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Gypsum Products in North America

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

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

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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.



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 non-building construction.

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Sample Text, Table & Chart

CALCINED GYPSUM PRODUCTS

Mobile Home Gypsum Board -- Consumption of gypsum board in North America is projected to increase annually to 1.1 billion metric tons valued at \$1.1 billion. The weight of gypsum board is measured in metric tons. The demand for gypsum board is derived from a number of sources. The demand for gypsum board is derived from a number of sources. The demand for gypsum board is derived from a number of sources.

SAMPLE TEXT

Mobile home gypsum board is used to construct the walls and ceilings of manufactured housing, or HUD-code housing, and frame housing built in a factory environment on a mobile home chassis. The primary difference between mobile home gypsum board and other varieties of gypsum board is the thickness. Mobile home gypsum board is thinner than traditional gypsum board, with the standard thickness being 5/16-inch thick. Accordingly, mobile home gypsum board is among the lightest types of gypsum board. Unlike most other 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.

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\$) | 10,000 | 12,000 | 14,000 | 16,000 | 17,640 |
| metric tons gypsum/bil \$ GDP | 100 | 100 | 100 | 100 | 53 |
| Industrial Gypsum Prdt Demand | | | | | 90 |
| By Product: | | | | | |
| Building & Industrial Plaster | | | | | 35 |
| Gypsum Board | | | | | 10 |
| Gypsum in Cement | | | | | 55 |
| Fillers & Others | | | | | 90 |
| By Country: | | | | | |
| United States | | | | | 45 |
| Canada | | | | | 75 |
| Mexico | | | | | 70 |
| \$/metric ton | | | | | 90 |
| Industrial Gypsum Products (mil \$) | | | | | 42 |
| % industrial | | | | | 5.0 |
| Gypsum Demand (000 metric tons) | 40,200 | 43,210 | 41,000 | 47,700 | 54,000 |

SAMPLE TABLE

CHART VIII-1

AMERICA GYPSUM PRODUCT MARKET SHARE, 2008 (\$4.2 billion)



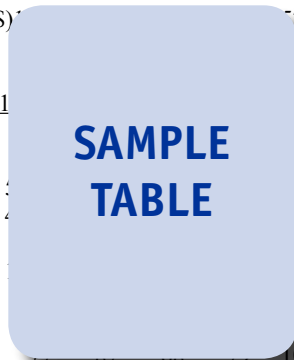
SAMPLE CHART

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\$) | 170 | 175 | 180 | 185 | 190 |
| metric tons cement/mil \$ construct | 17 | 17 | 17 | 17 | 17 |
| Cement Production (mil metric tons) | 100 | 100 | 100 | 100 | 100 |
| kg gypsum/metric ton cement | 48 | 48 | 48 | 48 | 48 |
| Gypsum in Cement | 50 | 50 | 50 | 50 | 50 |
| United States | 30 | 30 | 30 | 30 | 30 |
| Canada | 20 | 20 | 20 | 20 | 20 |
| Mexico | 50 | 50 | 50 | 50 | 50 |
| \$/metric ton | 12 | 12 | 12 | 12 | 12 |
| Gypsum in Cement (mil \$) | 101 | 101 | 101 | 101 | 101 |



COMPANY PROFILES

Panel Rey SA
 Serafin Pena 938 Sur
 Monterrey, Nuevo Leon 64000
 Mexico
 52-81-8345-0000
 http://www.panelrey.com.mx

Annual Sales:
 Employment:
 Key Products:

SAMPLE PROFILE

Panel Rey manufactures gypsum 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

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"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

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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

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