INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

CLICK TO VIEW

Gypsum Products in North America

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

Study #2550 | September 2009 | $4700 | 252 pages

The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Gypsum in North America

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

Freedonia®

Table of Contents

Gypsum in North America

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

Freedonia

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

GYPSUM SUPPLY & DEMAND

GYPSUM PRODUCT OVERVIEW

CALCINED GYPSUM PRODUCTS

UNCALCINED GYPSUM PRODUCTS

MARKETS

INDUSTRY STRUCTURE

Study #2550
September 2009
$4700
252 Pages

Gypsum in North America

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

Freedonia®

Gains in North American demand for gypsum products will derive primarily from the recovery of the US new housing sector, the leading consumer of gypsum.

North American demand to rise 2.7% annually through 2013

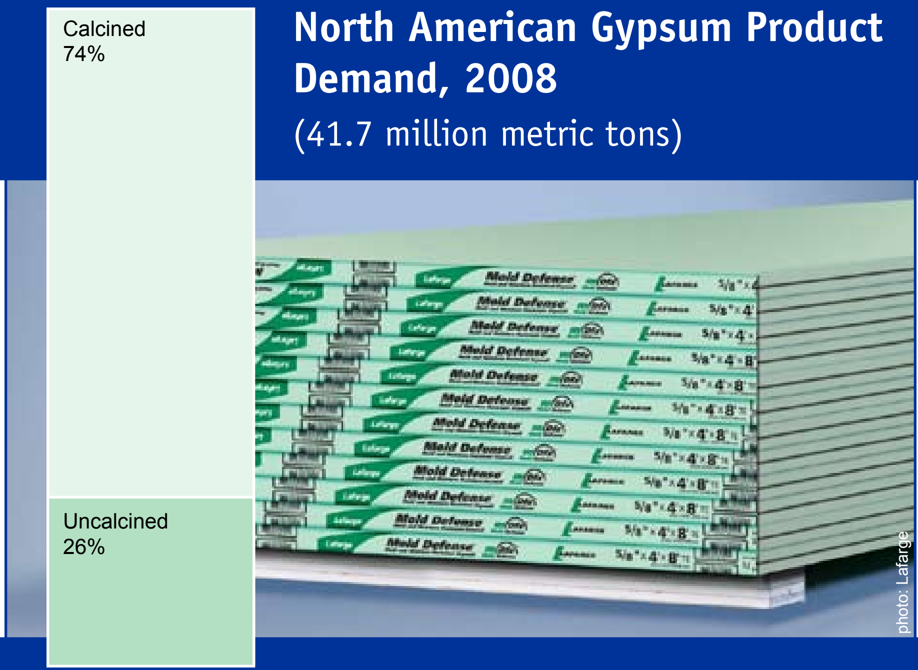
Demand for gypsum products in North America is projected to increase 2.7 percent annually through 2013 to 47.7 million metric tons, valued at $5.3 billion. Gypsum board is the largest gypsum product segment by a wide margin, accounting for about 70 percent of demand. Demand for gypsum board is projected to rise 3.2 percent annually to 34.2 million metric tons in 2013, equivalent to 36.3 billion square feet. Gains in demand for gypsum products will derive primarily from the recovery of the US new housing sector, the leading consumer of gypsum.

Regular gypsum board, water-resistant board among best prospects

Gypsum board is the primary end use for crude gypsum, accounting for 70 percent of total demand in 2008. Growth in gypsum board demand will derive primarily from the recovery of the US new housing market. Products that will benefit the most from the housing turnaround include regular gypsum board, water-resistant board, veneer board and mobile home board, all of which are concentrated in housing construction. Products such as type X board, sheathing and ceiling tiles, on the other hand, are primarily dependent on nonresidential construction, and will thus post less robust gains.

North American Gypsum Product Demand, 2008

(41.7 million metric tons)



Housing sector recovery to spark positive growth

In the US, demand for gypsum and gypsum products declined sharply in 2007 and 2008 as new housing construction collapsed in the wake of upheaval in the banking and credit industries and with the onset of a general economic recession. Consumption also softened in residential improvement and repair applications. Going forward, the recovery of the US new housing sector from its depressed 2008 level will lead the industry back to positive growth.

Demand for gypsum and gypsum products in Canada and Mexico will also show growth through 2013. In Mexico, demand will increase 2.1 percent annually through 2013, representing a deceleration from the gains posted in the 1998-2008 time frame, reflecting slowing growth in both residential and nonresidential construction activity. Better prospects will emerge in nonbuilding markets in Mexico, due to expanded infrastructure construction. In Canada, demand for gypsum products will increase only marginally, reflecting a contraction in new housing construction and decelerating growth in residential improvement and repair spending, nonresidential construction and nonbuilding construction.

Gypsum in North America

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

Freedonia

Sample Text, Table & Chart

TABLE VII-10

NORTH AMERICA INDUSTRIAL DEMAND FOR GYPSUM PRODUCTS BY PRODUCT & COUNTRY (thousand metric tons)

Item	1998	2003	2008	2013	2018
Gross Domestic Product (bil 2000$)	1[illegible]				[illegible]640
metric tons gypsum/bil $ GDP					[illegible]53
Industrial Gypsum Prdt Demand					[illegible]90
By Product:					
Building & Industrial Plaster					[illegible]35
Gypsum Board					[illegible]10
Gypsum in Cement					[illegible]55
Fillers & Others					[illegible]90
By Country:					
United States					[illegible]45
Canada					[illegible]75
Mexico					[illegible]70
$/metric ton					[illegible]90
Industrial Gypsum Products (mil $)					[illegible]42
% industrial					[illegible].0
Gypsum Demand (000 metric tons)	40[illegible]	[illegible]	[illegible]	[illegible]	[illegible]4000

SAMPLE TABLE

CALCINED GYPSUM PRODUCTS

Mobile Home Gypsum Board -- Consumptio[illegible] gypsum board in North America is projected to increa[illegible] annum to [illegible]lued at $[illegible] weight t[illegible] metric [illegible] derive fr[illegible]anufact[illegible] ments af[illegible]ne. The demand [illegible]ufacture[illegible] greatest [illegible] Canada[illegible]

SAMPLE TEXT

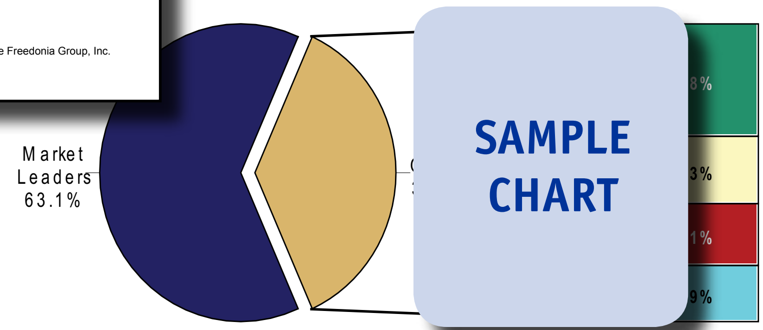
Mobile home gypsum board is used to construct [illegible]ings of manufactured housing, or HUD-code housing, [illegible] frame housing built in a factory environment on a met[illegible] used to transport the home to the building site. The pr[illegible] between mobile home gypsum board and other varieti[illegible] board is the thickness. Mobile home gypsum board is [illegible] thinner than traditional gypsum board, with the standa[illegible] gypsum board being 5/16-inch thick. Accordingly, the[illegible] among the lightest types of gypsum board. Unlike mo[illegible] can gypsum products, the US accounts for virtually all North American demand for mobile home gypsum board.

The two principal competitive factors in the mobile home gypsum board industry are price and the speed with which the board can be installed. Price is key in that manufactured housing producers face intense pressures to restrain the cost of the finished product, which is often accomplished by controlling raw material costs. As a result, the majority of mobile home gypsum boards have a core of relatively inexpensive regular gypsum. However, some boards are made with type X or water-resistant cores based on the specific needs of the manufactured housing producer. In comparison to many other gypsum board products, mobile home gypsum board is a more specialized product manufactured by fewer producers.

124

CHART VIII-1

[illegible]ERICA GYPSUM PRODUCT MARKET SHARE, 2008 ($4.2 billion)



Click here to purchase online

Order now, click here!

Gypsum in North America

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

Freedonia®

Sample Profile, Table & Forecast

TABLE VI-2

NORTH AMERICA UNCALCINED GYPSUM DEMAND IN CEMENT ADDITIVE APPLICATIONS (thousand metric tons)

Item	1998	2003	2008	2013	2018
Bldg Construction Spending (bil 2000$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
metric tons cement/mil $ construct	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cement Production (mil metric tons)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
kg gypsum/metric ton cement	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Gypsum in Cement	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
United States	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Canada	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Mexico	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$/metric ton	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Gypsum in Cement (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	101

SAMPLE TABLE

COMPANY PROFILES

Panel Rey SA
Serafin Pena 938 Sur
Monterrey, Nuevo Leon 64000
Mexico
52-81-8345-0
http://www.pa

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

Panel Rey ... textures, joint compounds and galvanized-steel metal-framing components used in drywall construction. In addition, the Company distributes several manufacturers' panels, fastening products and construction accessories. Panel Rey is a subsidiary of Grupo PROMAX (Mexico), an industrial group involved in the pulp and paper, chemicals, home building materials and transportation industries.

The Company is involved in the North American gypsum industry through the production of gypsum drywall and joint compounds. Panel Rey makes drywall in standard, fire-resistant, moisture-resistant and exterior sheathing types. Standard wallboard is designed for interior wall divisions. The Company's fire-resistant drywall features fiberglass reinforcements intended to delay heat transfer. The product also has 21-percent water content and releases steam when exposed to fire to prevent heat transfer. Moisture-resistant wallboard, which is treated to withstand moisture, is suitable for use in bathrooms, kitchens, laundry rooms and other humid areas. Panel Rey's exterior sheathing features a wax-treated water-resistant gypsum core and water-repellent facing and backing paper. Joint compounds from the Company comprise standard

235

"Consumption of uncalcined gypsum cement additives is projected to increase 2.1 percent annually to 7.5 million metric tons in 2013, valued at nearly $80 million. Gains will result from renewed strength in the US residential construction market (in cement used in foundations and building slabs) and by growth in nonbuilding construction, reflecting increasing investment in infrastructure repair and modernization. In nonbuilding markets, the greatest growth opportunities will continue to ..."
--Section VI, pg. 150

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or +1 440.684.9600

FAX: +1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional $2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM

F-WEB.2550

Gypsum in North America $4700

☐ Corporate Use License (add to study price) * +$2600

___ Additional Print Copies @ $600 each *

Total (including selected option) $________

☐ Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

☐ Bill my company ☐ American Express ☐ MasterCard ☐ Visa

MM YY

Credit Card # Expiration

Signature ________

Name ________

Title ________

Company ________

Division ________

Street ________
(No PO Box please)

City/State/Zip ________

Country ________

Phone ________ Fax ________

Email ________

* Please check appropriate option and sign below to order an electronic version of the study.

☐ Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature ________

☐ Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add $2600; one additional user, add $600; two additional users, add $1200; three additional users, add $1800.

Signature ________

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com

Other Studies

World Siding

Global demand for siding is forecast to reach 4.8 billion square meters in 2013, driven largely by advances in residential construction. The Asia/Pacific region will be one of the fastest growing markets. Demand for masonry and concrete products will remain strong, led by fiber cement and concrete and stone siding. This study analyzes the 4.3 billion square meter world siding industry, with forecasts for 2013 and 2018 by product, market, world region and for 19 countries. It also evaluates market share and profiles industry players.

#2498 .... 06/2009..................... $5800

Wall Coverings

US wall coverings demand will reverse 2003-2008 declines and grow 4.2% annually through 2013. Decorative tile and finished gypsum board will be the fastest growing segments, with the tile market matching wall paneling demand by 2013. Wallpaper will make a long-awaited recovery based on new and improved products. This study analyzes the $1.9 billion US wall coverings industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates market share and profiles industry players.

#2473 .... 05/2009..................... $4600

World Insulation

Global insulation consumption is projected to grow 3.8% yearly through 2012. The fastest growth will occur in developing Asian countries based on strong building construction activity and increasing production of insulated products. Foamed plastic will remain the largest segment while fiberglass gains market share. This study analyzes the $29.2 billion world insulation industry, with forecasts for 2012 and 2017 by material, market, world region and for 46 countries. It also evaluates company market share and profiles major players.

#2434 .... 02/2009..................... $5800

World Cement & Concrete Additives

Global demand for cement and concrete additives will rise 6% yearly through 2012. Gains will be driven by more penetration of chemical and fiber additives in concrete construction, in both emerging markets in Asia and Eastern Europe as well as the more mature cement industry in North America. This study analyzes the $12.1 billion world cement and concrete additive industry, with forecasts for 2012 and 2017 by type, market, world region and for 26 countries. It also evaluates market share and profiles industry players.

#2425 .... 12/2008..................... $5700

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

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unibiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

• Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

Click here to learn more about Freedonia

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

Click here to learn more about Custom Research

Click here for complete title list

Click here to visit freedoniagroup.com

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com