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Industry Study with Forecasts for **2011 & 2016**

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The Freedonia Group

767 Beta Drive

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Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

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The developing countries of Asia will continue to lead gains in insulation demand based on strong building construction activity and increasing production of products that use insulation.

China, developing Asia to lead gains in demand

Worldwide consumption of thermal and acoustical insulation materials is projected to expand 4.6 percent per year through 2011 to more than $33 billion in dollar terms. The most rapid rates of growth will continue to be recorded in the developing countries of Asia, boosted by strong building construction activity and increasing production of products that incorporate insulation materials, such as refrigerators and freezers. In particular, building construction spending continues to expand rapidly in China, sparking very strong annual growth in the value of insulation demand through 2011. Demand for insulation in China will also benefit from government initiatives to encourage more energy-efficient building construction. In the other developing economies of Asia, rising living standards and increasing industrialization will support growing demand.

In the mature insulation markets of the industrialized countries of North America, Western Europe and Japan, growth will trail the world average. Slowing residential construction in the US and Canada will limit insulation gains in new construction. However, a rebound in nonresidential construction and improvements in industrial and OEM markets will lead to an acceleration of insulation demand for North America through 2011. In Western Europe, insulation demand will accelerate from the 2001-2006 period as European Union directives on energy conservation spur demand for insulation in both new and retrofit building applications. The insulation market in Japan is expected to reverse the downward trend (in terms of thermal insulating value) over the 1996-2006 period. An expanding Japanese economy will support increased demand for insulation in construction markets.

World Insulation Demand, 2006
($26.5 billion)

Foamed plastics to remain largest type of insulation

Foamed plastic insulation will continue to account for the largest portion of total demand in dollar terms through 2011. Economic expansion in the developing countries of Asia will raise demand for foamed plastic insulation in both building construction and in the production of household appliances. Foamed plastic insulation can be applied with various types of structural materials, including stone, brick and masonry. Foamed plastics can also be used in sandwich panels with metal skins. However, moderation in plastics raw materials costs will hold down overall gains. Mineral wool will record the fastest growth, due to accelerating demand in Western Europe, Eastern Europe and the Asia/Pacific region. Fiberglass insulation, while becoming more widely used, will remain concentrated in the relatively slow-growing North American market. Other materials will continue to be niche products, finding use on the basis of their low cost or environmental advantages.

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Sample Text, Table & Chart

TABLE VII-7

INDIA -- MACROECONOMIC INDICATORS & INSULATION DEMAND

Item	1996	2001	2006	2011	2016
Population (millions)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
GDP/capita	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Gross Domestic Prdt (bil 2005$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% of GDP	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Fixed Investment (bil 2005$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
sq m R-1/capita	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
sq m R-1/000$ GDP	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
sq m R-1/000$ GFI	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Insulation Demand (mil sq m R-1)	[illegible]	[illegible]	[illegible]	[illegible]	900

SAMPLE TABLE

ASIA/PACIFIC

India: Insulation Supply & Demand

In 2006, insulation demand in India totaled 46[illegible] meters of R-1 value, making it the third largest mar[illegible] Insulation demand has risen steadily since 1996 as [illegible] fixed investment spending in India increased at robu[illegible] for insulation in India has been driven by infrastruc[illegible] well as by increased manufacturing activity. While [illegible] tion per structure in India is rather low, the sheer siz[illegible] economy results in a substantial market.

Demand for insulation in India is projected to [illegible] [illegible] million square meters of R-1 value. Growth [illegible]es in fixed investment spending and con- [illegible] excess of the world average. In addition, a [illegible]turing industry will offer opportunities for [illegible]s.

SAMPLE TEXT

[illegible] is the largest single outlet for insulation in India, accounting for nearly 40 percent of total demand in 2006. Residential construction expenditures in India have expanded rapidly, with continued strong growth expected through 2011. Historically, India has exhibited a severe lack of housing, particularly for the lower classes. This is not unusual for a developing nation, particularly one with such a huge population. However, as economic growth in India shows continued strength, fueling an expanding middle class, demand for housing will benefit. Housing has also become mo[illegible] As recently as 1996, average home prices [illegible] age annual income, a rate which had shrun[illegible] annual income by 2006. In addition, gove[illegible] housing for the poor are ongoing. Consum[illegible] tial markets in India is forecast to expand [illegible] than 260 million square meters of R-1 valu[illegible]

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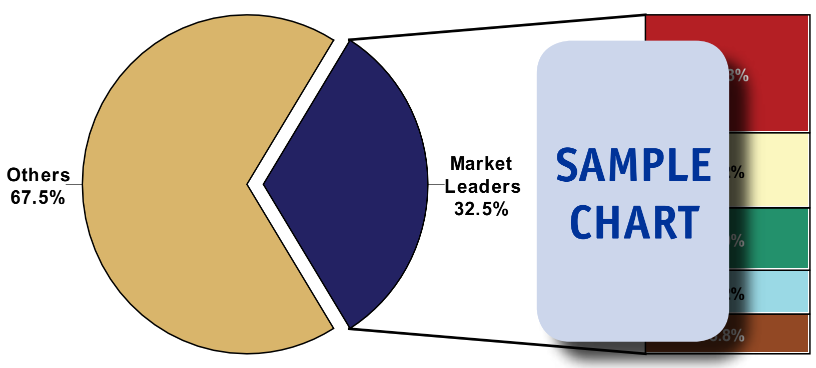
CHART IX-1

WORLD INSULATION MARKET SHARE BY COMPANY, 2006
($26.5 billion)



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Sample Profile, Table & Forecast

TABLE VII-8

INDIA -- INSULATION SUPPLY & DEMAND
(million dollars)

Item	1996	2001	2006	2011	2016
Insulation Demand (mil sq m R-1)					
Residential Construction					
Nonresidential Construction					
Industrial, HVAC & OEM					
$/sq m R-1					
Insulation Demand					
Foamed Plastics					
Fiberglass					
Mineral Wool					
Other					
+ net exports					
Insulation Production					

SAMPLE TABLE

COMPANY PROFILES

CSR Limited
9 Help Street, Level 1
Chatswood, New South Wales 2067
Australia
612-923
http://ww

Revenue
Geograp al) Australia 91%,
New Zea
Employ
Key Prod

SAMPLE PROFILE

CSR is a manufacturing company with operations in Australia, Asia and New Zealand. The Company comprises six segments: Building Products; Aluminum; Sugar - Milling; Sugar - Ethanol and Refining; Property; and Corporate and Other.

The Company participates in the world insulation industry through the Building Products segment, which had sales of US$737 million in FY 2006. Among other products, this segment produces glass and rock wool insulation, roof tiles, and clay bricks and pavers. As of FY 2006, CSR had a production capacity of 93,000 metric tons per year of insulation and ducting products. CSR produces insulation materials for residential, commercial and industry applications through the Building Products segment's CSR Bradford Insulation subsidiary (Australia).

CSR Bradford manufactures such glass and rock wool insulation products as batts, blankets and other materials for partition wall, ceiling, roof, floor and sectional pipe applications. Products include BRADFORD GOLD glass wool batts; ULTRATEL glass wool duct insulation; SUPERTEL glass wool duct insulation; ANTICON glass.

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"Measured in dollar value terms, insulation demand in India is expected to reach $910 million in 2011 on yearly gains of 8.3 percent. Advances will be driven primarily by volume increases, although prices will show modest growth as well. Growth in demand largely reflects growing construction activity and increasing market penetration."

--Section VII, pg. 183

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Other Studies

Flat Glass in China

Demand for flat glass in China will rise 8.6% yearly through 2011 based on strong gains in building construction and manufacturing. Float glass will continue supplanting drawn and rolled glass. Fabricated flat glass will benefit from higher-end window and furniture glass and healthy motor vehicle and electronic display production. This study analyzes the ¥58.5 billion Chinese flat glass industry, with forecasts (2011, 2016) by product, market and region. It also details market share and profile major players.

#2223 .... 11/2007..................... $4900

Gypsum Products in North America

Demand for gypsum products in the US, Canada and Mexico will reach 54.6 metric tons in 2011. Nonresidential buildings will offer the best opportunities and help offset weakness in the key residential construction market. Synthetic gypsum will continue to supplant mined gypsum for use in calcined gypsum products. This study analyzes the North American gypsum industry, with forecasts for 2011 and 2016 by product, market and country. It also evaluates company market share and profiles major producers.

#2225 .... 08/2007..................... $4500

Glass Fibers

US glass fiber demand will reach $7 billion in 2011. The dominant glass wool fiber sector will grow the fastest, driven by rebounding demand in office and commercial construction and increasing insulation use per structure to improve energy efficiency. Reinforced plastics will present the best opportunities for textile glass fiber. This study analyzes the US glass fiber industry, with forecasts for 2011 and 2016 presented by type and market. It also evaluates company market share and profiles leading competitors.

#2199 .... 05/2007..................... $4400

World Siding (Cladding)

Global demand for exterior siding (or cladding) will grow 3.8% yearly through 2010 based on a pickup in nonresidential building construction. Metal, concrete and stone, and fiber cement siding will grow the fastest. China, India and Russia will lead gains, while growth rates in developed countries will be slower. This study analyzes the 4.3 billion square meter world siding industry to 2010 and 2015 by product, market, world region and for 31 countries. It also evaluates market share and profiles major producers.

#2159 .... 02/2007..................... $5500

Roofing

US roofing demand will reach 278 million squares in 2010. The nonresidential construction market will offer the best growth opportunities, with the office/commercial and institutional segments seeing above-average gains. Plastic (thermoplastic polyolefin, spray-applied) and metal (panels, tiles, shingles) will be the fastest growing roofing materials. This study analyzes the $12.7 billion US roofing industry to 2010 and 2015 by product, market and region. It also evaluates market share and profiles major producers.

#2109 .... 10/2006..................... $4400

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