



**Global and China Gypsum Board
Industry Report, 2014-2016**

Sep. 2014

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 include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Global gypsum board capacity was 12.2 billion square meters in 2013, up 8% from a year earlier, and North America was still the region with the largest capacity, accounting for 34%. However, Asia saw rapid expansion in gypsum board capacity in recent years, lagging only 2 percentage points behind North America in 2013. And, it is expected that Asia will surpass North America to be the world's largest gypsum board production base.

China's gypsum board output has been growing quickly during 2006-2013, at an average annual growth rate of 20.9%, and reached 2.7 billion square meters in 2013, a year-on-year jump of 27.3%. In 2013, 39.4% of China's total gypsum board output was produced in East China, the largest producing region in the country. Demand for gypsum board in 2013 was 2.57 billion square meters, predominantly contributed by nonresidential public decoration.

Beijing New Building Materials Public Limited Company is the largest gypsum board manufacturer around the world with the capacity of 1.65 billion square meters in 2013, occupying 47% of the Chinese gypsum board market. But most of local Chinese gypsum board producers are generally small in production scale and lack of market competitiveness.

The companies that can compete with BNBM include mainly German Knauf, Australian BORAL, French Saint-Gobain and other foreign companies, with the former three companies taking up about 12% of the Chinese gypsum board market in 2013.

A glimpse of development trends of global gypsum board industry will enable us to find that the industry is shifting from North America to Asia, where most new gypsum board capacity will come. Over the next 2-3 years, hit by the national ban that the construction of buildings (including office building, conference building, auditorium, hostel, exhibition hall, memorial hall, club, sanatorium for army officer, nursing home and cadres dormitory and ward with high-grade decoration) be further restricted, the demand from governments will continue to decline, but favorable factors like steady rise in urbanization rate and renovation of shanty towns will prop up the growth of China gypsum board industry.

Global and China Gypsum Board Industry Report, 2014-2016 by ResearchInChina focuses on the following:

- Development of global gypsum board industry (overview and market supply & demand);
- Development of gypsum board industry in major countries (including the United States, Britain, Russia, Japan and four countries in Southeast Asia);
- Gypsum board supply and demand in China, forecast for next three years, and competitive landscape (regional competition and competition among enterprises);
- Operation and gypsum board business of 8 global major gypsum board manufacturers (including Saint-Gobain, USG, Etex, BORAL, etc.)
- Operation and gypsum board business of 7 Chinese gypsum board manufacturers (including BNBM, Jason and King Coconut, etc.)

Capacity of Major Gypsum Board Manufacturers Worldwide, 2013



Source: Global and China Gypsum Board Industry Report, 2014-2016; ResearchInChina

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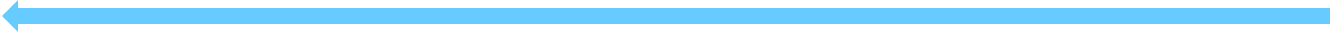
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