INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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World Building Boards

Industry Study with Forecasts for **2017 & 2022**

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INDUSTRY STRUCTURE

Gains will be driven by recoveries in the building construction markets of many developed countries, and by continued strong increases in building construction activity in developing areas.

World demand to rise 6.2% annually through 2017

Global demand for building boards is forecast to rise 6.2 percent per year through 2017 to 398 million cubic meters, significantly faster than during the 2007-2012 period. Gains will be driven by recoveries in the building construction markets of many developed countries, although growth will be exaggerated somewhat by a weak 2012 base, particularly in the US. Additionally, continued strong increases in building construction activity in developing areas, as well as increasing intensity of use, will boost demand.

World Building Board Demand
(398 million cubic meters, 2017)

China was the largest national market for building boards in 2012 and will see its share of global demand rise to half of the total in 2017. Continuing rapid growth and industrialization, as well as an increase in the average size of housing units in the country, will boost gains. Also, as personal incomes rise, households can better afford homes built with modern construction techniques and materials, such as building boards, thereby increasing demand. As such, China is projected to post robust demand gains of 8.5 percent per annum through 2017, a rate slower than that of the previous decade but still among the fastest in the world.

The US market for building boards is forecast to post a strong recovery and see growth of 7.0 percent annually though 2017 after suffering severe declines between 2007 and 2012. An expected housing market rebound will drive demand gains in the country. Western Europe, another market that saw declines in building board demand between 2007 and 2012, is also projected to see a recovery through 2017, though not as strong as that in the US.

Structural boards to outpace nonstructural

Structural boards (softwood plywood and oriented strand board -- OSB) are expected to see faster demand growth through 2017 than nonstructural boards. Structural boards are primarily used in construction applications and were therefore hurt more by the housing market collapses of the 2007-2012 period, so demand for them will rise from a lower base. OSB, which has the same performance characteristics as softwood plywood but is generally less expensive, is forecast to see faster growth than softwood plywood through 2017 as it continues to grow in popularity worldwide and gain market share.

Among nonstructural boards (particleboard, medium density fiberboard -- MDF, hardboard, and other boards), the fastest demand gains through 2017 are expected in MDF. MDF is a popular board because it can be used in many construction and manufacturing applications, and has better performance characteristics than its main competitor, particleboard.

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Sample Text, Table & Chart

TABLE VI-5

**JAPAN:
BUILDING BOARD SUPPLY & DEMAND**

Item	2002	2007	2012	2017	2022
Gross Domestic Product (bil 2011$)					
per capita GDP					
Population (million persons)					
Building Constr Expend (bil 2011$)					
Residential					
Nonresidential					
m³ building board/mil $ GDP					
m³ building board/000 capita					
m³ building board/mil $ constructio					
Building Board Demand (000 m³)					
net exports					
Building Board Production (000 m³)					

SAMPLE TABLE

ASIA/PACIFIC

exceed that of the 2002-2012 period. Yet even with a declini
tion, per capita GDP growth will be subdued. Japan must als
twin challenges of a rapidly aging population and a sovereig
is more than twice the size of annual economic output, a far l
than that in most of the world's industrialized countries.

Japan: Supply & Demand

In 2012, demand for building boards in Japan totaled 11
cubic meters, making it the second largest market in the Asia
region, accounting for seven percent of regional demand. Pe
demand in Japan is well above the regional and global averag
ing the higher standards of living in the country. However, i
capita demand was below the historical level, as a decline in
construction activity between 2007 and 2012 led to lower de
building boards.

Through 2017, building board demand in Japan is forecast to rise
7 million cubic meters, among the slowest
While Japan is expected to see a rebound in
ty through 2017, gains will be well below the
nand growth. Japan is also expected to see
cturing activity, further limiting demand.
's largest net importers of build
trades with other countries in the
region, including China and Thailand.

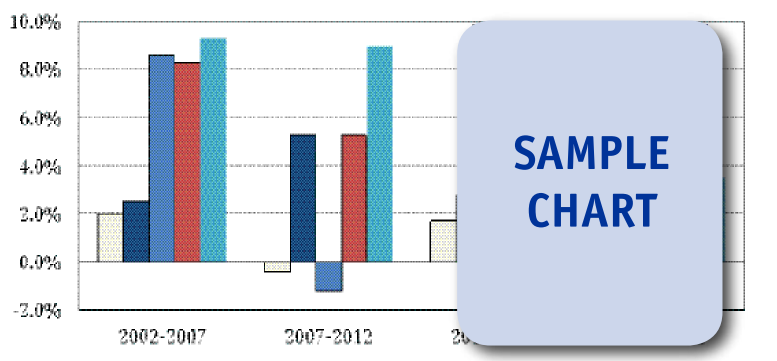
SAMPLE TEXT

Shipments of building boards from factories in Japan
million cubic meters in 2012. Building board manufactur
tered in Japan include Okura Industrial and Sumitomo For
foreign companies maintain manufacturing locations in th
though Celulosa Arauco y Constitución (Chile), Dare Tech
(China), and FRITZ EGGER (Austria) maintain sales offic

141 Copyright 2

CHART II-2

**SELECTED BUILDING BOARD PRICE CHANGES, 2002-2022
(average annual rate of change)**



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Sample Profile, Table & Forecast

TABLE VI-6

JAPAN: BUILDING BOARD DEMAND BY PRODUCT & MARKET (thousand cubic meters)

Item	2002	2007	2012	2017	2022
Asia/Pacific Building Board Demand					
% Japan					
Building Board Demand					
By Product:					
Structural Boards					
Softwood Plywood					
OSB					
Nonstructural Boards					
Particleboard					
MDF					
Hardboard					
Other Boards					
By Market:					
Construction					
Residential Buildings					
Nonresidential Buildings					
Manufacturing					
Furniture & Fixtures					
Other Manufacturing					

SAMPLE TABLE

COMPANY PROFILES

Dřevozpracující družstvo
Lukavec čp.9
394 26 Lukavec
Czech Rep
420-565
http://w

Annual
Employ

Key Pro ticleboard

SAMPLE PROFILE

Dřev ng producer of lumber and wood-based board materials. The Company is privately held. The Company participates in the world building boards industry through the manufacture of medium density fiberboard (MDF) and particleboard. These products are available in raw, laminated, veneered, and blank varieties primarily for furniture manufacturing, among other applications. Of DDL's total annual sales, laminated particleboard account for 25 percent, MDF blanks for 11 percent, laminated MDF for 10 percent, raw MDF for 10 percent, particleboard blanks for seven percent, raw particleboard for five percent, veneered particleboard for five percent, and veneered MDF for two percent. The Company's MDF, which is sold under the LUHOPOL brand name, is suitable for non-loadbearing purposes in the interior design, cabinetry, milling workshop, furniture making, and other industries. The MDF panels are available in standard, light, ultralight, and deep milling models. Particleboard from DDL is sold under the LUKAPOL tradename and includes general use, multilayer, and high mechanical strength varieties. The Company also produces veneered MDF and particleboard panels for decorative nonstructural applications. These panels are available with pine, oak, beech, cherry, ash, European maple, mahogany, and

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STUDY COVERAGE

This Freedonia study, ***World Building Boards***, offers historical data (2002, 2007, 2012) as well as forecasts for 2017 and 2022 for supply and demand, as well as demand by product and market in six regions and 18 countries. The study also examines key market environment factors, evaluates company market share and profiles 34 competitors in the global building board industry.

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Other Studies

Wood-Plastic Composite & Plastic Lumber

US demand for wood-plastic composite and plastic lumber will rise 9.8 percent annually to $5.5 billion in 2018. Decking will remain the largest application and will grow the fastest, based on alternative lumber's minimal maintenance and long service life. Wood-plastic composite materials will outpace plastic lumber. This study analyzes the $3.5 billion US wood-plastic composite and plastic lumber industry, with forecasts for 2018 and 2023 by material, application, market and region. The study also evaluates company market share and profiles industry players.

#3145 ....June 2014 .... $5300

World Housing

World construction of new housing will reach 61.3 million units in 2018 on 2.9 percent yearly advances. The Asia/Pacific region will own the most new housing units, while the Africa/Mideast housing stock region will grow the fastest. Multifamily housing construction will continue to outpace that of single-family types. This study analyzes the two billion unit world housing industry, with forecasts for 2018 and 2023 for housing stock and new housing units by type, world region, and for 22 countries. The study also considers economic trends, demographics and other market factors.

#3184 .... July 2014................... $5800

World Siding (Cladding)

The global siding market is projected to rise 5.1 percent annually to 5.7 billion square meters in 2017, valued at $89 billion. North America will be the fastest growing regional market, while the Asia/Pacific region will remain dominant. Masonry and concrete will remain the most popular siding products. This study analyzes the 4.4 billion square meter world siding industry, with forecasts for 2017 and 2022 by product, market, world region and for 36 countries. The study also evaluates company market share and profiles industry players.

#3101 .... November 2013 .... $6300

Construction Outlook in China

Construction expenditures in China are expected to rise 8.5 percent per annum in real terms through 2017. Nonbuilding construction of transportation infrastructure and utility projects will see the fastest growth.The Central-East region will remain the largest market while the Northwest region will grow the fastest. This study analyzes the 13.3 trillion yuan construction industry in China, with forecasts for 2017 and 2022 by market, application, and geographic region. The study also evaluates company market share and profiles industry participants.

#3035 .... July 2013................... $5300

Building Boards

US building board demand will rise 7.0 percent yearly through 2017 to 52.5 billion square feet (3/8 inch basis). Windows and doors, subflooring, and roofing will be the fastest growing uses. OSB will outpace softwood plywood among structural boards. Insulation board and high and low density fiberboard will pace nonstructural boards. This study analyzes the 37.5 billion square foot US building board industry, with forecasts for 2017 and 2022 by product, market, application, and region. The study also evaluates company market share and profiles industry players.

#3017 ....April 2013 .... $4900

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