



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

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[About Freedonia, Custom Research, Related Studies, 8](#)

World Drywall & Building Plaster

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

Study #2924 | August 2012 | \$6100 | 358 pages

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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

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Historical Trends	5
Market Outlook.....	7
World Demographic Overview	11
World Building Construction Outlook	13
Residential Building Outlook	16
Nonresidential Building Outlook.....	18
World Gypsum Mine Production	20
Pricing	24
Environmental Considerations	26
Gypsum Mining & Manufacturing Operations	26
Waste Gypsum Disposal & Recycling.....	29
Synthetic Gypsum	32

OVERVIEW

General	36
Drywall.....	39
Drywall Demand by Region & Market.....	43
Residential.....	48
Nonresidential	50
Drywall Production by Region	52
International Trade Flows in Drywall.....	54
Building Plaster	56
Building Plaster Demand	
by Region & Market.....	58
Residential.....	60
Nonresidential	61
Building Plaster Production by Region	63
International Trade Flows	
in Building Plaster.....	64

NORTH AMERICA

General	67
Drywall Supply & Demand.....	69
Drywall Suppliers & Market Share.....	71
Building Plaster Supply & Demand	73
United States	74
Canada	81
Mexico	87

WESTERN EUROPE

General	94
Drywall Supply & Demand.....	96
Drywall Suppliers & Market Share.....	98
Building Plaster Supply & Demand	99
Germany	101
United Kingdom.....	107
Spain	113
France.....	119
Italy	125
Other Western Europe	131
Netherlands	135
Belgium	136
All Other	136

ASIA/PACIFIC

General	139
Drywall Supply & Demand.....	141
Drywall Suppliers & Market Share.....	143
Building Plaster Supply & Demand	145
China	147
Japan.....	154
South Korea	160
Australia.....	167
India	172
Thailand	179
Other Asia/Pacific	185
Indonesia.....	190
Vietnam	191
All Other	191

OTHER REGIONS

Central & South America	194
General	194
Drywall Supply & Demand	196
Building Plaster Supply & Demand.....	198
Brazil.....	200
Other Central & South America.....	206
Eastern Europe	212
General.....	212
Drywall Supply & Demand	214
Building Plaster Supply & Demand.....	216
Russia.....	218
Poland	224
Other Eastern Europe.....	230
Africa/Mideast.....	236
General	236
Drywall Supply & Demand	238
Building Plaster Supply & Demand.....	240
Turkey.....	242
Saudi Arabia	248
Other Africa/Mideast.....	254

INDUSTRY STRUCTURE

General	261
Industry Composition & Market Share.....	261
Market Leaders	265
Vertical & Horizontal Integration.....	270
Manufacturing	273
Marketing	276
Distribution	277
Cooperative Agreements.....	278
Mergers & Acquisitions.....	282

COMPANY PROFILES

Armstrong World Industries	286
Beijing New Building Material.....	289
BGC Australia Proprietary	291
Boral Limited	293
Caraustar Industries	298
Chiyoda-Ute Company.....	299
CSR Limited	300
Eagle Materials	304
Etex Group.....	307
Fletcher Building	312
Gypsemna Company.....	315

International Paper	316
KCC Corporation	318
Knauf Gips	319
Koch Industries	325
Kuwait Gypsum Manufacturing & Trading	328
Lafarge SA	330
National Gypsum.....	334
Pacific Coast Building Products	337
Panel Rey SA	339
Saint-Gobain	342
Shandong Pingyi Zhongxing Plasterboard.....	348
Shangdong Taihe Dongxin	349
Uralita SA	350
USG Corporation	351
Yoshino Gypsum.....	356

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..	11
2 World Population by Region	13
3 World Building Construction	
Expenditures by Region	15
4 World Residential Building Construction	
Expenditures by Region	18
5 World Nonresidential Building Construction	
Expenditures by Region	20
Cht World Gypsum Mine Production	
by Country, 2011	24

OVERVIEW

1 World Drywall & Building Plaster Demand	39
2 World Drywall Demand	
by Region & Market.....	45
Cht Per Capita Drywall Demand/Per Capita	
Building Construction Spending	
Relationship, 2011.....	47
3 World Residential Drywall	
Demand by Region	50
4 World Nonresidential Drywall	
Demand by Region	51
5 World Drywall Production by Region	54
6 World Drywall Net Exports by Region	56
7 World Building Plaster Demand	
by Region & Market.....	59
8 World Residential Building Plaster	
Demand by Region	61
9 World Nonresidential	
Building Plaster Demand	62
10 World Building Plaster	
Production by Region	64
11 World Building Plaster	
Net Exports by Region	66

(continued on following page)

List of Tables/Charts

(continued from previous page)

NORTH AMERICA

1 North America: Market Environment for Drywall & Building Plaster	69
2 North America: Drywall Supply & Demand	71
Cht North America: Drywall Market Share by Company, 2011.....	72
3 North America: Building Plaster Supply & Demand.....	74
4 United States: Market Environment for Drywall & Building Plaster	76
5 United States: Drywall Supply & Demand	79
6 United States: Building Plaster Supply & Demand.....	81
7 Canada: Market Environment for Drywall & Building Plaster.....	83
8 Canada: Drywall Supply & Demand	85
9 Canada: Building Plaster Supply & Demand.....	87
10 Mexico: Market Environment for Drywall & Building Plaster.....	89
11 Mexico: Drywall Supply & Demand.....	91
12 Mexico: Building Plaster Supply & Demand.....	93

WESTERN EUROPE

1 Western Europe: Market Environment for Drywall & Building Plaster	96
2 Western Europe: Drywall Supply & Demand.....	98
Cht Western Europe: Drywall Market Share by Company, 2011.....	99
3 Western Europe: Building Plaster Supply & Demand.....	101
4 Germany: Market Environment for Drywall & Building Plaster	103
5 Germany: Drywall Supply & Demand	105
6 Germany: Building Plaster Supply & Demand.....	107
7 United Kingdom: Market Environment for Drywall & Building Plaster	109
8 United Kingdom: Drywall Supply & Demand.....	111
9 United Kingdom: Building Plaster Supply & Demand.....	113
10 Spain: Market Environment for Drywall & Building Plaster.....	115
11 Spain: Drywall Supply & Demand.....	117
12 Spain: Building Plaster Supply & Demand.....	119
13 France: Market Environment for Drywall & Building Plaster.....	121
14 France: Drywall Supply & Demand	123
15 France: Building Plaster Supply & Demand.....	125
16 Italy: Market Environment for Drywall & Building Plaster.....	127
17 Italy: Drywall Supply & Demand.....	129
18 Italy: Building Plaster Supply & Demand.....	131

19 Other Western Europe: Market Environment for Drywall & Building Plaster	133
20 Other Western Europe: Drywall Supply & Demand.....	135
21 Other Western Europe: Building Plaster Supply & Demand.....	138

ASIA/PACIFIC

1 Asia/Pacific: Market Environment for Drywall & Building Plaster	141
2 Asia/Pacific: Drywall Supply & Demand	143
Cht Asia/Pacific: Drywall Market Share by Company, 2011.....	144
3 Asia/Pacific: Building Plaster Supply & Demand.....	146
4 China: Market Environment for Drywall & Building Plaster.....	149
5 China: Drywall Supply & Demand.....	152
6 China: Building Plaster Supply & Demand.....	154
7 Japan: Market Environment for Drywall & Building Plaster.....	156
8 Japan: Drywall Supply & Demand	158
9 Japan: Building Plaster Supply & Demand.....	159
10 South Korea: Market Environment for Drywall & Building Plaster	162
11 South Korea: Drywall Supply & Demand	164
12 South Korea: Building Plaster Supply & Demand.....	166
13 Australia: Market Environment for Drywall & Building Plaster.....	168
14 Australia: Drywall Supply & Demand	170
15 Australia: Building Plaster Supply & Demand.....	172
16 India: Market Environment for Drywall & Building Plaster.....	174
17 India: Drywall Supply & Demand	176
18 India: Building Plaster Supply & Demand.....	178
19 Thailand: Market Environment for Drywall & Building Plaster.....	181
20 Thailand: Drywall Supply & Demand	183
21 Thailand: Building Plaster Supply & Demand.....	185
22 Other Asia/Pacific: Market Environment for Drywall & Building Plaster	187
23 Other Asia/Pacific: Drywall Supply & Demand.....	190
24 Other Asia/Pacific: Building Plaster Supply & Demand.....	193

OTHER REGIONS

1 Central & South America: Market Environment for Drywall & Building Plaster.....	196
2 Central & South America: Drywall Supply & Demand.....	198
3 Central & South America: Building Plaster Supply & Demand	200
4 Brazil: Market Environment for Drywall & Building Plaster.....	202
5 Brazil: Drywall Supply & Demand	204

6 Brazil: Building Plaster Supply & Demand.....	206
7 Other Central & South America: Market Environment for Drywall & Building Plaster.....	208
8 Other Central & South America: Drywall Supply & Demand.....	210
9 Other Central & South America: Building Plaster Supply & Demand	212
10 Eastern Europe: Market Environment for Drywall & Building Plaster	214
11 Eastern Europe: Drywall Supply & Demand.....	216
12 Eastern Europe: Building Plaster Supply & Demand.....	218
13 Russia: Market Environment for Drywall & Building Plaster.....	220
14 Russia: Drywall Supply & Demand.....	222
15 Russia: Building Plaster Supply & Demand.....	224
16 Poland: Market Environment for Drywall & Building Plaster.....	226
17 Poland: Drywall Supply & Demand	228
18 Poland: Building Plaster Supply & Demand.....	230
19 Other Eastern Europe: Market Environment for Drywall & Building Plaster	232
20 Other Eastern Europe: Drywall Supply & Demand.....	234
21 Other Eastern Europe: Building Plaster Supply & Demand.....	236
22 Africa/Mideast: Market Environment for Drywall & Building Plaster	238
23 Africa/Mideast: Drywall Supply & Demand.....	240
24 Africa/Mideast: Building Plaster Supply & Demand.....	242
25 Turkey: Market Environment for Drywall & Building Plaster.....	244
26 Turkey: Drywall Supply & Demand	246
27 Turkey: Building Plaster Supply & Demand.....	248
28 Saudi Arabia: Market Environment for Drywall & Building Plaster	250
29 Saudi Arabia: Drywall Supply & Demand	252
30 Saudi Arabia: Building Plaster Supply & Demand.....	254
31 Other Africa/Mideast: Market Environment for Drywall & Building Plaster	256
32 Other Africa/Mideast: Drywall Supply & Demand.....	258
33 Other Africa/Mideast: Building Plaster Supply & Demand.....	260

INDUSTRY STRUCTURE

1 World Drywall & Building Plaster Sales for Selected Manufacturers, 2011.....	264
Cht World Drywall & Building Plaster Market Share by Company, 2011	265
Cht World Drywall Market Share by Company, 2011.....	270
2 Selected Cooperative Agreements.....	281
3 Selected Acquisitions & Divestitures.....	284

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.

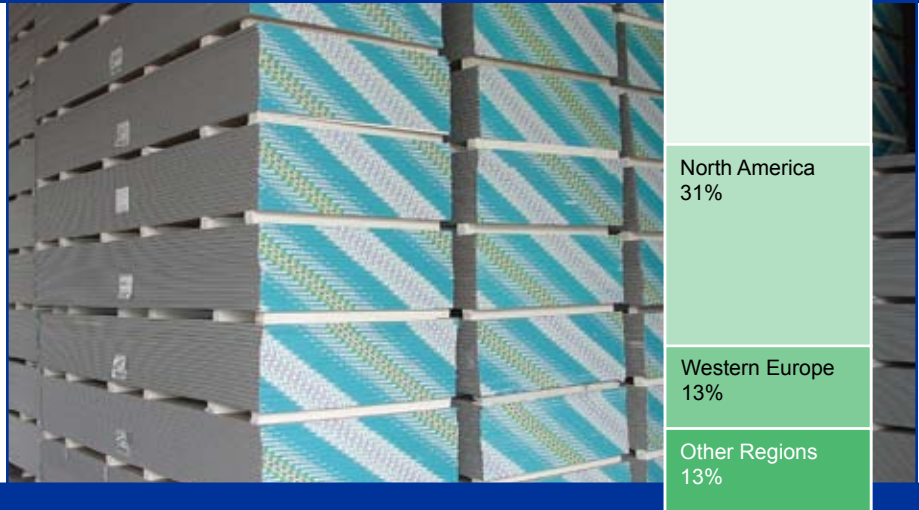
Drywall demand to rise 8.6% yearly through 2016

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.

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

World Drywall Demand, 2016 (10.7 billion square meters)



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 Brazil is projected to increase 7.4 percent annually through 2016 to 38 million square meters. Nonresidential and residential building construction expenditure gains, along with advances in Brazil's drywall industry, will bolster demand. Drywall will also be used more frequently in the future as building materials companies gradually increase their use of modern building materials. However, levels of drywall use will still be quite low in comparison to other similar countries.

SAMPLE TEXT

CHART VIII-1

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



SAMPLE CHART

ilities in Brazil are projected to million square meters, leaving the billion square meters. Locally-based

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Sample Profile, Table & Forecast

COMPANY PROFILES

Chiyoda-Ute Company Limited

15-2 Sumiyoshi-cho
 Yokkaichi-shi, Mie 510
 Japan
 81-59-36
 http://ww

Sales: \$
 Employ

Key Pro jointing compounds

Chiyoda-Ute is a construction 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

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**SAMPLE
PROFILE**

TABLE VII-4

BRAZIL: MARKET ENVIRONMENT FOR DRYWALL & BUILDING PLASTER

Item	2001	2006	2011	2016	2021
Population (million persons)	1	1	1	1	1
per capita GDP	8	8	8	8	8
Gross Domestic Product (bil 2010\$)	1	1	1	1	1
\$ building construction/000\$ GDP	1	1	1	1	1
Building Construction (bil 2010\$)	1	1	1	1	1
Residential					
Nonresidential					
kg/capita					
kg/mil \$ GDP					
kg/000\$ bldg construction					
Bldg Gypsum Demand (000 metric tons)					
Drywall					
Building Plaster					

**SAMPLE
TABLE**

"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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