

Roofing Materials Market in Japan: Key Research Findings 2010

~ Roofing materials; the industry and markets in times of accelerating change ~

➔ **Research Outline**

Yano Research Institute has conducted a study on the roofing materials market with following conditions.

1. Research period: July to November 2010
2. Research targets: Roofing material manufacturers and industry associations for roofing materials
3. Research methodologies: Face-to-face interviews by our specialized researchers

➔ **Key Findings**

- ◆ **Market of roofing materials for single-family housing in Japan ended up with 56.613 million m², 13.8% decrease year-on-year, in FY2009.**

Due to continuing slowdown in new housing construction starts, the market of roofing materials for single-family housing (including low-rise (two or three stories) apartment houses) decreased by 13.8%, compared to 65.690 million m² of the previous year, to 56.613 million m², based on the total roofed area in FY2009.

- ◆ **Even the market of clay roof tiles with dominant share in the roofing materials market, scaled back.**

Clay roof tiles, the most popular roofing material for single-family housing, accounted for a majority of 51.3% of the market of roofing materials for single-family housing in FY2009. The cement roof tiles follows at 31.6% and then metallic roofing materials at 14.5%. In the meantime, the markets of these roofing materials are all smaller than the previous year, and only shingle material market among all roofing materials markets grew and accounted for 2.6% of the total market of roofing materials for single-family housing.

- ◆ **The market of imported shingle materials expands and the shingle material market in Japan is now split between imported products and domestic products.**

The imported products that have been said to hardly penetrate or become popular in the market of housing and building materials are now expanding the market. In the shingle material market in particular, the proportion of imported products has exceeded 50%.

➔ **Report format:**

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Issued in: December 2010

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Price: 150,000 yen (7,500 yen of consumption tax will be additionally charged for sales in Japan.)

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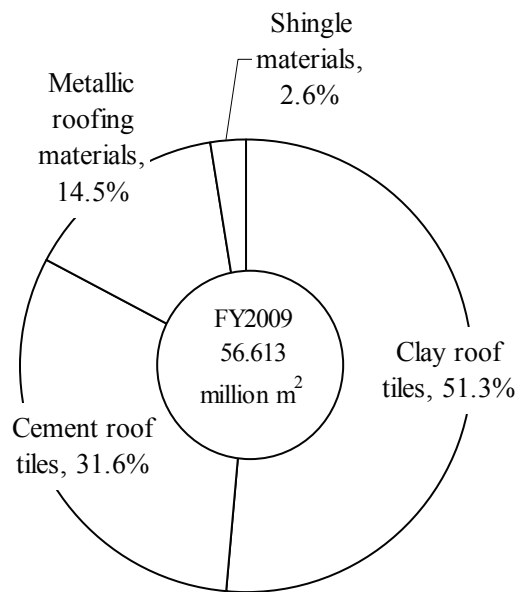
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Figure 1: Proportion of the market of roofing materials for single-family housing by material type (FY2009)



Estimated by Yano Research Institute

Notes:

1) Based on roofed area

Table 1: Market size for the roofing materials for single-family housing for renovation purpose and its proportion by material type (FY2009)

(Units: 1,000 m², %)

Material type	Roofing materials market (for single-family housing)	Market size of roofing materials for renovation	Proportion of roofing materials for renovation by material type
Clay roof tiles	29,054	8,716	57.1
Cement roof tiles	17,877	1,411	9.2
Shingle materials	1,483	222	1.5
Metallic roofing materials	8,199	4,919	32.2
Total	56,613	15,268	100.0

Estimated by Yano Research Institute

Notes:

2) Based on roofed area

3) Market of roofing materials for renovation is included in the roofing material market for single-family housing.

**Table 2: Sales volume of shingle materials (in roofed are):
Domestic products vs. imported products**

(Units: 1,000 m², %)

	FY2008		FY2009		FY2010 (Forecast)	
	Roofed area	Y-o-Y%	Roofed area	Y-o-Y%	Roofed area	Y-o-Y%
Domestic products	1,308	101.7	1,232	94.2	1,305	105.9
(Proportion)	(48.4)		(46.5)		(40.7)	
Imported products	1,393	123.9	1,416	101.7	1,900	134.2
(Proportion)	(51.6)		(53.5)		(59.3)	
Total	2,701	112.1	2,648	98.0	3,205	121.0

Estimated by Yano Research Institute

Notes:

4) Sales of shingle materials for nonresidential buildings are included.