



World Drywall & Building Plasters

Industry Study with Forecasts for **2014 & 2019**

Study #2643 | June 2010 | \$5800 | 309 pages

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Over four-fifths of all new drywall demand -- which is nearly two and one-half times greater than demand for gypsum-based building plaster -- will be attributable to the US and the Asia/Pacific region.

Global drywall demand to advance 8.4% annually through 2014

Global demand for drywall (also known as gypsum board, plasterboard and wallboard) is forecast to advance 8.4 percent per year through 2014 to 10.7 billion square meters, a significant improvement over the 2004-2009 rate of growth. Over four-fifths of all new product demand generated during the 2009-2014 period will be attributable to the US and the Asia/Pacific region. Drywall sales in the US are predicted to grow 12.4 percent annually through 2014 as the country's housing market recovers from a period of significant turmoil. Residential building construction spending in the US will grow at a double-digit annual pace during this time.

The drywall market in the Asia/Pacific region will record the second fastest growth rate through 2014, after North America. Rapid growth in residential and nonresidential building construction will stimulate drywall sales. A number of Asian countries are expected to post large gains, including China, India, Thailand and South Korea. China alone will account for over one-third of all new global drywall demand between 2009 and 2014.

The Africa/Mideast region, Eastern Europe, and Central and South America are also projected to see significant



advances in drywall sales, spurred by healthy building construction gains. Turkey, Russia and Brazil will experience particularly rapid growth, as local construction firms increase their use of drywall in wall and ceiling construction applications. Drywall markets in more developed parts of the world -- Australia, Canada, Japan and Western Europe -- will generally expand at a slower pace through 2014 than their industrializing counterparts. Nonetheless, several of these countries are still expected to experience impressive drywall demand growth (starting from a low 2009 base), including South Korea, the UK and Spain.

Global building plaster demand to advance 5.3% annually through 2014

Global demand for gypsum-based building plaster is projected to advance 5.3 percent per annum to 36.9 million metric tons in 2014. The building plaster market will experience somewhat slower growth through 2014 than the drywall market, as construction firms in many countries adopt drywall-based building construction techniques because of rising labor costs. At the global level, drywall demand is nearly two and one-half times greater (on a weight basis) than demand for gypsum-based building plaster.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Drywall Supply & Demand

Drywall demand in China totaled 1.6 billion metric tons making it the world's second largest market for these products in the US. Since drywall only became available in China about a decade ago, the country's market is still in the early stages of development. Drywall is only frequently employed in urban and industrial areas. As a result, local construction firms have adopted modern building techniques. As a result, the intensity of product use in China (compared to building construction spending and population size) is below that of most developed countries. In recent years, residents, businesses and government controlled entities have become more receptive to drywall construction methods. From 2004 to 2009, drywall sales grew an unprecedented 35 percent per year, supported by a surge in building construction activity. Currently China's market is heavily dominated by the nonresidential and new residential construction sectors.

Drywall shipments in 2009. China posted 1.6 billion square meters that year, making it the largest market for these products after Germany. Beijing-based BNB (BNBM), which had 43 million square meters of gypsum board production capacity as of January 2010, is the largest manufacturer. Products from BNB are sold under the DRAGON brand name. Among the other notable drywall producers in China are Armstrong World Industries, Knauf, LBG, Linyi Feipeng Industrial (China), Saint-Gobain and Shandong Pingyi Zhongxing Plasterboard. Several companies have announced plans to expand production capacity in China, including BNB and LBG. For example, LBG is currently building a new drywall plant in Baoshan, Shanghai. The facility, which is due to be completed in 2010, will have a production capacity of 34 million square meters.

**SAMPLE
TEXT**

TABLE VI-5

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

Item	1999	2004	2009	2014	2019
Building Construction Expend (bil 2008\$) kg drywall/000\$ building construction					10.0
Drywall Demand (000 metric tons) metric tons/000 square meters					
Drywall Demand					
Residential:					
New					
Improvement & Repair					
Nonresidential					
net exports					
Drywall Shipments					

**SAMPLE
TABLE**

CHART VIII-1

WORLD DRYWALL & BUILDING PLASTER SALES BY COMPANY
(\$14.2 billion, 2009)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-6
CHINA -- BUILDING PLASTER SUPPLY & DEMAND
 (000 metric tons)

Item	1999	2004	2009	2014	2019
Building Construction Exp (bil 2008\$): kg plaster/000\$ building construction					
Building Plaster Demand					
Residential					
Nonresidential					
net exports					
Building Plaster Shipments					



COMPANY PROFILES

Chiyoda-Ute Company Limited
 15-2 Sumiyoshi-cho
 Yokkaichi-shi, Mie 510-8570
 Japan
 81-59-363-5555
 http://www.chiyoda-ute.co.jp

Sales: \$ (2009)
 Employe

Key Pro jointing compounds
 Chi construction products
 primarily operates through two
 segments

SAMPLE PROFILE

The Company is active in the world drywall and building plaster industry through the Gypsum Boards segment, which had sales of \$235 million and employed 475 in FY 2009. The segment manufactures gypsum board for wall and ceiling applications, as well as gypsum-based jointing compounds. Gypsum board products from Chiyoda-Ute include standard, high-strength, moisture-resistant, water-resistant and sound-absorbing types. The Company also makes a range of specialty gypsum board products, including decorative gypsum wallboard and ceiling tiles; FC wallboard, which is designed to absorb formaldehyde; TEA LIFE wallboard, which is engineered to absorb bacteria and odors without the use of chemicals; REFRESHING humidity-regulating wallboard; SUPER BOARD gypsum board with electromagnetic shielding properties; and fiberglass-reinforced fire-resistant wallboard. Gypsum-based jointing compounds from Chiyoda-Ute are produced in base coat and top coat varieties.

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“Through 2014, building plaster demand in China is projected to advance 12.0 percent per annum to 1.4 million metric tons, outperforming the Asia/Pacific region as a whole. Product sales are expected to surge as both building construction and gypsum board installation activity (the main application for gypsum-based building plaster) in the country expands rapidly. Also, in Northern China, wet construction applications will employ a greater proportion of gypsum building plaster than they do at present.”
 --Section VI, pg. 139

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OTHER STUDIES

World Housing

Global demand for new housing will rise 3% yearly to 2014. North America, Western Europe and Japan will grow the fastest from steep recent declines. Among developing areas, the Asia/Pacific region will build the most new units while the Africa/Mideast region grows the fastest. The global housing stock will rise 1.8% yearly. This study analyzes the 1.9 billion unit world housing industry, with forecasts for 2014 and 2019 by type, world region and for 22 countries. It also considers market environment influences on demand.

#2692 September 2010..... \$5300

Brick & Block

US demand for brick and block products is projected to increase 11.8% annually through 2014. Gains will be driven by a recovery in building construction, especially new housing. Common, glazed and other clay brick will be the fastest growing products, followed by concrete pavers. This study analyzes the 7.1 billion unit US brick and block industry, with forecasts for 2014 and 2019 by product, market, application and US region. It also evaluates company market share and profiles industry players.

#2652 September 2010..... \$4800

Cement & Concrete Additives

US cement and concrete additive demand will rise 9.9% yearly through 2014. The residential building market will grow the fastest, followed by highway and street uses based on continued federal transportation funding. Chemical additives will remain the largest segment, while mineral and fiber additives lead gains. This study analyzes the \$1.9 billion US cement and concrete additive industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.

#2657 July 2010..... \$4800

Siding

Demand for siding in the US is forecast to grow 6.5% annually through 2014, driven by a rebound in housing completions from depressed levels in 2009. Fiber cement, stucco and brick siding will see the most rapid advances. Vinyl siding will remain the largest segment and will continue to supplant wood. This study analyzes the 74 million square US siding industry, with forecasts for 2014 and 2019 by material, market and US region. It also evaluates company market share and profiles industry players.

#2623 April 2010 \$4900

Gypsum Products in North America

North American gypsum demand will rise 2.7% yearly through 2013, based mainly on a recovery in US new housing. Synthetic gypsum will continue to increase its share of crude gypsum production. Regular gypsum board, water-resistant board, veneer board and mobile home board will benefit the most from the housing turnaround. This study analyzes the 41.7 million metric ton gypsum industry in North America, with forecasts for 2013 and 2018 by country, product and market. It also details market share and profiles industry players.

#2550 September 2009..... \$4700

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