

# Gypsum-Based Plasterboard Market and Alternatives: A Global and Regional Analysis, 2023-2033

<https://marketpublishers.com/r/G2F121B4823CEN.html>

Date: March 2024

Pages: 149

Price: US\$ 4,950.00 (Single User License)

ID: G2F121B4823CEN

## Abstracts

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### Gypsum-Based Plasterboard Market and Alternatives Overview

The gypsum-based plasterboard market and alternatives was valued at \$22.90 billion in 2023, and it is expected to grow at a CAGR of 7.88% and reach \$48.89 billion by 2033. Gypsum-based plasterboard and alternatives are poised to revolutionize construction practices by offering several advantages over conventional chemical inputs. The market is at a growing stage and is projected to experience considerable growth. Market players investing in research, infrastructure, and partnerships are expected to capitalize on the increasing demand for gypsum-based plasterboard and alternatives.

### Introduction of Gypsum-Based Plasterboard Market and Alternatives

The gypsum-based plasterboard market and alternatives, encompassing the production and utilization of drywall or wallboard, is a cornerstone of the construction industry globally. Gypsum-based plasterboard is a versatile building material known for its ease of installation, fire resistance, soundproofing capabilities, and affordability. It finds extensive use in both residential and non-residential construction projects, contributing to the creation of functional and aesthetically pleasing interior spaces. While gypsum-based plasterboard remains dominant in the construction industry, alternatives have emerged to address specific needs and preferences. Each alternative offers unique properties such as enhanced durability, moisture resistance, or design flexibility, catering to diverse end-user requirements in both residential and non-residential applications.

## Market Introduction

The gypsum-based plasterboard market and alternatives has witnessed significant growth due to rising construction activities, owing to its versatility, ease of installation, and cost-effectiveness in construction projects worldwide. Gypsum-based plasterboard offers exceptional fire resistance, sound insulation properties, and smooth surface for finishing. Its widespread adoption in both residential and commercial construction projects has made it a staple material in the building industry.

## Industrial Impact

The demand for gypsum-based plasterboard is driven by the increasing construction activities, particularly in residential and commercial sectors, as it is a preferred material for interior walls and ceilings due to its ease of installation and cost-effectiveness. Moreover, renovation and remodeling projects in both residential and commercial buildings often involve the use of gypsum-based plasterboard for its versatility and ability to transform interior spaces quickly. Furthermore, ongoing technological advancements in gypsum board manufacturing processes lead to improved product quality, enhanced performance, and increased efficiency, further fueling market growth. Growing awareness of environmental issues and the need for sustainable construction materials drive the demand for alternatives such as bio-based plasterboard, which utilizes renewable and biodegradable resources, reducing reliance on non-renewable materials.

The key players operating in the gypsum-based plasterboard market and alternatives include Saint-Gobain Group, Knauf Digital GmbH, National Gypsum Services Company, Etex Group, Georgia-Pacific, Fletcher Building, PABCO Gypsum, China National Building Material Company Limited, USG Corporation, American Gypsum Company, LLC, Hemspan, Adaptavate Ltd, Smarter Habitat GmbH & Co KG, Strawcture Eco and Armstrong World Industries, Inc., among others. These companies are focusing on strategic partnerships, collaborations, and product launches to enhance their product offerings and expand their market presence.

## Market Segmentation:

### Segmentation 1: by End-User Application

#### Residential

## Non-Residential

### Residential to Lead the Gypsum-Based Plasterboard Market and Alternatives (by End-User Application)

In the gypsum-based plasterboard market and alternatives based on end-user application, residential applications continue to lead due to their widespread usage in residential construction projects. Gypsum-based plasterboard is highly favored in residential settings for its versatility, ease of installation, and cost-effectiveness. It serves as an essential material for constructing interior walls and ceilings, providing a smooth surface for finishing touches such as painting or wallpapering.

However, as environmental concerns grow and sustainability becomes a priority across industries, alternatives to gypsum-based plasterboard are gaining traction, particularly in residential applications. These alternatives offer similar functionalities while addressing concerns such as environmental impact, durability, and energy efficiency.

### Segmentation 2: by Type

Standard Plasterboard

Fire-Resistant Plasterboard

Sound-Insulated Plasterboard

Thermal Plasterboard

Moisture-Resistant Plasterboard

Impact-Resistant Plasterboard

Others

### Fire-Resistant Plasterboard to Lead the Gypsum-Based Plasterboard Market and Alternatives (by Type)

In the gypsum-based plasterboard market and alternatives, fire-resistant plasterboard

emerges as a frontrunner among its various types. This dominance can be attributed to the stringent safety regulations and increasing awareness regarding fire hazards in construction projects. Fire-resistant plasterboard, equipped with special additives and reinforced with glass fibers or other materials, offers superior fire protection compared to standard gypsum-based plasterboard. Its ability to withstand high temperatures and prevent the spread of flames makes it indispensable in buildings where fire safety is a priority, such as commercial spaces, high-rise buildings, and public facilities. As regulations continue to tighten and emphasis on fire safety grows, the demand for fire-resistant plasterboards is expected to propel its market dominance further in the foreseeable future.

### Segmentation 3: by Material

Gypsum

Bio-Based

### Gypsum to Lead the Gypsum-Based Plasterboard Market and Alternatives (by Material)

In the gypsum-based plasterboard market and alternatives based on material, gypsum stands as the undisputed leader among materials. Gypsum's dominance is rooted in its exceptional properties that cater to a wide range of construction needs. Its abundant availability, ease of processing, and affordability make it a preferred choice for manufacturing plasterboard. Additionally, gypsum-based plasterboard offers excellent fire resistance, sound insulation, and thermal properties, further solidifying its position as the go-to material for construction projects. While alternatives such as hemp or fiber cement panels exist, they often lack the versatility and cost-effectiveness that gypsum provides. Moreover, gypsum-based plasterboard's compatibility with various finishing materials and its ability to create smooth, seamless surfaces add to its appeal among builders, architects, and homeowners alike. As the construction industry continues to evolve, gypsum's market dominance is expected to persist, fueled by its inherent advantages and continual innovations in gypsum-based products.

### Segmentation 4: by Region

North America: U.S., Canada, and Mexico

Europe: Germany, France, U.K., Italy, and Rest-of-Europe

Asia-Pacific: China, Japan, Australia, South Korea, India, and Rest-of-Asia-Pacific

Rest-of-the-World: Brazil, U.A.E., and Others

The Asia-Pacific region is poised to lead the gypsum-based plasterboard market and alternatives. With rapid urbanization, burgeoning population, and substantial infrastructure development projects, countries in the Asia-Pacific region, particularly China, India, and Southeast Asian nations, are witnessing significant growth in construction activities. This surge in construction demand is driving the consumption of gypsum-based plasterboard as a preferred material for interior walls and ceilings due to its cost-effectiveness, ease of installation, and compliance with stringent building regulations. Moreover, the region's increasing focus on sustainable building practices and environmental conservation is fostering the adoption of alternatives such as bio-based plasterboards, which utilize renewable resources and offer eco-friendly attributes. As the Asia-Pacific region continues to experience robust economic growth and infrastructure development, it is expected to maintain its dominance in the gypsum-based plasterboard market and alternatives, and emerge as a key market for sustainable alternatives, contributing to the region's construction industry's advancement and sustainability goals.

#### Recent Developments in the Gypsum-Based Plasterboard Market and Alternatives

In December 2023, Etex Group acquired BGC's lightweight construction materials, including gypsum products and fiber cement, in Australia, expanding its Australian presence. The deal includes BGC's large plasterboard plant in Perth and a robust network of nine warehouses across Australia and New Zealand. This strategic move enhances Etex's position in the gypsum-based plasterboard market and alternatives, significantly impacting the industry by broadening its product range and distribution capabilities in the region.

In October 2023, Georgia-Pacific opened a gypsum wallboard facility in Sweetwater, Texas, marking the company's first new build since 2004. The facility is valued at \$325 million and represents the second Georgia-Pacific gypsum wallboard production site in Nolan County. It aims to enhance safety, quality, and operational efficiency, showcasing Georgia-Pacific's commitment to innovation and leadership in the construction materials industry.

In August 2023, Adaptavate Ltd, a company specializing in bio-composite materials designed for the traditional building sector, secured a \$2.5 million (?2 million) investment led by Counteract, alongside LCIF2, Semin, Perivoli Innovations, and industry experts. This follows a March 2022 seed round of \$2.84 million. The funding would speed up work on carbon-negative formulations and carbon capture for high-performance alternatives to conventional building materials.

In November 2022, Armstrong World Industries, Inc. acquired GC Products, a leading manufacturer of durable, custom architectural interior products made of glass fiber-reinforced gypsum. With GC products' expertise in manufacturing durable, custom solutions, the company strengthens its position as a leader in the industry, which will help it continue growing and increasing its market share.

## Demand - Drivers, Limitations, and Opportunities

**Market Driver: Increase in Construction Activities Due to Rapid Urbanization, Population Growth, and Economic Development**

The increase in construction activities driven by rapid urbanization, population growth, and economic development serves as a significant driver in the gypsum-based plasterboard market and alternatives. As urban areas expand and populations grow, there is a heightened demand for residential, commercial, and industrial infrastructure. This demand, in turn, fuels the need for construction materials such as plasterboards.

Gypsum-based plasterboards are favored for their versatility, ease of installation, and fire-resistant properties, making them a popular choice in various construction projects. The growing construction sector, particularly in emerging economies experiencing rapid urbanization and economic development, drives the demand for these products.

Additionally, the increasing emphasis on sustainable construction practices and environment-friendly materials has led to the exploration of alternatives to traditional gypsum-based plaster boards. These alternatives may include products made from recycled materials, bio-based materials, or innovative composite materials that offer comparable performance while reducing environmental impact.

More than 4.3 billion people live in urban areas worldwide, which signifies that over half



of the global population, approximately 55%, resides in urban settings. The ongoing urbanization contributes significantly to the growth and evolution of both the gypsum-based plasterboard market and the alternative, shaping the construction industry's landscape in urban areas worldwide.

#### Market Challenge: Price Volatility of Raw Materials

The price volatility of raw materials in the gypsum-based plasterboard market and alternatives presents a significant challenge for industries reliant on these essential resources. The market can be influenced by a multitude of factors, including supply and demand dynamics, geopolitical events such as the Russia-Ukraine war, and economic conditions. This volatility disrupts supply chains and leads to cost increases and product shortages.

For instance, the Russia-Ukraine war acted as a massive restraint on the gypsum mining market. This conflict has direct repercussions on the global supply chain, affecting the smooth flow of goods and resulting in notable cost hikes and shortages. In April 2022, it led to a staggering increase of up to 12% in Mexican gypsum prices compared to levels before the conflict. Additionally, Indian cement companies have struggled with the aftermath of this war. In March 2022, these companies experienced a 4% annual increase in logistics costs, while raw materials such as fly ash and gypsum saw a substantial 7% year-on-year rise. The repercussions of the Russia-Ukraine conflict, with related sanctions, disrupted the supply chains, inevitably impacting not only the gypsum mining market but also the construction industry. Instances such as the Thailand floods in 2010 and the Japanese earthquake in 2011 showcased the vulnerability of industries to unforeseen events, profoundly affecting production costs, profit margins, and overall market stability.

Moreover, the effects of the pandemic-induced supply chain disruptions have added to these challenges, highlighting the urgent need for resilient strategies to navigate the volatile landscape of raw material prices in the gypsum market. The pandemic has showcased vulnerabilities in global supply chains, intensifying the impact of the disruptions. Instances of a bullwhip effect have been observed, where changes in demand are magnified as they move upstream in supply chains, causing significant shifts in availability and pricing. Thus, the gypsum market, already susceptible to fluctuations, faces additional pressures from the pandemic-induced supply chain disruptions, further complicating the ability of industries to plan and budget for operations.

## Market Opportunity: Advancements in Technology and Product Innovation

The gypsum-based plasterboard market and alternatives has been witnessing significant advancements in technology and product innovation, opening up numerous opportunities for manufacturers, builders, and end users alike. These advancements not only enhance the quality and functionality of plasterboard products but also address environmental concerns, leading to the development of sustainable and efficient alternatives.

The launch of gypsum boards resistant to moisture has tackled the issues related to high humidity. Gypsum boards that are resistant to fire are becoming popular, particularly in commercial and public structures where compliance with safety regulations is crucial. Moreover, enhancements in the production techniques have resulted in the creation of gypsum boards that are lighter in weight, making them easier to manage and install.

Additionally, the adoption of digital technology in the creation and design of gypsum boards is paving new paths. The possibilities for custom designs, 3D printing, and digital modeling are transforming the application of gypsum boards in interior design, offering architects and designers an expanded array of creative options.

There's a growing demand for sustainable building materials. In response, manufacturers are developing eco-friendly plasterboards made from recycled materials or designed to have a lower environmental impact. This includes gypsum boards that reduce energy consumption during production and boards that contribute to better indoor air quality by absorbing pollutants.

There's an increasing focus on products that offer aesthetic versatility alongside functional benefits. This includes plasterboards with integrated finishes, textures, or colors, reducing the need for additional materials and simplifying the installation process.

How can this report add value to an organization?

**Product/Innovation Strategy:** The product segment helps the reader understand the different applications of gypsum-based plasterboard and alternatives available based on end-user application (residential and non-residential), type (standard plasterboard, fire-resistant plasterboard, sound-insulated plasterboard, thermal plasterboard, moisture-resistant plasterboard, impact-resistant plasterboard, and others) and material (gypsum



and bio-based) market is poised for significant expansion with ongoing technological advancements, increased investments, and growing awareness of gypsum-based plasterboard and alternatives. Therefore, this business is a high-investment and high-revenue generating model.

**Growth/Marketing Strategy:** The gypsum-based plasterboard market and alternatives has been growing at a rapid pace. The market offers enormous opportunities for existing and emerging market players. Some of the strategies covered in this segment are mergers and acquisitions, product launches, partnerships and collaborations, business expansions, and investments. The strategies preferred by companies to maintain and strengthen their market position primarily include product development and partnerships and collaborations.

**Competitive Strategy:** The key players in the gypsum-based plasterboard market and alternatives analyzed and profiled in the study include gypsum-based plasterboard manufacturers. Additionally, a comprehensive competitive landscape such as partnerships, agreements, and collaborations are expected to aid the reader in understanding the untapped revenue pockets in the market.

## Research Methodology

### Factors for Data Prediction and Modeling

Under bio-based materials, hemp-lime boards and hemp OSB, among others, are considered. Metal panels are not considered an alternative to gypsum-based plasterboard as applications differ in most cases.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

Nearly all the recent developments from January 2020 to December 2023 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major breakthroughs in technology.

## Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global gypsum-based plasterboard market and alternatives.

The process of market engineering involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes is explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

## Primary Research

The primary sources involve industry experts from the gypsum-based plasterboard market and alternatives and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

validation and triangulation of all the numbers and graphs

validation of reports segmentation and key qualitative findings

understanding the competitive landscape

validation of the numbers of various markets for market type

percentage split of individual markets for geographical analysis

## Secondary Research

This research study of the gypsum-based plasterboard market and alternatives involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the aforementioned data sources, the study has been undertaken with the help of other data sources and websites, such as EPA and USDA.

Secondary research was done in order to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

segmentations and percentage shares

data for market value

key industry trends of the top players of the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

## Key Market Players and Competition Synopsis

The companies that are profiled in the gypsum-based plasterboard market and

alternatives have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Some of the prominent names in the gypsum-based plasterboard market and alternatives are:

Saint-Gobain Group

Knauf Digital GmbH

National Gypsum Services Company

Etex Group

Georgia-Pacific

Fletcher Building

PABCO Gypsum

China National Building Material Company Limited

USG Corporation

American Gypsum Company, LLC

Hemspan

Adaptavate Ltd

Smarter Habitat GmbH & Co KG

Strawcture Eco

Armstrong World Industries, Inc.

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