

Global Fiber Cement Market: Analysis By Raw Material (Portland cement, Cellulosic Fiber, Silica, and Others), By Curing Process (Steam Pressure Cured, and Ambient Cured), By Application (Exterior Cladding, Roofing Solutions, and Others), By Sector Usage (Residential Sector, and Non-Residential Sector) By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

<https://marketpublishers.com/r/G54121C25F6EEN.html>

Date: December 2023

Pages: 176

Price: US\$ 2,350.00 (Single User License)

ID: G54121C25F6EEN

Abstracts

The global fiber cement market in 2022 stood at US\$16.70 billion and is likely to reach US\$23.53 billion by 2028. Fiber cement, a composite material made of cement reinforced with cellulose fibers, is known for its durability and versatility in construction. This material uniquely combines the strength and rigidity of cement with the flexibility and resilience of wood fibers, making it ideal for a range of applications from roofing to siding. Its resistance to fire, termites, and rot, along with minimal maintenance requirements, makes it a preferred choice for long-lasting construction. The adaptability in aesthetics, from textures that mimic wood to smooth finishes, allows for design flexibility. Continuous innovation in its composition and manufacturing process is vital for meeting evolving construction demands and sustainability goals.

Fiber cement, emerging from the demand for durable, versatile building materials, has become a cornerstone in modern construction. Its rise in popularity is linked to the growing need for weather-resistant, low-maintenance alternatives to traditional materials. Composed of cement reinforced with cellulose fibers, it offers a unique combination of strength, longevity, and aesthetic versatility, appealing to both residential and commercial construction. As sustainability and energy efficiency gain priority in

building practices, fiber cement's adaptability and environmental friendliness position it as a key player. Its ongoing development and refinement remain crucial to addressing the evolving challenges and opportunities in the construction industry. The global fiber cement market is projected to grow at a CAGR of 5.88% during the forecast period of 2023-2028.

Market Segmentation Analysis:

By Raw Material: Based on the raw material, the global fiber cement market can be divided into four segments namely Portland cement, silica, cellulosic fiber, and others. In 2022, the Portland Fiber Cement Market, the largest in its sector, specializes in blending Portland cement with cellulose fibers, resulting in products ideal for roofing, cladding, and facades. This market's dominance is attributed to the material's superior durability, fire resistance, and adaptability to various architectural styles, making it a top choice for exterior construction in both residential and commercial areas. Its widespread availability, cost-effectiveness, and compliance with strict building regulations reinforce its leading position.

By Curing Process: Based on the curing process, the global fiber cement market can be divided into two segments namely, steam pressure cured, and ambient cured. In 2022, the steam pressure cured fiber cement market, renowned for its high-pressure steam curing process, leads the market due to its enhanced strength, density, and durability. These properties make it ideal for demanding construction environments and heavy-duty applications like infrastructure and commercial buildings. Looking forward to the forecast period of 2023-2028, the ambient cured fiber cement market is anticipated to be the fastest-growing segment, driven by its increasing use in residential construction and renovations. Its ease of installation, design versatility, and energy-efficient production make it highly suitable for DIY projects and expanding residential sectors in emerging economies, aligning with the growing demand for sustainable and accessible building materials.

By Application: The global fiber cement market can be categorized into three main segments based on application, namely, Exterior Cladding, Roofing Solutions, and Others. In 2022, the Exterior Cladding Fiber Cement Market emerged as the predominant segment in building materials, driven by its extensive use in both residential and commercial constructions. This market thrives on the demand for durable, low-maintenance, and aesthetically versatile cladding solutions. Fiber cement's resilience to elements like weather, fire, and pests, coupled with its ability to imitate materials such as wood or stone, has bolstered its popularity. Additionally, its cost-

effectiveness and eco-friendly nature have reinforced its standing as the preferred cladding choice.

By Sector Usage: Based on the Sector Usage, the global fiber cement market can be divided into two segments namely, residential sector, and non-residential sector. In 2022, the residential sector fiber cement market emerged as the largest segment, outpacing non-residential sectors, largely due to its widespread application in home construction and renovations. This growth is fueled by the increasing preference for durable, low-maintenance, and versatile materials in residential building. The popularity of fiber cement in this sector is attributed to its resistance to weather, fire, pests, and its ability to mimic traditional materials like wood. Moreover, the growing trend towards sustainable home construction has further elevated its appeal. Fiber cement's suitability for various applications such as siding, roofing, and interiors, combined with its environmental compatibility, has made it a favorite among homeowners.

By Region: According to this report, the global fiber cement market can be divided into five major regions: Asia Pacific (China, India, Japan, South Korea, and Rest of Asia Pacific), Europe (Germany, France, Italy, UK, and Rest of Europe), North America (The US, Canada, and Mexico), Middle East & Africa, and Latin America. In 2022, the Asia Pacific region led the Fiber Cement Market, propelled by rapid urbanization, particularly in China and India, and the increasing demand for durable, cost-effective construction materials. This region's shift towards sustainable building practices and the need for disaster-resilient structures further boosted its market dominance. Looking ahead, North America is projected to grow significantly from 2023 to 2028, propelled by trends in sustainable construction, technological advancements in fiber cement production, and a growing emphasis on energy-efficient and disaster-resilient buildings.

During 2023-2028, the US is forecasted to maintain its lead within North America. This trajectory is largely attributed to the country's expansive construction sector, significant infrastructure investments, and a strong emphasis on sustainable building practices. The US market benefits from fiber cement's diverse applications across residential, commercial, and industrial sectors. Its advanced construction technologies and growing preference for fiber cement in various uses like cladding, roofing, and siding are key factors supporting this growth.

Global Fiber Cement Market Dynamics:

Growth Drivers: The rising demand for energy-efficient buildings, driven by sustainable construction practices and environmental concerns, has become a key growth driver for

the global fiber cement market. Fiber cement's insulation properties align with this trend, contributing to thermal efficiency and reduced energy consumption, crucial for meeting green building standards like LEED. Data showing a rebound in LEED projects underlines the growing commitment to energy-efficient construction, bolstering fiber cement's adoption. Further, the market is expected to grow owing to rise in construction activities, urbanization and lifestyle changes, increasing stringency of building regulations, advancements in fiber cement technology, growing preference for fiber cement, shift toward low-maintenance building materials, expansion of distribution channels, growing popularity of prefabricated and modular construction, etc. in recent years.

Challenges: The high installation cost of fiber cement products, stemming from the need for specialized tools and skilled labor, presents a significant challenge in the global market. This complexity leads to increased labor costs and extended project timelines, making fiber cement less attractive in cost-sensitive regions despite its durability and aesthetic benefits, thereby impacting its market growth and competitiveness. Additionally, other factors like competition from alternative materials, etc. are other challenges to the market.

Market Trends: During 2023-2028, the global fiber cement market is poised for growth, driven by the rising demand for eco-friendly construction materials. As environmental consciousness grows, fiber cement, known for its sustainability, lower carbon footprint, and potential for recycling, becomes increasingly popular. This shift towards greener building solutions is expected to significantly elevate fiber cement's market demand, especially in projects targeting green certifications and in areas with strict environmental codes. More trends in the market are believed to grow the fiber cement market during the forecasted period, which may include integration of smart building technologies, development in 3D printing in construction, increasing focus on disaster-resilient infrastructure, enhanced focus on indoor air quality, shift towards circular economy in construction, government initiatives in affordable housing, adoption of fiber cement in niche applications, advancements in surface treatments and finishes, etc.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic severely impacted the global fiber cement market, with supply chain disruptions, labor shortages, and a downturn in construction activities. Economic uncertainties led to decreased investments and consumer spending in construction, challenging the sector significantly. However, this period also spurred industry innovation and adaptation, highlighting the need for resilience and agility in

manufacturing and distribution to navigate future global challenges.

The post-COVID fiber cement market is navigating a complex mix of challenges and growth opportunities, relying on strategic innovation and adaptability to thrive in the transformed global construction landscape.

Competitive Landscape and Recent Developments:

The global fiber cement market is a dynamic and competitive landscape, marked by a blend of established giants and emerging innovators. This partially fragmented market features no dominant player, creating a fertile ground for competition and innovation. Leading companies like James Hardie and Etex Group are enhancing their product lines with cutting-edge fiber cement technologies, while NICHHA and SCG are making notable strides in sustainable and efficient building solutions. The market is responsive to global trends like urbanization and industrialization, with key players like Swisspearl, after its acquisition of Cembrit, focusing on eco-friendly products and expanding production to meet the demands of new developments. This vibrant market is thus characterized by continuous innovation and strategic corporate maneuvers, driven by the global push for sustainable construction and the growing needs of an evolving construction landscape.

Further, key players in the Fiber cement market are:

James Hardie Industries PLC
Compagnie de Saint-Gobain SA
Siam Cement Public Company Limited (SCG Building Materials)
Etex Group NV
Elementia, S.A.B. de C.V.
Century Plyboards (India) Limited
Knauf Group (Knauf Gypsum)
Standard Industries (GAF Materials Corporation)
Swisspearl Group AG
American Fiber Cement Corporation
CSR Limited
Nichiha Corporation

The global fiber cement market is characterized by a diverse product portfolio, catering to a wide spectrum of applications. With major players like James Hardie and Etex Group offer a comprehensive range of fiber cement products, meticulously engineered

for specific uses. These products encompass siding solutions that provide weather resistance and aesthetic appeal, roofing options that ensure long-lasting protection against the elements, and interior finishes that enhance the visual character of indoor spaces. Tailored to meet diverse operational requirements, fiber cement products prioritize durability, aesthetic versatility, and environmental sustainability, making them a preferred choice for various construction projects.?

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