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Wall Coverings

US Industry Study with Forecasts for **2013 & 2018**

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Trends driving wall coverings demand include a recovery in new single-family housing and manufactured housing, and a return to positive growth in the long-suffering wallpaper segment.

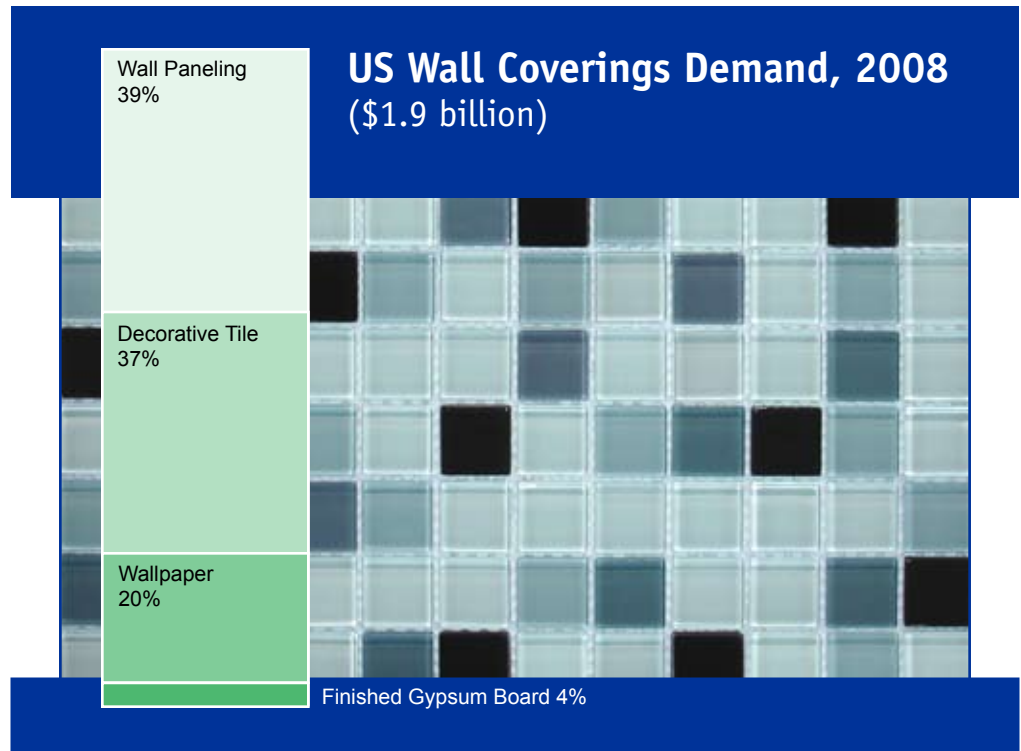
US demand to advance 4.2% yearly through 2013

Demand for wall coverings is projected to advance 4.2 percent annually from a weak 2008 base to \$2.4 billion in 2013. Going forward, the basic demand fundamentals for wall coverings will be much improved. In particular, new single-family housing is expected to recover from its 2008 level, while the manufactured housing segment is projected to see a modest recovery in demand. In addition, demand for wallpaper, which has suffered mightily over the last ten years, will finally begin to show positive growth again.

Decorative wall tile to see best growth opportunities

Demand for wall panels is forecast to advance 4.0 percent per year through 2013. Gains will benefit from growth in new home building, a rebound in manufactured housing and new product development in laminated wall panels. In nonresidential markets, demand for wall paneling will post less robust gains, mostly due to slow advances in new nonresidential markets.

Demand for decorative wall tile is projected to increase 5.0 percent annually through 2013. Consumption of these products will benefit primarily from the recovery of the new housing segment, which will spur construction of more kitchen and bathroom space, the primary places for wall covering use.



Unlike some wall covering products that are heavily dependent upon a single market, decorative tile products are used widely in both residential and nonresidential markets, and in both new construction and improvement and repair projects.

Consumption of wallpaper is projected to expand 2.7 percent annually through 2013. This reflects a long-awaited recovery in an industry segment that had recorded steady declines over the last ten years due to cost, difficulty of use and changing style trends. The development of new products, such as removable wallpaper, wallpaper cut-outs, customized wallpaper, low-emission and mold-resistant products, will make

wallpaper more consumer friendly and easier to use. Products such as reprints of vintage wallpaper, digitally designed papers, couture papers and mural papers will also help demand.

Finished gypsum board demand is projected to increase 4.2 percent annually through 2013. These products are almost entirely dependent on the manufactured housing industry. Consequently, when manufactured housing production declined precipitously in the 1998-2008 period, demand for prefinished gypsum board panels suffered. Conversely, as manufactured housing finally recovers, gypsum board demand will also post gains.

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Sample Text, Table & Chart

PRODUCTS

Fabric-Backed Vinyl -- Consumption of fabric-backed wallpaper is expected to grow at a rate of more than one percent annually to \$1.9 billion by 2018, up from the level of \$1.5 billion in 2008. This growth reflects the increasing use of fabric-backed wallpaper in nonresidential markets, which is the primary market niche for this product. Demand in nonresidential markets is expected to increase through 2013, coupled with continuing strong competition from other wall covering products.

SAMPLE TEXT

Fabric-backed vinyl wallpaper consists of a solid vinyl coating laminated to a woven or nonwoven fabric ground. While the performance characteristics of the wallpaper do vary somewhat based on the type of substrate used, the solid vinyl coating imparts such features as high durability, washability, scrubbability and stain resistance. These features make fabric-backed vinyl wallpaper ideally suited for use in demanding applications. As a result, use of this wallpaper is dominated by nonresidential markets such as commercial and institutional facilities, leading to fabric-backed vinyl wallpaper commonly being referred to as commercial or contract wall coverings.

Woven fabric backings such as scrim, osnaburg and drill cloth have traditionally been the dominant substrates used to produce fabric-backed vinyl wallpaper. However, nonwoven backings are increasingly popular as a result of advantages in ease of installation, strippability and moisture resistance. Unlike standard woven backings, nonwovens consist of a mass of natural or synthetic fibers that are formed into a sheet, web or batt, rather than being converted into yarn. Additives are added to the fiber web to provide wet strength and absorbency, allowing the substrate to remain dimensionally stable when wet for improved installation.

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TABLE V-8

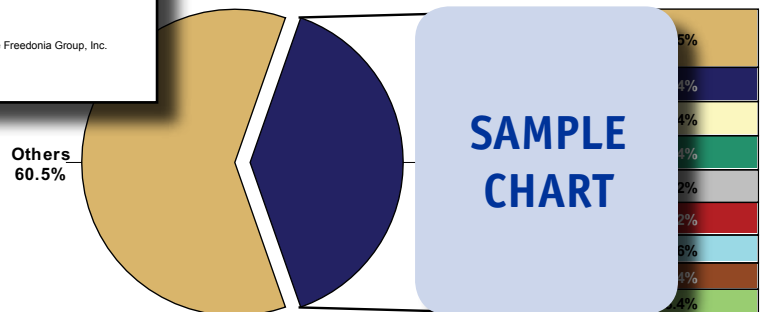
SOUTH REGION DEMAND FOR WALL COVERINGS (million dollars)

Item	1998	2003	2008	2013	2018
South Construction Expend (bil \$)	252.4	340.0	429.0	543.0	713.0
\$ wall covering/000\$ construction	4.1	2.8	1.9	1.9	1.6
South Wall Coverings Demand	1,051	871	600	1,007	1,155
By Subregion:					
South Atlantic					0
East South Central					0
West South Central					5
By Application:					
Residential					0
Nonresidential					5
% South					8
Total Wall Coverings Demand					0

SAMPLE TABLE

CHART VI-1

WALL COVERINGS MARKET SHARE BY COMPANY, 2008 (\$1.9 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-2
RESIDENTIAL WALL COVERINGS DEMAND
 (million dollars)

Item	1998	2003	2008	2013	2018
Res Bldg Construction Expend (bil \$)	310	310	310	310	299.5
\$ wall covering/000\$ construction					2
Residential Wall Coverings Demand					50
By Market Segment:					
New Housing					25
Improvement & Repair					25
By Product:					
Decorative Tile					30
Wall Paneling					40
Wallpaper					30
Finished Gypsum Board					30
% residential Wall Coverings Demand	27	27	27	27	27



COMPANY PROFILES

Crossville Incorporated
 346 Sweeney Drive
 Crossville, TN 38555
 931-484-2110
<http://www.crossvilleinc.com>

Annual Sales:
 Employment:

Key Products:

SAMPLE PROFILE

Crossville Incorporated (C) is a Group Incorporated (C) manufacturer of porcelain, glass, and floor applications through a network of independent dealers and distributors in North America.

The Company competes in the US wall coverings industry through the manufacture of porcelain, metal and natural stone wall tiles, among other products. Crossville's main product line comprises proprietary porcelain stone tiles, which are sold under the PORCELAIN STONE brand name. These tiles are engineered to be stronger than slate, granite or marble; and for easy maintenance and cleaning. Moreover, PORCELAIN STONE tiles feature through-body colors that are fired deep into the body of the tile. The Company markets these and other tile products under the CROSSVILLE umbrella brand name.

PORCELAIN STONE tiles are made in a variety of colors, styles, finishes and sizes. These tiles are marketed through such series as COLOR BLOX, Americana and Milestone Mosaics. Specifically, COLOR BLOX tiles are available in 20 colors that are designed to

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"Consumption of finished gypsum board in residential markets is projected to expand 3.8 percent annually from a very weak 2008 base to \$70 million in 2013. This product category is heavily dependent on shipments of new manufactured housing, a market segment which has been in steady and severe decline for over a decade. It would appear that manufactured housing has finally bottomed out, and as production of new units advances through 2013, demand for finished gypsum board will benefit."
 --Section IV, pg. 125

OTHER STUDIES

Decorative Laminates

This study analyzes the US decorative laminate industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by raw material (e.g., plastics, adhesives, paper, vinyl, wood), product (e.g., low-basis weight papers, saturated papers, vinyl films, decorative foils, high pressure laminate, edgebanding) and market (e.g., cabinets, furniture, store fixtures, flooring, wall panels, countertops). The study also considers market environment factors, details market share and profiles industry players.

#2511 06/2009..... \$4700

World Flooring & Carpets

World floor covering demand will rise 4% yearly through 2012, driven by nonresidential building construction in less developed areas. Nonresilient flooring will stay the largest product segment and grow the fastest. China will remain the largest national market and account for 43% of total gains. This study analyzes the 12.5 billion square meter world flooring and carpet industry, with forecasts for 2012 and 2017 by product, market, world region and for 32 countries. It also evaluates market share and profiles industry players.

#2417 12/2008..... \$5800

Paint & Coatings

US demand for paint and coatings will rise 3.1% annually through 2012, aided by an improving outlook for construction and manufacturing activity and favorable export opportunities. A rebounding residential market will pace the dominant architectural paint segment, with interior paint outpacing exterior. This study analyzes the \$19.7 billion US paint and coating industry, with forecasts for 2012 and 2017 by market, application, end use and formulation. It also evaluates company market share and profiles industry players.

#2386 08/2008..... \$4600

World Drywall & Building Plasters

Global demand for drywall will grow 4.5% annually through 2012. Prospects in the Asia/Pacific region will be particularly robust, while sales growth in the dominant North American market will significantly lag all other regions. Drywall based on synthetic gypsum will account for an increasing share of demand. This study analyzes the 7.8 billion square meter world drywall industry, with forecasts for 2012 and 2017 by product, market, world region and for 14 countries. It also evaluates market share and profiles major players.

#2335 04/2008..... \$5500

Decorative Tile

US decorative tile demand will grow 4.3% annually through 2011. The dominant flooring market will lead gains as consumer preferences shift away from carpets and rugs. Nonresidential flooring will be particularly strong based on better appreciation of tile's advantages over other high-end flooring materials. This study analyzes the 3.2 billion square foot decorative tile industry, with forecasts for 2011 and 2016 by product, application and market. It also evaluates market share and profiles major producers.

#2285 01/2008..... \$4500

About The Freedonia Group

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