

# Global Dry Construction Market: Analysis By Type (Supporting Framework and Boarding), By Material (Plasterboard, Wood, Metal and Others), By Application (Residential and Non Residential), By Region, Size and Trends with Impact of COVID-19 and Forecast up to 2029

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## Abstracts

Dry construction is a modern building technique that minimizes the use of water, utilizing prefabricated materials like gypsum boards, metal frames, and insulation panels. This method enhances construction speed and efficiency, reduces construction waste, and improves site cleanliness. Dry construction offers flexibility in design, allowing for easy modifications and installations. It is commonly used in interior partitions, ceilings, and flooring systems, providing superior acoustic and thermal insulation. This environmentally friendly approach not only lowers water consumption but also contributes to sustainable building practices, making it a popular choice in contemporary construction projects. The global dry construction market was valued at US\$92.76 billion in 2023, and is expected to be worth US\$127.69 billion in 2029.

Several upcoming trends are poised to shape the future of dry construction. One notable trend is the integration of advanced technologies such as Building Information Modeling (BIM) and automation into the dry construction process. These technologies enable more precise planning, faster assembly, and improved quality control, further enhancing the efficiency and effectiveness of dry construction projects. Furthermore, the growing interest in modular construction techniques is expected to drive innovation in the dry construction sector. The global dry construction market is expected to grow at a CAGR of 5.47% over the years 2024-2029.

## Market Segmentation Analysis:

**By Type:** The global dry construction market by type can broadly be divided into two segments namely, Supporting Framework and Boarding. Supporting framework segment dominated the market in 2023 and is also foreseen to grow at the fastest CAGR during the forecasted period. Supporting Framework encompasses the structural elements that provide stability and support within dry construction systems. This includes metal studs, joists, tracks, and other framing components. The increasing preference for lightweight and easily installable materials, such as metal studs, contributes to the demand for supporting framework systems. Additionally, the rising focus on sustainable construction practices favors the adoption of materials with high recyclability and low environmental impact, further fueling the growth of this segment.

**By Material:** The global dry construction market by material can broadly be divided into four segments namely, Plasterboard, Wood, Metal and Others. Plasterboard segment dominated the market in 2023. Plasterboard, also known as gypsum board or drywall, is one of the most widely used materials in dry construction. Its popularity stems from its ease of installation, affordability, and versatility. Factors driving the growth of the plasterboard segment include its excellent fire resistance properties, sound insulation capabilities, and its ability to provide smooth and uniform surfaces for finishing. Additionally, the increasing adoption of eco-friendly plasterboard options, which are made from recycled materials and offer improved sustainability, is further fueling the segment's growth.

**By Application:** The global dry construction market by application can broadly be divided into two segments namely, Residential and Non Residential. Residential segment dominated the market in 2023 and is also foreseen to grow at the fastest CAGR during the forecasted period. In the residential segment, dry construction methods are extensively employed in the construction of houses, apartments, and other residential buildings. The growth of this segment is primarily driven by factors such as rapid urbanization, population growth, and increasing disposable incomes, particularly in emerging economies. Additionally, the demand for quick and efficient construction methods that minimize disruption to occupants is fueling the adoption of dry construction techniques in residential projects.

**By Region:** In the report, the global dry construction market is divided into four regions: Asia Pacific, North America, Europe, and Rest of the World. Asia Pacific dominated the dry construction market in 2023. The Asia Pacific region stands at the forefront of the dry construction market, a trend driven by a confluence of factors including population

growth, rising per capita disposable income, and evolving market dynamics. This region's trajectory is further buoyed by an escalating demand for corporate spaces, hotels, shopping malls, schools, hospitals, and other structures, reflecting the evolving needs of its populace. Participating regional powerhouses like China, India, and Japan are poised to significantly impact the Asia-Pacific market, with emerging trends in North American countries such as the US and Canada adding to its momentum. The surge in construction projects, fueled by increased foreign direct investment (FDI) inflows, rapid industrialization, and heightened purchasing power, underscores the pivotal role of dry construction technologies in meeting the demands of an urbanizing world.

In the Asia-Pacific region, rapid population growth and urbanization, particularly in China and India, have spurred the adoption of dry construction as a solution to the pressing need for efficient and cost-effective building methods. This trend aligns with the region's increasing emphasis on eco-friendly solutions and sustainability, with governments implementing supportive policies and regulations. China's burgeoning market, driven by new construction projects and a burgeoning population, commands a significant share of the global dry construction industry. Moreover, the region's preference for high-quality yet affordable building materials, coupled with a growing appreciation for DIY application methods, positions dry construction as a favored choice for both professionals and end-users alike.

In North America, the dry construction market is experiencing robust growth, fueled by a combination of factors including urbanization, technological advancements, and evolving consumer preferences. Across North America, the demand for dry construction is also fueled by a growing trend towards DIY (do-it-yourself) application methods. Homeowners and small-scale developers are increasingly opting for dry construction materials that enable easy installation and customization, driving market growth in the region. Furthermore, the COVID-19 pandemic has accelerated the adoption of dry construction methods in North America, as they offer advantages such as reduced on-site labor requirements and enhanced safety protocols.

#### Market Dynamics:

**Growth Drivers:** The market has been growing over the past few years, due to factors such as rapid urbanization, increase in disposable income, rising interest in green buildings, emphasis on indoor air quality and energy efficiency, cost-effectiveness and time efficiency, increasing interest in acoustic solutions, etc. As cities expand and population increase, there is a heightened demand for quick, efficient, and sustainable construction solutions. Dry construction methods, which involve assembling pre-

fabricated components off-site before transporting and installing them on-site, offer several advantages in this context. Firstly, they reduce construction time significantly compared to traditional wet construction methods, allowing for faster project completion and quicker occupancy. Secondly, dry construction minimizes the use of water and waste generation, aligning with sustainable building practices and environmental concerns. Additionally, these methods often result in cost savings due to reduced labor requirements and material waste.

**Challenges:** However, some challenges are also impeding the growth of the market such as resistance to change in construction practices and regulatory and building code compliance. The construction sector has a longstanding history of utilizing traditional, wet construction methods, and various stakeholders, including builders, contractors, and labor unions, may exhibit hesitancy towards embracing dry construction practices. This resistance is driven by several factors. Industry professionals may lack familiarity with dry construction methods. Such resistance to change can impede the adoption of dry construction methods.

**Trends:** The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as rising demand for luxury vinyl tile (LVT) flooring, BIM (Building Information Modeling) development, expansion in emerging economies, incorporation of 3D printing and technological advancements. The development of Building Information Modeling (BIM) is emerging as a significant trend within the dry construction market, revolutionizing traditional practices. BIM technology enables seamless digital modeling and coordination of construction projects, fostering enhanced collaboration among architects, engineers, and contractors. By providing a comprehensive digital representation of the building process, BIM significantly enhances project efficiency, reduces errors, and streamlines decision-making processes. Moreover, BIM simplifies the integration of prefabricated components and construction processes within dry construction methods.

#### Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has had a significant impact on the global dry construction market, disrupting supply chains, delaying construction projects, and affecting demand. During the initial stages of the pandemic, widespread lockdowns and restrictions on movement led to a slowdown in construction activities worldwide, causing project delays and cancellations. Uncertainty surrounding the economic outlook also resulted in reduced investment in new construction projects, further dampening market growth. Additionally, disruptions in the supply of raw materials and components, as well as

logistical challenges, hindered the production and delivery of dry construction materials and systems.

In the post-COVID scenario, the global dry construction market is expected to witness a resurgence driven by several factors. As the construction industry adapts to the new normal, the demand for efficient, cost-effective, and sustainable building solutions is likely to drive the adoption of dry construction methods.

#### Competitive Landscape:

The global dry construction market is highly fragmented, with several key players vying for market share through strategies such as mergers and acquisitions, partnerships, and product innovations. Leading companies in the market are focusing on expanding their product portfolios, enhancing their production capabilities, and strengthening their distribution networks to gain a competitive edge. Major players in the global dry construction market include Saint-Gobain, Knauf, Etex Group, and Fletcher Building, among others. These companies are at the forefront of driving innovation in dry construction technologies and are continuously investing in research and development to introduce advanced and sustainable solutions. Regional players also play a crucial role in the market, catering to the specific needs and preferences of local markets. These players often focus on offering customized solutions and leveraging their local market knowledge to compete effectively against global players.

The key players of the global dry construction market are:

Saint-Gobain S.A. (Certain Teed)  
Etex Group  
Fletcher Building Limited  
Georgia-Pacific LLC  
National Gypsum Company  
Knauf Gips KG (USG Corporation)  
Beijing New Building Materials Public Co., Ltd.  
American Gypsum Company LLC  
PABCO Building Products LLC (PABCO Gypsum)  
Panel Rey, S.A.  
VANS Gypsum Pvt. Ltd.

## Contents

### 1. EXECUTIVE SUMMARY

### 2. INTRODUCTION

- 2.1 Dry Construction: An Overview
- 2.2 Dry Construction Segmentation: An Overview
  - 2.2.1 Dry Construction Segmentation

### 3. GLOBAL MARKET ANALYSIS

- 3.1 Global Dry Construction Market: An Analysis
  - 3.1.1 Global Dry Construction Market: An Overview
  - 3.1.2 Global Dry Construction Market by Value
  - 3.1.3 Global Dry Construction Market by Type (Supporting Framework and Boarding)
  - 3.1.4 Global Dry Construction Market by Material (Plasterboard, Wood, Metal and Others)
  - 3.1.5 Global Dry Construction Market by Application (Residential and Non Residential)
  - 3.1.6 Global Dry Construction Market by Region (Asia Pacific, North America, Europe, and ROW)
- 3.2 Global Dry Construction Market: Type Analysis
  - 3.2.1 Global Dry Construction Market By Type: An Overview
  - 3.2.2 Global Supporting Framework Dry Construction Market By Value
  - 3.2.3 Global Boarding Dry Construction Market By Value
- 3.3 Global Dry Construction Market: Material Analysis
  - 3.3.1 Global Dry Construction Market By Material: An Overview
  - 3.3.2 Global Plasterboard Dry Construction Market By Value
  - 3.3.3 Global Wood Dry Construction Market By Value
  - 3.3.4 Global Metal Dry Construction Market By Value
  - 3.3.5 Global Other Materials Dry Construction Market By Value
- 3.4 Global Dry Construction Market: Application Analysis
  - 3.4.1 Global Dry Construction Market By Application: An Overview
  - 3.4.2 Global Residential Dry Construction Market By Value
  - 3.4.3 Global Non Residential Dry Construction Market By Value

### 4. REGIONAL MARKET ANALYSIS

- 4.1 Asia Pacific Dry Construction Market: An Analysis

- 4.1.1 Asia Pacific Dry Construction Market: An Overview
- 4.1.2 Asia Pacific Dry Construction Market by Value
- 4.1.3 Asia Pacific Dry Construction Market by Region (China, Japan, India, and Rest of Asia Pacific)
- 4.1.4 China Dry Construction Market by Value
- 4.1.5 India Dry Construction Market by Value
- 4.1.6 Japan Dry Construction Market by Value
- 4.1.7 Rest of Asia Pacific Dry Construction Market by Value
- 4.2 North America Dry Construction Market: An Analysis
  - 4.2.1 North America Dry Construction Market: An Overview
  - 4.2.2 North America Dry Construction Market by Value
  - 4.2.3 North America Dry Construction Market by Region (The US, Canada and Mexico)
  - 4.2.4 The US Dry Construction Market by Value
  - 4.2.5 Canada Dry Construction Market by Value
  - 4.2.6 Mexico Dry Construction Market by Value
- 4.3 Europe Dry Construction Market: An Analysis
  - 4.3.1 Europe Dry Construction Market: An Overview
  - 4.3.2 Europe Dry Construction Market by Value
  - 4.3.3 Europe Dry Construction Market by Region (UK, France, Germany, and the Rest of Europe)
  - 4.3.4 Germany Dry Construction Market by Value
  - 4.3.5 France Dry Construction Market by Value
  - 4.3.6 United Kingdom Dry Construction Market by Value
  - 4.3.7 Rest of Europe Dry Construction Market by Value
- 4.4 Rest of the World Dry Construction Market: An Analysis
  - 4.4.1 Rest of the World Dry Construction Market: An Overview
  - 4.4.2 Rest of the World Dry Construction Market by Value

## **5. IMPACT OF COVID-19**

- 5.1 Impact of COVID-19
  - 5.1.1 Impact of COVID-19 on Global Dry Construction Market
  - 5.1.2 Post-COVID Scenario

## **6. MARKET DYNAMICS**

- 6.1 Growth Drivers
  - 6.1.1 Rapid Urbanization

- 6.1.2 Increase In Disposable Income
- 6.1.3 Rising Interest in Green Buildings
- 6.1.4 Emphasis on Indoor Air Quality and Energy Efficiency
- 6.1.5 Increasing Adoption of Environment-friendly Construction Practices
- 6.1.6 Cost-effectiveness and Time Efficiency
- 6.1.7 Increasing Interest in Acoustic Solutions
- 6.2 Challenges
  - 6.2.1 Resistance to Change in Construction Practices
  - 6.2.2 Regulatory and Building Code Compliance
- 6.3 Market Trends
  - 6.3.1 Rising Demand for Luxury Vinyl Tile (LVT) Flooring
  - 6.3.2 BIM (Building Information Modeling) Development
  - 6.3.3 Expansion in Emerging Economies
  - 6.3.4 Incorporation of 3D Printing
  - 6.3.5 Technological Advancements

## **7. COMPETITIVE LANDSCAPE**

- 7.1 Global Dry Construction Market: Competitive Landscape
- 7.2 Global Dry Construction Market Players by Products

## **8. COMPANY PROFILES**

- 8.1 Saint-Gobain S.A. (Certain Teed)
  - 8.1.1 Business Overview
  - 8.1.2 Operating Segments
  - 8.1.3 Business Strategy
- 8.2 Etex Group
  - 8.2.1 Business Overview
  - 8.2.2 Operating Segments
  - 8.2.3 Business Strategy
- 8.3 Fletcher Building Limited
  - 8.3.1 Business Overview
  - 8.3.2 Operating Segments
- 8.4 Georgia-Pacific LLC
  - 8.4.1 Business Overview
  - 8.4.2 Business Strategy
- 8.5 National Gypsum Company
  - 8.5.1 Business Overview



- 8.5.2 Business Strategy
- 8.6 Knauf Gips KG (USG Corporation)
  - 8.6.1 Business Overview
- 8.7 Beijing New Building Materials Public Co., Ltd.
  - 8.7.1 Business Overview
- 8.8 American Gypsum Company LLC
  - 8.8.1 Business Overview
- 8.9 PABCO Building Products LLC (PABCO Gypsum)
  - 8.9.1 Business Overview
- 8.10 Panel Rey, S.A.
  - 8.10.1 Business Overview
- 8.11 VANS Gypsum Pvt. Ltd.
  - 8.11.1 Business Overview

## List Of Figures

### LIST OF FIGURES

Figure 1: Advantages of Dry Construction

Figure 2: Dry Construction Segmentation

Figure 3: Global Dry Construction Market by Value; 2019-2023 (US\$ Billion)

Figure 4: Global Dry Construction Market by Value; 2024-2029 (US\$ Billion)

Figure 5: Global Dry Construction Market by Type; 2023 (Percentage, %)

Figure 6: Global Dry Construction Market by Material; 2023 (Percentage, %)

Figure 7: Global Dry Construction Market by Application; 2023 (Percentage, %)

Figure 8: Global Dry Construction Market by Region; 2023 (Percentage, %)

Figure 9: Global Supporting Framework Dry Construction Market By Value; 2019-2023 (US\$ Billion)

Figure 10: Global Supporting Framework Dry Construction Market By Value; 2024-2029 (US\$ Billion)

Figure 11: Global Boarding Dry Construction Market By Value; 2019-2023 (US\$ Billion)

Figure 12: Global Boarding Dry Construction Market By Value; 2024-2029 (US\$ Billion)

Figure 13: Global Plasterboard Dry Construction Market By Value; 2019-2023 (US\$ Billion)

Figure 14: Global Plasterboard Dry Construction Market By Value; 2024-2029 (US\$ Billion)

Figure 15: Global Wood Dry Construction Market By Value; 2019-2023 (US\$ Billion)

Figure 16: Global Wood Dry Construction Market By Value; 2024-2029 (US\$ Billion)

Figure 17: Global Metal Dry Construction Market By Value; 2019-2023 (US\$ Billion)

Figure 18: Global Metal Dry Construction Market By Value; 2024-2029 (US\$ Billion)

Figure 19: Global Other Materials Dry Construction Market By Value; 2019-2023 (US\$ Billion)

Figure 20: Global Other Materials Dry Construction Market By Value; 2024-2029 (US\$ Billion)

Figure 21: Global Residential Dry Construction Market By Value; 2019-2023 (US\$ Billion)

Figure 22: Global Residential Dry Construction Market By Value; 2024-2029 (US\$ Billion)

Figure 23: Global Non Residential Entry Dry Construction Market By Value; 2019-2023 (US\$ Billion)

Figure 24: Global Non Residential Dry Construction Market By Value; 2024-2029 (US\$ Billion)

Figure 25: Asia Pacific Dry Construction Market by Value; 2019-2023 (US\$ Billion)

- Figure 26: Asia Pacific Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 27: Asia Pacific Dry Construction Market by Region; 2023 (Percentage, %)
- Figure 28: China Dry Construction Market by Value, 2019-2023 (US\$ Billion)
- Figure 29: China Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 30: India Dry Construction Market by Value, 2019-2023 (US\$ Billion)
- Figure 31: India Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 32: Japan Dry Construction Market by Value, 2019-2023 (US\$ Billion)
- Figure 33: Japan Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 34: Rest of Asia Pacific Dry Construction Market by Value, 2019-2023 (US\$ Billion)
- Figure 35: Rest of Asia Pacific Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 36: North America Dry Construction Market by Value; 2019-2023 (US\$ Billion)
- Figure 37: North America Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 38: North America Dry Construction Market by Region; 2023 (Percentage, %)
- Figure 39: The US Dry Construction Market by Value; 2019-2023 (US\$ Billion)
- Figure 40: The US Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 41: Canada Dry Construction Market by Value; 2019-2023 (US\$ Billion)
- Figure 42: Canada Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 43: Mexico Dry Construction Market by Value; 2019-2023 (US\$ Billion)
- Figure 44: Mexico Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 45: Europe Dry Construction Market by Value; 2019-2023 (US\$ Billion)
- Figure 46: Europe Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 47: Europe Dry Construction Market by Region; 2023 (Percentage, %)
- Figure 48: Germany Dry Construction Market by Value; 2019-2023 (US\$ Billion)
- Figure 49: Germany Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 50: France Dry Construction Market by Value; 2019-2023 (US\$ Billion)
- Figure 51: France Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 52: United Kingdom Dry Construction Market by Value; 2019-2023 (US\$ Billion)
- Figure 53: United Kingdom Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 54: Rest of Europe Dry Construction Market by Value; 2019-2023 (US\$ Billion)
- Figure 55: Rest of Europe Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 56: Rest of the World Dry Construction Market by Value; 2019-2023 (US\$ Billion)
- Figure 57: Rest of the World Dry Construction Market by Value; 2024-2029 (US\$ Billion)
- Figure 58: Share of Urban Population in Total Population by Group of Economies; 2016, 2021 & 2050 (Percentage, %)
- Figure 59: Global GDP per Capita; 2018-2024 (US\$ Thousand)
- Figure 60: Global Dry Construction Market Players by Products
- Figure 61: Saint-Gobain S.A. Sales by Segment; 2023 (Percentage, %)

Figure 62: Etex Group Revenue by Segments, 2023 (Percentage, %)

Figure 63: Fletcher Building Limited Revenue by Segments, 2023 (Percentage, %)

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