World Drywall & Building Plaster

Industry Study with Forecasts for **2016 & 2021**

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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

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NORTH AMERICA

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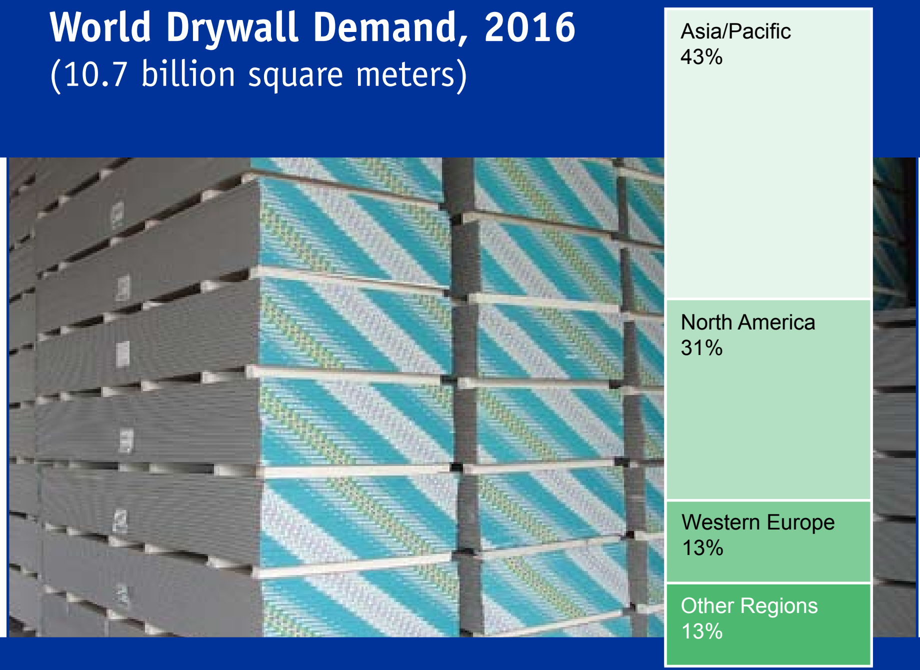
INDUSTRY STRUCTURE

Following recent severe losses between 2008 and 2011, drywall demand is expected to rebound sharply in North America and Western Europe. The East European market will also improve.

Drywall demand to rise 8.6% yearly through 2016

Worldwide sales of drywall are forecast to expand 8.6 percent per annum through 2016 to 10.7 billion square meters, a massive improvement over the 2006-2011 pace. Following recent severe losses between 2008 and 2011, drywall demand is expected to rebound sharply in North America and Western Europe. The East European market will also improve. While advances in the Africa/Mideast region, Asia/Pacific region, and Central and South America are projected to decelerate slightly through 2016, each of these regions is still expected to record impressive growth.

World Drywall Demand, 2016
(10.7 billion square meters)



China, US to dominate new drywall demand

Nearly 70 percent of additional drywall demand generated between 2011 and 2016 will be attributable to China and the US. Product sales in the US are projected to grow over 12 percent per year during this period. After declining sharply between 2006 and 2011, the amount of new residential floor space in the country is expected to increase at a double-digit pace. Rapid nonresidential building construction spending gains are also expected to stimulate growth in the US market. In China, demand for drywall is forecast to grow nearly 12 percent per year through 2016 because of large increases in residential and nonresidential construction activity. Drywall will also be used more frequently in residential applications in China, as these products become more popular.

Numerous industrializing countries are also projected to register robust growth between 2011 and 2016, including India, Saudi Arabia, Mexico, Thailand, and Turkey. Increasing demand for urban housing will drive residential building construction spending and related drywall sales. Consumption in these countries will also grow because of advances in office and commercial construction activity. Going forward, local construction firms will increase their use of modern building materials (such as drywall) at the expense of other products (such as building plaster).

Building plaster demand to rise 5.8% annually

Global building plaster demand is forecast to rise 5.8 percent per year to more than 37 million metric tons in 2016. While this pace is an improvement over the 2006-2011 rate, the building plaster segment will record slower growth than the drywall segment. Construction firms in many countries will gradually increase their use of drywall-based building construction techniques through 2016, at the expense of wet construction methods, which employ more building plaster per unit. A portion of these losses will be offset by the increased use of joint compounds during the drywall installation process.

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Sample Text, Table & Chart

TABLE VII-5

BRAZIL: DRYWALL SUPPLY & DEMAND
(million square meters)

Item	2001	2006	2011	2016	2021
Building Construction (bil 2010$)					
kg drywall/000$ construction					
Drywall Demand (000 metric tons)					
metric tons/000 square meters					
Drywall Demand					
Residential:					
New					
Improvement & Repair					
Nonresidential					
net exports					
Drywall Shipments					

OTHER REGIONS

Brazil: Drywall Supply & Demand -- Sales of drywall in Brazil were 40 million square meters in 2011, representing two-fifths of regional consumption. Because the drywall market in Brazil is still in the early stages of development, per capita product demand in the country is considerably lower than in other rapidly industrializing nations (e.g., China, Russia). Furthermore, traditional building materials are used in many parts of Brazil. Drywall sales grew 7.4 percent per annum between 2006 and 2011 because of healthy nonresidential and residential building construction expenditure gains. The more frequent use of drywall in both residential and nonresidential applications by local construction firms also contributed to growth.

In 2011, shipments of drywall from factories in Brazil reached 25 million square meters. Brazil posted a trade deficit of 15 million square meters that year, equivalent to 38 percent of consumption. Foreign multinationals play a key role in the industry. Etex, Knauf and Saint-Gobain are responsible for the majority of output in Brazil. However, locally-based suppliers are also active in the industry. Trevo Industrial de Gesso, which operates a plant in Juaziero do Norte, is a notable example.

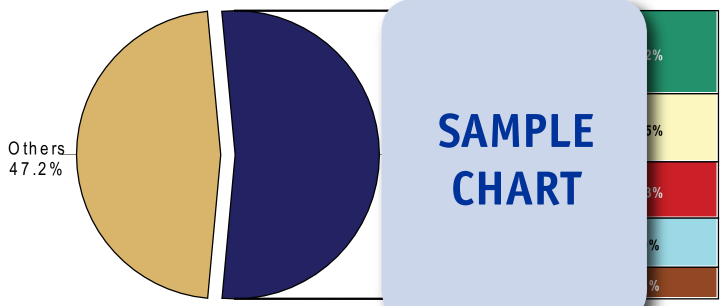
Drywall demand in ... percent annually through 2016 to ... nonresidential and residential buil... will bolster advances in Brazil's dry... also be used more frequently in the f... nies gradually increase their use of mod... building materials. However, levels of drywall use will still be quite low in comparison to other similar countries.

SAMPLE TEXT

...cilities in Brazil are projected to ... million square meters, leaving the ... illion square meters. Locally-based

CHART VIII-1

WORLD DRYWALL & BUILDING PLASTER MARKET SHARE BY COMPANY, 2011
($14.1 billion)



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Sample Profile, Table & Forecast

TABLE VII-4

BRAZIL: MARKET ENVIRONMENT FOR DRYWALL & BUILDING PLASTER

Item	2001	2006	2011	2016	2021
Population (million persons)					
per capita GDP					
Gross Domestic Product (bil 2010$)					
$ building construction/000$ GDP					
Building Construction (bil 2010$)					
Residential					
Nonresidential					
kg/capita					
kg/mil $ GDP					
kg/000$ bldg construction					
Bldg Gypsum Demand (000 metric tons)					
Drywall					
Building Plaster					

SAMPLE TABLE

COMPANY PROFILES

Chiyoda-Ute Company Limited
15-2 Sumiyoshi-cho
Yokkaichi-shi, Mie 510
Japan
81-59-3
http://ww

Sales: $
Employ

Key Pro... jointing compounds

SAMPLE PROFILE

Chiy... nstruction products specializing in the production of gypsum board. The Company's products are sold primarily to the Japanese market. Knauf Gips KG (Germany) holds a 20.34 percent share in Chiyoda-Ute, making it one of the Company's largest shareholders.

The Company is active in the world drywall and building plaster industry through the design, manufacture, and sale of gypsum board and gypsum based jointing compounds. Chiyoda-Ute's gypsum board products are suitable for wall and ceiling construction applications in residential and nonresidential buildings. These plasterboard products include standard, fire resistant, water resistant, impact resistant, moisture resistant, and sound absorptive varieties. Additional gypsum board products from the Company include specialty grades, such as REFRESHING humidity regulating wallboard; FC gypsum board engineered to absorb formaldehyde; TAFUJUBODO N high strength plasterboard that features sound absorptive properties; and SUPER BOARD gypsum board, which features electromagnetic shielding properties. Chiyoda-Ute also produces TEA LIFE wallboard, which is designed to absorb bacteria and odors. This wallboard was developed

299

"Through 2016, the building plaster market in Brazil is forecast to expand 5.6 percent to 920,000 metric tons, approximating growth for Central and South America as a whole. A moderate increase in building construction activity will fuel market gains between 2011 and 2016. However, local construction firms will increase their use of drywall in both residential and nonresidential applications, which will restrain building plaster consumption. The more frequent use of building plaster as a joint compound during the installation of drywall will offset a portion of the losses."
--Section VII, pg. 205

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Other Studies

World Housing

New housing construction will reach 60.5 million units in 2016, an increase of 3.5 percent per annum. Most new units will be built in developing countries, where population and housing growth will be the strongest. Multifamily housing units will outpace single-family units. This study analyzes the 50.7 million unit world housing industry, with forecasts for 2016 and 2021 by type, world region and for 22 major countries. The study also considers market environment factors such as world economic and demographic trends, and housing construction expenditures.

#2942 .... September 2012................ $5500

Construction Outlook in China

Construction expenditures in China will increase 8.8 percent per annum in real terms to 16.4 trillion yuan in 2016. Nonbuilding construction will be the fastest growing segment, benefiting from transportation infrastructure expansion and upgrades, and from the construction of utilities. Growth in residential and nonresidential building construction will also be strong. This study analyzes the 10.8 trillion yuan construction industry in China, with forecasts for 2016 and 2021 by type, market and region. The study also evaluates company market share and profiles industry participants.

#2898 ....June 2012 .... $5500

Siding

Demand for siding in the US is forecast to advance 8.4 percent per year through 2016 to 96.5 million squares. Brick, stucco and fiber cement siding will see the most rapid demand gains. The South and West regions -- where these materials are most often installed -- are forecast to see the strongest growth in population and housing activity. This study analyzes the 64.5 million square US siding industry, with forecasts for 2016 and 2021 by siding material, market and US region. The study also evaluates company market share and profiles industry players.

#2875 ....April 2012 .... $5100

Insulation

US demand for insulation is forecast to rise 7.8 percent annually to $8.9 billion in 2016. The residential market will post the most rapid gains, advancing at a double-digit pace as housing starts rebound. Fiberglass insulation will remain the market leader, while radiant barrier/reflective insulation and cellulose grow the fastest from smaller bases. This study analyzes the $6.1 billion US insulation industry, with forecasts for 2016 and 2021 by product, market and US geographic region. The study also evaluates company market share and profiles industry players.

#2858 .... March 2012................... $5100

World Siding (Cladding)

The global siding market is forecast to grow 4.8 percent per year through 2015 to over five billion square meters valued at $87 billion. Masonry and concrete products will remain the dominant segment, while vinyl siding exhibits the most rapid gains. The North American region, led by the US, will be the fastest growing market. This study analyzes the 4.2 billion square meter world siding industry, with forecasts for 2015 and 2020 by product, market, world region and for 20 countries. The study also evaluates company market share and profiles industry players.

#2834 ....December 2011 .... $6100

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