59.72%
Composite	1.44%	1.69%	1.76%	1.77%
Wood fiberboard	10.59%	14.70%	9.99%	14.18%

2006 and projected 2007 roof deck installation by material type				
Roof deck type	2006		2007	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	9.64%	12.04%	9.31%	12.14%
Lightweight insulating concrete and fill	10.15%	8.37%	10.67%	8.48%
Poured gypsum	1.84%	3.05%	1.50%	2.89%
Precast gypsum panel	2.44%	3.18%	1.73%	3.03%
Steel	64.66%	62.68%	64.91%	63.02%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	10.74%	9.68%	11.51%	9.05%
Thermal-setting insulation fill	0.53%	1.01%	0.38%	1.37%

Following are the respondents' indications of their percentages for 2006 and projections for 2007 of roof cover-board installation (e.g., wood fiber, gypsum board, perlite).

2006 and projected 2007 of roof cover-board installation					
New construction	2006		New construction	2007	
	Reroofing Tear-off	Reroofing Re-cover		Reroofing Tear-off	Reroofing Re-cover
24.45%	45.69%	29.86%	24.53%	45.47%	30.00%

Regional Data—New England

Percentages of low-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	2.89%	7.25%	1.88%	6.58%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0.83%	0.50%	0.71%	0.53%
EPDM	63.68%	59.65%	62.34%	61.30%
PVC	12.67%	12.60%	13.53%	10.52%
TPO	11.61%	8.65%	14.94%	9.73%
Spray polyurethane foam	0%	0.50%	0%	0.79%
Metal—structural	0.28%	0%	0%	0%
Metal—architectural	5.67%	3.35%	4.29%	2.47%
APP-polymer-modified bitumen*	1.00%	5.25%	0.76%	5.42%
SBS-polymer-modified bitumen*	.83%	1.80%	0.59%	1.89%
Other	0.56%	0.45%	0.94%	0.74%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Percentages of low-slope insulation installation by material type				
Insulation type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	7.78%	8.25%	8.13%	9.45%
Extruded polystyrene (XPS)	4.72%	2.00%	5.94%	2.50%
Fiberglass	0%	0%	0%	0%
Cellular glass	0.28%	0%	0%	0%
Mineral fiber	0%	0%	0%	0%
Perlite	0.56%	0.75%	0.63%	0.83%
Polyisocyanurate	75.97%	75.35%	75.03%	74.02%
Composite	0.56%	0.75%	1.25%	1.39%
Wood fiberboard	9.34%	11.90%	9.07%	11.56%
Other	0.83%	1.00%	0%	0.28%

Regional Data—New England

Percentages of steep-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	54.33%	53.81%	53.93%	53.46%
Organic asphalt shingle	10.33%	7.94%	10.36%	7.82%
Clay tile	0.33%	0.29%	0%	0%
Concrete tile	0%	0%	0%	0%
Wood shingle/shake	3.00%	7.35%	3.21%	7.94%
Slate	11.67%	16.29%	12.86%	16.88%
Metal—architectural	19.33%	13.70%	18.57%	13.32%
Metal shingle	0.67%	0.29%	0.71%	0.31%
Spray polyurethane foam	0%	0%	0%	0%
Fiber cement	0%	0%	0%	0%
Other	0.33%	0.29%	0.36%	0.31%

Percentages of roof deck installation by material type				
Roof deck type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	9.00%	7.50%	10.00%	8.75%
Lightweight insulating concrete and fill	1.00%	1.93%	1.11%	1.42%
Poured gypsum	0%	1.93%	0%	1.42%
Precast gypsum panel	2.00%	1.21%	0%	1.42%
Steel	83.50%	81.43%	83.88%	80.00%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	4.50%	6.00%	5.00%	7.00%
Thermal-setting insulation fill	0%	0%	0%	0%

Regional Data—Mid-Atlantic

Percentages of low-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	8.59%	8.42%	9.04%	7.33%
BUR—coal tar (hot-applied)*	0.37%	0.32%	0.19%	0.32%
BUR—cold process*	4.26%	5.81%	3.35%	6.65%
EPDM	49.73%	46.73%	51.76%	45.12%
PVC	2.67%	2.58%	2.00%	3.58%
TPO	11.29%	14.26%	11.50%	15.17%
Spray polyurethane foam	0.56%	0%	0.38%	0.32%
Metal—structural	1.67%	2.32%	1.73%	2.26%
Metal—architectural	7.18%	7.39%	7.46%	7.36%
APP-polymer-modified bitumen*	4.89%	4.65%	3.73%	4.10%
SBS-polymer-modified bitumen*	8.22%	6.10%	8.58%	7.20%
Other	0.56%	1.45%	0.27%	0.65%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Percentages of low-slope insulation installation by material type				
Insulation type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	1.00%	1.38%	0.96%	1.21%
Extruded polystyrene (XPS)	0.26%	0.52%	0.27%	0.34%
Fiberglass	3.15%	1.55%	2.50%	1.90%
Cellular glass	0%	0%	0%	0%
Mineral fiber	3.52%	3.79%	4.04%	3.79%
Perlite	2.56%	1.72%	2.69%	2.24%
Polyisocyanurate	73.17%	72.97%	75.64%	71.38%
Composite	2.96%	5.21%	2.88%	3.79%
Wood fiberboard	12.81%	12.10%	9.77%	13.24%
Other	0.56%	0.76%	1.23%	2.10%

Regional Data—Mid-Atlantic

Percentages of steep-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	53.25%	54.64%	54.85%	56.07%
Organic asphalt shingle	0%	0%	0%	0%
Clay tile	0.50%	1.15%	0.25%	0.96%
Concrete tile	1.25%	0.58%	2.50%	0.58%
Wood shingle/shake	3.75%	4.46%	2.35%	3.65%
Slate	9.25%	12.15%	8.85%	11.73%
Metal—architectural	30.75%	21.53%	29.15%	22.50%
Metal shingle	0.75%	0.38%	1.25%	0.58%
Spray polyurethane foam	0%	0%	0%	0%
Fiber cement	0.25%	0.96%	0.55%	0.77%
Other	0.25%	4.11%	0.25%	3.15%

Percentages of roof deck installation by material type				
Roof deck type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	0%	8.41%	0%	8.41%
Lightweight insulating concrete and fill	3.85%	3.41%	4.23%	5.47%
Poured gypsum	0%	0.18%	0%	0.76%
Precast gypsum panel	1.92%	3.12%	1.92%	3.29%
Steel	86.14%	76.46%	80.37%	73.52%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	8.08%	7.06%	11.92%	7.06%
Thermal-setting insulation fill	0%	1.35%	1.54%	1.47%

Regional Data—South Atlantic

Percentages of low-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	18.01%	19.56%	15.39%	18.42%
BUR—coal tar (hot-applied)*	0.32%	1.23%	0.33%	0.45%
BUR—cold process*	1.70%	2.18%	2.03%	2.87%
EPDM	15.15%	16.76%	14.10%	16.12%
PVC	4.86%	5.87%	4.52%	6.14%
TPO	19.59%	15.13%	22.51%	16.21%
Spray polyurethane foam	0.40%	0.46%	0%	0.60%
Metal—structural	1.41%	1.29%	1.58%	0.91%
Metal—architectural	13.89%	7.99%	14.65%	8.16%
APP-polymer-modified bitumen*	6.45%	8.41%	5.97%	7.97%
SBS-polymer-modified bitumen*	16.12%	19.28%	17.94%	19.23%
Other	2.14%	1.86%	1.00%	2.92%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Percentages of low-slope insulation installation by material type				
Insulation type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	3.90%	2.01%	3.77%	2.50%
Extruded polystyrene (XPS)	0.59%	0.80%	0.70%	0.81%
Fiberglass	0%	0.07%	0%	0%
Cellular glass	0%	0%	0%	0%
Mineral fiber	0.25%	0.25%	0.30%	0.25%
Perlite	14.58%	17.02%	14.23%	15.31%
Polyisocyanurate	73.17%	72.97%	75.64%	71.38%
Composite	1.66%	1.09%	1.79%	1.59%
Wood fiberboard	18.05%	16.55%	8.72%	15.41%
Other	0.56%	0.65%	0.79%	1.07%

Regional Data—South Atlantic

Percentages of steep-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	34.61%	50.19%	33.83%	50.11%
Organic asphalt shingle	0.19%	0.16%	0.02%	0.01%
Clay tile	5.02%	4.36%	4.72%	3.82%
Concrete tile	12.90%	8.71%	11.88%	7.06%
Wood shingle/shake	1.07%	2.62%	0.91%	2.55%
Slate	4.53%	5.26%	5.48%	5.98%
Metal—architectural	38.94%	25.38%	39.68%	25.35%
Metal shingle	1.10%	1.38%	1.74%	2.45%
Spray polyurethane foam	0%	0%	0%	0%
Fiber cement	0.05%	0.03%	0.02%	0.16%
Other	1.61%	1.88%	1.75%	2.46%

Percentages of roof deck installation by material type				
Roof deck type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	5.42%	6.13%	1.17%	5.50%
Lightweight insulating concrete and fill	18.13%	17.32%	19.56%	16.72%
Poured gypsum	1.67%	5.63%	1.30%	4.44%
Precast gypsum panel	0.42%	2.34%	0%	2.34%
Steel	51.26%	49.54%	55.34%	51.64%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	22.92%	18.44%	22.61%	18.60%
Thermal-setting insulation fill	0.21%	0.63%	0%	0.78%

Regional Data—East North Central

Percentages of low-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	6.02%	8.81%	4.81%	10.34%
BUR—coal tar (hot-applied)*	0.72%	0.96%	0.60%	1.76%
BUR—cold process*	0.86%	3.19%	0.71%	3.64%
EPDM	45.92%	39.89%	45.77%	39.56%
PVC	8.21%	9.29%	8.88%	9.88%
TPO	11.81%	9.96%	14.90%	9.60%
Spray polyurethane foam	2.33%	2.02%	2.38%	2.20%
Metal—structural	0.12%	0.42%	0.12%	0.24%
Metal—architectural	4.16%	3.67%	5.55%	4.16%
APP-polymer-modified bitumen*	11.56%	14.02%	10.55%	10.92%
SBS-polymer-modified bitumen*	6.77%	6.60%	4.05%	6.48%
Other	1.51%	1.17%	1.67%	1.22%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Percentages of low-slope insulation installation by material type				
Insulation type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	11.68%	7.24%	11.22%	8.63%
Extruded polystyrene (XPS)	1.95%	0.84%	2.07%	0.96%
Fiberglass	0%	0.02%	0.24%	0.41%
Cellular glass	0%	0.02%	0%	0.02%
Mineral fiber	0%	0.22%	0%	0.22%
Perlite	4.88%	8.00%	4.27%	6.86%
Polyisocyanurate	67.59%	67.72%	68.67%	66.98%
Composite	0.85%	0.52%	0.85%	0.51%
Wood fiberboard	7.68%	14.50%	7.32%	14.41%
Other	5.37%	0.92%	5.37%	1.00%

Regional Data—East North Central

Percentages of steep-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	60.51%	68.84%	50.36%	65.08%
Organic asphalt shingle	0.17%	0.51%	0.36%	0.30%
Clay tile	3.50%	3.38%	2.68%	3.57%
Concrete tile	0.93%	1.33%	4.82%	0.57%
Wood shingle/shake	2.50%	3.29%	2.50%	3.39%
Slate	6.80%	3.73%	9.43%	6.18%
Metal—architectural	20.44%	14.11%	25.46%	12.66%
Metal shingle	2.17%	2.11%	1.96%	2.82%
Spray polyurethane foam	0%	0%	0%	0%
Fiber cement	0%	0%	0%	0%
Other	3.00%	2.67%	2.43%	5.46%

Percentages of roof deck installation by material type				
Roof deck type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	15.33%	9.22%	16.07%	9.70%
Lightweight insulating concrete and fill	9.00%	2.32%	9.29%	2.40%
Poured gypsum	0.33%	0.97%	0.36%	1.00%
Precast gypsum panel	4.00%	6.84%	4.29%	6.57%
Steel	65.66%	76.17%	65.71%	72.75%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	5.67%	3.81%	4.29%	3.60%
Thermal-setting insulation fill	0%	0.65%	0%	4.00%

Regional Data—East South Central

Percentages of low-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	9.44%	11.40%	7.63%	10.06%
BUR—coal tar (hot-applied)*	0.07%	0.53%	0%	0%
BUR—cold process*	1.48%	2.60%	1.33%	2.17%
EPDM	26.37%	23.23%	27.92%	23.54%
PVC	7.93%	4.00%	5.04%	4.65%
TPO	18.66%	18.47%	19.96%	17.72%
Spray polyurethane foam	3.70%	6.67%	4.58%	6.55%
Metal—structural	1.26%	1.03%	1.46%	1.21%
Metal—architectural	8.30%	4.57%	10.04%	4.72%
APP-polymer-modified bitumen*	1.63%	5.97%	1.88%	7.24%
SBS-polymer-modified bitumen*	17.11%	18.03%	19.96%	18.65%
Other	4.04%	3.50%	0.21%	3.45%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Percentages of low-slope insulation installation by material type				
Insulation type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	5.96%	11.48%	5.88%	11.30%
Extruded polystyrene (XPS)	0%	0.26%	0%	0%
Fiberglass	0%	0%	0%	0%
Cellular glass	0%	0%	0%	0%
Mineral fiber	0%	0%	0%	0%
Perlite	11.13%	12.00%	10.50%	11.92%
Polyisocyanurate	61.38%	51.22%	61.92%	52.18%
Composite	0.21%	0.19%	0.21%	0.74%
Wood fiberboard	18.21%	21.48%	17.92%	20.55%
Other	3.13%	3.37%	3.58%	3.30%

Regional Data—East South Central

Percentages of steep-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	44.12%	53.32%	46.58%	56.29%
Organic asphalt shingle	0%	0%	0%	0%
Clay tile	0.61%	0.84%	0.58%	1.17%
Concrete tile	1.72%	0.32%	1.95%	0.39%
Wood shingle/shake	1.11%	1.05%	0.63%	0.94%
Slate	3.45%	3.63%	3.11%	3.72%
Metal—architectural	41.79%	30.84%	45.63%	30.51%
Metal shingle	0.67%	4.05%	0.32%	1.44%
Spray polyurethane foam	0%	0%	0%	0%
Fiber cement	0.28%	0.26%	0.26%	0.28%
Other	6.28%	5.68%	0.95%	5.28%

Percentages of roof deck installation by material type				
Roof deck type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	14.69%	18.58%	15.00%	20.26%
Lightweight insulating concrete and fill	8.75%	9.19%	8.33%	8.16%
Poured gypsum	0%	0.62%	0%	0.42%
Precast gypsum panel	0%	0%	0%	0.26%
Steel	68.13%	60.59%	71.00%	65.95%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	5.63%	8.48%	5.67%	4.47%
Thermal-setting insulation fill	2.81%	2.57%	0%	0.47%

Regional Data—West North Central

Percentages of low-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	17.41%	20.08%	14.95%	18.22%
BUR—coal tar (hot-applied)*	0%	0.36%	0%	0%
BUR—cold process*	0.23%	1.07%	0.23%	1.07%
EPDM	43.90%	36.26%	47.54%	38.58%
PVC	1.09%	1.61%	2.41%	3.50%
TPO	16.59%	9.79%	16.36%	10.61%
Spray polyurethane foam	0.45%	4.82%	0.45%	5.54%
Metal—structural	0.23%	0%	0.23%	0%
Metal—architectural	2.27%	3.11%	3.86%	4.22%
APP-polymer-modified bitumen*	4.41%	4.47%	3.14%	4.00%
SBS-polymer-modified bitumen*	12.50%	16.15%	9.91%	13.22%
Other	0.91%	2.32%	0.91%	1.07%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Percentages of low-slope insulation installation by material type				
Insulation type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	13.48%	17.07%	14.91%	17.34%
Extruded polystyrene (XPS)	2.29%	2.00%	1.81%	1.81%
Fiberglass	0%	0%	0%	0%
Cellular glass	0%	0%	0%	0%
Mineral fiber	0.24%	0.96%	0.24%	0.96%
Perlite	3.19%	4.00%	2.71%	3.81%
Polyisocyanurate	67.53%	53.40%	67.53%	53.29%
Composite	0.24%	2.88%	0.24%	2.88%
Wood fiberboard	13.05%	19.65%	12.57%	19.88%
Other	0%	0%	0%	0%

Regional Data—West North Central

Percentages of steep-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	60.54%	60.86%	50.39%	58.24%
Organic asphalt shingle	0.77%	4.76%	1.67%	4.76%
Clay tile	0%	1.24%	3.00%	1.24%
Concrete tile	7.31%	0.24%	4.67%	1.67%
Wood shingle/shake	2.54%	11.19%	1.27%	8.43%
Slate	1.08%	1.86%	1.33%	1.14%
Metal—architectural	27.39%	14.43%	31.66%	18.33%
Metal shingle	0%	1.81%	5.67%	2.86%
Spray polyurethane foam	0%	0%	0%	0.95%
Fiber cement	0%	0%	0%	0%
Other	0.38%	3.62%	0.33%	2.38%

Percentages of roof deck installation by material type				
Roof deck type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	1.67%	10.91%	0.56%	10.91%
Lightweight insulating concrete and fill	1.11%	0.45%	0.56%	0.45%
Poured gypsum	0.56%	2.36%	0.56%	2.27%
Precast gypsum panel	10.00%	7.73%	10.00%	7.73%
Steel	78.33%	71.26%	78.88%	70.90%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	7.78%	6.82%	8.89%	7.27%
Thermal-setting insulation fill	0.56%	0.45	0.56%	0.45%

Regional Data—West South Central

Percentages of low-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	18.96%	17.07%	17.41%	18.10%
BUR—coal tar (hot-applied)*	1.27%	0.34%	0.52%	0.17%
BUR—cold process*	2.47%	2.31%	2.48%	3.17%
EPDM	4.67%	2.83%	5.00%	3.28%
PVC	4.43%	6.45%	6.03%	9.00%
TPO	22.03%	19.79%	22.14%	16.04%
Spray polyurethane foam	3.97%	5.24%	3.97%	5.24%
Metal—structural	0.97%	1.17%	0.79%	2.17%
Metal—architectural	9.46%	3.97%	8.97%	5.86%
APP-polymer-modified bitumen*	11.93%	16.83%	11.97%	12.76%
SBS-polymer-modified bitumen*	19.33%	20.04%	20.38%	20.35%
Other	0.50%	3.97%	0.34%	3.86%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Percentages of low-slope insulation installation by material type				
Insulation type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	4.14%	3.11%	4.46%	3.15%
Extruded polystyrene (XPS)	0.17%	0.52%	0%	0%
Fiberglass	0%	0%	0%	0%
Cellular glass	0%	0%	0%	0%
Mineral fiber	0%	0%	0%	0%
Perlite	13.66%	26.11%	14.78%	20.37%
Polyisocyanurate	68.76%	55.33%	67.46%	59.96%
Composite	1.72%	2.41%	1.96%	2.78%
Wood fiberboard	4.66%	5.30%	4.18%	6.52%
Other	6.90%	7.22%	7.14%	7.22%

Regional Data—West South Central

Percentages of steep-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	35.55%	46.85%	34.04%	44.30%
Organic asphalt shingle	0%	0%	0%	0%
Clay tile	5.05%	3.40%	4.76%	5.40%
Concrete tile	5.25%	2.50%	4.76%	1.95%
Wood shingle/shake	1.35%	1.10%	1.05%	1.85%
Slate	2.15%	0.85%	3.43%	0.85%
Metal—architectural	40.10%	28.10%	40.95%	28.20%
Metal shingle	1.50%	7.85%	2.38%	8.10%
Spray polyurethane foam	8.35%	7.35%	7.95%	7.35%
Fiber cement	0.25%	1.00%	0.24%	1.00%
Other	0.45%	1.00%	0.43%	1.00%

Percentages of roof deck installation by material type				
Roof deck type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	8.25%	8.25%	8.00%	9.00%
Lightweight insulating concrete and fill	11.88%	15.19%	11.00%	15.00%
Poured gypsum	2.19%	5.31%	1.33%	4.67%
Precast gypsum panel	0.94%	0.63%	0%	1.00%
Steel	67.52%	60.95%	69.34%	61.68%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	9.25%	9.69%	10.33%	8.67%
Thermal-setting insulation fill	0%	0%	0%	0%

Regional Data—Mountain

Percentages of low-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	13.30%	11.05%	11.47%	11.50%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	2.00%	4.77%	2.90%	4.50%
EPDM	27.10%	25.50%	24.21%	21.25%
PVC	3.90%	4.91%	4.58%	5.00%
TPO	21.50%	26.86%	29.79%	29.50%
Spray polyurethane foam	7.75%	9.23%	8.16%	10.25%
Metal—structural	4.65%	1.50%	0%	0%
Metal—architectural	8.00%	5.36%	8.00%	6.75%
APP-polymer-modified bitumen*	5.55%	5.05%	4.42%	3.75%
SBS-polymer-modified bitumen*	4.15%	4.86%	3.84%	5.00%
Other	2.10%	0.91%	2.63%	2.50%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Percentages of low-slope insulation installation by material type				
Insulation type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	23.23%	22.90%	17.50%	21.11%
Extruded polystyrene (XPS)	1.76%	2.90%	1.88%	3.06%
Fiberglass	0.29%	0.53%	0.31%	0.56%
Cellular glass	0%	0%	0%	0%
Mineral fiber	0%	0%	0%	0%
Perlite	7.65%	11.84%	6.88%	11.66%
Polyisocyanurate	52.94%	43.16%	59.38%	45.55%
Composite	0.88%	0.53%	1.56%	0%
Wood fiberboard	12.35%	16.84%	11.56%	16.66%
Other	0.88%	1.32%	0.94%	1.39%

Regional Data—Mountain

Percentages of steep-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	44.50%	59.88%	47.34%	58.82%
Organic asphalt shingle	0%	0%	0%	0%
Clay tile	7.19%	1.56%	3.67%	1.47%
Concrete tile	18.75%	14.31%	21.14%	13.88%
Wood shingle/shake	4.44%	5.81%	4.40%	4.82%
Slate	0.63%	0.50%	0.67%	0.41%
Metal—architectural	22.63%	14.94%	16.47%	14.29%
Metal shingle	1.88%	2.69%	5.67%	5.41%
Spray polyurethane foam	0%	0%	0%	0%
Fiber cement	0%	0%	0%	0%
Other	0%	0.31%	0.67%	0.88%

Percentages of roof deck installation by material type				
Roof deck type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	0%	12.86%	0%	0%
Lightweight insulating concrete and fill	9.17%	6.43%	7.00%	9.17%
Poured gypsum	0%	1.43%	0%	1.67%
Precast gypsum panel	0%	0%	0%	0%
Steel	78.34%	62.15%	77.00%	71.67%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	11.67%	14.29%	13.40%	15.33%
Thermal-setting insulation fill	0.83%	2.86%	2.60%	2.17%

Regional Data—Pacific

Percentages of low-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	42.44%	40.32%	40.08%	39.14%
BUR—coal tar (hot-applied)*	1.53%	1.11%	1.53%	1.11%
BUR—cold process*	1.89%	3.13%	1.19%	3.47%
EPDM	0.86%	0.80%	0.75%	0.87%
PVC	9.22%	12.45%	10.44%	13.09%
TPO	15.69%	14.85%	18.05%	15.71%
Spray polyurethane foam	3.19%	3.44%	3.19%	3.56%
Metal—structural	0.28%	0.33%	0.14%	0.44%
Metal—architectural	4.06%	1.96%	5.00%	1.78%
APP-polymer-modified bitumen*	8.97%	6.53%	7.86%	6.47%
SBS-polymer-modified bitumen*	7.03%	7.09%	6.61%	6.31%
Other	4.83%	8.00%	5.14%	8.07%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Percentages of low-slope insulation installation by material type				
Insulation type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	8.45%	13.86%	7.59%	12.94%
Extruded polystyrene (XPS)	2.00%	5.71%	1.35%	5.65%
Fiberglass	0.48%	0.31%	0.52%	0.29%
Cellular glass	0%	0.29%	0.34%	0.29%
Mineral fiber	0.32%	0.34%	0.41%	0.35%
Perlite	15.75%	18.34%	16.97%	18.59%
Polyisocyanurate	57.24%	45.43%	55.70%	46.11%
Composite	2.16%	2.54%	4.21%	2.62%
Wood fiberboard	10.23%	10.11%	11.21%	10.06%
Other	3.39%	3.06%	1.72%	3.09%

Regional Data—Pacific

Percentages of steep-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	55.70%	68.78%	49.30%	66.68%
Organic asphalt shingle	1.55%	1.88%	1.41%	1.46%
Clay tile	7.00%	5.03%	10.22%	4.88%
Concrete tile	17.56%	10.33%	19.09%	10.19%
Wood shingle/shake	2.66%	3.10%	2.50%	3.51%
Slate	1.14%	0.45%	1.37%	1.12%
Metal—architectural	8.17%	2.65%	10.56%	4.88%
Metal shingle	0.48%	3.00%	0.62%	2.98%
Spray polyurethane foam	3.62%	3.25%	3.28%	3.05%
Fiber cement	1.17%	1.05%	0.91%	0.76%
Other	0.97%	0.50%	0.72%	0.49%

Percentages of roof deck installation by material type				
Roof deck type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	26.92%	29.16%	26.15%	29.16%
Lightweight insulating concrete and fill	15.77%	13.33%	19.23%	13.33%
Poured gypsum	10.00%	10.83%	10.00%	10.83%
Precast gypsum panel	1.92%	2.08%	1.9%	2.08%
Steel	33.07%	32.08%	30.38%	32.91%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	11.54%	9.17%	11.54%	8.33%
Thermal-setting insulation fill	0.77%	3.33%	0.77%	3.33%

Regional Data—Alaska, Hawaii, Puerto Rico and U.S. Virgin Islands

Percentages of low-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	0%	12.50%	5.00%	12.50%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0%	3.75%	0%	3.75%
EPDM	20.00%	20.25%	17.50%	8.75%
PVC	0%	0%	0%	0%
TPO	0%	0%	0%	0%
Spray polyurethane foam	3.75%	1.25%	0%	5.00%
Metal—structural	40.00%	15.00%	45.00%	20.00%
Metal—architectural	11.25%	12.50%	7.50%	10.00%
APP-polymer-modified bitumen*	0%	0%	0%	0%
SBS-polymer-modified bitumen*	25.00%	8.75%	25.00%	15.00%
Other	0%	25.00%	0%	25.00%

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Percentages of low-slope insulation installation by material type				
Insulation type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Expanded polystyrene (EPS)	46.25%	37.50%	43.75%	37.50%
Extruded polystyrene (XPS)	0%	0%	0%	0%
Fiberglass	0%	0%	0%	0%
Cellular glass	0%	0%	0%	0%
Mineral fiber	0%	0%	0%	0%
Perlite	0%	0%	0%	0%
Polyisocyanurate	53.75%	57.50%	56.25%	57.50%
Composite	0%	0%	0%	0%
Wood fiberboard	0%	5.00%	0%	5.00%
Other	0%	0%	0%	0%

Regional Data—Alaska, Hawaii, Puerto Rico and U.S. Virgin Islands

Percentages of steep-slope roofing work by roof system type				
Roof system type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	1.50%	63.32%	2.50%	61.65%
Organic asphalt shingle	0%	0%	0%	0%
Clay tile	0%	0%	0%	0%
Concrete tile	0%	0%	0%	0%
Wood shingle/shake	0%	0%	0%	0%
Slate	0%	0%	0%	0%
Metal—architectural	98.50%	36.66%	97.50%	38.32%
Metal shingle	0%	0%	0%	0%
Spray polyurethane foam	0%	0%	0%	0%
Fiber cement	0%	0%	0%	0%
Other	0%	0%	0%	0%

Percentages of roof deck installation by material type				
Roof deck type	2006		2007 (projected)	
	New construction	Reroofing	New construction	Reroofing
Cementitious wood-fiber deck panel	0%	0%	0%	0%
Lightweight insulating concrete and fill	0%	0%	0%	0%
Poured gypsum	0%	0%	0%	0%
Precast gypsum panel	0%	0%	0%	0%
Steel	100%	90.00%	100%	90.00%
Structural concrete (cast-in-place, post-tensioned and precast/prestressed)	0%	10.00%	0%	10.00%
Thermal-setting insulation fill	0%	0%	0%	0%

Historical Data

Historical averages for low-slope roofing sales for new construction and reroofing by type of roof system										
Roof system type	Projected 2007		2006		Projected 2005		2004		2003	
	New construction	Reroofing								
BUR— asphalt (hot-applied)*	14.32%	16.69%	15.77%	17.01%	12.58%	14.52%	13.27%	15.21%	14.90%	18.13%
BUR— coal tar (hot-applied)*	0.39%	0.51%	0.49%	0.65%	0.30%	0.77%	0.33%	95.00%	0.87%	1.35%
BUR— cold process*	1.74%	3.15%	1.84%	2.77%	2.45%	4.01%	1.98%	3.26%	1.53%	2.44%
EPDM	26.90%	24.32%	27.03%	24.85%	28.45%	24.34%	29.02%	25.02%	32.84%	25.70%
PVC	6.16%	6.83%	5.71%	6.27%	7.86%	8.11%	8.21%	7.43%	6.47%	6.87%
TPO	18.15%	14.61%	16.26%	14.06%	12.53%	10.02%	10.44%	9.76%	10.74%	9.01%
Spray polyurethane foam	2.04%	3.14%	2.09%	2.86%	1.96%	2.68%	1.99%	2.47%	2.23%	3.82%
Metal— structural	1.43%	1.05%	1.56%	1.03%	1.69%	1.71%	1.77%	1.59%	0.70%	0.27%
Metal— architectural	8.45%	5.28%	7.98%	4.86%	7.26%	4.59%	6.61%	4.28%	5.13%	2.42%
APP-polymer-modified bitumen	7.02%	7.59%	7.69%	8.49%	7.04%	9.01%	7.91%	9.73%	6.30%	7.72%
SBS-polymer-modified bitumen	11.55%	13.17%	11.63%	13.82%	14.48%	15.81%	15.05%	16.05%	11.97%	10.38%
Other	1.83%	3.62%	1.97%	3.35%	3.40%	4.48%	3.39%	4.28%	n/a	n/a

*To accurately interpret these figures, built-up membranes using polymer-modified bitumen cap sheets at the topmost surface should be considered polymer-modified bitumen roof systems.

Historical Data

Historical averages for steep-slope roofing sales for new construction and reroofing by type of roof system										
Roof system type	Projected 2007		2006		Projected 2005		2004		2003	
	New construction	Reroofing								
Fiberglass asphalt shingle	44.37%	56.98%	47.49%	58.24%	50.25%	58.43%	49.79%	59.64%	43.55%	51.50%
Organic asphalt shingle	1.05%	1.16%	1.03%	1.30%	1.14%	1.65%	1.38%	1.17%	2.85%	2.46%
Clay tile	4.63%	3.38%	4.22%	3.41%	4.02%	4.13%	4.54%	4.05%	1.77%	2.21%
Concrete tile	9.02%	5.36%	8.44%	5.74%	7.14%	4.41%	7.15%	4.26%	3.62%	2.90%
Wood shingle/shake	2.11%	3.59%	2.53%	3.75%	3.14%	3.92%	3.56%	4.19%	1.72%	2.10%
Slate	5.07%	4.93%	4.35%	4.58%	4.73%	4.56%	5.41%	5.11%	1.12%	2.68%
Metal—architectural	29.55%	18.25%	28.09%	17.55%	24.39%	16.34%	22.85%	15.20%	27.85%	16.36%
Metal—shingle	1.79%	2.57%	1.01%	2.10%	2.06%	1.95%	1.51%	2.20%	n/a	n/a
Spray polyurethane foam	1.09%	0.97%	1.10%	0.89%	0.06%	1.04%	0.36%	1.25%	0.17%	0.88%
Fiber cement	0.22%	0.42%	0.23%	0.37%	0.19%	0.20%	0.29%	0.35%	0.04%	0.04%



10255 W. Higgins Road
Suite 600
Rosemont, IL
60018-5607
(847) 299-9070
Fax: (847) 299-1183
Web site: www.nrca.net
E-mail: nrca@nrca.net

