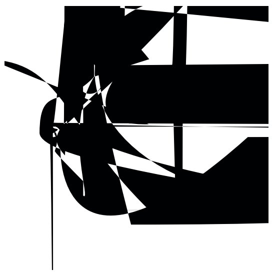

As 2018 comes to a close, we would like to provide an at-a-glance perspective on some of the issues that mattered most over the past year and that will impact 2019. This year has proven to be full of social, political, and economic changes, and our steel design and construction industry has reacted in kind. Below is a snapshot of our year-end State of the Industry which captures updated perspectives on our membership and our markets.

What Do Our Markets Look Like?

Structural steel is currently the leading structural framing material for buildings in the United States, with a 46% market share for 2017 for non-residential and multi-story residential construction. The market share for the closest competing material—reinforced concrete—is only 34%, indicating a strong market preference for structural steel.

Market share values for all structural framing materials over the past nine years for non-residential and multi-story residential building construction based on square footage are as shown in the following table. The overall decrease in steel market share is due to several factors including rising imports of both mill material and fabricated structural steel as well as an increasing proportion of residential construction since 2011.

Non-residential construction represented 37% of the overall demand for structural steel while multi-story residential construction accounted for 8% of the overall demand for structural steel.

The remaining demand for structural steel is comprised of non-building structures (which includes open-air stadiums, process and chemical plants, power plants, petroleum re neries, and other buildings that do not have a roof), and non-structural applications (such as rack systems, marine applications, trailers, transportation and mobile homes). Structural steel maintains a dominant share in these markets with these non-building structures generating approximately 40% of the demand for structural steel.

[illegible]

	2009	2010	2011	2012	2013	2014	2015	2016	2017
S r c ra S	56%	58%	56%	51%	47%	49%	48%	49%	46%
Pr -E r B ( )	7%	6%	6%	6%	6%	5%	5%	4%	4%
W	7%	7%	8%	8%	9%	8%	8%	9%	10%
Ma r	10%	9%	7%	7%	7%	7%	6%	6%	6%
R rc C cr	20%	21%	22%	28%	31%	31%	33%	32%	34%

S : D A