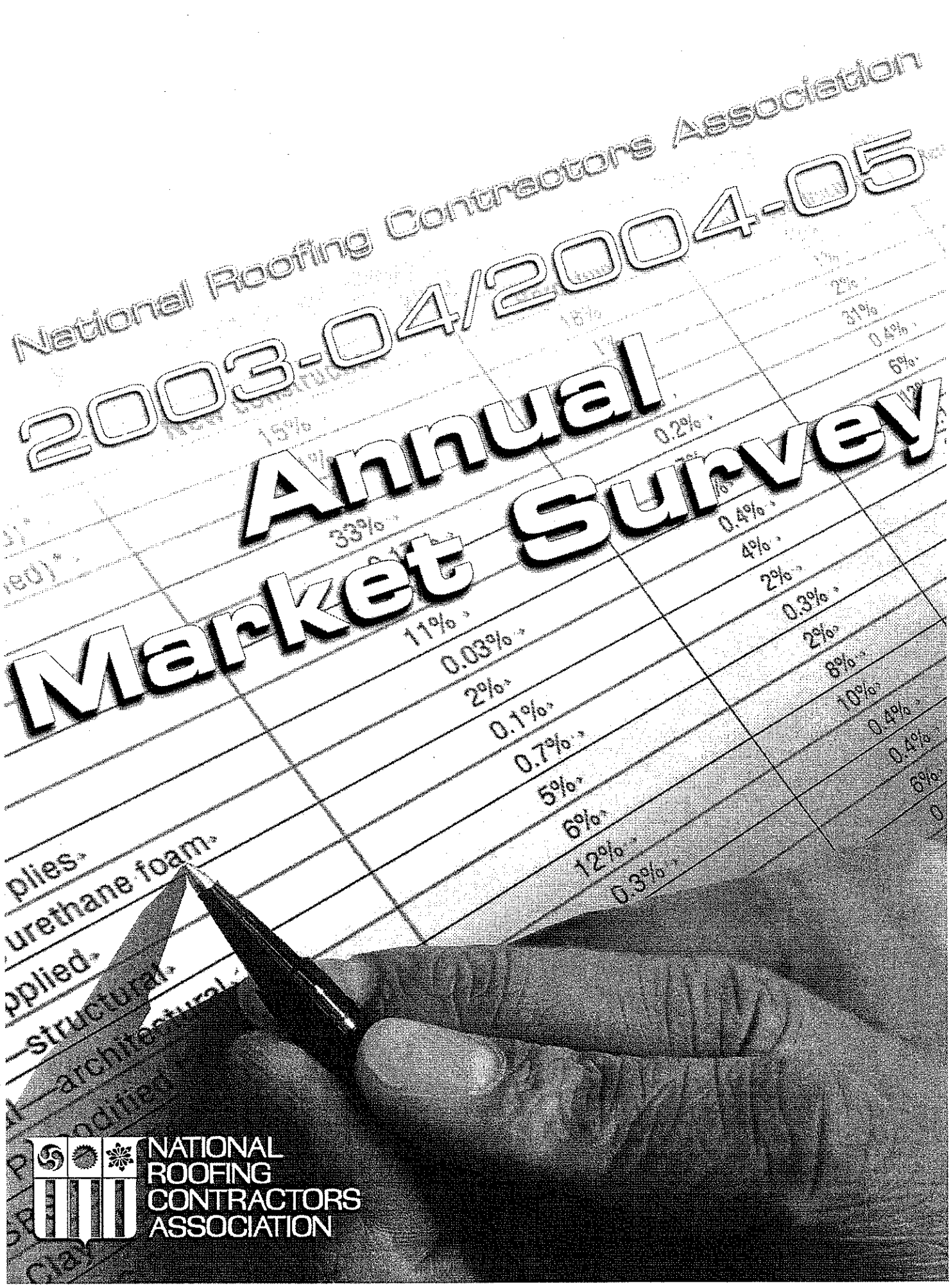
National Roofing Contractors Association

2003-04/2004-05 Annual Market Survey



NATIONAL ROOFING CONTRACTORS ASSOCIATION

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NRCA's 2003-04 Market Survey Introduction

For its 2003-04 market survey, NRCA decided to condense the survey and focus on those roofing market areas most important to roofing contractors: squares of installed roof systems; sales of types of roof systems for low- and steep-slope new construction, reroofing, and repair and maintenance work; and overall sales volume trends.

Background

NRCA surveyed approximately 2,000 NRCA member and nonmember roofing contractors in September 2004 to respond to an online survey and compare their experiences from 2003 and 2004. NRCA did not receive enough online responses to complete the report, so the survey questionnaire was mailed to the same group of contractors. NRCA received a total of 199 responses for a response rate of 10 percent, enough to provide sufficient information for a meaningful report. However, NRCA's market survey is not a statistically valid analysis of the roofing market; it is intended only to provide feedback from contractors about annual trends in sales volume, squares and the types of roof systems installed.

Respondent details

Respondents' average sales volumes for 2003 averaged $4,645,494 and $5,711,025 for 2004. When asked about whether roofing sales increased or decreased in 2004 from 2003, responding contractors expected an average increase in sales of 11 percent for 2004. This varied by the geographic location of responding contractors. (See Figure 1.) Contractors also reported low-slope roofing work represented 72 percent of their annual sales, with steep-slope roofing work representing the remaining 28 percent. These percentages held steady for 2003 and 2004.

The breakdown of new construction, reroofing, and repair and maintenance work also was consistent during 2003 and 2004. On average, respondents reported 26 percent of their work included new construction, 60 percent was reroofing, and 14 percent involved repair and maintenance work.

On average, contractors installed more squares (100 square feet) during 2004 than 2003. The average increase of squares applied during 2004 vs. 2003 for low-slope roofing was approximately 3 percent; the average increase of squares applied during the same time period for steep-slope roofing was approximately 8 percent.

Roof system percentages

For low-slope roofing work, the survey results show EPDM as the market leader for new construction and reroofing, garnering an approximate 24 percent share of the new construction and reroofing markets for 2003 and 2004. Polymer-modified bitumen roof systems posted an approximate 14 percent share for new construction for 2003 and 2004 and an approximate 17 percent for reroofing for 2003 and 2004. Following closely were hot-applied BUR systems, capturing approximately 11 percent of the new construction market for 2003 and 2004 and 17 percent of the reroofing market for 2003 and 15 percent for 2004. (See Figure 2.)

Regional breakdowns of roofing sales volume increases or decreases from 2003 to 2004

Region	Percent increase or decrease in sales volume
New England (Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont)	16% increase
Mid-Atlantic (New Jersey, New York and Pennsylvania)	14% increase
South Atlantic (Delaware, Florida, Georgia Maryland, North Carolina, South Carolina, Virginia, Washington, D.C., and West Virginia)	17% increase
East North Central (Illinois, Indiana, Michigan, Ohio and Wisconsin)	9% increase
East South Central (Alabama, Kentucky, Mississippi and Tennessee)	23% increase
West North Central (Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota)	1% decrease
West South Central (Arkansas, Oklahoma, Louisiana and Texas)	3% increase
Mountain (Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Wyoming and Utah)	9% increase
Pacific (California, Oregon and Washington)	13% increase

(Note: There were no responses for Alaska, Hawaii, Puerto Rico and the U.S. Virgin Islands.)

Figure 1. Regional sales volume breakdowns

For steep-slope roofing work, fiberglass asphalt shingles led the way, with an approximate 25 percent market share for new construction during 2003 and 2004 and an approximate 35 percent share for reroofing for 2003 and 2004. Architectural metal followed with a 16 percent market share for new construction during 2003 and 2004 and 11 percent share for reroofing for 2003 and 2004. (See Figure 3.)

2004-05 survey

NRCA continued to publish its market survey in a simplified form for its 2004-05 market survey. NRCA sent the survey questionnaire in March 2004 to be able to provide more timely information about contractors' experiences in 2004 and projections for 2005. The results are included with this report.

Percentages of low-slope roofing work by roof system type				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	15%	18%	13%	16%
BUR—coal tar (hot-applied)*	1%	1%	1%	1%
BUR—cold process*	2%	2%	2%	2%
EPDM	33%	26%	31%	26%
CSPE/Hypalon®	0.17%	0.2%	0.4%	0.08%
PVC	6%	7%	6%	7%
TPO	11%	9%	12%	9%
Other single plies	0.03%	0.4%	0.1%	0.4%
Spray polyurethane foam	2%	4%	2%	4%
Liquid-applied	0.1%	2%	0.3%	2%
Metal—structural	0.7%	0.3%	1%	0.4%
Metal—architectural	5%	2%	4%	3%
APP-modified bitumen*	6%	8%	7%	7%
SBS-modified bitumen*	12%	10%	12%	11%
Clay tile	0.3%	0.4%	0.2%	0.2%
Concrete tile	0.2%	0.4%	0.4%	0.4%
Fiberglass asphalt shingle	4%	6%	5%	8%
Organic asphalt shingle	0.4%	0.4%	0.4%	0.4%
Fiber-cement	0%	0.05%	0%	0.01%
Wood shingle/shake	0.2%	0.2%	0.2%	0.2%
Slate	0.2%	0.4%	0.2%	0.2%
Other	0.4%	2%	0.3%	1.4%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 2. Percentages of low-slope roofing work by roof system type

Percentages of steep-slope roofing work by roof system type				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	2%	3%	2%	3%
BUR—coal tar (hot-applied)*	0.04%	0.4%	0.04%	0.4%
BUR—cold process*	0.2%	0.3%	0%	0.3%
EPDM	3%	3%	4%	3%
CSPE/Hypalon®	0%	0%	0%	0.04%
PVC	1%	0.4%	1%	0.5%
TPO	2%	2%	2%	2%
Other single plies	0%	0.1%	0.2%	0.2%
Spray polyurethane foam	0.2%	1%	0.3%	2%
Liquid-applied	1%	2%	1%	1%
Metal—structural	3%	3%	3%	3%
Metal—architectural	28%	16%	28%	17%
APP-modified bitumen*	0.5%	1%	1%	1%
SBS-modified bitumen*	3%	3%	3%	3%
Clay tile	2%	2%	2%	2%
Concrete tile	4%	3%	5%	3%
Fiberglass asphalt shingle	44%	51%	43%	50%
Organic asphalt shingle	3%	2%	2%	3%
Fiber-cement	0.04%	0.04%	1%	1%
Wood shingle/shake	2%	2%	2%	2%
Slate	1%	3%	2%	2%
Other	1%	2%	1%	2%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 3. Percentages of steep-slope roofing work by roof system type

Percentages of low-slope roofing work by roof system type—New England				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	5%	6%	4%	5%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0.5%	0%	0.5%	0%
EPDM	43%	45%	40%	37%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	7%	5%	4%	5%
TPO	6%	5%	10%	6%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	0%	0%	0%	0%
Liquid-applied	0%	0.5%	0%	0.5%
Metal—structural	0%	0%	0%	0%
Metal—architectural	4%	3%	0%	0%
APP-modified bitumen*	0.5%	2%	9%	10%
SBS-modified bitumen*	1%	2%	1%	1%
Clay tile	0%	0%	0%	0%
Concrete tile	0%	0%	0%	0%
Fiberglass asphalt shingle	32%	31%	30%	32%
Organic asphalt shingle	1%	0.5%	0.5%	0.5%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	0%	1%	0%	1%
Slate	2%	1%	1%	1%
Other	0.5%	0.5%	0.5%	0.5%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 4. Percentages of low-slope roofing work by roof system type in the New England region

Percentages of steep-slope roofing work by roof system type—New England				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	0%	0%	0%	0%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0%	0%	0%	0%
EPDM	8%	13%	16%	14%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	0%	0%	0%	0%
TPO	0%	0%	0%	0%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	0%	0%	0%	0%
Liquid-applied	0%	0%	0%	0%
Metal—structural	0.6%	3%	1%	0.9%
Metal—architectural	16%	10%	16%	10%
APP-modified bitumen*	0%	0%	0%	0%
SBS-modified bitumen*	0%	0.5%	0%	0.5%
Clay tile	0%	0%	0%	0%
Concrete tile	0%	0%	0%	0%
Fiberglass asphalt shingle	62%	62%	57%	63%
Organic asphalt shingle	9%	3%	6%	2%
Fiber cement	0.5%	0.5%	0%	0%
Wood shingle/shake	0%	1%	3%	3%
Slate	3%	8%	3%	7%
Other	0%	0%	0%	0%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 5. Percentages of steep-slope roofing work by roof system type in the New England region

Percentages of low-slope roofing work by roof system type—Mid-Atlantic				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	12%	18%	10%	17%
BUR—coal tar (hot-applied)*	0.8%	3%	0%	0.9%
BUR—cold process*	3%	4%	4%	4%
EPDM	61%	46%	58%	47%
CSPE/Hypalon®	0.4%	0%	0.4%	0%
PVC	2%	2%	2%	1%
TPO	10%	9%	12%	6%
Other single plies	0%	0%	0%	0.3%
Spray polyurethane foam	1%	2%	0.7%	4.4%
Liquid-applied	0%	0.6%	0%	0.3%
Metal—structural	0.8%	0.6%	0.8%	0.6%
Metal—architectural	3%	2%	5%	2%
APP-modified bitumen*	2%	2%	3%	3%
SBS-modified bitumen*	2%	2%	2%	5%
Clay tile	0%	0.3%	0%	0%
Concrete tile	0%	0%	0%	0%
Fiberglass asphalt shingle	2%	0.9%	1%	1%
Organic asphalt shingle	0%	0%	0%	0%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	0.3%	0.3%	0.3%	0.3%
Slate	0%	1%	0%	0.3%
Other	1%	8%	1%	7%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 6. Percentages of low-slope roofing work by roof system type in the Mid-Atlantic region

Percentages of steep-slope roofing work by roof system type—Mid-Atlantic				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	3%	9%	3%	9%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0%	0.7%	0%	0.7%
EPDM	3%	2%	3%	3%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	0%	0.4%	0%	0.4%
TPO	10%	7%	9%	6%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	1%	0.7%	2%	1%
Liquid-applied	0%	0%	0%	0.7%
Metal—structural	1%	0.7%	1%	1%
Metal—architectural	44%	19%	43%	26%
APP-modified bitumen*	2%	1%	2%	1%
SBS-modified bitumen*	0%	0%	0%	0%
Clay tile	2%	0.7%	1%	1%
Concrete tile	0%	0%	0%	0%
Fiberglass asphalt shingle	30%	36%	28%	33%
Organic asphalt shingle	0%	0%	0%	0%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	2%	2%	3%	2%
Slate	2%	11%	5%	5%
Other	2%	8%	2%	8%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 7. Percentages of steep-slope roofing work by roof system type in the Mid-Atlantic region

Percentages of low-slope roofing work by roof system type—South Atlantic				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	15%	18%	13%	15%
BUR—coal tar (hot-applied)*	0.5%	0.9%	0.7%	0.7%
BUR—cold process*	0.5%	2%	1%	2%
EPDM	15%	12%	14%	13%
CSPE/Hypalon®	0.5%	0.5%	0.8%	0.1%
PVC	7%	12%	5%	12%
TPO	16%	14%	18%	12%
Other single plies	0.2%	0.3%	0.2%	0.5%
Spray polyurethane foam	3%	3%	3%	3%
Liquid-applied	0.3%	0.9%	1%	1%
Metal—structural	2%	0.7%	2%	0.7%
Metal—architectural	8%	4%	8%	6%
APP-modified bitumen*	6%	6%	5%	7%
SBS-modified bitumen*	2%	2%	2%	5%
Clay tile	0%	0.5%	0.3%	0.1%
Concrete tile	0%	0.4%	0.2%	0.5%
Fiberglass asphalt shingle	5%	6%	4%	7%
Organic asphalt shingle	2%	1%	1%	1%
Fiber-cement	0%	0%	0%	0.1%
Wood shingle/shake	0.3%	0.5%	0.3%	0.3%
Slate	0.3%	0.4%	0.3%	0.1%
Other	0.2%	0.4%	0.3%	0.3%

*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.

Figure 8. Percentages of low-slope roofing work by roof system type in the South Atlantic region

Percentages of steep-slope roofing work by roof system type—South Atlantic				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	0.4%	1%	1%	2%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0%	0%	0%	0.2%
EPDM	0.7%	0.6%	3%	1%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	0%	0.4%	0%	0%
TPO	0%	0%	0.6%	0%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	0.4%	0.4%	0.4%	0.4%
Liquid-applied	4%	4%	4%	4%
Metal—structural	5%	6%	6%	6%
Metal—architectural	43%	29%	38%	27%
APP-modified bitumen*	0.2%	0%	1%	0.7%
SBS-modified bitumen*	1%	2%	2%	2%
Clay tile	1%	3%	1%	4%
Concrete tile	5%	2%	9%	1%
Fiberglass asphalt shingle	31%	44%	27%	44%
Organic asphalt shingle	3%	2%	3%	2%
Fiber-cement	0%	0%	0%	0.8%
Wood shingle/shake	3%	3%	3%	2%
Slate	2%	2%	2%	3%
Other	0%	0.4%	0%	0.4%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 9. Percentages of steep-slope roofing work by roof system type in the South Atlantic region

Percentages of low-slope roofing work by roof system type—East North Central				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	7%	13%	7%	13%
BUR—coal tar (hot-applied)*	3%	4%	2%	2%
BUR—cold process*	0.9%	1%	0.2%	2%
EPDM	52%	45%	52%	46%
CSPE/Hypalon®	0%	0.3%	0.4%	0%
PVC	8%	8%	10%	8%
TPO	6%	4%	8%	6%
Other single plies	0%	0.5%	0%	0.8%
Spray polyurethane foam	4%	3%	4%	3%
Liquid-applied	0%	0.3%	0%	0.6%
Metal—structural	0%	0%	0%	0%
Metal—architectural	6%	1%	2%	1%
APP-modified bitumen*	9%	11%	10%	9%
SBS-modified bitumen*	2%	4%	3%	4%
Clay tile	0%	0%	0%	0%
Concrete tile	0%	0%	0%	0%
Fiberglass asphalt shingle	1%	3%	0.7%	4%
Organic asphalt shingle	0%	0.2%	0%	0%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	0.2%	0.2%	0.2%	0.2%
Slate	0%	0.5%	0.4%	0.2%
Other	0.4%	0%	0%	0%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 10. Percentages of low-slope roofing work by roof system type in the East North Central region

Percentages of steep-slope roofing work by roof system type—East North Central				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	0%	0.4%	0%	0.4%
BUR—coal tar (hot-applied)*	0%	2%	0%	2%
BUR—cold process*	0.8%	1%	0%	0.8%
EPDM	2%	2%	2%	2%
CSPE/Hypalon®	0%	0%	0%	0.2%
PVC	7%	1%	3%	1%
TPO	0.6%	0.2%	0%	0%
Other single plies	0%	0.6%	0%	1%
Spray polyurethane foam	0%	0%	0%	0%
Liquid-applied	0%	0%	0%	0%
Metal—structural	2%	2%	2%	2%
Metal—architectural	8%	4%	9%	5%
APP-modified bitumen*	0.2%	1%	0%	2%
SBS-modified bitumen*	0.2%	1%	0.5%	2%
Clay tile	0.8%	0.8%	0.9%	0.8%
Concrete tile	0.4%	0.2%	0.5%	0.4%
Fiberglass asphalt shingle	68%	73%	74%	70%
Organic asphalt shingle	5%	2%	0.7%	5%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	2%	4%	3%	3%
Slate	0.8%	2%	4%	1%
Other	3%	3%	2%	2%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 11. Percentages of steep-slope roofing work by roof system type in the East North Central region

Percentages of low-slope roofing work by roof system type—East South Central				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	21%	26%	16%	24%
BUR—coal tar (hot-applied)*	2%	3%	0%	1%
BUR—cold process*	0%	2%	0%	2%
EPDM	39%	29%	40%	27%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	0%	0%	0%	0%
TPO	0%	0%	0%	0.7%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	0%	0%	0%	0%
Liquid-applied	0%	6%	0%	4%
Metal—structural	0%	0%	0%	0%
Metal—architectural	4%	1%	4%	1%
APP-modified bitumen*	2%	6%	0.7%	5%
SBS-modified bitumen*	30%	26%	39%	33%
Clay tile	0%	0%	0%	0%
Concrete tile	0%	0%	0%	0%
Fiberglass asphalt shingle	1%	1%	1%	1%
Organic asphalt shingle	0%	0%	0%	0%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	0%	0%	0%	0%
Slate	0%	0%	0%	0%
Other	0%	0%	0%	0%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 12. Percentages of low-slope roofing work by roof system type in the East South Central region

Percentages of steep-slope roofing work by roof system type—East South Central				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	2%	2%	2%	2%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0%	0%	0%	0%
EPDM	1%	2%	0.8%	2%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	0%	0%	0%	0%
TPO	0%	0%	0%	0%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	0%	0%	0%	0%
Liquid-applied	0%	10%	0%	5%
Metal—structural	14%	2%	0.8%	0%
Metal—architectural	32%	27%	35%	23%
APP-modified bitumen*	2%	2%	2%	2%
SBS-modified bitumen*	14%	12%	12%	12%
Clay tile	4%	6%	6%	6%
Concrete tile	0%	3%	0%	7%
Fiberglass asphalt shingle	25%	29%	24%	21%
Organic asphalt shingle	1%	3%	0.8%	4%
Fiber-cement	0%	0%	15%	15%
Wood shingle/shake	2%	2%	0.8%	0.8%
Slate	1%	3%	0.8%	3%
Other	2%	0.8%	2%	0.8%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 13. Percentages of steep-slope roofing work by roof system type in the East South Central region

Percentages of low-slope roofing work by roof system type—West North Central				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	23%	23%	19%	14%
BUR—coal tar (hot-applied)*	0%	0.5%	0%	0%
BUR—cold process*	0%	0%	0%	0%
EPDM	50%	32%	40%	34%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	0%	1%	0%	0%
TPO	3%	2%	4%	4%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	0%	14%	0%	14%
Liquid-applied	0%	0%	0%	0%
Metal—structural	0%	0%	3%	0%
Metal—architectural	6%	2%	3%	4%
APP-modified bitumen*	0.7%	5%	2%	3%
SBS-modified bitumen*	11%	11%	12%	7%
Clay tile	0.7%	0%	0.6%	0%
Concrete tile	0%	0%	4%	0%
Fiberglass asphalt shingle	6%	5%	13%	15%
Organic asphalt shingle	0%	0%	0%	0%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	0%	0%	0.6%	0.5%
Slate	0%	0%	0%	0%
Other	0%	6%	0%	6%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 12. Percentages of low-slope roofing work by roof system type in the West North Central region

Percentages of steep-slope roofing work by roof system type—West North Central				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	3%	7%	4%	2%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0%	0%	0%	0%
EPDM	23%	20%	14%	18%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	0%	0%	0%	0%
TPO	2%	0%	0%	0%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	0%	0%	0%	0%
Liquid-applied	0%	0%	0%	0%
Metal—structural	0%	0%	0%	0%
Metal—architectural	45%	27%	14%	15%
APP-modified bitumen*	0%	0%	0%	0%
SBS-modified bitumen*	5%	3%	6%	6%
Clay tile	0%	10%	0%	0%
Concrete tile	0%	0%	8%	0%
Fiberglass asphalt shingle	22%	32%	54%	59%
Organic asphalt shingle	0%	2%	0%	0%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	0%	0%	1%	1%
Slate	0%	0%	0%	0%
Other	0%	0%	0%	0%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 13. Percentages of steep-slope roofing work by roof system type in the West North Central region

Percentages of low-slope roofing work by roof system type—West South Central				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	11%	11%	11%	9%
BUR—coal tar (hot-applied)*	0.5%	0%	0%	0%
BUR—cold process*	1%	2%	2%	0.4%
EPDM	7%	4%	6%	5%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	3%	2%	2%	2%
TPO	22%	23%	23%	23%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	1%	9%	0%	10%
Liquid-applied	0%	9%	0%	8%
Metal—structural	1%	0.8%	1%	2%
Metal—architectural	8%	2%	10%	2%
APP-modified bitumen*	25%	17%	24%	16%
SBS-modified bitumen*	21%	23%	23%	25%
Clay tile	0%	0%	0%	0%
Concrete tile	0.5%	0%	0.5%	0%
Fiberglass asphalt shingle	0%	0%	0.5%	0%
Organic asphalt shingle	0%	0%	0%	0%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	0%	0%	0%	0%
Slate	0%	0%	0%	0%
Other	0.5%	0%	0%	0%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 16. Percentages of low-slope roofing work by roof system type in the West South Central Region

Percentages of steep-slope roofing work by roof system type—West South Central				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	0%	0%	0%	0%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0%	0%	0%	0%
EPDM	0%	0%	0%	0%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	0%	0%	0%	0%
TPO	1%	4%	1%	4%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	0%	14%	0%	14%
Liquid-applied	0%	0%	0%	0%
Metal—structural	3%	3%	3%	3%
Metal—architectural	62%	48%	61%	34%
APP-modified bitumen*	1%	2%	1%	2%
SBS-modified bitumen*	0%	0%	0%	0%
Clay tile	3.1%	0.7%	0.6%	0.7%
Concrete tile	4%	1%	4%	15%
Fiberglass asphalt shingle	19%	22%	25%	21%
Organic asphalt shingle	0%	0%	0%	0%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	2%	0.7%	0.6%	0.7%
Slate	0%	0%	0%	0%
Other	3%	0%	0.6%	0%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 17. Percentages of steep-slope roofing work by roof system type in the West South Central Region

Percentages of low-slope roofing work by roof system type—Mountain				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	25%	36%	17%	35%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	10%	6%	17%	11%
EPDM	6%	6%	10%	8%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	12%	14%	11%	17%
TPO	23%	19%	31%	17%
Other single plies	0%	2%	0%	0%
Spray polyurethane foam	0%	0.5%	0%	1%
Liquid-applied	0%	0%	0%	0%
Metal—structural	0%	0%	0%	0%
Metal—architectural	5%	0%	5%	0%
APP-modified bitumen*	18%	13%	10%	9%
SBS-modified bitumen*	0%	2%	0%	2%
Clay tile	0%	0.5%	0%	0%
Concrete tile	0%	2%	0%	0%
Fiberglass asphalt shingle	2%	1%	2%	1%
Organic asphalt shingle	0%	0%	0%	0%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	0%	0%	0%	0%
Slate	0.8%	0%	0%	0%
Other	0%	0%	0%	0%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 18. Percentages of low-slope roofing work by roof system type in the Mountain region

Percentages of steep-slope roofing work by roof system type—Mountain				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	0%	0%	0%	0%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0%	0%	0%	0%
EPDM	0%	0%	0%	0%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	0%	0%	0%	0%
TPO	0%	0%	0%	0%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	0%	0%	0%	0%
Liquid-applied	0%	0%	0%	0%
Metal—structural	1%	2%	1%	6%
Metal—architectural	21%	0%	17%	1%
APP-modified bitumen*	0%	0%	0%	0%
SBS-modified bitumen*	4%	2%	4%	3%
Clay tile	8%	4%	3%	4%
Concrete tile	5%	16%	25%	16%
Fiberglass asphalt shingle	54%	68%	47%	64%
Organic asphalt shingle	0%	0%	0%	0%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	3%	3%	2%	0.7%
Slate	1%	3%	0%	3%
Other	4%	2%	1%	1%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 19. Percentages of steep-slope roofing work by roof system type in the Mountain region

Percentages of low-slope roofing work by roof system type—Pacific				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	23%	12%	20%	11%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0%	0%	0.5%	0%
EPDM	27%	29%	26%	29%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	9%	4%	8%	7%
TPO	22%	24%	24%	26%
Other single plies	0%	0%	2%	0%
Spray polyurethane foam	1%	1%	1%	3%
Liquid-applied	0%	5%	0.5%	3%
Metal—structural	0%	0%	0%	0%
Metal—architectural	5%	8%	5%	9%
APP-modified bitumen*	1%	2%	2%	2%
SBS-modified bitumen*	6%	4%	6%	4%
Clay tile	1%	2%	1%	0.5%
Concrete tile	1%	1%	1%	1%
Fiberglass asphalt shingle	4%	5%	4%	5%
Organic asphalt shingle	0.5%	0.5%	0.5%	0.5%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	0.5%	0%	0.5%	0%
Slate	0%	0%	0%	0%
Other	1%	0.5%	0%	0%

*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.

Figure 20. Percentages of low-slope roofing work by roof system type in the Pacific region

Percentages of steep-slope roofing work by roof system type—Pacific				
	2003		2004	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	10%	7%	9%	7%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	0%	0%	0%	0%
EPDM	1%	2%	1%	2%
CSPE/Hypalon®	0%	0%	0%	0%
PVC	1%	2%	1%	2%
TPO	10%	12%	10%	12%
Other single plies	0%	0%	0%	0%
Spray polyurethane foam	0%	0%	0%	0%
Liquid-applied	0%	0%	0%	0%
Metal—structural	0%	0%	0%	0%
Metal—architectural	15%	11%	16%	10%
APP-modified bitumen*	0.6%	0.7%	0.6%	0.7%
SBS-modified bitumen*	2%	3%	2%	2%
Clay tile	1%	1%	2%	3%
Concrete tile	11%	9%	12%	7%
Fiberglass asphalt shingle	41%	44%	42%	48%
Organic asphalt shingle	0.6%	0.7%	0%	0.7%
Fiber-cement	0%	0%	0%	0%
Wood shingle/shake	4%	5%	4%	5%
Slate	0%	0%	0.6%	0%
Other	3%	1%	0.6%	0.7%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 21. Percentages of steep-slope roofing work by roof system type in the Pacific region

NRCA's 2004-05 Market Survey Introduction

For its 2004-05 market survey, NRCA continued to gather information about roofing contractors' experiences and material usage, including sales of types of roof systems for low- and steep-slope new construction, reroofing and repair and maintenance work, as well as overall sales volume trends.

Background

In March 2005, NRCA mailed survey questionnaires to approximately 2,800 NRCA member roofing contractors to obtain data and compare contractors' experiences from 2004 and expectations for 2005. NRCA received 517 responses for a response rate of 18.5 percent, a much higher rate than in 2004, enough information for a much more reliable report. NRCA's market survey, however, 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
(Note: There were no responses for Alaska, Hawaii, Puerto Rico and the U.S. Virgin Islands.)

Respondent details

The respondent's average sales volumes for 2004 and 2005 averaged $4,483,433 and $4,976,325 respectively. Although regionally there were variances in the annual sales volume projections from 2004 to 2005 (see Figure 1), every region had optimistic views, with an expected overall average increase of nearly 11 percent.

When looking at the breakout of roofing work performed (low-slope vs. steep-slope), the results were different from those reported in the 2003-04 report (72.06 percent low-slope and 27.94 percent steep-slope work). The 2004-05 report shows that for 2004, respondents identified 66.56 percent of their roofing sales as being low-slope (3:12 or less) and 33.44 percent as being steep-slope (greater than 3:12), and their predictions for 2005 were similar: 66.63 percent for low-slope and 33.37 percent for steep-slope. The increase of reported steep-slope sales most likely correlated to the increased response rate, with more contractors who perform steep-slope roofing work responding to the 2004-05 survey.

When broken down into new construction, reroofing, and repair and maintenance work, the low-slope figures reported for 2004 held steady with the projections for 2005, as well as with figures reported in 2003-04. On average, for 2004, respondents reported 27 percent of their low-slope work as being new construction, 61 percent of their work as reroofing, and 12 percent of their work as repair and maintenance work.

The steep-slope figures reported for 2004 also held steady for 2005 projections, with respondents reporting an average of

Region	2004 Reported Average of Annual Sales Volume (in millions of dollars)	2005 Projected Average of Annual Sales Volume (in millions of dollars)	2004-2005 Percentage of Projected Increase in Sales Volume
New England	$3.699	$4.153	12.27%
Mid-Atlantic	$3.314	$3.667	10.65%
South Atlantic	$4.816	$5.550	15.24%
East North Central	$3.845	$4.066	5.75%
East South Central	$2.799	$3.175	13.43%
West North Central	$4.624	$5.047	9.15%
West South Central	$4.045	$4.574	13.08%
Mountain Region	$5.428	$6.099	12.36%
Pacific	$7.047	$7.695	9.20%
All Regions	$4.483	$4.976	10.99%

Figure 1. Average annual regional sales volumes for 2004 and projected for 2005

29 percent for new construction, 59 percent for reroofing, and 12 percent for repair and maintenance work.

Roof system percentages

As with the 2003-04 Market Survey report, the 2004-05 survey results for low-slope roof systems show EPDM as the market leader in 2004 with a reported 29 percent share for new construction and 25 percent share for reroofing work. In second place for 2004 were SBS-modified bitumen systems, with an approximate 15 percent share of new construction work and 16 percent share of reroofing work. The projections reported for 2005 in the types of roof systems used for low-slope roofing were similar in percentages (please refer to Figure 2).

In all but three regions, EPDM ranked as the number one choice for low-slope roof systems used in both new construction and reroofing projects. The three regions that reported something other than EPDM as the top choice were the West South Central region, which reported SBS-modified bitumen as the preferred choice; the Mountain region, which reported TPO as the top choice; and the Pacific region, which reported BUR-asphalt (hot applied) as the top choice. Please refer to the regional charts to see how the remaining roof systems ranked within the low-slope roofing category.

On average, fiberglass asphalt shingles appear to dominate both categories (new construction and reroofing) in the 2004 steep-slope market and was projected to do so in 2005, as well (see figure 3). Metal—architectural roof systems—holds a steady second across the board.

For steep-slope roofing work in new construction, all but one region reported fiberglass asphalt shingles as the leader for 2004. Although the South Atlantic Region reported fiberglass asphalt shingles as the No. 2 (second to metal—architectural) type of roof system used in 2004 for new construction steep-slope roofing projects, the 2005 projections showed fiberglass asphalt singles would dominate the region's market. And for the 2004 reroofing market, all regions reported fiberglass asphalt shingle roof systems as the market leader. Two regions (mountain and pacific) reported concrete tile as the second type of most widely used steep-slope roof system, while the remaining regions reported metal—architectural roof systems each as their No. 2 systems for steep-slope roofing projects.

2004 and Projected 2005 Low-slope Roofing Sales by Type of Roof System

Type	2004		2005	
	New Construction	Reroofing	New Construction	Reroofing
BUR- asphalt (hot applied)	13.27%	15.21%	12.58%	14.52%
BUR-coal tar (hot applied)	.33%	.95%	.30%	.77%
BUR-cold process	1.98%	3.26%	2.45%	4.01%
EPDM	29.02%	25.02%	28.45%	24.34%
PVC	8.21%	7.43%	7.86%	8.11%
TPO	10.44%	9.76%	12.53%	10.02%
Spray polyurethane foam	1.99%	2.47%	1.96%	2.68%
Metal-structural	1.77%	1.59%	1.69%	1.71%
Metal-architectural	6.61%	4.28%	7.26%	4.60%
APP-modified bitumen	7.91%	9.73%	7.04%	9.01%
SBS-modified bitumen	15.05%	16.05%	14.48%	15.81%
Other	3.39%	4.28%	3.40%	4.48%

Figure 2. Percentages of low-slope roofing work by roof system type

2004 and Projected 2005 Steep-slope Roofing Sales by Type of Roof System

Type	2004		2005	
	New Construction	Reroofing	New Construction	Reroofing
Fiberglass asphalt shingle	49.79%	59.64%	50.25%	58.43%
Organic asphalt shingle	1.38%	1.17%	1.14%	1.65%
Clay tile	4.54%	4.05%	4.02%	4.13%
Concrete tile	7.15%	4.26%	7.14%	4.41%
Wood shingle/shake	3.56%	4.19%	3.14%	3.92%
Slate	5.4%	5.11%	4.73%	4.56%
Metal-architectural	22.85%	15.2%	24.39%	16.34%
Metal shingles	1.51%	2.2%	2.06%	1.95%
Spray polyurethane foam	.36%	1.25%	.06%	1.04%
Fiber-cement	.29%	35%	.19%	.20%
Other	3.17%	2.59%	2.9%	3.37%

Figure 3. Percentages of steep-slope roofing work by roof system type

Percentages of low-slope roofing work by roof system type—New England				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	4.5%	4.36%	4.3%	4.48%
BUR—coal tar (hot-applied)*	0%	0.14%	0%	0.1%
BUR—cold process*	2.1%	1.23%	1.8%	1.95%
EPDM	56.35%	52.46%	55.6%	53.34%
PVC	4.5%	6.46%	4%	6.91%
TPO	13.5%	10.36%	14.25%	10.72%
Spray polyurethane foam	0%	0%	0%	0%
Metal—structural	1%	2.5%	1%	1.43%
Metal—architectural	6.5%	6.27%	6.55%	8.95%
APP-modified bitumen*	3.15%	1.95%	2.45%	1.48%
SBS-modified bitumen*	8.2%	9.36%	9.65%	8.43%
Other	0.2%	4.9%	0.4%	2.24%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 4. Percentages of low-slope roofing work by roof system type in the New England region

Percentages of steep-slope roofing work by roof system type—New England				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	68.83%	67.65%	67.38%	66.31%
Organic asphalt shingle	2.35%	1.5%	0.94%	1.32%
Clay tile	0.06%	0.05%	0%	1.05%
Concrete tile	4.24%	3.95%	3.88%	3.95%
Wood shingle/shake	4.18%	6.8%	1.75%	5.84%
Slate	7.94%	4.1%	11.56%	5.10%
Metal—architectural	11.35%	13.15%	10.25%	14.16%
Metal shingles	0.88%	0.75%	10.06%	0.79%
Spray polyurethane foam	0%	0%	0%	0%
Fiber-cement	0%	0%	0%	0%
Other	1.18%	2.05%	0.19%	1.47%

Figure 5. Percentages of steep-slope roofing work by roof system type in the New England region

Percentages of low-slope roofing work by roof system type—Mid-Atlantic				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	4.66%	7.91%	5.73%	6.51%
BUR—coal tar (hot-applied)*	0.14%	0.52%	0.14%	0.2%
BUR—cold process*	1.22%	2.79%	2.24%	2.82%
EPDM	47%	44.19%	44.02%	45.58%
PVC	1.83%	2.69%	3.53%	2.91%
TPO	9.82%	10.03%	12.11%	8.94%
Spray polyurethane foam	3.48%	4.08%	3.48%	4.92%
Metal—structural	0.63%	0.66%	0.71%	0.5%
Metal—architectural	7.58%	2.28%	8.56%	2.95%
APP-modified bitumen*	7.39%	8.06%	5.58%	7%
SBS-modified bitumen*	11.63%	13.10%	10.14%	13.79%
Other	4.66%	3.71%	3.81%	3.86%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 6. Percentages of low-slope roofing work by roof system type in the Mid-Atlantic region

Percentages of steep-slope roofing work by roof system type—Mid-Atlantic				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	52.34%	60.52%	50.72%	59.4%
Organic asphalt shingle	2.55%	3.14%	2.45%	3.1%
Clay tile	0.43%	1.2%	0.43%	1.22%
Concrete tile	0.11%	0%	0%	0%
Wood shingle/shake	5.09%	3.57%	4.02%	5.34%
Slate	4.51%	8.3%	4.94%	5.62%
Metal—architectural	25.28%	14.89%	29.33%	15.66%
Metal shingles	0.47%	0.47%	1.13%	0.92%
Spray polyurethane foam	2.13%	1.96%	0%	0%
Fiber-cement	0.21%	0.49%	0.21%	0.24%
Other	3.92%	5.49%	6.81%	8.5%

Figure 7. Percentages of steep-slope roofing work by roof system type in the Mid-Atlantic region

Percentages of low-slope roofing work by roof system type—South Atlantic				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	14.52%	14.65%	13.74%	14.65%
BUR—coal tar (hot-applied)*	0.4%	1.18%	0.41%	1.1%
BUR—cold process*	2.33%	3.73%	2.78%	3.83%
EPDM	21.6%	16.84%	20.49%	16.97%
PVC	9.15%	7.57%	7.62%	7.79%
TPO	14.43%	13.37%	16.33%	13.01%
Spray polyurethane foam	0.22%	0.18%	0.05%	0.49%
Metal—structural	2.44%	1.93%	3.11%	2.26%
Metal—architectural	8.65%	6.77%	9.69%	6.47%
APP-modified bitumen*	7.57%	10.85%	6.47%	10.33%
SBS-modified bitumen*	17.61%	19.34%	17.38%	18.32%
Other	1.09%	3.54%	1.93%	4.74%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 8. Percentages of low-slope roofing work by roof system type in the South Atlantic region

Percentages of steep-slope roofing work by roof system type—South Atlantic				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	37.02%	53.1%	38.9%	52.76%
Organic asphalt shingle	0.48%	0.39%	0.46%	0.38%
Clay tile	2.86%	4.16%	2.97%	3.79%
Concrete tile	8.72%	6.96%	8.63%	6.65%
Wood shingle/shake	1.91%	3.74%	2.42%	3.7%
Slate	4.7%	5.2%	4.05%	5.31%
Metal—architectural	39.26%	21.97%	37.25%	22.7%
Metal shingles	1.71%	1.76%	2.06%	2.5%
Spray polyurethane foam	0.06%	0.01%	0.06%	0.01%
Fiber-cement	0.65%	0.54%	0.38%	0.43%
Other	2.6%	2.18%	2.78%	2.23%

Figure 9. Percentages of steep-slope roofing work by roof system type in the South Atlantic region

Percentages of low-slope roofing work by roof system type—East North Central				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	7.36%	10.47%	5.38%	9.49%
BUR—coal tar (hot-applied)*	0.75%	1.6%	0.85%	1.23%
BUR—cold process*	1.17%	2.12%	1.06%	2.45%
EPDM	35.47%	31.47%	37.05%	29.55%
PVC	8.64%	6.07%	8.52%	8.66%
TPO	6.94%	6.55%	9.79%	7.07%
Spray polyurethane foam	2.35%	2.73%	2.21%	2.68%
Metal—structural	1.06%	0.51%	0.34%	0.37%
Metal—architectural	5.78%	3.91%	6.35%	4.68%
APP-modified bitumen*	13.19%	17.57%	12.4%	16.84%
SBS-modified bitumen*	10.64%	12.15%	9.39%	11.72%
Other	6.65%	4.85%	6.62%	5.31%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 10. Percentages of low-slope roofing work by roof system type in the East North Central region

Percentages of steep-slope roofing work by roof system type—East North Central				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	61.53%	68.83%	68.16%	67.76%
Organic asphalt shingle	3.02%	2.23%	2.98%	3.58%
Clay tile	6.57%	4.42%	3.3%	4.48%
Concrete tile	0.52%	0.27%	0%	0.42%
Wood shingle/shake	5.43%	5.34%	1.09%	3.46%
Slate	9.02%	6.88%	3.68%	5.36%
Metal—architectural	9.82%	7.5%	6.7%	8.44%
Metal shingles	1%	1.54%	11.17%	1.97%
Spray polyurethane foam	0%	1.69%	0%	1.74%
Fiber-cement	0.13%	0%	0%	0%
Other	2.97%	1.28%	1.47%	2.76%

Figure 11. Percentages of steep-slope roofing work by roof system type in the East North Central region

Percentages of low-slope roofing work by roof system type—East South Central				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	4.21%	8.16%	5.69%	9.3%
BUR—coal tar (hot-applied)*	0.31%	0.8%	0.1%	1.1%
BUR—cold process*	1.07%	1.1%	0.79%	4.9%
EPDM	31.21%	27.56%	30.55%	25.36%
PVC	13.14%	12.46%	11.72%	11.4%
TPO	11.55%	10.63%	13.52%	11.5%
Spray polyurethane foam	0%	0%	0%	0%
Metal—structural	3.62%	2%	1.9%	2%
Metal—architectural	9.66%	6.16%	8.52%	6.83%
APP-modified bitumen*	4.31%	5.5%	8.9%	5.5%
SBS-modified bitumen*	17.59%	22.46%	19.97%	22.03%
Other	3.34%	3.13%	3.34%	0.1%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 12. Percentages of low-slope roofing work by roof system type in the East South Central region

Percentages of steep-slope roofing work by roof system type—East South Central				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	39.45%	46.05%	39.72%	49.35%
Organic asphalt shingle	1.3%	0.65%	0.68%	0.63%
Clay tile	7.7%	8.4%	7.18%	6.79%
Concrete tile	1%	0.22%	0.45	0.42%
Wood shingle/shake	2.25%	2.96%	2%	1.83%
Slate	8.55%	8.22%	7%	8.29%
Metal—architectural	32.25%	26.53%	36.54%	26.84%
Metal shingles	1.75%	1.13%	1.18%	1.08%
Spray polyurethane foam	0%	0%	0%	0%
Fiber-cement	0.25%	1.09%	0.23%	0.21%
Other	5.5%	4.78%	5%	4.58%

Figure 13. Percentages of steep-slope roofing work by roof system type in the East South Central region

Percentages of low-slope roofing work by roof system type—West North Central				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	12.7%	15.3%	12.41%	14.92%
BUR—coal tar (hot-applied)*	0.02%	0.48%	0.02%	0.45%
BUR—cold process*	0.34%	1.52%	0.19%	1.81%
EPDM	41.77%	35.88%	40.49%	32.8%
PVC	7.61%	8.13%	6.79%	8.26%
TPO	7.98%	7.61%	10.29%	9.54%
Spray polyurethane foam	5.96%	7.06%	5.84%	7.05%
Metal—structural	0.12%	1.13%	0.24%	3.45%
Metal—architectural	3.99%	3.41%	5.52%	4.07%
APP-modified bitumen*	8.12%	4.98%	6.5%	4.19%
SBS-modified bitumen*	10.41%	12.39%	11.03%	12.05%
Other	0.95%	2.09%	0.71%	1.47%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 14. Percentages of low-slope roofing work by roof system type in the West North Central region

Percentages of steep-slope roofing work by roof system type—West North Central				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	54.39%	64.6%	48.08%	59.43%
Organic asphalt shingle	1.9%	1.51%	1.03%	1.62%
Clay tile	2.35%	2.03%	2.52%	2.18%
Concrete tile	6.45%	1.27%	6.62%	3.73%
Wood shingle/shake	5.35%	3.72%	4.97%	4.76%
Slate	1.41%	1.09%	1.59%	1.65%
Metal—architectural	19.69%	11.91%	23.63%	15.59%
Metal shingles	4.7%	7.33%	7.97%	4.47%
Spray polyurethane foam	0%	1.52%	0%	2.06%
Fiber-cement	0%	0%	0%	0%
Other	3.79%	5%	3.62%	4.56%

Figure 15. Percentages of steep-slope roofing work by roof system type in the West North Central region

Percentages of low-slope roofing work by roof system type—West South Central				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	17.1%	19.28%	16.4%	18.15%
BUR—coal tar (hot-applied)*	0.54%	1.85%	0.16%	1.34%
BUR—cold process*	2.4%	4.21%	2.14%	4.68%
EPDM	5.77%	4.43%	5.8%	4.68%
PVC	8.56%	8.38%	8.93%	8.83%
TPO	8.07%	7.79%	9.63%	7.13%
Spray polyurethane foam	2.37%	3.51%	2.61%	3.64%
Metal—structural	4.23%	4.23%	4.33%	3.72%
Metal—architectural	6.68%	3.11%	8.09%	2.91%
APP-modified bitumen*	6.51%	7.64%	6.84%	7.98%
SBS-modified bitumen*	35.68%	33.88%	33.98%	35.05%
Other	1.12%	1.7%	1.12%	1.89%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 16. Percentages of low-slope roofing work by roof system type in the West South Central region

Percentages of steep-slope roofing work by roof system type—West South Central				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	51.84%	53.92%	49.42%	53.45%
Organic asphalt shingle	0.03%	0.03%	0.03%	0.08%
Clay tile	8.82%	7.06%	9.81%	9.67%
Concrete tile	3.7%	3.53%	3.76%	3.42%
Wood shingle/shake	1.39%	0.67%	1%	0.81%
Slate	4.09%	3.86%	3.51%	3.08%
Metal—architectural	27.72%	23.11%	30.15%	24.59%
Metal shingles	0.27%	3.39%	0.18%	.67%
Spray polyurethane foam	0%	2.78%	0%	2.78%
Fiber-cement	0.03%	0.17%	0.03%	0.03%
Other	2.09%	1.5%	2.09%	1.5%

Figure 17. Percentages of steep-slope roofing work by roof system type in the West South Central region

Percentages of low-slope roofing work by roof system type—Mountain				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	13.3%	12.32%	12.52%	11.46%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	5.95%	5.4%	6.52%	6.92%
EPDM	19%	17.8%	17.6%	15.96%
PVC	16.04%	17.12%	17.17%	16.46%
TPO	20.38%	21%	21.08%	22.5%
Spray polyurethane foam	0.48%	0.4%	0.43%	0.38%
Metal—structural	2.52%	2.2%	2.3%	1.73%
Metal—architectural	3.35%	2.8%	3.7%	1.54%
APP-modified bitumen*	5.74%	9.2%	5.52%	6.73%
SBS-modified bitumen*	8.21%	6.76%	8.56%	8.23%
Other	5%	5%	4.56%	8.08%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 18. Percentages of low-slope roofing work by roof system type in the Mountain region

Percentages of steep-slope roofing work by roof system type—Mountain				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	46.49%	61.65%	45.1%	55.14%
Organic asphalt shingle	0.06%	0.1%	0.05%	4.86%
Clay tile	2.83%	1.85%	3.55%	1.76%
Concrete tile	29.27%	14.55%	31.8%	14.09%
Wood shingle/shake	4.28%	4.85%	3.8%	3.14%
Slate	1.72%	1.05%	1.3%	1.24%
Metal—architectural	12%	13.15%	11.75%	13.57%
Metal shingles	1.5%	1.3%	1.5%	19.05%
Spray polyurethane foam	0%	0%	0%	0%
Fiber-cement	0.28%	0%	0%	0%
Other	1.56%	1.5%	1.15%	4.29%

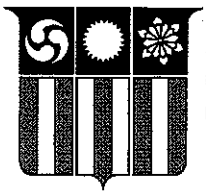
Figure 19. Percentages of steep-slope roofing work by roof system type in the Mountain region

Percentages of low-slope roofing work by roof system type—Pacific				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
BUR—asphalt (hot-applied)*	49.83%	41.12%	47.64%	40.6%
BUR—coal tar (hot-applied)*	0%	0%	0%	0%
BUR—cold process*	2.94%	6.41%	6.52%	8.66%
EPDM	0.97%	1.02%	0.83%	1%
PVC	8.17%	10%	6.44%	10.46%
TPO	11.44%	9.82%	14.73%	8086%
Spray polyurethane foam	1.69%	3.27%	1.8%	3.3%
Metal—structural	0.67%	0.92%	0.8%	0.8%
Metal—architectural	3.08%	1.86%	4.09%	2.7%
APP-modified bitumen*	7.5%	8.2%	3.18%	7.08%
SBS-modified bitumen*	8.53%	7.9%	5.64%	7.3%
Other	5.17%	9.49%	5.32%	9.24%
*To accurately report these figures, built-up roof membranes using modified bitumen cap sheets are considered modified bitumen roof systems.				

Figure 20. Percentages of low-slope roofing work by roof system type in the Pacific region

Percentages of steep-slope roofing work by roof system type—Pacific				
	2004		2005 (projected)	
Material type	New construction	Reroofing	New construction	Reroofing
Fiberglass asphalt shingle	50.48%	64.21%	55.67%	63.9%
Organic asphalt shingle	0%	0%	0%	0%
Clay tile	9.63%	5.25%	8.22%	4.88%
Concrete tile	21.7%	9.38%	18.04%	9.06%
Wood shingle/shake	1.97%	7.08%	2.28%	6.73%
Slate	3.91%	1.25%	2.28%	1.48%
Metal—architectural	9.16%	6.46%	9.85%	6.54%
Metal shingles	1.66%	2.8%	2.19%	.3.35%
Spray polyurethane foam	0.41%	2.35%	0.41%	2.35%
Fiber-cement	0.5%	0.6%	0.47%	0.44%
Other	0.63%	0.63%	0.63%	1.27%

Figure 21. Percentages of steep-slope roofing work by roof system type in the Pacific region



NATIONAL
ROOFING
CONTRACTORS
ASSOCIATION

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