

Fibre Cement Boards and Sheets Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Raw Material (Asbestos and Non- Asbestos), By Application (Roofing, Siding, Cladding, Moulding & Trimming & Others), By End User (Residential and Non-Residential), By Region & Competition, 2019-2029F

<https://marketpublishers.com/r/F94747083C7FEN.html>

Date: September 2024

Pages: 181

Price: US\$ 4,500.00 (Single User License)

ID: F94747083C7FEN

Abstracts

Global Fibre Cement Boards and Sheets Market was valued at USD 4.08 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 6.19% through 2029.

The Fibre Cement Boards and Sheets market refers to the global industry that produces and supplies construction materials made from a composite of cement, cellulose fibers, and other additives. These materials are engineered to provide a durable, versatile, and sustainable solution for various construction applications. Fibre Cement Boards and Sheets are renowned for their resistance to fire, water, pests, and harsh weather conditions, making them suitable for both interior and exterior use. They find widespread application in roofing, siding, flooring, cladding, and other construction elements. The market's growth is driven by factors such as the expanding construction industry, increasing awareness of sustainable building practices, and the resilience of fibre cement in adverse environmental conditions. Manufacturers in this market continually innovate to meet evolving building codes, environmental regulations, and consumer preferences, contributing to the market's dynamic and progressive nature. The Fibre Cement Boards and Sheets market plays a crucial role in modern construction, offering solutions that balance performance, sustainability, and aesthetic versatility.

Key Market Drivers

Growing Construction Industry and Urbanization

The global Fibre Cement Boards and Sheets market is significantly driven by the rapid growth of the construction industry and increasing urbanization worldwide. As economies develop and populations expand, there is a rising demand for residential, commercial, and industrial infrastructure. Fibre cement boards and sheets have gained prominence in the construction sector due to their durability, versatility, and sustainability. As more countries invest in infrastructure projects and urban development, the demand for these materials is expected to surge.

Fibre cement products find extensive use in various construction applications, including roofing, siding, flooring, and cladding. The robustness of fibre cement, coupled with its resistance to water, fire, and insects, makes it a preferred choice for builders and architects. With ongoing urbanization trends and the need for resilient construction materials, the Fibre Cement Boards and Sheets market is poised for continued growth.

Increasing Awareness of Sustainable Building Materials

The global emphasis on sustainable and environmentally friendly building materials has propelled the demand for Fibre Cement Boards and Sheets. As awareness of the environmental impact of construction materials rises, both consumers and industry professionals are seeking alternatives with lower carbon footprints. Fibre cement, being composed of natural raw materials such as cement, cellulose fibers, and sand, is considered eco-friendly compared to traditional building materials like wood or vinyl.

Governments and regulatory bodies are also implementing stricter environmental standards, encouraging the adoption of sustainable practices in the construction industry. This has led to a surge in the use of Fibre Cement Boards and Sheets, contributing to the market's growth. The recyclability of fibre cement products further aligns with the global push for circular economies, making them a preferred choice in green building initiatives.

Resilience to Harsh Weather Conditions

The durability and resilience of Fibre Cement Boards and Sheets in harsh weather conditions constitute a significant driver for their global market growth. Regions prone to

extreme weather events, such as hurricanes, typhoons, and wildfires, have witnessed an increased adoption of fibre cement products in construction. Unlike traditional materials that may deteriorate or rot when exposed to moisture, fibre cement boards remain intact, making them ideal for both interior and exterior applications.

The ability of fibre cement to withstand temperature variations, high humidity, and direct sunlight without warping or degradation enhances its appeal in diverse climates. This resilience factor positions fibre cement as a reliable choice for construction projects in areas with challenging weather conditions, contributing to the expansion of the market on a global scale.

Government Policies are Likely to Propel the Market

Building Code Standards and Fire Safety Regulations

Government policies play a pivotal role in shaping the global Fibre Cement Boards and Sheets market, with building code standards and fire safety regulations being particularly impactful. Many governments around the world have implemented stringent building codes to ensure the safety and resilience of structures. Fibre cement boards, known for their fire-resistant properties, align well with these regulations, making them a preferred choice in construction projects.

Building codes specify the minimum standards for construction materials, including requirements for fire resistance, load-bearing capacity, and durability. Fibre cement boards, composed of cement, cellulose fibers, and sand, offer inherent fire resistance, making them suitable for applications where fire safety is a priority. Governments often incentivize or mandate the use of fire-resistant materials, driving the demand for Fibre Cement Boards and Sheets in the construction industry.

As governments continually update and strengthen building codes to enhance public safety, the Fibre Cement Boards and Sheets market is influenced by these regulatory measures. Manufacturers in the industry must align their products with evolving standards, ensuring compliance and contributing to the overall safety of built environments.

Environmental Regulations and Sustainable Construction Practices

In response to growing environmental concerns, governments worldwide are implementing policies to promote sustainable construction practices. Fibre Cement

Boards and Sheets, composed of natural materials such as cement and cellulose fibers, are often considered more environmentally friendly than traditional building materials. As a result, government initiatives that encourage or mandate the use of sustainable construction materials contribute to the growth of the Fibre Cement market.

Environmental regulations may include requirements for the reduction of carbon emissions, responsible sourcing of raw materials, and the promotion of recyclability. Fibre cement, with its low environmental impact and recyclability, aligns with these goals. Governments may provide incentives, tax credits, or certification programs to encourage the adoption of sustainable building materials, further propelling the demand for Fibre Cement Boards and Sheets.

Manufacturers in the industry are increasingly investing in research and development to improve the sustainability profile of their products. This aligns not only with regulatory requirements but also with the growing preference among consumers and businesses for eco-friendly construction materials.

Infrastructure Development Initiatives and Public-Private Partnerships

Government-led infrastructure development initiatives and public-private partnerships are instrumental in driving demand for Fibre Cement Boards and Sheets globally. Many governments are actively investing in the expansion and modernization of infrastructure, including roads, bridges, and public buildings. Fibre cement products, known for their durability and versatility, are well-suited for diverse applications in infrastructure projects.

Public-private partnerships (PPPs) involve collaboration between government entities and private businesses to finance and execute infrastructure projects. These partnerships often prioritize the use of high-quality, long-lasting materials to ensure the longevity of the constructed assets. Fibre Cement Boards and Sheets, meeting the performance and safety standards required for infrastructure projects, find increased demand in this context.

Government policies that promote and fund infrastructure development contribute to a sustained market for Fibre Cement products. Manufacturers benefit from these initiatives as they supply materials for a range of applications in large-scale construction projects.

Key Market Challenges

Raw Material Price Volatility and Supply Chain Disruptions

One of the significant challenges facing the global Fibre Cement Boards and Sheets market is the volatility in raw material prices and the potential for disruptions in the supply chain. Fibre cement is composed of key raw materials such as cement, cellulose fibers, and sand. The prices of these materials are subject to fluctuations influenced by various factors, including global economic conditions, geopolitical events, and supply-demand dynamics.

Cement, as a primary component of fibre cement, is particularly sensitive to market changes. The cement industry is influenced by factors such as energy prices, transportation costs, and government policies. Changes in any of these elements can lead to sudden spikes or declines in raw material prices, impacting the production costs for manufacturers in the Fibre Cement market.

The global supply chain for raw materials is interconnected, and disruptions in one region can have ripple effects across the industry. Events such as natural disasters, trade disputes, or geopolitical tensions can disrupt the supply chain, leading to shortages or delays in the procurement of essential raw materials.

Manufacturers in the Fibre Cement industry must navigate these challenges by implementing strategic supply chain management practices, exploring alternative sources for raw materials, and engaging in risk mitigation strategies. This requires a careful assessment of market dynamics, close monitoring of global events, and the development of contingency plans to ensure a stable and reliable supply of raw materials.

The industry may benefit from collaborative efforts between manufacturers, industry associations, and governments to address challenges related to raw material prices and supply chain disruptions. Initiatives that promote stability in the supply chain can contribute to the overall resilience of the Fibre Cement Boards and Sheets market.

Competition from Alternative Construction Materials

Another significant challenge facing the global Fibre Cement Boards and Sheets market is the competition from alternative construction materials. While fibre cement has gained popularity for its durability, fire resistance, and sustainability, it faces competition from a diverse range of materials used in the construction industry.

Traditional materials such as wood, concrete, and metal, as well as emerging materials like engineered wood products and synthetic alternatives, present viable options for builders and architects. The choice of construction materials is often influenced by factors such as cost, availability, aesthetics, and specific project requirements. Fibre cement manufacturers must continually innovate and differentiate their products to maintain a competitive edge in the market.

Wood, for example, remains a widely used construction material due to its natural appeal and ease of use. While fibre cement offers advantages in terms of durability and resistance to pests, wood has its own unique characteristics that appeal to certain segments of the market. Similarly, advancements in the development of alternative materials, such as high-performance plastics or composite materials, pose challenges to the market share of fibre cement.

To address this challenge, Fibre Cement Boards and Sheets manufacturers must focus on product innovation, quality improvement, and cost efficiency. Developing new variants of fibre cement products with enhanced features, textures, and colors can attract a broader range of customers. Additionally, effective marketing strategies that highlight the unique benefits of fibre cement compared to alternative materials can help create a strong market position.

Market education is also crucial in overcoming the challenge of competition from alternative materials. Building awareness among architects, builders, and end-users about the specific advantages of fibre cement, such as its fire resistance, low maintenance, and environmental sustainability, can influence decision-making in favor of fibre cement products.

Collaboration with architects and builders in showcasing successful projects that utilize fibre cement in innovative ways can further strengthen the market position of these products. In a competitive landscape, differentiation and effective communication of the unique value proposition of Fibre Cement Boards and Sheets are essential to sustain and expand market share.

Key Market Trends

Growing Emphasis on Sustainability and Eco-Friendly Construction Materials:

In recent years, there has been a noticeable trend towards sustainability and

environmental consciousness in the construction industry, which has significantly influenced the Global Fibre Cement Boards and Sheets Market. As concerns about climate change and resource depletion continue to rise, there is a growing demand for construction materials that are not only durable and high-performing but also eco-friendly and sustainable.

Fibre cement boards and sheets have emerged as a popular choice among architects, builders, and homeowners seeking environmentally responsible building solutions. These materials are primarily composed of cement, cellulose fibers, sand, and other additives, making them inherently more sustainable compared to traditional alternatives such as wood, vinyl, or aluminum. Unlike wood, fibre cement is not susceptible to rot, decay, or termite infestation, which helps to preserve natural resources and reduce the need for frequent replacements.

Fibre cement boards and sheets are manufactured using a process that consumes fewer natural resources and generates less waste compared to other building materials. The longevity and durability of fibre cement also contribute to its sustainability credentials, as buildings constructed with these materials require less maintenance and repair over their lifespan, further reducing environmental impact.

Another key aspect driving the trend towards sustainability in the fibre cement market is the increasing adoption of green building certification programs such as LEED (Leadership in Energy and Environmental Design) and BREEAM (Building Research Establishment Environmental Assessment Method). These programs incentivize the use of environmentally friendly materials and construction practices, providing a competitive advantage to manufacturers offering sustainable solutions like fibre cement boards and sheets.

Segmental Insights

Raw Material Insights

The Non- Asbestos segment held the largest Market share in 2023. The primary driver for the dominance of non-asbestos materials is the well-documented health hazards associated with asbestos exposure. Asbestos fibers, when inhaled, can lead to severe respiratory diseases, including lung cancer and asbestosis. Recognizing these risks, many countries have imposed strict regulations or outright bans on asbestos-containing products. As a result, manufacturers and consumers alike have shifted towards non-asbestos alternatives to ensure the safety of workers and end-users.

Global regulatory bodies and governments have implemented stringent regulations regarding the use of asbestos in construction materials. Many countries have banned or restricted the production, import, and use of asbestos due to its known health risks. The legal landscape has pushed the industry toward adopting safer alternatives, with non-asbestos Fibre Cement Boards and Sheets gaining prominence as compliant and viable substitutes.

Increasing awareness among consumers about the health risks associated with asbestos has influenced purchasing decisions. Homeowners, builders, and architects are now more conscious of the materials used in construction projects. Non-asbestos Fibre Cement products, which offer comparable performance without the health concerns, have gained favor among consumers who prioritize safety and sustainability in their building materials.

Technological advancements have allowed manufacturers to develop non-asbestos Fibre Cement Boards and Sheets with improved strength, durability, and fire-resistant properties. These advancements have addressed some of the historical limitations of non-asbestos alternatives, making them more attractive to a broad range of construction applications.

The global shift towards sustainable and eco-friendly construction practices has played a role in the dominance of non-asbestos Fibre Cement materials. Asbestos is not only a health hazard but also poses environmental challenges during its extraction and production. Non-asbestos alternatives, composed of natural materials like cement and cellulose fibers, align with sustainability goals and appeal to environmentally conscious consumers and industries.

Over time, non-asbestos Fibre Cement products have gained widespread acceptance within the construction industry. These materials meet or exceed industry standards for performance, fire resistance, and durability. As a result, architects, builders, and contractors are more inclined to choose non-asbestos options that offer a balance of safety, performance, and compliance with regulatory requirements.

Regional Insights

North America

North America held the largest market share in 2023. North America has a robust

construction industry characterized by significant investments in residential, commercial, and infrastructure projects. The region's steady economic growth, coupled with favorable government policies and initiatives, has fueled construction activity, creating a sustained demand for building materials like fibre cement boards and sheets. This strong demand acts as a driving force behind North America's dominance in the global market.

In recent years, there has been a growing emphasis on sustainability and environmental responsibility in the construction sector, both among consumers and regulatory bodies. Fibre cement boards and sheets are renowned for their eco-friendly properties, as they are made from a blend of cement, cellulose fibers, and other additives that minimize environmental impact. North American consumers and builders increasingly prefer these sustainable materials, contributing to the region's dominance in the global market.

North America has some of the most stringent building codes and regulations in the world, aimed at ensuring structural safety, energy efficiency, and environmental sustainability. Fibre cement boards and sheets often meet or exceed these regulatory requirements, making them a popular choice for construction projects across the region. Manufacturers in North America have adapted to these regulations, producing high-quality fibre cement products that comply with local building standards.

The North American region is at the forefront of technological advancements in manufacturing processes and product innovation. Manufacturers continually invest in research and development to enhance the quality, performance, and versatility of fibre cement boards and sheets. Advanced manufacturing techniques allow for greater customization, improved durability, and enhanced aesthetic appeal, meeting the diverse needs of builders and architects in the region. These technological advancements further solidify North America's position as a leader in the global market.

North America benefits from well-established infrastructure and distribution networks, facilitating the efficient production and distribution of fibre cement boards and sheets. Manufacturers have access to modern facilities, transportation networks, and logistics solutions that enable them to meet demand effectively and deliver products to customers in a timely manner. This established infrastructure gives North American companies a competitive edge in the global market, allowing them to maintain market dominance.

Consumers in North America have high expectations for quality and performance when it comes to construction materials. Fibre cement boards and sheets manufactured in the

region adhere to rigorous quality standards, ensuring reliability, durability, and long-term performance. This commitment to quality has earned the trust of builders, contractors, and homeowners, further reinforcing North America's dominance in the global fibre cement market.

Key Market Players

James Hardie Industries plc

Nichiha Corporation

Etex NV

Compagine de Saint-Gobain

CRH plc

HIL Limited

Knauf Digital GmbH

Swisspearl Group AG

Holcim Ltd

Everest Industries Ltd

Report Scope:

In this report, the Global Fibre Cement Boards and Sheets Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Fibre Cement Boards and Sheets Market, By Raw Material:

Asbestos

Non- Asbestos

Fibre Cement Boards and Sheets Market, By Application:

Roofing

Siding

Cladding

Moulding & Trimming

Others

Fibre Cement Boards and Sheets Market, By End User:

Residential

Non-Residential

Fibre Cement Boards and Sheets Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Fibre Cement Boards and Sheets Market.

Available Customizations:

Global Fibre Cement Boards and Sheets Market report with the given Market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional Market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
- 1.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL FIBRE CEMENT BOARDS AND SHEETS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Raw Material (Asbestos and Non- Asbestos)
 - 5.2.2. By End User (Residential and Non-Residential)
 - 5.2.3. By Application (Roofing, Siding, Cladding, Moulding & Trimming & Others)
 - 5.2.4. By Region

5.2.5. By Company (2023)

5.3. Market Map

6. NORTH AMERICA FIBRE CEMENT BOARDS AND SHEETS MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Raw Material

6.2.2. By End User

6.2.3. By Application

6.2.4. By Country

6.3. North America: Country Analysis

6.3.1. United States Fibre Cement Boards and Sheets Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Raw Material

6.3.1.2.2. By End User

6.3.1.2.3. By Application

6.3.2. Canada Fibre Cement Boards and Sheets Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Raw Material

6.3.2.2.2. By End User

6.3.2.2.3. By Application

6.3.3. Mexico Fibre Cement Boards and Sheets Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Raw Material

6.3.3.2.2. By End User

6.3.3.2.3. By Application

7. EUROPE FIBRE CEMENT BOARDS AND SHEETS MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Raw Material

7.2.2. By End User

7.2.3. By Application

7.2.4. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Fibre Cement Boards and Sheets Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Raw Material

7.3.1.2.2. By End User

7.3.1.2.3. By Application

7.3.2. United Kingdom Fibre Cement Boards and Sheets Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Raw Material

7.3.2.2.2. By End User

7.3.2.2.3. By Application

7.3.3. Italy Fibre Cement Boards and Sheets Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Raw Material

7.3.3.2.2. By End User

7.3.3.2.3. By Application

7.3.4. France Fibre Cement Boards and Sheets Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Raw Material

7.3.4.2.2. By End User

7.3.4.2.3. By Application

7.3.5. Spain Fibre Cement Boards and Sheets Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Raw Material

7.3.5.2.2. By End User

7.3.5.2.3. By Application

8. ASIA-PACIFIC FIBRE CEMENT BOARDS AND SHEETS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Raw Material

8.2.2. By End User

8.2.3. By Application

8.2.4. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Fibre Cement Boards and Sheets Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Raw Material

8.3.1.2.2. By End User

8.3.1.2.3. By Application

8.3.2. India Fibre Cement Boards and Sheets Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Raw Material

8.3.2.2.2. By End User

8.3.2.2.3. By Application

8.3.3. Japan Fibre Cement Boards and Sheets Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Raw Material

8.3.3.2.2. By End User

8.3.3.2.3. By Application

8.3.4. South Korea Fibre Cement Boards and Sheets Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Raw Material

- 8.3.4.2.2. By End User
- 8.3.4.2.3. By Application
- 8.3.5. Australia Fibre Cement Boards and Sheets Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Raw Material
 - 8.3.5.2.2. By End User
 - 8.3.5.2.3. By Application

9. SOUTH AMERICA FIBRE CEMENT BOARDS AND SHEETS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Raw Material
 - 9.2.2. By End User
 - 9.2.3. By Application
 - 9.2.4. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Fibre Cement Boards and Sheets Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Raw Material
 - 9.3.1.2.2. By End User
 - 9.3.1.2.3. By Application
 - 9.3.2. Argentina Fibre Cement Boards and Sheets Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Raw Material
 - 9.3.2.2.2. By End User
 - 9.3.2.2.3. By Application
 - 9.3.3. Colombia Fibre Cement Boards and Sheets Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Raw Material

9.3.3.2.2. By End User

9.3.3.2.3. By Application

10. MIDDLE EAST AND AFRICA FIBRE CEMENT BOARDS AND SHEETS MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Raw Material

10.2.2. By End User

10.2.3. By Application

10.2.4. By Country

10.3. Middle East and Africa: Country Analysis

10.3.1. South Africa Fibre Cement Boards and Sheets Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Raw Material

10.3.1.2.2. By End User

10.3.1.2.3. By Application

10.3.2. Saudi Arabia Fibre Cement Boards and Sheets Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Raw Material

10.3.2.2.2. By End User

10.3.2.2.3. By Application

10.3.3. UAE Fibre Cement Boards and Sheets Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Raw Material

10.3.3.2.2. By End User

10.3.3.2.3. By Application

10.3.4. Kuwait Fibre Cement Boards and Sheets Market Outlook

10.3.4.1. Market Size & Forecast

10.3.4.1.1. By Value

10.3.4.2. Market Share & Forecast

- 10.3.4.2.1. By Raw Material
- 10.3.4.2.2. By End User
- 10.3.4.2.3. By Application
- 10.3.5. Turkey Fibre Cement Boards and Sheets Market Outlook
 - 10.3.5.1. Market Size & Forecast
 - 10.3.5.1.1. By Value
 - 10.3.5.2. Market Share & Forecast
 - 10.3.5.2.1. By Raw Material
 - 10.3.5.2.2. By End User
 - 10.3.5.2.3. By Application

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

13. COMPANY PROFILES

- 13.1. James Hardie Industries plc
 - 13.1.1. Business Overview
 - 13.1.2. Key Revenue and Financials
 - 13.1.3. Recent Developments
 - 13.1.4. Key Personnel/Key Contact Person
 - 13.1.5. Key Product/Services Offered
- 13.2. Nichiha Corporation
 - 13.2.1. Business Overview
 - 13.2.2. Key Revenue and Financials
 - 13.2.3. Recent Developments
 - 13.2.4. Key Personnel/Key Contact Person
 - 13.2.5. Key Product/Services Offered
- 13.3. Etex NV
 - 13.3.1. Business Overview
 - 13.3.2. Key Revenue and Financials
 - 13.3.3. Recent Developments
 - 13.3.4. Key Personnel/Key Contact Person
 - 13.3.5. Key Product/Services Offered
- 13.4. Compagine de Saint-Gobain

- 13.4.1. Business Overview
- 13.4.2. Key Revenue and Financials
- 13.4.3. Recent Developments
- 13.4.4. Key Personnel/Key Contact Person
- 13.4.5. Key Product/Services Offered
- 13.5. CRH plc
 - 13.5.1. Business Overview
 - 13.5.2. Key Revenue and Financials
 - 13.5.3. Recent Developments
 - 13.5.4. Key Personnel/Key Contact Person
 - 13.5.5. Key Product/Services Offered
- 13.6. HIL Limited
 - 13.6.1. Business Overview
 - 13.6.2. Key Revenue and Financials
 - 13.6.3. Recent Developments
 - 13.6.4. Key Personnel/Key Contact Person
 - 13.6.5. Key Product/Services Offered
- 13.7. Knauf Digital GmbH
 - 13.7.1. Business Overview
 - 13.7.2. Key Revenue and Financials
 - 13.7.3. Recent Developments
 - 13.7.4. Key Personnel/Key Contact Person
 - 13.7.5. Key Product/Services Offered
- 13.8. Swisspearl Group AG
 - 13.8.1. Business Overview
 - 13.8.2. Key Revenue and Financials
 - 13.8.3. Recent Developments
 - 13.8.4. Key Personnel/Key Contact Person
 - 13.8.5. Key Product/Services Offered
- 13.9. Holcim Ltd
 - 13.9.1. Business Overview
 - 13.9.2. Key Revenue and Financials
 - 13.9.3. Recent Developments
 - 13.9.4. Key Personnel/Key Contact Person
 - 13.9.5. Key Product/Services Offered
- 13.10. Everest Industries Ltd
 - 13.10.1. Business Overview
 - 13.10.2. Key Revenue and Financials
 - 13.10.3. Recent Developments

13.10.4. Key Personnel/Key Contact Person

13.10.5. Key Product/Services Offered

14. STRATEGIC RECOMMENDATIONS

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