



Global and China Gypsum Board Industry Report, 2011-2012

Aug. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources China Customs, National Bureau of Statistics of China and WIND Database etc.

Abstract

Gypsum board is an important lightweight construction material, and an energy-saving building material promoted by the Ministry of Construction of China vigorously. In recent years, driven by favorable policies, China's gypsum board production and demand have seen significant growth. From 2002-2010, the demand in China gypsum board market grew at the annual growth rate of 40%, much higher than the growth rate of the demand for cement and other building materials.

In 2011, China's annual capacity of gypsum board reached 2.5 billion square meters, the output was more than 1.8 billion square meters, and the demand exceeded 2.2 billion square meters, so there was a big gap in the market supply. At present, China's gypsum board industry is undergoing rapid investment growth. Chinese gypsum board enterprises represented by BNBM are expanding the gypsum board capacity quickly. Saint-Gobain, Boral, Knauf and other major foreign gypsum board enterprises may speed up the layout of gypsum board production bases in China after they solve the problems about the land for the expansion and upstream gypsum mineral resources.

In China, the demand for gypsum boards mainly comes from non residential public buildings. Gypsum boards are mainly used for ceiling, architectural suspended ceiling and other fields in China; however, in Europe, the U.S., Japan and other developed countries, the demand mainly comes from the residential sector. In the future, as Chinese gypsum board marketing matures, the residential consumption will become the largest demand growth point in the domestic gypsum board market. In 2015, China will need over 4.2 billion square meters of gypsum boards, which is basically consistent with the global demand for gypsum boards.

The report mainly analyzes supply and demand in the global gypsum board market; China's gypsum board production scale, demand and market structure; domestic and foreign key gypsum board production enterprises.

BNBM is the largest manufacturer of gypsum board in China. It has more and more market share in the domestic market of gypsum board. Currently, the company is accelerating the market distribution of the 2 billion-m² gypsum board production base in China. In 2011, the company invested in 21 gypsum board production lines; at the end of 2011, the company had 47 gypsum board production lines.

After acquiring French Lafarge's 50% stake in Lafarge Boral Gypsum Asia at the end of 2011, Australia BORAL has become China's largest foreign gypsum board production enterprise, with the annual capacity of 140 million square meters and five gypsum board production bases in cities including Shanghai, Chengdu, Chongqing and Tai'an.

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