

US outlook for

Gypsum Products in North America

with forecasts to 2005 and 2010

New study finds:

- *North American demand for gypsum products is expected to advance 1.8 percent per annum through 2005 to 45.1 million metric tons*
- *Among construction segments, repair and remodeling applications will provide the best opportunities for gypsum products over the forecast period*
- *Three companies -- USG, National Gypsum and Georgia-Pacific -- dominate the gypsum board industry in North America, collectively producing roughly two-thirds of the gypsum board used on the continent*

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Gypsum Products in North America

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Gypsum Products in North America, a new study from The Freedonia Group, provides you with an in-depth analysis of major trends in the industry and the outlook for product segments and major markets -- critical information to help you with strategic planning.

This brochure gives you an indication of the scope, depth and value of Freedonia's new study, *Gypsum Products in North America*. Ordering information is included on the back page of the brochure.

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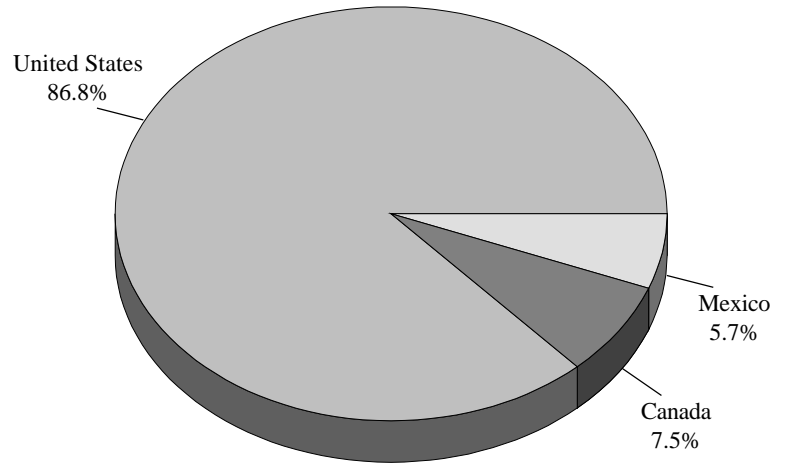
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Study Highlights

- North American demand for gypsum products is expected to advance 1.8 percent per annum through 2005 to 45.1 million metric tons.
- By 2005, synthetic gypsum is projected to account for nearly 30 percent of crude gypsum consumption in North America.
- Among construction segments, repair and remodeling applications will provide the best opportunities for gypsum products over the forecast period.
- Gypsum use as an additive for cement is forecast to expand 2.4 percent per year over the period to 7.3 million metric tons. Advances will be spurred by increased attention to road construction and maintenance in the US market, offsetting the sluggish prospects for building construction use of cement.
- Three companies -- USG, National Gypsum and Georgia-Pacific -- dominate the gypsum board industry in North America, collectively producing roughly two-thirds of the gypsum board used on the continent.

Study Highlights

North America Gypsum Product Demand by Country, 2000



North America Gypsum Product Demand

(thousand metric tons)

Item	1995	2000	2005	2010	% Annual Growth	
					00/95	05/00
Construct Fixed Invest (bil 1996 US\$)	752.4	955.3				1.9
m tons gypsum/mil US\$ constr	41.8					
Gypsum Products Demand	31464					
By Type:						
Gypsum Board	22114					
Other	9350	11500				
By Country:						
United States	27329					
Canada	2576					
Mexico	1559					
US\$/m ton	80					
Gypsum Products Demand (mil US\$)	2508	3945				1.0

SUMMARY TABLE

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Market Environment/ Gypsum Supply & Demand

These Sections discuss factors influencing gypsum products demand, including construction and demographic trends, and mine and synthetic gypsum production for the United States, Canada and Mexico.

This information provides you with an understanding and an analysis of the climate in which the gypsum products industry operates.

MARKET ENVIRONMENT

Cement Outlook - Mexico

Following several years of economic stagnation during the 1980s (much of it associated with depressed economic activity, inflation and unemployment, and massive foreign debt), many experts felt Mexico's economy was predestined to a significant extent upon the macroeconomic reforms made in local Mexican production facilities (maquiladoras), and the establishment of NAFTA between the US, Canada and Mexico to reduce and eliminate trade barriers among the three countries. The latter could eventually lead to a virtual North American free trade zone, and ultimately even encompass the entire Western Hemisphere (there has, however, been much debate over the initial impact of NAFTA concerning the issue of "winners and losers" within the respective economies of the three countries).

Relative to initial expectations, Mexico's actual performance was subpar for most of the 1990s, commencing with a period of sluggish economic growth in 1992-1994 that was accompanied by a widening current account deficit. Of even greater

in late 1994, and the effect of an country's central bank; response, GDP (inflows of external savings) only exacerbated a fairly significant during 1997 and into 1998-1999 global recession in the Western Hemisphere, commencing earlier in the 1990s, in agreement with the

Canada Gypsum Supply & Demand

(thousand metric tons)

Item	1990	1995	2000	2005	2010
Crude Gypsum Mined	8790	8055			
- exports	4539				
+ imports	249				
+ synthetic gypsum	0				
Crude Gypsum Consumption	4500				
US\$/metric ton	8.44				
Crude Gypsum Consump (mil US\$)	38				

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Products

The Product Sections provide demand for historical years and forecast growth to 2005 and 2010.

This information helps you:

- Analyze your company's growth potential in the industry.
- Outline your strategic plans for five and ten years out.
- Establish sales goals.

CALCINED GYPSUM PRODUCTS

Demand by Type - Water-Resistant Gypsum Board

North American demand for water-resistant (moisture-resistant) gypsum board is projected to advance 2.4 percent annually to 2010, reaching 1.1 billion square feet, with a value of US\$1.1 billion. Water-resistant gypsum board is most often used in kitchens, bathrooms, and laundry rooms, causing demand to be swayed by construction activity in these types of rooms, primarily single and multiunit residential housing, as well as some offices. Gains for water-resistant gypsum board will decelerate because of an expected decline in housing starts in the large US market. Offsetting some of the effect of weakening residential construction activity will be trends toward a higher number of bathrooms per house and toward larger kitchens and bathrooms.

Historically, water-resistant board was not recommended for ceilings, as the board had a tendency to sag. In recent years, however, manufacturers have improved the characteristics of the board, and it is now accepted procedure to apply water-resistant board to ceilings in high moisture settings, particularly if the framing is spaced closer, so as to reduce the distance spanned between the studs. The greater acceptability of water-resistant board for ceiling use will also contribute to growth.

Water-resistant board is also used as at least partial underlayments for ceramic tiles

North America Gypsum Demand in Cement

(thousand metric tons)

Item	1990	1995	2000	2005	2010
Construction Fixed Invest (bil 96 US\$)	743.7	752.4			800.0
m tons cement/mil US\$ constr	142	140			140
Cement Production (mil m tons)	105.5	110.0			115.0
kg gypsum/m ton cement	48				
Gypsum in Cement	5060	5340			5500
United States	3360	3690			3900
Canada	560	500			500
Mexico	1140	1150			1100
US\$/m ton	13	14			15
Gypsum in Cement (mil US\$)	66	66			66

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Markets

The Markets Section analyzes trends and considers the threats and opportunities in each of the major markets for gypsum products.

The information presented will help you:

- Focus your sales and marketing efforts on high growth areas.
- Propose new areas for development.

GYPSUM MARKETS

Agricultural

North American demand for gypsum in agriculture is forecast to expand 2.2 percent per annum through 2010. Gains will be aided by efforts to increase the amount of cultivated cropland. Gypsum is used primarily on irrigated cropland and, although arable land in North America is slowly declining over the forecast period, the amount of irrigated land is expected to increase.

Gypsum used in agriculture is ground in its uncalcined form. The ground rock provides the soil with both calcium and sulfur, two elements important for proper plant development. In addition to nutrient value, the calcium promotes root growth by flocculating clays in soil, allowing improved air and water movement. It also improves compacted soils and makes moist soils easier to till. Gypsum is also used to reclaim alkali soils and to help keep the soil from packing down, allowing

North America Nonresidential Building Remodeling & Repair Demand for Gypsum

(thousand metric tons)

Item	1990	1995	2000	2005	2010
Nonres Improve Expend (bil 96 US\$)	83.9	79.4			85.5
m tons gypsum/mil US\$ expend	54.7	56.7			57.5
Nonres Remod/Repair Gyp Demand	4587	4415			4500
Gypsum Board	4265	4135			4200
Gypsum in Cement	182	166			170
Building Plaster	140	156			130
US\$/m ton	93	98			100
Nonres Remodel/Rep Gyp (mil US\$)	425	436			450

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Industry Structure

Gain a better understanding of your competition and analyze your company's position in the industry with information about:

- industry composition & market share
- barriers to entry & exit
- competitive strategies
- gypsum board distribution
- operating requirements
- cooperative agreements
- acquisitions & related matters

INDUSTRY STRUCTURE

Synthetic Gypsum Producers

Synthetic gypsum is chemically manufactured and is typically a byproduct that is created during various manufacturing, industrial or chemical processes. The principal process from which synthetic gypsum is derived in North America is flue gas desulfurization, which is used by many coal-burning power plants. In the US and Canada, the power plants are required to use FGD in order to reduce sulfur dioxide emissions from their power plants. The popularity of synthetic gypsum created in the late 1990s. Manufacturers of gypsum board sought to use synthetic gypsum to use in conjunction with expansions of their gypsum board production capacity.

Because of the costs of transporting gypsum board, it is generally not profitable to produce it more than one day's drive away from the market. At the same time, mined gypsum is a high bulk, low value commodity, and the cost of transporting it is also fairly high. Since naturally occurring deposits of gypsum are not necessarily located near major centers of population, it has in the past been crucial that if the gypsum board plant is not sited near the mine, it be sited so that the raw gypsum can be transported by water from the mine. For example, in the northeastern US, where there are no gypsum deposits, much of the mined gypsum has been obtained from Nova Scotia. Electric power plants are more likely to be located near population centers, however, and FGD gypsum can be a competitive source of raw material. Some new gypsum board manufacturing facilities have been constructed on the site of a power facility or nearby to reduce the cost of transporting the raw material. Examples of gypsum board plants adjacent to electric power plants include Georgia-Pacific's facility in Wheatfield, Indiana and Lafarge's facility in Palatka, Florida. The manufacturer of gypsum board typically enters into a long-term contract with the electric utility to assure itself of a stable supply of FGD gypsum. Since the synthetic gypsum is merely a waste product in the hands of the utility, it can afford to offer the synthetic gypsum to the board producer under

Company Profiles

The Profiles Section analyzes 35 companies active in the North American gypsum products market. These profiles represent a sampling or cross-section of the types of companies involved in the industry.

Divisions, subsidiaries, joint ventures, etc., are discussed under appropriate parent companies.

Sources for profiles included:

- Information provided by key staff members in the respective companies
- Annual reports
- 10-K reports
- Security analysts reports
- Corporate product literature

COMPANY PROFILES

Temple-Inland Incorporated

1300 Mopac Expressway South
Austin, TX 78746
512-434-8000

Temple-Inland is a holding company that operates in three segments: Paper, Building Products and Financial Services. In addition, the Company has significant forest resource operations. The Company's main subsidiaries include Temple-Inland Forest Products Corporation (Temple-Inland FPC), Inland Paperboard and Packaging Incorporated, and Temple Services Incorporated. In 2000, the Company's revenue was \$1.1 billion originating in the US, US\$33 million in Canada. Temple-Inland employed 14,800 in 2000.

SAMPLE PAGE

Regular gypsum board is sold in numerous widths and lengths for various new construction and remodeling tasks. These boards are sold in beveled-edge or tapered forms to facilitate assembly. Fifty-four-inch gypsum board is six inches wider than standard panels, eliminating the need for gap-filling boards, reducing costs, waste and construction time while increasing wall strength. Fire-rated Type X gypsum boards are formulated with glass fibers and chemical additives. The boards of this type are made in 48- and 54-inch widths and meet both local and federal fire-code construction guidelines.

Water-resistant gypsum board is coated with treated facing paper that prevents moisture accumulation. These boards are used as bases for ceramic, metal and plastic tiles in bathrooms, kitchens and other areas with high water flow. Moreover, water-resistant gypsum boards are available with Type X cores. Gypsum sheathing is designed for exterior wall construction applications, and serves as a

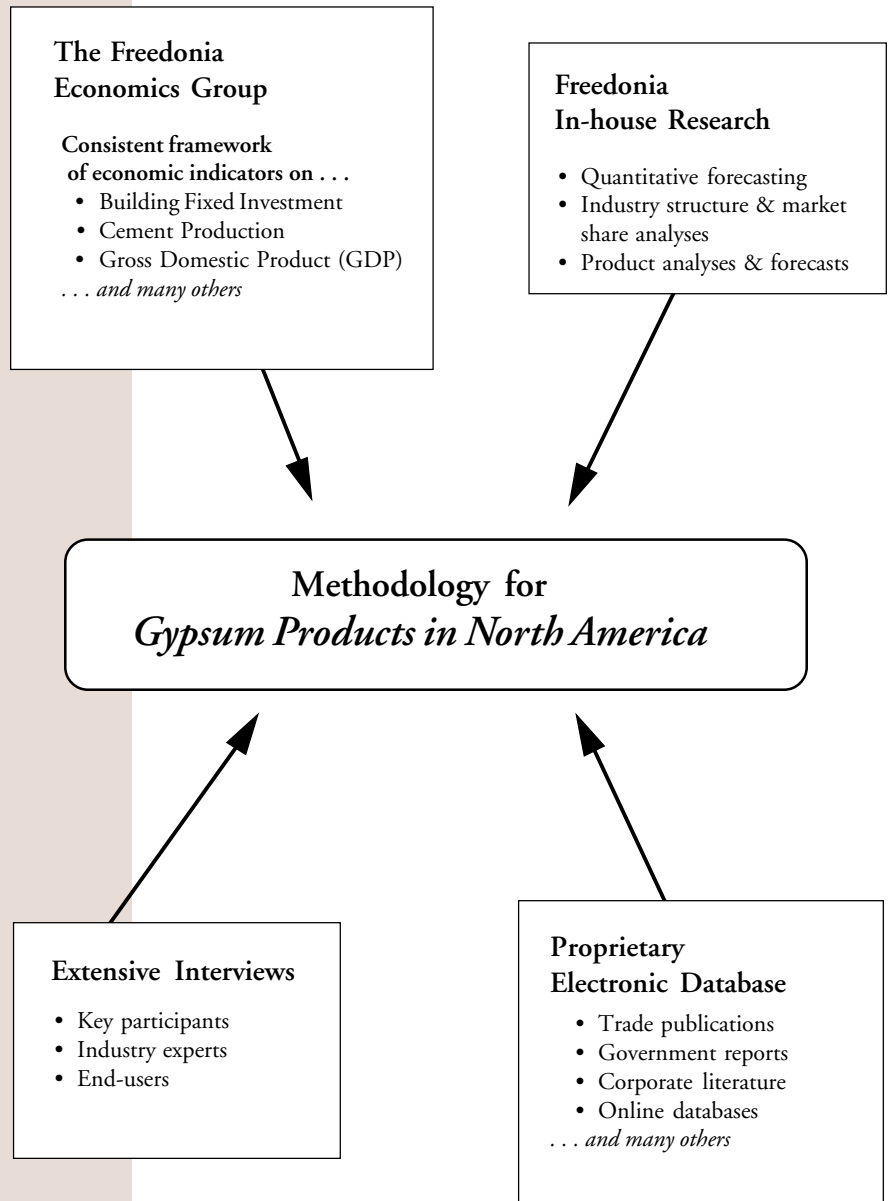
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Companies Profiled

Air Products and Chemicals Incorporated
Pure Air
Allegheny Energy Incorporated
American Electric Power Company Incorporated
AMPEL Corporation
BPB plc
Celotex Corporation
Westroc Incorporated
Caraustar Industries Incorporated
Premier Boxboard Limited LLC
Standard Gypsum LP
CEMEX SA de CV
Kosmos Concrete Company
Southdown Incorporated
Centex Construction Products Incorporated
American Gypsum Company
Illinois Cement Company
Republic Gypsum Company
Texas-Lehigh Cement Company
Cinergy Corporation
Compania Occidental Mexicana SA de CV
Continental Gypsum Company
DPL Incorporated
FirstEnergy Corporation
Pennsylvania Power Company
Georgia-Pacific Corporation
G-P Gypsum Corporation
Hardie (James) Industries Limited
Harrison Gypsum Company
Holloway (HM) Incorporated
Huntsman Corporation
Tioxide Americas Incorporated
Kemira Oy
Kerr-McGee Corporation
Kemira Pigments Incorporated
Keystone-Conemaugh Projects
Lafarge SA
Carmeuse NA
Dravo Corporation
Seven Hills Paperboard LLC
National Gypsum Company
NiSource Incorporated
Northern Indiana Public Service Company
Pacific Coast Building Products Incorporated
PABCO Gypsum
Panel Rey SA
Potash Corporation of Saskatchewan Incorporated
Powergen plc
LG&E Energy Corporation
Louisville Gas & Electric Company
Scottish Power plc
PacifiCorp
TECO Energy Incorporated
Tampa Electric Company
Temple-Inland Incorporated
Premier Boxboard Limited LLC
Standard Gypsum LP
Tennessee Valley Authority
TransAlta Corporation
USG Corporation
Canadian Gypsum Company Incorporated
L&W Supply
North American Gypsum
Wilson (Art) Company

Forecasting Methodology

Freedonia does not just collect and reprint data; Freedonia develops data. Our analysts thoroughly investigate an industry by extensively interviewing key industry participants and analyzing information from sources such as associations, government and trade literature. Once this research is complete, Freedonia establishes one set of forecasts. All writing, editing and forecasting is done in-house to assure quality and consistency. In cases where data does not exist, Freedonia develops the data based on input/output ratios, bills of materials and flow charts. The following chart summarizes Freedonia's methodology:



About The Freedonia Group

Advantages of Freedonia Reports

The Freedonia Group, Inc. is a leading international industry study/database company.

Since 1985, Freedonia has published over 1,600 titles covering areas such as chemicals, coatings and adhesives, building materials, plastics, industrial components and equipment, health care, packaging, household goods, security, and many other industries.

Freedonia has produced a wide variety of titles, including:

- *Cement & Concrete Additives*
- *Prefabricated Housing*
- *Windows & Doors*
- *Siding*

Because Freedonia is a reliable information source, our forecasts are cited in numerous publications such as *The Wall Street Journal*, *Purchasing* and *National Home Center News*.

In-house operations

Because all of our staff work at the same location, interaction between analysts and departments provides a strong system of checks and balances.

Consistency

Our Economics Group develops indicators that are used by all analysts. Therefore, every Freedonia study is based on a consistent set of economic assumptions (GDP, cement production, building fixed investment, etc.)

Reliable forecasts

Because all of our forecasts consider the environment in which a product or industry is operating, as well as threats and opportunities to the market, Freedonia forecasts are reliable indicators of future performance.

One-on-one interviews

All studies are produced by conducting interviews with key industry participants and end-users.

Proprietary electronic database

Freedonia's analysts can tap into an extensive in-house electronic database containing corporate literature (including private company information), trade publications, government reports and many other sources of information.

About Our Customers

Freedonia's clients include major US and international companies in the manufacturing, services, consulting and financial sectors.

Typical purchasers of Freedonia studies :

- **Key Executives**
- **Corporate Planners**
- **Market Researchers**
- **Financial Analysts**
- **Information Centers**
- **New Product Developers**
- **Merger & Acquisition Specialists**

Since 1985 we have provided research to customers ranging in size from global conglomerates to one person consulting firms. More than 90% of the industrial companies in the Fortune 500 use Freedonia research to help with their strategic planning.

Some of Freedonia's customers in the gypsum products market include: Georgia-Pacific, James Hardie Industries, Lafarge SA, National Gypsum and USG.

Other Titles From Freedonia

For more information about these or other Freedonia titles, please contact us at:

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Cement & Concrete Additives

US demand for cement and concrete additives will be boosted by increased use of concrete in construction, and by higher additive loading rates per cubic yard of finished concrete. Gains will be led by higher-value specialty additives, while building construction remains the largest outlet for additives overall. This study analyzes the US market for cement and concrete additives industry with forecasts to 2005 and 2010 by product and market. It also presents market share data and profiles of key industry participants.

#1465. 9/00. \$3,900

Prefabricated Housing

US demand for prefabricated housing will continue to grow through 2005, driven by the cost advantages of factory production and a tight labor market for skilled on-site construction workers. Manufactured housing will remain the largest market (in both unit and value terms) followed by panelized housing. This study analyzes the US prefabricated housing industry through 2005 and 2010 by product and region. It also examines the market environment, evaluates market share and profiles key producers.

#1458. 8/01. \$3,600

Windows & Doors

Demand for windows and doors in the US will reach \$24.6 billion in 2005. Vinyl and other plastic window and door demand will grow almost 6% annually, based on vinyl's strength in residential markets. Plastics are already the top material in the replacement window segment and will surpass wood windows in new home construction by 2005. This study analyzes the US window and door industry to 2005 and 2010 by type, material, market and by region. It also details market share and profiles key industry players.

#1435. 5/01. \$3,800

Siding

Demand for exterior cladding in the US will reach 109 million squares in 2005. Fiber cement will be the star performer, experiencing unit gains of nearly 5% annually and continuing to wrest market share from wood and vinyl. However, vinyl will remain the market leader, benefiting from expenditures on residential remodeling. This study analyzes the \$8.6 billion US siding industry to 2005 and 2010 by material, market and region. It also profiles selected industry participants and presents market share data.

#1413. 4/01. \$3,700

Roofing

The best opportunities in roofing will be found in reroofing applications, which account for three-quarters of demand. Thermoplastic membrane roofing will grow the fastest, with thermoplastic polyolefin (TPO) making inroads against built-up roofing and elastomeric roofing. Asphalt shingles will remain the dominant roofing material. This study analyzes the \$9.6 billion US roofing industry to 2005 and 2010 by product, market, and geographic region. It also profiles key companies and presents market share data.

#1394. 3/01. \$3,700

World Prefabricated Housing

World demand for prefabricated housing will reach 1.3 million units in 2004. Gains will be bolstered by housing activity in developing Asia/Pacific and Latin America, where prefabricated housing will find use as both low-cost units to reduce shortages and as high-quality, well-insulated houses for well-to-do consumers. This study analyzes the US \$54 billion world prefabricated housing industry to 2004 and 2009 by type, market and region, and for 19 countries. It also details market shares and profiles key companies.

#1370. 1/01. \$4,300

Wood & Competitive

Residential Building Materials

Engineered wood and nonwood alternatives will enjoy the greatest gains in demand, fostered by product innovations and widening cost advantages over solid wood. With new construction markets lagging, better opportunities will exist in residential repair and improvement demand. This study analyzes the 96 billion square foot US residential building materials industry to 2003 and 2008 by material, product, market and geographic region. The study also presents market share data and profiles key companies.

#1169. 9/99. \$3,500

