WATERPROOFING IN COMMERCIAL CONSTRUCTION 2017

The building materials and construction industry’s most trusted source

PRINCIPIA
BRIDGING INSIGHT INTO ACTION
Waterproofing in Commercial Construction 2017

Billions of dollars are spent every year to minimize the damaging and costly effects of water intrusion in commercial construction. Commercial buildings are exposed to a wide variety of conditions while required to structurally perform with long-term durability. In addition to ongoing moisture intrusion issues, severe weather conditions can significantly create physical damage and weaken a building structure. Waterproofing products play a critical role in protecting buildings and the costs associated with repair and replacement, and are experiencing rapid growth.

Waterproofing is a highly fragmented market which includes a wide variety of waterproofing solutions and application technologies to protect various elements of a building, for example walls, below and above grade foundations, floor slabs, roofing, joints and window and door enclosures. The building envelope must be carefully designed with regard to climate, ventilation and energy consumption within the structure.

Key functions of the building envelope include providing structural support, controlling moisture, insulating from the elements, regulating temperature and controlling air pressure changes. Waterproofing products and application technologies are playing an every increasingly significant role in supporting and protecting these important functions. Increased awareness and growing acceptance as not only a maintenance solution but as a preventative measure by architects, building engineers, professional contractors and building maintenance managers has led to growing interest and use of waterproofing in commercial construction. Several key drivers for increased demand of waterproofing products include:

- **Commercial growth.** Rapid growth of commercial and governmental construction is propelling the need for new waterproofing systems and products.

- **Changing regulations.** Ever-changing and evolving ASTM standards and EPA requirements related to waterproofing and indoor air quality.

- **Focus on efficiency.** The building envelope affects ventilation and energy use within the building and waterproofing serves as protection for these functions.

- **Restoration.** Over 80% of building defect complaints are associated with moisture intrusion which can cost millions of dollars for a single structure and billions of dollars on a national basis.

- **Improved standards.** Buildings are constructed with a variety of designs, materials and components requiring compatible choices of building materials and waterproofing solutions.

Building owners, suppliers and building science experts in this diverse industry need to retain current knowledge of the rapidly evolving field of waterproofing products and systems and their impact on long term building integrity. Waterproofing in Commercial Construction 2017 will explore the dynamics influencing current and projected demand for these waterproofing products and systems used to provide protection in commercial buildings.
The report provides insights into industry trends to help manufacturers and distribution companies develop strategies to participate and drive market share increases in the waterproofing industry.

About the Program

Report Format

The report is structured for easy reference. The tentative outline that follows is subject to changes based on charter subscriber input.

1. Executive Summary

Summary of current market size, trends and developments, keys for future success and outlook.

2. Product Overview

A review of waterproofing products, along with recent product advances and developments. Product review considering:

- Application / primary and secondary functionality
- New products / technologies
- Warranties
- Installed costs, including cost per SF coverage for various waterproofing systems
- Prices (Average factory gate)
- Major producers/ brands
- Inter-material and other competitive products

3. Market Review

A thorough analysis of demand in North America will provide the baseline. A three-year projection will provide insights into how demand is most likely to shift by product, use, channel and region.

- Market segment demand analysis in 2016 for waterproofing, volume & value by:
  - Product
  - Construction type
  - Market
  - Distribution channel
  - Region (according to U.S. Census Bureau regions and Canada)
• Distribution channel dynamics
  • Flow of product by distribution outlet and region
  • Channel margins
  • Factors influencing trade within distribution channels
• Supply assessment
  • Supplier share for each product
  • New product developments
  • Inter-product competition
  • Acquisitions, divestitures and partnerships
• Year-over-year forecast demand to 2018, segmented like the current market
  • Market, technical and regulatory trends affecting potential demand
  • Macroeconomic and roofing market specific impact on demand

4. Voice of the Customer

Research from 500 interviews and surveys conducted among manufacturers, building science consultants, distributors and dealers, contractors, distributors and dealers and property owners provides fresh industry perspectives that assess issues driving material and supplier market shares. Subscribers learn what key players know and are saying about the current and future direction of waterproofing.

5. Business Assessment

A realistic business assessment to help define industry opportunities.
  • Overall current environment
  • Size of opportunity for waterproofing
  • Changing customer requirements
  • Impact of regulatory and code changes
  • Evolving channel dynamics
  • Opportunities and challenges for success


Voice of Customer research captures 500 market touch points, including interviews and surveys with architects, consultants, contractors, distributors and dealers and property owners. The research reveals information focused on brand awareness, preferred manufacturers, material and product preferences and other important factors such as:

A&D community, property owners
  • Key factors that influence material selection
  • Usage and preference trends
  • Brand awareness and its influence on specifying
  • Influential information sources
  • Preferred sales approach from manufacturers and channel partners
  • Others

Contractors
  • Product usage, competitive materials and system preferences
  • Code adoption and impact on building practices
  • Shifts in material needs
  • Key influencers
  • Preferred brands and materials
  • Others

Distributors and dealers
  • Material demand shifts
  • Channel changes
  • Brand preferences
  • Others
Using the Report

Waterproofing in Commercial Construction 2017 provides a vital baseline analysis for forecasting and business planning for current and new industry participants. Using 2016 as its launch point, the report analyzes demand drivers and trends by material, construction type, distribution channel, supplier and region, providing forecasts through 2018.

It also analyzes trends in current products, new product developments and technologies, and competitive materials, helping companies anticipate customer needs, plus insights into:

- Up-to-date market size and forecast
- Voice of Customer feedback on usage and preference trends
- Channel dynamics and trends impacting demand
- Market share review for leading producers
- Strategic insights into growth of waterproofing

Market Model and Forecast Tool: Create Your Own Forecasting Scenarios

A key feature for subscribers is the market model and forecast tool. The interactive market model tool enables subscribers to evaluate the market through whatever lens they choose. The market model and forecast tool is based on Principia’s proprietary process used to develop industry forecasts and demand assessments.

Key variable data include base year assumptions; forecast year-over-year GDP growth; population growth; market trends and other related metrics. This analytical and planning tool will enable clients to construct their own “what-if” scenarios of future demand and growth to develop their go-to-market strategies.

- Base year assumptions
- Forecasts of year-over-year commercial construction
- Building permits and remodeling spending year-over-year forecasts
- Product share and penetration rates of waterproofing by application, market and region

This powerful web-based tool is designed around best practices of data visualization and usability. The online platform enables users to login from any desktop or mobile device to access all of the data from the report, with the added ability to instantly customize the data views with their own information.
Use the tool to:

- Quickly analyze, visualize and share data
- Create rich analyses and interactive dashboards with intuitive functionality
- Filter, drill down and combine multiple views of data with a few clicks
- Instantly update with your own data and generate custom reports

Inside the Principia Market Model and Forecast Tool

Information from different sources is compiled and analyzed to create demand forecasts based on a wide range of scenario assumptions, including your own.
Why Subscribe?
The report is the essential reference for executives responsible for business planning at companies involved in or planning participation in waterproofing in North America. These include:

- Waterproofing manufacturers
- Waterproofing distributors and dealers
- Coatings raw material suppliers
- Building materials manufacturers

Report Methodology
Waterproofing in Commercial Construction 2017 is the indispensable tool for decision makers, offering a definitive 360-degree view of the industry including primary metrics defined by product, market, channel, region and supplier. The report also explores key issues affecting national and regional markets.

Principia maintains a building products and construction industry database that serves as the starting point for the research. In addition, Principia utilizes primary research and surveys to develop the data and information for its industry studies.

Subscription Information
Scope
The report focuses on waterproofing market in North America, including the United States and Canada.

Report Timing
Waterproofing in Commercial Construction 2017 launched in the last quarter of 2016 and is scheduled for completion in the second quarter of 2017. Principia is prepared to discuss report findings with interested parties to accommodate their specific information needs.

Subscription Price
The subscription price is $17,500 for the report. All subscribers to the full program are offered a private presentation by the Principia project team with an open discussion about the report and to address any company-specific issues. The consultation is included in the subscription price.
This agreement is between Principia Consulting, LLC and ______________________ (Client).

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