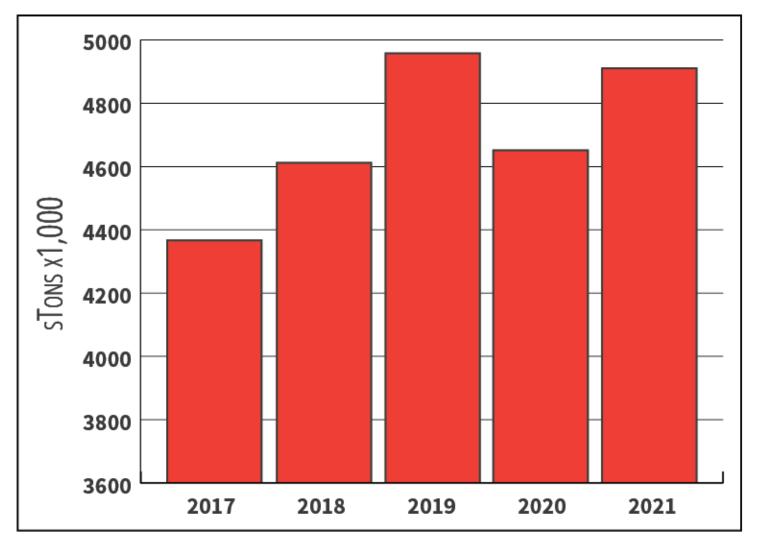
### 2021 HDG Induszry Performance & 2022 Construction Outlook

John Krzywicki – Marketing Director Wednesday, Apríl 6, 2021



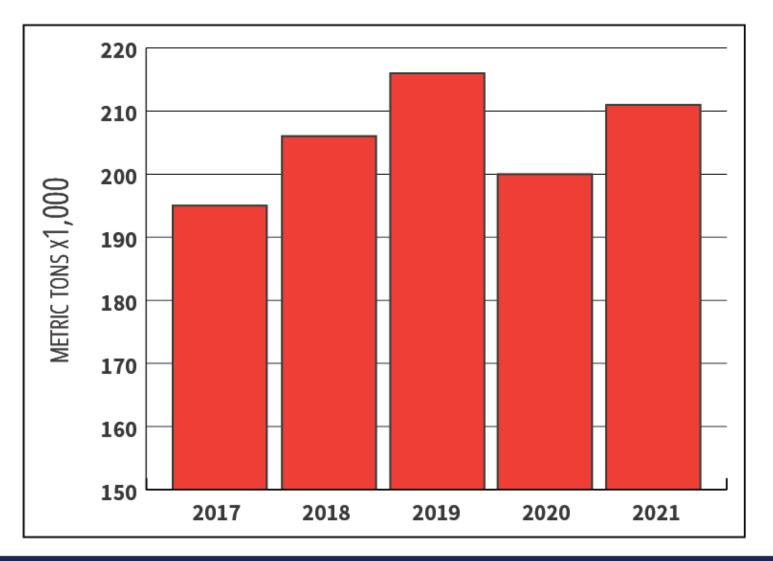


## 2021 HDG Production



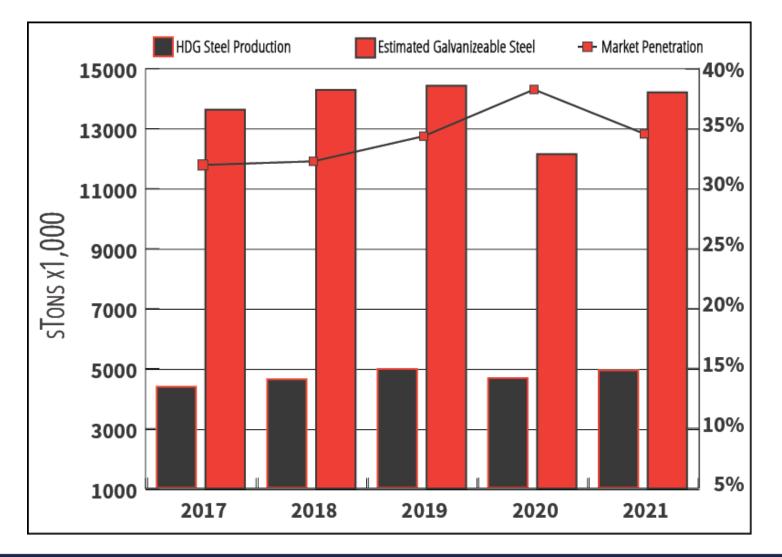
5.6% Increase in HDG Production

2021 Zinc Consumption



5.6% Increase ín Zínc Consumptíon

## MARKEZ PENEZRAZION

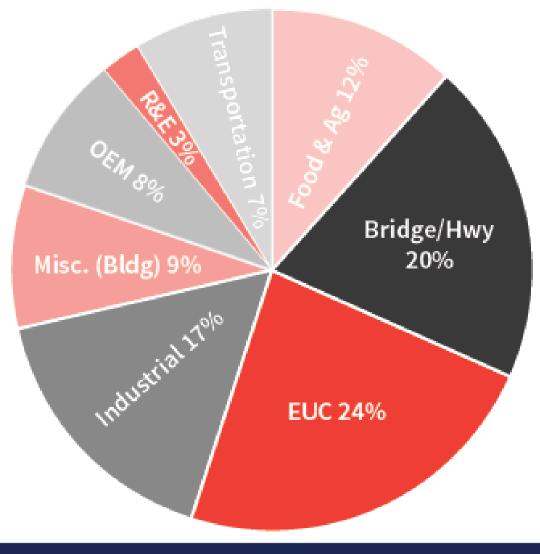




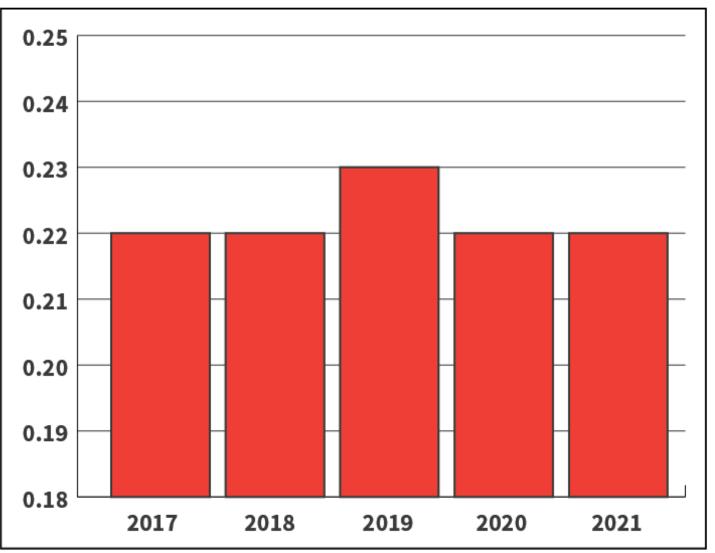
#### 2022 AGA Annual Conference

200/000

### 2021 Markez Breakdown by Seczor



### Ingensizy of Use



## 2022 Construction Outlook



## MAZERIAL PRICES

Year over Year (Y/Y) % Change 1.4% Asphalt 34.0% Softwood lumber 79.7% 38.0% Plywood 44.1% 8.1% Particle board & OSB 62.5% 1.9% Gypsum 5.1% 3.1% Insulation materials 5.4% 4.2% Cement 3.0% 0.6% Ready-mix concrete 0.8% 1.6% Iron & steel scrap 45.7% 36.1% Steel bars, plates & structural shapes 15.2% 16.2% Prefabricated Metal Buildings 18.4% 9.6% Aluminum mill shapes 3.9% 7.5% Copper wire & cable 18.2% 10.7% Regular gasoline unleaded 4.1% 39.1% Diesel Fuel 36.5% 31.4%

> Data source: Bureau of Labor Statistics (BLS). Charts: ConstructConnect

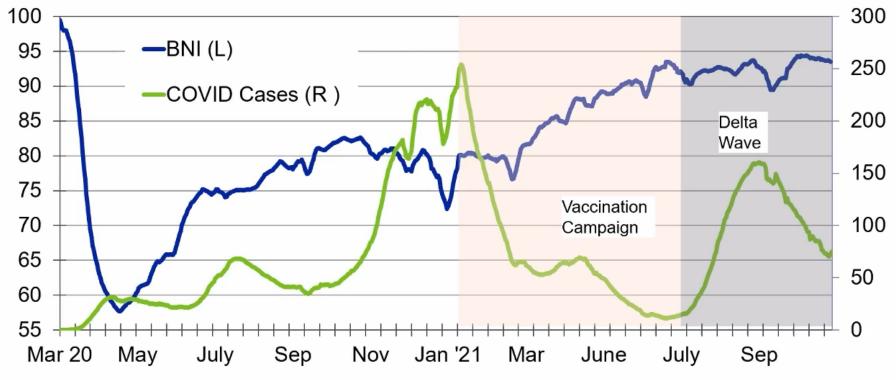
Latest 3 Months % Change



## COVID IMPACo

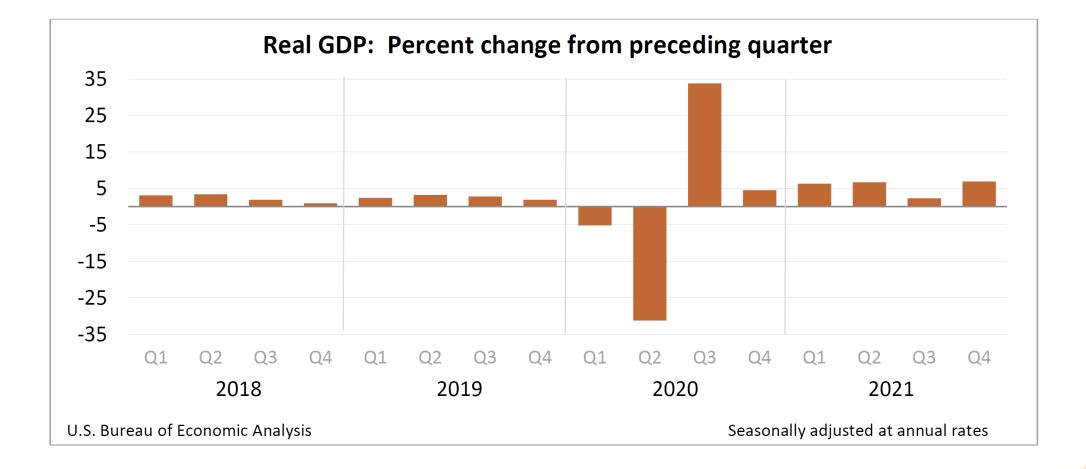
#### Economic Recovery Stalled With The Delta Wave

Back to Normal Index vs. U.S. COVID cases



Source: Moody's Analytics

## US GROSS DOMESZIC PRODUCZ





## 2022 Construction Outlook

### **United States**

Canada

2021 Estimated
 Starts 1 12% (Dodge)
 Put-in-Place 1 8% (FMI)
 2022 Forecast
 Starts 1 6% (Dodge)
 Put-in-Place 1 5% (FMI)

%2021 Estimated
%Put-in-Place 10% (FMI)
%2022 Forecast
%Put-in-Place 1% (FMI)

Challenges: Labor Shortages, Inflation & Supply Chain Issues



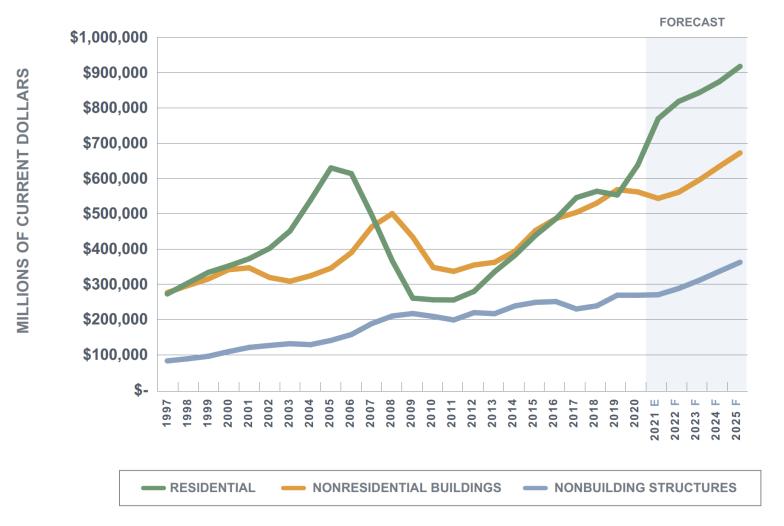
### U.S. CONSTRUCTION FORECAST

Sector	2021 (Starts)	2022 (Forecast)	2021 (P-in-P)	2022 (Forecast)
Single-Family	<b>14%</b>	<b>3%</b>	<b>22%</b> 仓	<b>6%</b> 압
Multifamily	<b>16%</b>	<b>2%</b>	<b>18%</b> 仓	<b>7%</b>
Commercial	<b>15%</b>	<b>12%</b> 仓	<b>6%</b> 압	<b>5%</b> 압
Retail	<b>10%</b>	<b>14%</b> 仓	N/A	N/A
Warehouse	<b>36%</b>	<b>13%</b> 仓	N/A	N/A
<b>Data Centers</b>	<b>17%</b>	<b>2%</b>	N/A	N/A
	Do	n odge	<b>F</b> ?	M1

### U.S. CONSTRUCTION FORECAST

Sector	2021 (Starts)	2022 (Forecast)	2021 (P-in-P)	2022 (Forecast)	
Manufacturing	<b>46%</b> 仓	<b>0%</b>	<b>7%</b>	<b>12%</b> 仓	
Transportation	<b>7%</b>	<b>5%</b>	<b>-4%</b> ₽	<b>2%</b> 仓	
Recreation	<b>36%</b> 仓	-7% 🖓	<b>-7%</b> ₽	0%	
Bridges	<b>1%</b>	<b>6%</b>	<b>2%</b> 介	<b>7%</b>	
<b>Roads/Hwys</b>	- <b>2%</b> ↓	<b>6%</b>	≈%0 ⊔		
<b>Power Plants</b>	<b>-3%</b> ₽	<b>10%</b>	<b>-2%</b> ₽	<b>6%</b>	
	E F	r MI	T	M1	

### U.S. ZOBAL CONSTRUCTION SPENDING P-IN-P



Source: FMI Forecast Q1 2022



### U.S. Non-Residential P-in-P Construction



**CONSTRUCTION SPENDING PUT IN PLACE 2020 (USD BILLIONS)** 

Source: FMI Forecast Q1 2022

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## US REGIONAL FORECASS

	NE	MA	ENC	WNC	SA	ESC	WSC	MTN	PAC
Residential	8%	5%	6%	5%	9%	4%	8%	8%	3%
Non-Res	5%	3%	7%	3%	2%	7%	3%	4%	0%
Non-Bldg	15%	7%	8%	7%	7%	8%	5%	7%	3%
Total	7%	5%	7%	5%	7%	<b>6%</b>	5%	7%	2%

Source: FMI Forecast Q1 2022



### 2022 CANADA CONSTRUCTION FORECAST

Sector	2021 (P-in-P)	2022 (Forecast)
Single-Family	<b>31%</b>	<b>-6%</b> ₽
Multi-Family	<b>18%</b> 仓	<b>-2%</b> ↓
Commercial	<b>-6%</b> ↓	<b>3%</b> 仓
Manufacturing	<b>1%</b> 仓	<b>6%</b> 仓
Transportation	<b>15%</b> 仓	<b>7%</b> 仓
Recreation	<b>-13%</b> ₽	<b>-1%</b> ₽
Power	<b>5%</b> 仓	<b>5%</b> 仓
Roads & Hwys	<b>5%</b> 仓	<b>8%</b> 企



### CANADA ZOZAL CONSTRUCTION SPENDING P-IN-P

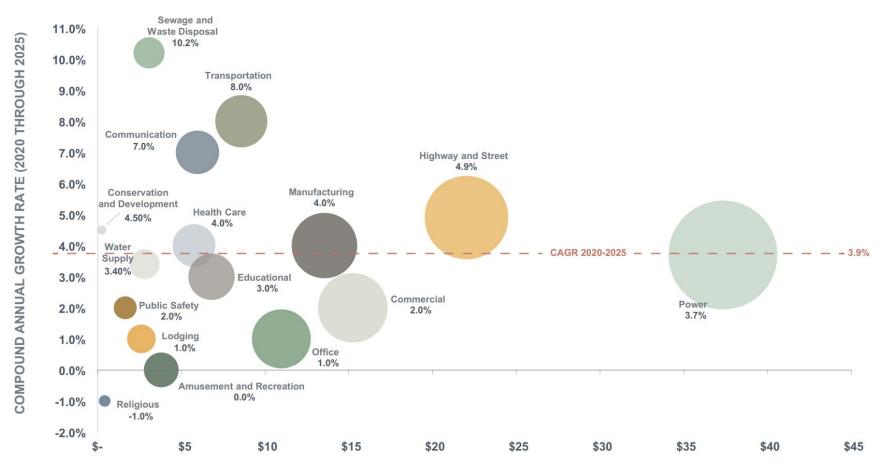


- RESIDENTIAL - NONRESIDENTIAL BUILDINGS - NONBUILDING STRUCTURES

#### Source: FMI Forecast Q1 2022



### CANADA NON-RESIDENTIAL P-IN-P CONSTRUCTION



**CONSTRUCTION SPENDING PUT IN PLACE 2020 (CANADA BILLIONS)** 

Source: FMI Forecast Q1 2022

## CANADA REGIONAL FORECASS

#### **Alberta**

Strong Residential / Infrastructure⊛3.4%î in 2022

#### British Columbia

 Devastating Floods
 4.6% ↑ in 2022
 

#### Ontario

Negative Interprovincial Migration
%14%î in 2022

#### **Quebec**

Strong Housing Market / Infrastructure Spending
16% î in 2022



# MORE INFORMATION

### **United States**



- Dodge Data Construction Outlook
- **FMI 2022 Overview**
- **\*AIA Consensus Forecast**
- **ARTBA Forecast**
- Industrial Info Resources
  Outlook

%FMI 2022 Overview
%On Site Magazine

