

## **Gypsum Industry Focus 2030 (GIF 2030)**

Multi-client market report  
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Varna, Bulgaria

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### Consulting

- Strategic planning
- Product portfolio
- Benchmarking
- M&A advisory
- Due diligence

### Market Research

- Market studies
- Market analysis
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- Sector surveys

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- Technical articles
- Corp. communication

We are in the market since 1997 and are focussing on B2B industries, having a large number of high-ranked industrial clients, spread across almost 30 countries:

Cement industry & other building material industries

More than 50 clients

Mining, environmental and other process industries

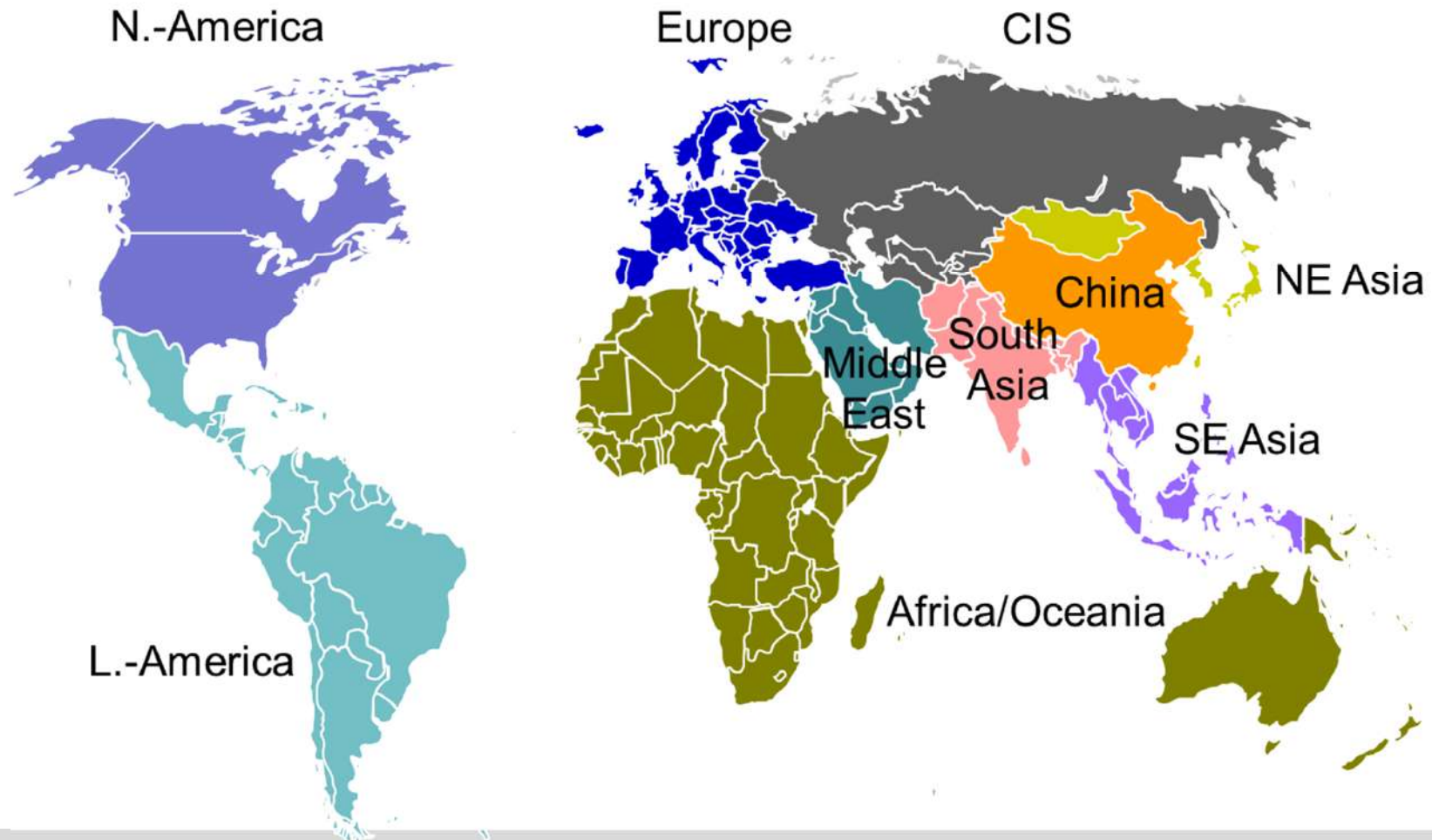
More than 40 clients

Infrastructure sector, Investors and Consulting

More than 30 clients

This market report is intended as a data base to provide our clients with latest market information about the market trends in the global gypsum industry and the impact of the COVID-19 pandemic with a short, medium and long-term outlook by 2030, with 2018 and 2019 as base years.

- ✓ Forecast of gypsum production and demand 2020, 2021, 2025 and 2030
- ✓ Global level, regional level and country-by-country level projections
- ✓ Gypsum sourcing, im- and exports, mined-, synthetic- and recycled gypsum
- ✓ Gypsum demand by cement, wallboard and other gypsum products
- ✓ Wallboard market development, major market players, capacity additions

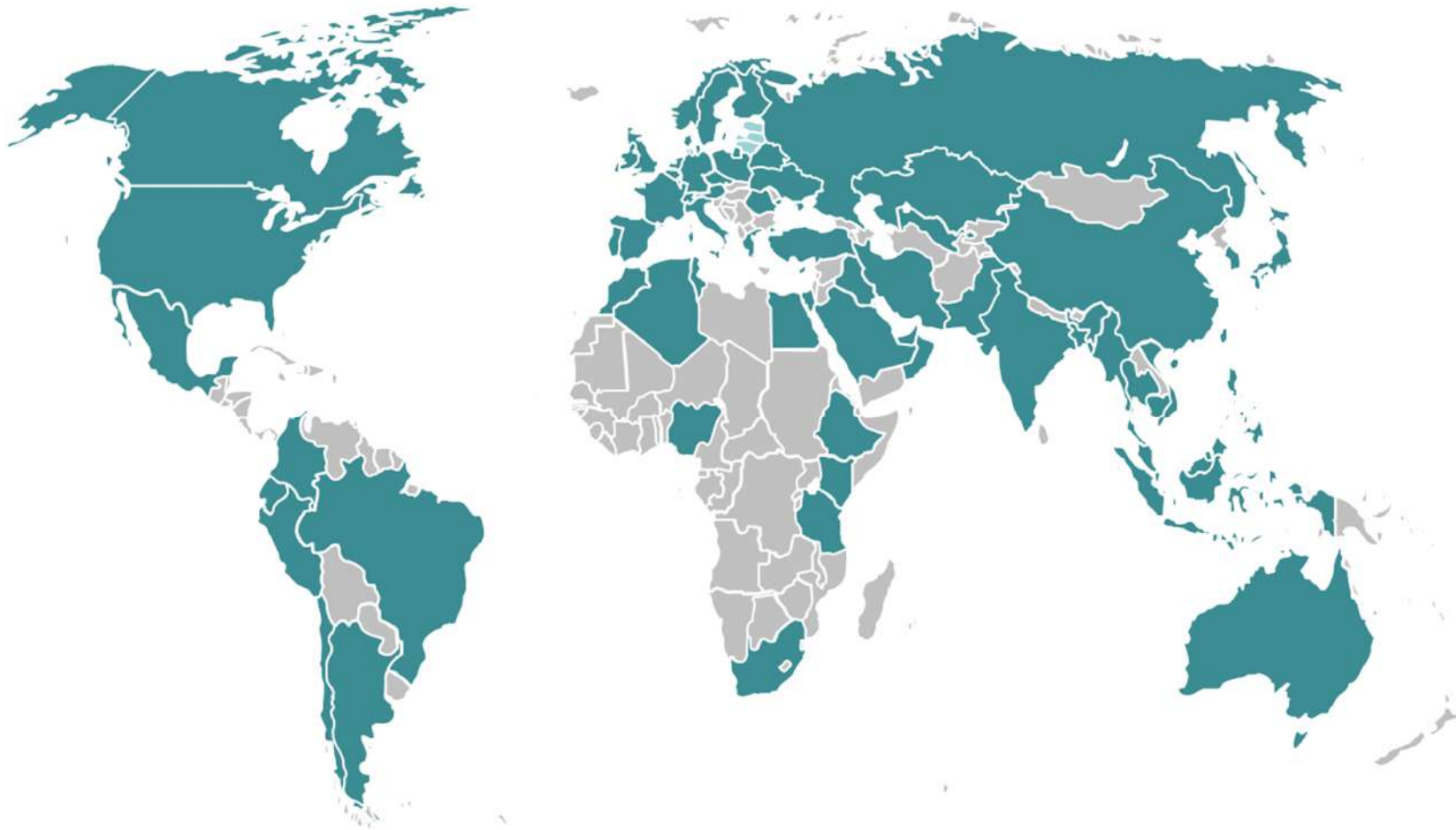


The world market is segmented into 10 world regions and 4 subregions in Europe covering all gypsum producing and consuming countries



Because of the large no. of countries in Europe, this region is further separated into 4 subregions: Northern-, Western-, Southern Europe and Central Eastern Europe (CEE) with Turkey.





67 gypsum producing and consuming countries are covered in the report comprising 98% of all gypsum mining and almost all of the wallboard production!

## Major sources used for gypsum market figures:

- Data by gypsum producers
- Gypsum manufacturer associations
- Data by National Statistical Offices and UN data on trade
- Data by national building materials industry analysts
- Interviews with experts from the gypsum industry

## Major sources used for specific market figures:

- World Mining Data 2020 and earlier issues
- Global Gypsum Directory 2020 and earlier issues
- Data about synthetic gypsum utilisation from several sources

Basis equations used for cross-checking market information:

1. Production vs. demand quantities  
globally:  
 $\text{production} \pm \text{stocks} = \text{demand (consumption)}$   
by region/country  
 $\text{production} + \text{imports} - \text{exports} \pm \text{stocks} = \text{demand}$
2. Imports vs. exports quantities  
globally:  
 $\text{exports} \pm \text{stocks} = \text{imports}$
3. Wallboard production quantities  
globally, by region/country  
 $\text{capacity} * \text{capacity utilisation} = \text{production}$
4. Gypsum quantity in wallboard production  
globally, by region/country  
 $\text{wallboard production} * \text{average gypsum/m}^2 = \text{gypsum demand}$
5. Gypsum quantity in cement production  
globally, by region/country  
 $\text{cement production} * \text{gypsum rate} = \text{gypsum demand}$

Comments:

Biggest problem to use equation no. 1 is that either globally and also by the countries no indication is given, to which demand the production is linked to.

Equation 2 is easy to use, but mostly statistics are linked to the value and not to the quantities.

Data for wallboard capacities exists, capacity utilisation rates have often to be estimated.