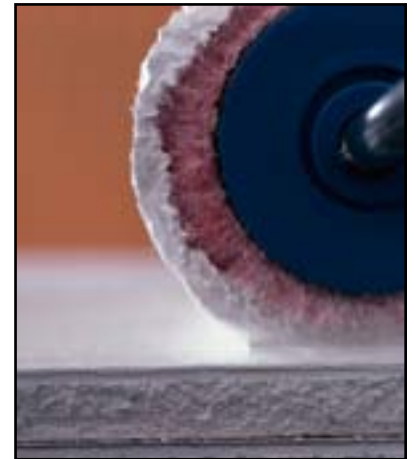


World Drywall & Building Plaster

Industry Study with Forecasts for 2020 & 2025

Study #3464 | October 2016 | \$6300



More than one-third of new drywall demand generated between 2015 and 2020 will be in China, where demand for drywall is expected to increase 6.0 percent per annum, bolstered by significant, although slowing, increases in both residential and nonresidential construction. About three-fourths of drywall use in China is generated by nonresidential building construction, so product demand will benefit from the nonresidential market's relatively better prospects.

Developing countries show growth

Many other industrializing countries -- including Brazil, India, Indonesia, Iran, Mexico, and Thailand -- are forecast to post solid growth in drywall demand through 2020. Increasing demand for urban housing will drive residential building construction spending and related drywall sales. Growth in office and commercial construction activity will also contribute to gains. Construction of interior walls and ceilings with drywall yields savings in time and labor costs compared to alternatives such as concrete masonry units. As labor costs rise in developing countries, building contractors will increasingly be attracted to the use of drywall.

Western Europe attempts a recovery

Many West European countries are expected to post rebounds in drywall demand as their housing markets

recover. However, in countries such as Greece, Italy, Portugal, and Spain, drywall demand in 2020 will remain significantly below that of a decade earlier, as the housing rebound will occur from a severely depressed 2015 level and will not recover all of the ground lost in the housing downturn.

Building plaster faces challenges

Building plaster demand growth will be slower than that in the drywall segment. Although some building plaster demand is associated with drywall use (e.g., joint compounds), traditional wet construction methods account for the bulk of demand for building plaster. Construction firms in many countries are projected to increase their use of drywall-based construction techniques gradually at the expense of plaster-based construction, constraining demand for building plaster.

Study coverage

This study analyzes the global drywall and building plaster markets. It presents historical data (2005, 2010 and 2015) plus forecasts (2020 and 2025) for drywall and building plaster supply and demand for residential and nonresidential markets in six regions and 21 countries. The study also considers key market environment factors, assesses industry structure and evaluates company market share.

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**BRAZIL:
MARKET ENVIRONMENT FOR DRYWALL & BUILDING PLASTER**

| Item | 2005 | 2010 | 2015 | 2020 | 2025 |
|---|------|------|------|------|------|
| Population (million persons) | | | | | |
| per capita GDP | | | | | |
| Gross Domestic Product (bil 2014\$) | | | | | |
| \$ building construction/000\$ GDP | | | | | |
| Building Construction Expend (bil 2014\$) | | | | | |
| Residential | | | | | |
| Nonresidential | | | | | |
| kg/capita | | | | | |
| kg/000\$ GDP | | | | | |
| kg/000\$ bldg construction | | | | | |
| Bldg Gypsum Demand (000 metric tons) | | | | | |
| Drywall | | | | | |
| Building Plaster | | | | | |

Source: The Freedonia Group

ASIA/PACIFIC

Thailand: Drywall Supply & Demand

Drywall demand in Thailand totaled 92 million square meters in 2015. Thailand has extensive natural gypsum reserves and a developed gypsum building materials industry, so the intensity of drywall use relative to building construction spending is in line with industrial countries in the Asia/Pacific region (such as Australia and Japan) and well above the regional average. During the 2010-2015 period, demand for drywall in Thailand rose 5.0 percent per year, driven by solid residential construction spending growth.

Drywall shipments from factories in Thailand totaled 102 million square meters in 2015, resulting in a trade surplus of 10 million square meters. Production growth has exceeded demand gains in recent years, allowing the country's trade deficit to turn into a trade surplus. India and Indonesia are Thailand's major trade partners. However, the Thai government has imposed regulations on where gypsum can be exported and has raised the cost of the product significantly. The government took these actions as a result of a study that recommended the country to limit on domestic consumption in order to avoid paying higher prices to import gypsum in the future. The restrictions took effect in 2015 and will affect exports going to other countries. Thai Gypsum Production is dominated by mid-sized companies that operate in the country.

Demand for drywall is projected to grow at a rate of 2.0 percent per annum through 2025, below the 2010-2015 average. However, demand is projected to decelerate in 2016, accelerating residential construction spending in 2017.

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SAMPLE
TEXT

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

TABLE V-17

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

| Item | 2005 | 2010 | 2015 | 2020 | 2025 |
|---|------|------|------|------|------|
| Building Construction Expend (bil 2014\$) | | | | | |
| 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 | | | | | |

Source: The Freedonia Group

SAMPLE
TABLE

Related Studies

World Insulation

Through 2020, global demand for insulation will rise 3.7 percent per year to 26.0 billion square meters of R-1 value. More than half of new global demand between 2015 and 2020 will occur in the Asia/Pacific region, with China, India, and Indonesia recording solid growth. Foamed plastic insulation will lead value gains. This study analyzes the current world market, at 21.6 billion square meters of R-1 value, with forecasts for 2020 and 2025 by material, market, region, and for 21 countries. The study also details company market share and profiles global players.

#3435..... July 2016 \$6500

Fiber Cement

US demand for fiber cement products is forecast to grow 5.8 percent annually through 2019 to 2.9 billion square feet, valued at \$2.2 billion. Siding will remain the dominant application, while backerboard grows the fastest. Growth in the dominant residential market will continue to outpace the nonresidential segment. This study analyzes the 2.2 billion square foot US fiber cement industry, with forecasts for 2019 and 2024 by material, application, market, and US region. The study also evaluates company market share and profiles industry players.

#3348..... December 2015 \$5300

World Solid Surface & Other Cast Polymers

Global demand for cast polymers will rise 6.6 percent yearly to 246 million square meters in 2019, with a value of \$23.1 billion. The Asia/Pacific region will remain the largest and fastest-growing market. Solid surface will remain the dominant type while engineered quartz, marble and other stone will grow the fastest. This study analyzes the 179 million square meter world cast polymer industry, with forecasts for 2019 and 2024 by type and application for six world regions and 18 major countries. The study also evaluates company market share and profiles industry players.

#3335..... October 2015 \$6400

Insulation

US insulation demand will rise 6.6 percent annually through 2019 to \$10.3 billion. The residential market will grow the fastest, while the nonresidential market will recover from recent declines. Fiberglass and foamed plastic insulation will continue to claim the vast majority of the market, with foamed plastic growing slightly faster than fiberglass. This study analyzes the \$7.5 billion US insulation industry, with forecasts for 2019 and 2024 by product, market and US region. The study also evaluates company market share and profiles industry participants.

#3332..... September 2015 \$5400

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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