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World Drywall & Building Plasters

Industry Study with Forecasts for **2012 & 2017**

Study #2335 | April 2008 | $5500 | 252 pages

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The markets for drywall in China and India will perform especially favorably, with countries such as Indonesia, Malaysia, Thailand and Vietnam also registering healthy gains in demand.

Global demand to rise 4.5% yearly through 2012

World demand for drywall (also known as plasterboard or wallboard) is forecast to expand 4.5 percent per year through 2012 to 9.75 billion square meters. Gains will vary greatly by region, depending on a host of factors such as building construction spending and economic growth prospects, as well as trends in local construction techniques. Gypsum-based building plaster sales will rise 5.2 percent per year through 2012 to 35 million metric tons. In most developed countries, drywall is by far the dominant market for gypsum. In developing countries, however, the dominant use for gypsum is as a cement additive. On a value basis, drywall is of far greater significance than gypsum-based building plasters at the global level, and is thus the focus of this study.

Robust demand forecast for Asia/Pacific region

Drywall prospects in the Asia/Pacific region will be particularly robust, especially when excluding Japan. The Japanese drywall market, although registering weak gains through 2012, will recover somewhat from the anemic performance of the past decade. China and India will perform especially favorably, with countries such as Indonesia, Malaysia, Thailand and Vietnam also registering healthy gains in demand. Growth in other developing parts of the world will typically exceed nine percent per year through 2012, with new drywall plants opening in booming markets such as the UAE and Ukraine. Both rapid construction growth and rising popularity of dry construction techniques will bolster demand in developing countries.

World Drywall Demand, 2007
(7.8 billion square meters)

Western Europe sales to top most developed areas

Drywall sales in Western Europe will register gains lagging the world average, but exceeding most other developed markets. Demand for drywall in the region averaged 3.4 square meters per person in 2007, well below levels in other developed areas such as the US and Canada (11.1 and 10.0 square meters per person, respectively). Gains will be particularly strong in countries such as Portugal, Italy and Spain, where drywall use is increasingly being substituted for traditional wet construction techniques. Western Europe will remain the world's largest market for gypsum-based building plasters through 2012.

The market for drywall is concentrated in North America, which accounted for 48 percent of global sales in 2007. However, through 2012, sales growth in North America will significantly lag all other regions, primarily due to maturation in the large US market. Moreover, construction spending growth in the US will remain well below the global average, although it will improve relative to the 2002-2007 period.

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Industry Study with Forecasts for ***2012 & 2017***

Sample Text, Table & Chart

SAMPLE TEXT

ASIA/PACIFIC

due to the presence of major ... eman wall in Thailand is projected ... mete with growth outpacing the g ... peri

The Thai plasterboard industry has continued growing d facing a number of adverse events over the past decade. A si decline in the country's construction sector over the 1997-20 was followed by a loss of four million metric tons in annual South Africa in October 2003 due to the imposition of signifi on plasterboard imports from Thailand by the South African Since 2006, key export markets in the Middle East and Asia Malaysia) have been under threat because of new drywall pla set up in those places. On the positive side, New Zealand wa to have removed anti-dumping duties on imports of Thai gyp that had been in effect for over a decade at the end of 2005 (a New Zealand's sole drywall producer, Winstone Wallboards, complaint about continued dumping from Thai exporters and if this issue has been resolved). Thailand's second largest export market, India, contemplated imposition of anti-dumping duties on Thai plasterboard imports in 2005, but came to the conclusion that the damage to its domestic industry was not significant enough to warrant such an action.

Thailand's drywall industry is dominated by two companies: LBGA, with annual production capacity estimated at 100 million square meters spread among three plants; and Thai Gypsum Products, a subsidiary of Saint-Gobain with annual production capacity of 75 million square meters between two production sites, the second of which came on-stream in 2005. Locally headquartered B.K. Plaster and Gypsum (BKG) also undertakes some plasterboard production in Thailand. Through 2012, the country's trade surplus in drywall will decline slightly due to the construction of significantly larger new plants in key Middle Eastern markets.

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TABLE VI-20

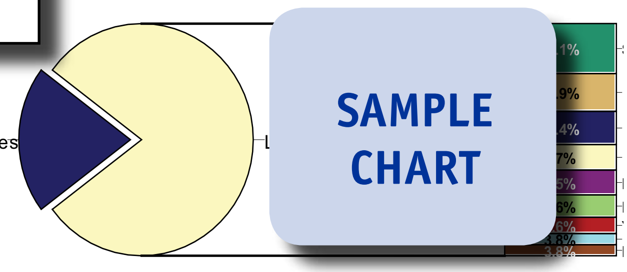
THAILAND -- DRYWALL SUPPLY & DEMAND
(million square meters)

SAMPLE TABLE

Item	1997	2002	2007	2012	2017
Bldg Construction Expend (bil 2006$)					
Residential					
Nonresidential					
kgs drywall/000$ bldg constr					
Drywall Demand (000 m ton)					
metric tons/000 square meters					
Drywall Demand					
Residential:					
New					
Improvement & Repair					
Nonresidential					
net exports					
Drywall Shipments					

CHART VIII-1

DRYWALL MARKET SHARE BY COMPANY, 2007
(7.8 billion square meters)



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Sample Profile, Table & Forecast

TABLE VI-21

THAILAND -- BUILDING PLASTER SUPPLY & DEMAND
(000 metric tons)

Item	1997	2002	2007	2012	2017
Bldg Construction Expend (bil 2006$)	4				4.1
Residential	2				.3
Nonresidential					.8
kgs plaster/000$ bldg construction	4				72
Building Plaster Demand					30
Residential					25
Nonresidential					55
net exports					00
Building Plaster Shipments	280	370	520	630	780

SAMPLE TABLE

COMPANY PROFILES

Beijing New Building Material plc
Number Eleven, Sanlihe Road A
Haidan District
China
86-10-8808-2
http://www.isi

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

Beijing New Building Material (BNBM) is a publicly traded company that develops, manufactures and markets a wide range of building and construction materials, prefabricated housing, and architectural paints. A controlling interest in the Company is held by state-owned China National Building Material Group Corporation.

The Company competes in the global drywall and building plaster market through the production of plasterboard and joint compound, which are marketed under the DRAGON brand name. BNBM's plasterboard is available in standard, fire-resistant, water-resistant, decorative and sound absorbent varieties.

BNBM manufactures gypsum plasterboard at 21 production lines in China, including plants in Beijing; Zhuozhuo, Qinhuangdao, Hengshui and Xibaipo, Hebei; Zaozhuang, Weifang and Tai'an, Shandong; Jiangyin, Pizhou and Xuzhou, Jiangsu; Tianshan, Xinjiang; Xiangtan, Hu'nan; Yimen, Yun'nan; Jiangmen, Hubei; and Chongqing, Sichuan. As of early 2008, the Company was building three new manufacturing facilities: a plant in Taicang, Jiangsu with a planned

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"Through 2012, the domestic market for building plasters will expand 4.6 percent per year to 450,000 metric tons. The country's net exports of building plasters will expand to 180,000 metric tons, with these products not susceptible to the imposition of tariffs and duties by foreign government as is the case with drywall."

--Section VI, pg. 155-6

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Other Studies

Brick & Block

The US market for brick and block is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by product (e.g., common, glazed and other clay bricks; structural and decorative concrete block; concrete pavers; concrete brick); market (residential, nonresidential, nonbuilding); application (e.g., siding, structural, chimneywork, fencing); and US region. The study also considers market environment factors, evaluates company market share and profiles major players.

#2331 .... 05/2008.................... $4500

World Cement

Global demand for cement will grow 5.3% annually through 2012, driven by strong increases in construction activity in developing countries. The rate of growth in China, the largest market, will moderate considerably but remain above the world average. The second largest market, India, will grow the fastest. This study analyzes the 2.8 billion metric ton world cement industry, with forecasts for 2012 and 2017 by type, market, world region and for 46 countries. It also evaluates company market share and profiles 44 major players.

#2325 .... 04/2008.................... $5800

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

Nanotechnology in Construction

US demand for nanomaterials in construction will reach $100 million in 2011, and leap to $1.75 billion by 2025. Coatings will be the largest application, followed by composites and concrete additives. Nanoscale silica, titanium dioxide, and clay will post substantial gains. This study analyzes the US market for nanomaterials in construction, with forecasts for 2011, 2016 and 2025 presented by product, application and market. It also considers market environment factors and profiles leading industry players.

#2185 .... 05/2007.................... $4500

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 for 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

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