World Drywall & Building Plaster

Industry Study with Forecasts for 2016 & 2021

Study #2924 | August 2012 | $6100 | 358 pages
# World Drywall & Building Plaster
## Industry Study with Forecasts for 2016 & 2021

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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.

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 be used more frequently in residential applications in China, as these products become more popular.

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.
## Table VII-5

**BRAZIL: DRYWALL SUPPLY & DEMAND**  
(million square meters)

<table>
<thead>
<tr>
<th>Item</th>
<th>2001</th>
<th>2006</th>
<th>2011</th>
<th>2016</th>
<th>2021</th>
</tr>
</thead>
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<tr>
<td>Building Construction (bil 2010$)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>kg drywall/000$ construction</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drywall Demand (000 metric tons)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>metric tons/000 square meters</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drywall Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Residential: New</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improvement &amp; Repair</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nonresidential</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>net exports</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drywall Shipments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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 forecast to advance 6.2 percent annually through 2016 to 54 million square meters. Healthy nonresidential and residential building construction activity growth will bolster advances in Brazil’s drywall market. These products will also be used more frequently in the future as local construction 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.

Shipments of drywall from facilities in Brazil are projected to increase 6.3 percent per year to 34 million square meters, leaving the country with a trade deficit of 20 million square meters. 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.
Chiyoda-Ute Company Limited
15-2 Sumiyoshi-cho
Yokkaichi-shi, Mie 510
Japan
81-59-363-5555
http://www.chiyoda-ute.co.jp

Sales: $352 million (FY 2012)
Employment: 500 (FY 2012)
Key Products: gypsum board and gypsum based jointing compounds

Chiyoda-Ute is a manufacturer of interior 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 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

Table VII-4
BRAZIL: MARKET ENVIRONMENT FOR DRYWALL & BUILDING PLASTER

<table>
<thead>
<tr>
<th>Item</th>
<th>2001</th>
<th>2006</th>
<th>2011</th>
<th>2016</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (million persons)</td>
<td>175.8</td>
<td>187.2</td>
<td>196.3</td>
<td>204.1</td>
<td>211.3</td>
</tr>
<tr>
<td>per capita GDP</td>
<td>8830</td>
<td>9770</td>
<td>11440</td>
<td>13400</td>
<td>15950</td>
</tr>
<tr>
<td>Gross Domestic Product (bil 2010$)</td>
<td>1553</td>
<td>1829</td>
<td>2246</td>
<td>2735</td>
<td>3370</td>
</tr>
<tr>
<td>$ building construction/000$ GDP</td>
<td>64.6</td>
<td>60.1</td>
<td>62.2</td>
<td>61.4</td>
<td>59.3</td>
</tr>
<tr>
<td>Building Construction (bil 2010$)</td>
<td>100.4</td>
<td>109.9</td>
<td>139.7</td>
<td>168.0</td>
<td>200.0</td>
</tr>
<tr>
<td>Residential</td>
<td>50.5</td>
<td>56.7</td>
<td>69.0</td>
<td>82.5</td>
<td>93.0</td>
</tr>
<tr>
<td>Nonresidential</td>
<td>49.9</td>
<td>53.2</td>
<td>70.7</td>
<td>85.5</td>
<td>107.0</td>
</tr>
<tr>
<td>kg/capita</td>
<td>3.6</td>
<td>4.2</td>
<td>5.5</td>
<td>7.1</td>
<td>8.6</td>
</tr>
<tr>
<td>kg/mil $ GDP</td>
<td>406</td>
<td>426</td>
<td>483</td>
<td>527</td>
<td>542</td>
</tr>
<tr>
<td>kg/000$ bldg construction</td>
<td>6.3</td>
<td>7.1</td>
<td>7.8</td>
<td>8.6</td>
<td>9.1</td>
</tr>
<tr>
<td>Bldg Gypsum Demand (000 metric tons)</td>
<td>630</td>
<td>780</td>
<td>1085</td>
<td>1440</td>
<td>1825</td>
</tr>
<tr>
<td>Drywall</td>
<td>210</td>
<td>270</td>
<td>385</td>
<td>520</td>
<td>695</td>
</tr>
<tr>
<td>Building Plaster</td>
<td>420</td>
<td>510</td>
<td>700</td>
<td>920</td>
<td>1130</td>
</tr>
</tbody>
</table>

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