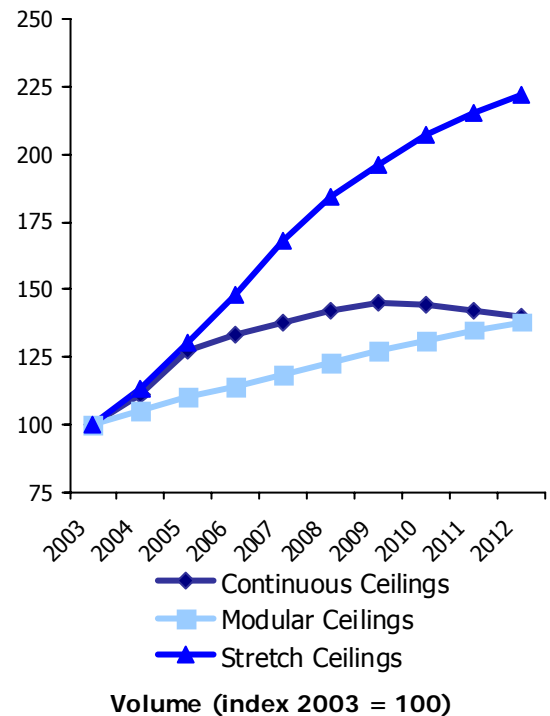


The Ceilings Market in Spain 2003-2012



THIS ESSENTIAL REPORT WILL ENABLE YOU TO

Analyse trends within the **Ceilings** market in **Spain**, from 2003 with forecasts to 2012 in this report published in English

Understand the factors affecting the Spanish market

Examine the trends in the ceilings market in Spain by type of product:

- continuous ceilings
- modular ceilings
- stretch ceilings

Learn more about the Spanish industry structure, distribution, and lots more...

Original research is at the heart of this report, prepared through interviews with manufacturers, importers, distributors, installers and trade associations in Spain.

This report contains the most up-to-date information on the ceilings market in Spain. See inside for further details...

This report contains 110 pages of analysis with 53 statistical tables and graphics. The following information is presented within this MSI report:

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*With this report, you will find essential data to help you plan your business strategy and budgeting.
The quantitative and qualitative analysis in this report includes:*

- The Spanish market for ceilings, in volume, value and average price, 2003-2012
 - The Spanish market for ceilings, by type, in volume and value, 2003-2012:
 - continuous ceilings
 - modular ceilings
 - stretch ceilings
 - The Spanish market for **continuous ceilings**, in volume, value and average price, 2003-2012
 - The Spanish market for continuous ceilings, by type, in volume and value, 2003-2012:
 - stucco ceilings
 - laminated plaster tile ceilings
 - The Spanish market for continuous ceilings, by type of cost, in value, 2003-2012:
 - installation
 - material
 - The Spanish market for continuous ceilings, by sector and by type of work, in volume, 2003-2012:
 - residential sector
 - new build
 - renovation
 - non-residential sector
 - new build
 - renovation
 - The Spanish market for **modular ceilings**, in volume, value and average price, 2003-2012
 - The Spanish market for modular ceilings, by type, in volume and value, 2003-2012:
 - plaster
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 - metal
 - vinyl
 - wood panels
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 - The Spanish market for modular ceilings, by type of cost, in value, 2003-2012:
 - installation
 - material
 - The Spanish market for modular ceilings, by sector and by type of work, in volume, 2003-2012:
 - residential sector
 - new build
 - renovation
 - non-residential sector
 - new build
 - renovation
 - The Spanish market for **stretch ceilings**, in volume, value and average price, 2003-2012
 - The Spanish market for stretch ceilings, by type of cost, in value, 2003-2012:
 - installation
 - material
 - The Spanish market for stretch ceilings, by sector and by type of work, in volume, 2003-2012:
 - residential sector
 - new build
 - renovation
 - non-residential sector
 - new build
 - renovation
- This report also contains:**
- PESTEL Analysis
 - Industry structure analysis:
 - continuous ceilings
 - modular ceilings
 - stretch ceilings
 - Pricing strategies
 - Marketing mix:
 - product
 - price
 - advertising
 - distribution
 - Distribution analysis:
 - ceilings distributors
 - continuous ceilings
 - modular ceilings
 - stretch ceilings
 - Mergers and acquisitions
 - Profiles of 11 major manufacturers
 - SWOT Analysis:
 - strengths
 - weakness
 - opportunities
 - threats
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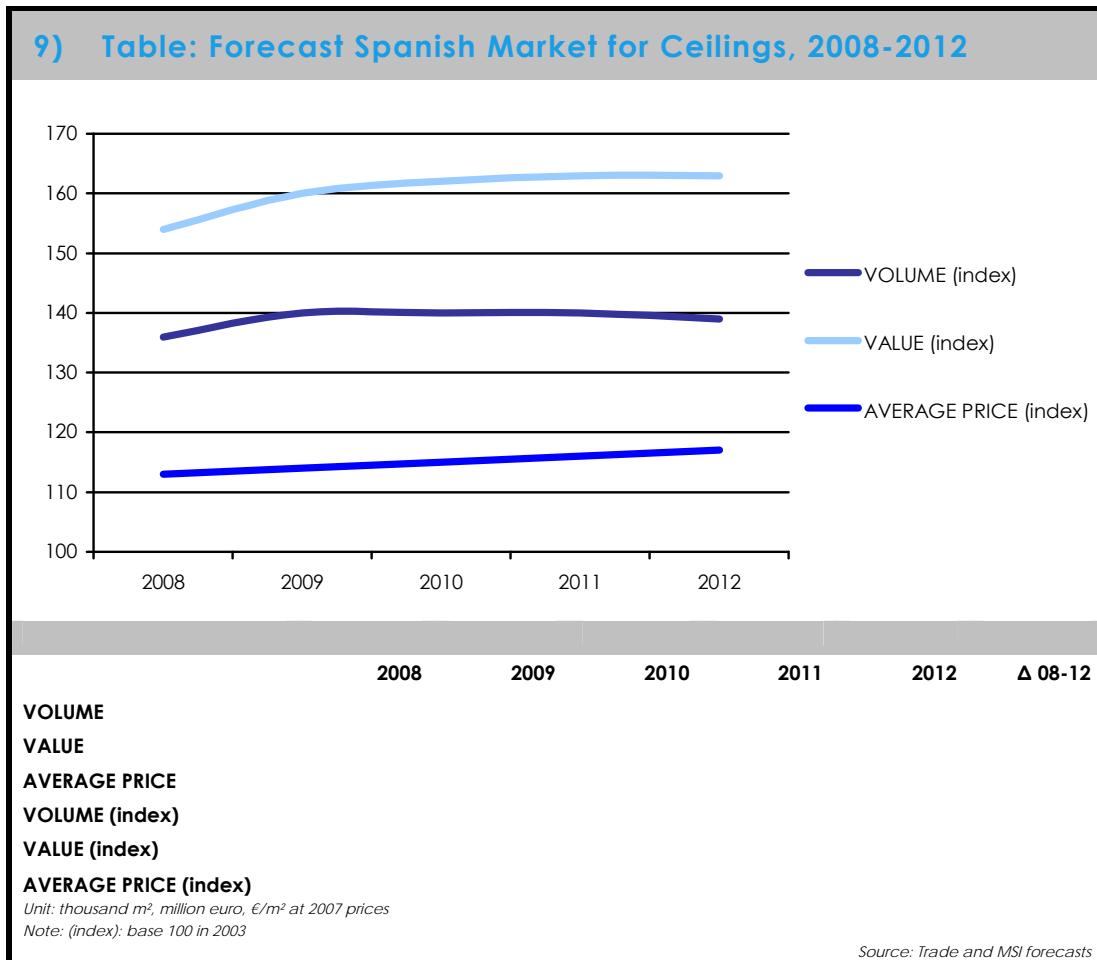
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5.1.2 Forecasts, Overview, 2008-2012



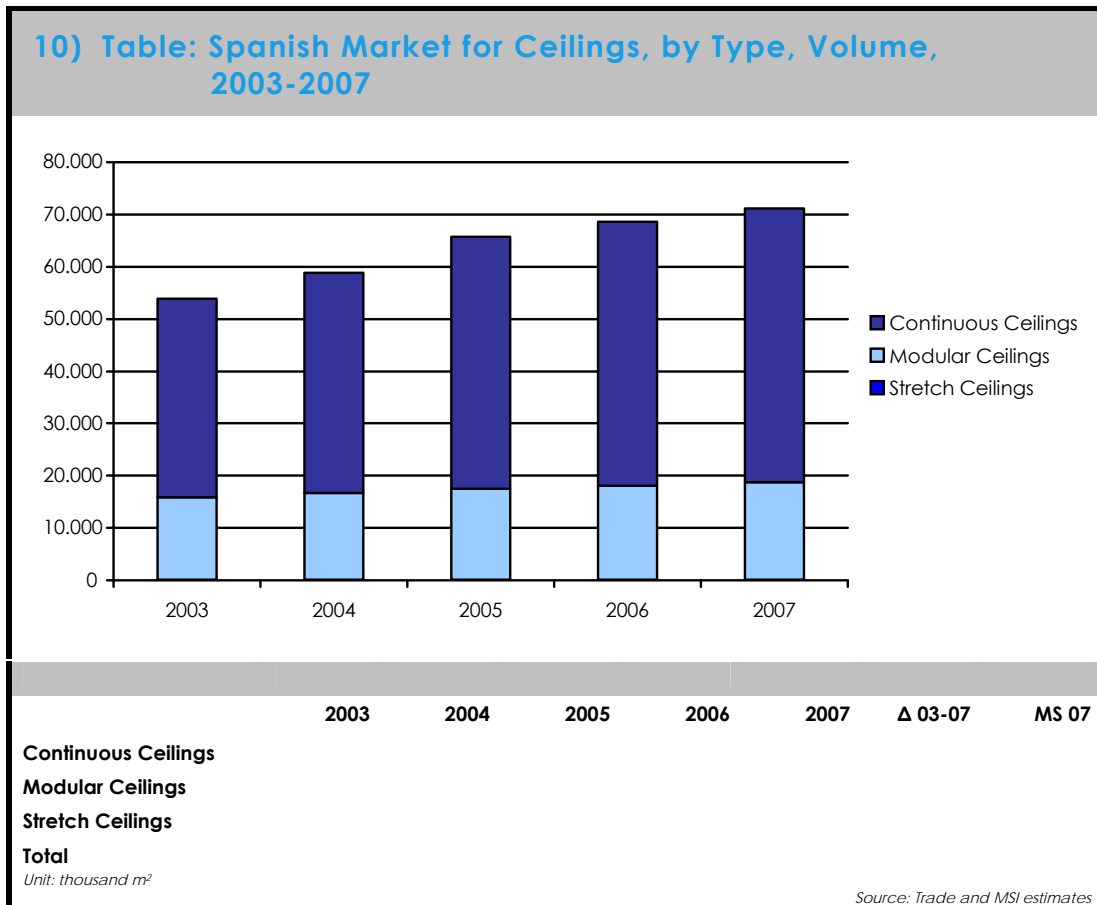
- During the forecast period, the ceilings market will carry on being strongly affected by growth in construction activity, being particularly sensitive to the behaviour of housing construction activity.

- MSI anticipates growth during the 2008-2012 period. This growth will be significant in real terms, thanks to the enforcing of the Nuevo Código Técnico de la Edificación.

- On the other hand, a major rise in average sales prices is expected in 2008, due to the increase in quality required by the new code, mainly with regard to thermal and acoustic insulation.

- The current high housing prices in Spain, which do not make housing easily affordable, especially not by young people, have triggered off the construction of cheap social housing on public land by the State. This type of dwelling requires cheap products, with the goal being to reduce costs, which will bring about a greater

5.1.3 by Type, Volume, 2003-2007



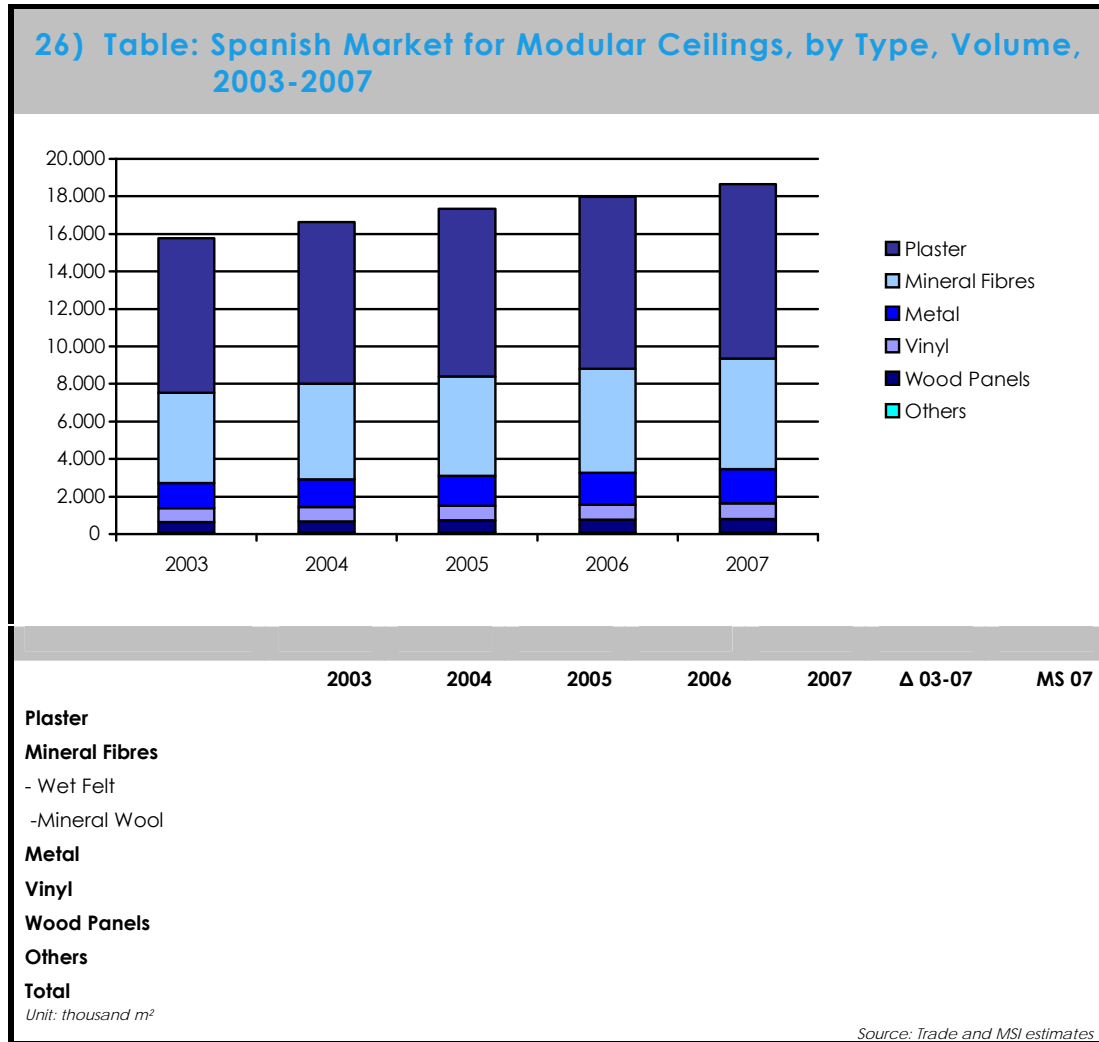
- Continuous ceilings are the most widely used ceilings. They clearly lead the market, due to their functionality and the plastering tradition that exists in Spain.

- Continuous ceilings gained an increased market share during the review period due to the significant increase in residential construction activity, a sector which almost exclusively demands this type of ceiling.

- The growth of both modular and stretch ceilings has been considerable. The ceilings market is becoming increasingly sensitive to the influence of fashion.

- During the review period, modular ceilings were quite sought-after, especially in the context of the non-residential sector, mainly due to their functionality and their aesthetics, which have improved in the last few years.

5.2.2.3 by Type, by Volume, 2003-2007



- The modular ceiling market is highly fragmented due to the various types of ceilings available.

- Spain is a country where plaster is almost always used for ceilings and walls, due to its climatological conditions which allow for quick, easy drying.

- Its growth during the review period was positive, following the trend defined by the construction market, but to a lesser degree than for other materials which are newer to the Spanish market.

- Sales of mineral fibre modular ceilings, in both their wet-felt and mineral wool varieties, grew in volume during the review period.

6. Industry Structure

6.1 Continuous Ceilings

2) Analysis: Structure of the Continuous Ceilings Industry in Spain, 2007

Company	Group	Nationality	Area of activity	Presence
Dangla		Spanish	Plaster ceilings	National
Eurovalls		Spanish	Plaster ceilings	International
Lebriplak		Spanish	Plaster ceilings	National
Knauf España	Knauf	German	Plaster ceilings	International
Saint-Gobain Placo Ibérica	Saint-Gobain	French	Plaster ceilings	International
USG Interiors España	USG	American	Plaster ceilings	International
Yesos Ibéricos	Uralita	Spanish	Plaster ceilings	International
Yesyforma		Spanish	Plaster ceilings	International

Source: MSI

- When it comes to analysing the continuous ceilings industry, distinctions need to be made concerning the different varieties of ceilings available:

- Stucco ceilings
- Laminated plaster tile ceilings

- The stucco ceilings industry is made of many small companies.

- This is an industry with few barriers to entry, as the manufacture of these products requires little prior investment in facilities or machinery.

- This is considered to be a well-established industry in Spain, for reasons of tradition.