

Dry Construction Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Material (Plasterboard, Metal, Plastic, Wood and Others), By Type (Supporting Framework and Boarding), By System (Ceiling System, Wall System, Flooring System and Others), By Application (Residential and Non-Residential), By Region, By Competition Forecast & Opportunities, 2018-2028

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Abstracts

The Global Dry Construction Market was valued at USD 62.19 billion in 2022 and is expected to grow at a CAGR of 6.25% during the forecast period. The global dry construction market is driven by the increasing industrialization, urbanization, and the construction industry's adoption of sustainable and lightweight building practices. Several developed countries have enacted legislation to promote dry construction methods.

Key Market Drivers

Urbanization and Population Growth

Urbanization and population growth play crucial roles in propelling the global dry construction market. As the world's population continues to expand, particularly in emerging economies, the demand for affordable and sustainable housing solutions is on the rise. Dry construction methods, including steel framing, drywall systems, and modular construction, have gained popularity due to their efficiency and cost-effectiveness in meeting this demand.

One key aspect of urbanization is the rapid growth of cities. As individuals migrate from rural areas to urban centers in pursuit of better job opportunities and improved living standards, the need for swift and efficient construction methods becomes imperative to accommodate the influx of residents. Dry construction offers several advantages in this context. It allows for expedited construction timelines, reducing the project completion time for housing and infrastructure development. This is particularly crucial in densely populated urban areas where space is limited, and delays can have significant economic and social consequences.

Moreover, dry construction methods are often more environmentally friendly compared to traditional wet construction methods. As urbanization continues to soar, there is a growing demand for sustainable construction practices that minimize resource consumption and waste generation. Dry construction materials are typically manufactured with lower energy inputs and generate less construction debris, making them an appealing option in today's environmentally conscious world.

In summary, urbanization and population growth are driving the global adoption of dry construction methods. These methods offer faster construction, cost-efficiency, and sustainability benefits that align with the demands of rapidly growing urban areas and a burgeoning global population.

Technological Advancements in Dry Construction

Technological advancements play a pivotal role in propelling the global dry construction market forward. Historically, the construction industry has been slow to adopt new technologies. However, recent innovations have revolutionized the way buildings are designed and constructed, driving the adoption of dry construction methods in several ways.

Firstly, the implementation of Building Information Modeling (BIM) and Computer-Aided Design (CAD) technologies has significantly improved the planning and design phases of construction projects. Architects and engineers can now create detailed 3D models of structures, enabling better visualization and more precise planning. These digital models seamlessly integrate with dry construction systems, facilitating the assembly of pre-fabricated components on-site. Consequently, this not only reduces errors and construction delays but also enhances project efficiency.

Secondly, automation and robotics are increasingly utilized in dry construction

processes. Automated systems can accurately cut, shape, and assemble dry construction materials, resulting in reduced labor costs and improved construction accuracy. Moreover, robots can perform tasks such as bricklaying, further automating the construction process.

Additionally, the advancement of materials has expanded the possibilities of dry construction. Lightweight and high-strength materials, such as fiber-reinforced composites, are incorporated into drywall systems and structural components, enhancing durability and energy efficiency of buildings. Furthermore, these materials are designed to be more sustainable, thereby reducing the environmental impact of construction.

Lastly, the integration of smart technologies, including IoT sensors and energy management systems, is driving the adoption of dry construction. Dry construction enables easy installation of these technologies, leading to smarter and more energy-efficient buildings.

In conclusion, technological advancements are accelerating the growth of the global dry construction market by enhancing design capabilities, automating construction processes, and improving the performance and sustainability of dry construction materials.

Sustainability and Environmental Concerns

Sustainability and environmental concerns play a pivotal role in shaping the global dry construction market. In an era marked by heightened awareness of climate change and resource depletion, construction practices are under scrutiny for their environmental impact. Dry construction methods present several advantages that align with these concerns.

A crucial factor in the sustainability of dry construction lies in waste reduction. Traditional wet construction methods often generate significant waste, including excess concrete, plaster, and bricks. In contrast, dry construction relies on precisely manufactured off-site prefabricated components, minimizing on-site waste, reducing landfill contributions, and conserving natural resources.

Furthermore, dry construction materials are often designed with sustainability in mind. Many manufacturers prioritize the use of recycled or recyclable materials in their products, reducing the demand for virgin resources. Additionally, the lightweight nature

of dry construction materials reduces transportation-related carbon emissions, as they are easier and more cost-effective to transport compared to heavy, traditional building materials.

Energy efficiency is another crucial aspect of sustainable construction. Dry construction methods often incorporate insulation materials that enhance a building's energy performance. Improved insulation reduces heating and cooling energy requirements, thereby contributing to lower greenhouse gas emissions throughout the building's lifespan.

Moreover, the adaptability and ease of retrofitting dry construction systems make them suitable for sustainable building renovations. Existing structures can be upgraded with dry construction components to improve energy efficiency and reduce their environmental footprint.

In conclusion, the global adoption of dry construction methods is driven by sustainability and environmental concerns. These methods offer reduced construction waste, eco-friendly materials, energy-efficient building solutions, and opportunities for retrofitting existing structures, effectively meeting the growing demand for sustainable construction practices worldwide.

Key Market Challenges

Resistance to Change in Construction Practices

One of the primary challenges confronting the global dry construction market is the resistance to change within the construction industry. 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. Firstly, industry professionals may lack familiarity with dry construction methods. Many construction workers and contractors possess expertise in traditional construction techniques and may display reluctance towards acquiring new skills and adapting to different construction processes. Such resistance to change can impede the adoption of dry construction methods.

Secondly, concerns may arise regarding the durability and safety of dry construction materials and systems. Certain stakeholders may perceive dry construction as being

less robust or reliable compared to traditional construction, thereby fostering skepticism and reticence towards embracing these methods. Overcoming such perceptions and demonstrating the quality and safety of dry construction poses a significant challenge.

Thirdly, financial considerations also contribute to resistance against change. The transition to dry construction may necessitate investments in new equipment, training, and technology. Construction companies may express apprehension regarding the initial costs and potential disruptions to their existing workflow, which can hinder the adoption of dry construction practices.

Effectively addressing this challenge requires the implementation of education and training initiatives to acquaint industry professionals with the benefits and safety of dry construction. Additionally, showcasing successful dry construction projects and offering financial incentives for adopting these methods can help surmount the resistance to change within the construction industry.

Regulatory and Building Code Compliance

Compliance with building codes and regulations is a significant challenge for the global dry construction market. Building codes and regulations vary from region to region, and they often favor or are tailored to traditional wet construction methods. Adapting dry construction systems to meet these regulations can be complex and time-consuming.

One key issue is ensuring that dry construction materials and systems meet fire safety standards and structural integrity requirements. Building codes often have specific provisions for materials like concrete and wood, which may not directly apply to dry construction components like steel framing and gypsum board. Dry construction manufacturers and builders must work closely with regulators to demonstrate compliance and obtain necessary approvals.

Additionally, building codes may not adequately address innovative dry construction techniques, such as modular construction or 3D printing of building components. This can create uncertainty for developers and builders, as they may not know how to navigate regulatory approval processes for these emerging technologies.

Furthermore, building codes and regulations are evolving to incorporate sustainability and energy efficiency standards. Dry construction, with its potential for improved insulation and reduced waste, aligns well with these goals. However, ensuring that dry construction methods meet these evolving standards while remaining cost-effective can

be a complex challenge.

To address this challenge, collaboration between industry stakeholders, regulatory bodies, and standard-setting organizations is crucial. This collaboration can lead to the development of clear guidelines and standards for dry construction methods, ensuring that they are both safe and compliant with building codes and regulations.

Market Fragmentation and Lack of Standardization

The global dry construction market faces a challenge related to market fragmentation and the lack of standardization. Dry construction encompasses a wide range of materials, components, and systems, and there is often a lack of consistency and standardization across different products and manufacturers.

This lack of standardization can create confusion for builders and contractors who may encounter varying product specifications and installation methods when using different dry construction systems. It can also make it challenging for customers to compare products and select the most suitable options for their projects.

Furthermore, market fragmentation can hinder economies of scale and innovation. When there are numerous small-scale manufacturers producing similar but slightly different products, it can be challenging to drive innovation and cost reductions through research and development.

To address this challenge, the dry construction industry needs to work towards greater standardization. This can involve the development of industry-wide standards for product specifications, quality control, and installation procedures. Standardization efforts should also consider sustainability and energy efficiency requirements to ensure that dry construction methods align with evolving industry trends and regulations.

Additionally, collaboration among manufacturers, builders, and industry associations is essential to drive standardization efforts forward. By working together to establish clear standards and best practices, the global dry construction market can overcome the challenges associated with market fragmentation and lack of standardization, ultimately benefiting both industry professionals and customers.

Key Market Trends

Growing Demand for Sustainable and Eco-Friendly Solutions

One notable trend in the global dry construction market is the increasing demand for sustainable and eco-friendly construction solutions. As environmental concerns gain prominence worldwide, the construction industry faces mounting pressure to adopt greener practices. Dry construction methods are well-suited to meet these demands due to their inherent sustainability benefits.

A key aspect of sustainability in dry construction is the reduction of construction waste. Unlike traditional wet construction methods that generate significant waste, dry construction relies on precisely manufactured off-site pre-fabricated components, minimizing on-site waste, reducing landfill contributions, and conserving natural resources. Manufacturers of dry construction materials are progressively utilizing recycled or recyclable materials, further reducing the environmental impact of their products.

Energy efficiency is another crucial aspect of sustainability, and dry construction methods often incorporate insulation materials that enhance a building's energy performance. Improved insulation reduces heating and cooling energy requirements, contributing to lower greenhouse gas emissions throughout a building's lifespan. Additionally, lightweight dry construction materials lessen transportation-related carbon emissions, as they are easier and more cost-effective to transport compared to heavy, traditional building materials.

Moreover, sustainable certifications and rating systems, such as LEED (Leadership in Energy and Environmental Design), are gaining increasing importance in the construction industry. Dry construction products and systems are being designed to meet the strict criteria of these certifications, making them more appealing to environmentally conscious builders and developers.

In summary, the inclination towards sustainability in construction is driving the demand for dry construction methods. These methods offer reduced construction waste, eco-friendly materials, and energy-efficient building solutions, aligning with the growing need for sustainable construction practices worldwide.

Modular and Prefabricated Construction Techniques

Modular and prefabricated construction techniques are gaining significant traction as a prominent trend in the global dry construction market. These methods involve the manufacturing of building components and modules in a controlled factory environment

before transporting and assembling them on-site. This approach presents numerous advantages, including enhanced speed, cost-efficiency, and quality control, all of which are driving its widespread adoption.

One of the primary benefits of modular and prefabricated construction is its remarkable speed. The controlled factory environment allows for simultaneous work on various building components, significantly reducing construction timelines. This expedited pace is particularly crucial in addressing the housing shortage and meeting tight project deadlines, such as those encountered during disaster relief efforts.

Cost-efficiency is another significant factor propelling the adoption of modular and prefabricated construction. The assembly-line production of building components can result in economies of scale, reducing material waste and labor costs. Additionally, the predictability and precision of factory-based production lead to fewer errors and rework, further contributing to substantial cost savings.

Quality control is a critical advantage inherent in modular construction. Components are manufactured under strict quality guidelines, substantially reducing the likelihood of structural issues or defects. Consequently, buildings constructed through this method consistently meet higher quality standards and exhibit reliable performance across multiple projects.

Moreover, modular and prefabricated construction aligns seamlessly with sustainability goals. The controlled factory environment allows for the efficient utilization of materials, while the reduction in on-site construction waste minimizes the overall environmental impact. Furthermore, these techniques enable the incorporation of energy-efficient technologies and materials into building components, further contributing to sustainable construction practices.

In summary, the increasing adoption of modular and prefabricated construction techniques is revolutionizing the global dry construction market by offering enhanced speed, cost-efficiency, quality control, and sustainability benefits.

Segmental Insights

Type Insights

The Supporting Framework segment holds a significant market share in the Global Dry Construction Market. The segment of supporting frameworks has witnessed integration

with technological advancements. Building Information Modeling (BIM) and Computer-Aided Design (CAD) are utilized to design and simulate structural elements with utmost accuracy. This integration enhances precision during the construction process and ensures seamless alignment of framework components with other dry construction systems.

The choice of supporting framework material is often influenced by local regulations, market preferences, and material availability. In regions where specific materials are abundant, they may present a more cost-effective and widely adopted solution.

Similarly, building codes and seismic considerations can dictate material selection. The supporting framework segment faces market competition and continuous innovation. Manufacturers persistently strive to improve material strength-to-weight ratios, develop fire-resistant solutions, and incorporate sustainable practices. The segment benefits from ongoing research and development efforts that aim to enhance material performance and construction efficiency.

In summary, the supporting framework segment within the global dry construction market is diverse and plays a critical role in ensuring the structural integrity of buildings. Its material diversity, load-bearing capabilities, integration with technology, and responsiveness to sustainability trends contribute significantly to its importance.

Material Insights

The Plasterboard segment holds a significant market share in the Global Dry Construction Market. The plasterboard segment plays a crucial role in the global dry construction market, serving diverse construction applications, particularly as interior wall and ceiling finishes. Also known as drywall or gypsum board, plasterboard is renowned for its easy installation, cost-effectiveness, and versatility. It represents a significant portion of the dry construction market, with its size and growth closely tied to the health of the construction industry. Demand is driven by various building projects, including residential, commercial, industrial, and institutional, influenced by factors such as population growth, urbanization, and renovation activities.

Comprising gypsum plaster sandwiched between layers of paper or fiberglass, plasterboard offers advantages in terms of fire resistance, acoustic insulation, and ease of installation. Manufacturers often produce specialized types to meet specific requirements, such as moisture-resistant or fire-rated boards. Widely used in both residential and commercial buildings, plasterboard serves as wall partitions, ceilings,

and surface finishes. Its smooth surface allows for various finishes, including paint, wallpaper, and textured coatings. The ease of finishing and painting makes plasterboard a preferred choice for interior spaces.

Regional Insights

The Asia Pacific region is expected to dominate the market during the forecast period. The Asia-Pacific region plays a pivotal role in the global dry construction market, driven by various factors that contribute to its growth and development in this region. Urbanization and population growth are significantly shaping the landscape of the Asia-Pacific region. As rural dwellers migrate to urban centers in search of better opportunities, the demand for housing and infrastructure has surged. Dry construction methods, renowned for their speed and efficiency in project execution, are gaining traction in the region as they effectively meet this demand. The reduced construction timelines associated with dry construction particularly benefit urban areas with limited space.

Many countries in the Asia-Pacific region are making substantial investments in infrastructure development and affordable housing initiatives. Governments are increasingly acknowledging the advantages of dry construction methods, including cost savings, reduced construction time, and minimized environmental impact. Consequently, they are actively promoting the adoption of these methods through incentives, policy support, and public-private partnerships. For instance, India's 'Housing for All' initiative has significantly boosted the demand for dry construction solutions.

Notably, the Asia-Pacific region has witnessed remarkable advancements in construction technology and digitalization. Building Information Modeling (BIM) and Computer-Aided Design (CAD) are extensively embraced to enhance the efficiency and precision of construction projects. These digital tools seamlessly integrate with dry construction methods, further bolstering their popularity. Moreover, automation and robotics are increasingly deployed to automate diverse construction tasks, thereby enhancing productivity.

Key Market Players

Fletcher Building Limited

CSR Limited

Knauf Gips KG

USG Boral Limited

Promax Group Inc.

Masterplast Plc.

Winstone Wallboards Limited

Georgia-Pacific LLC

Saint Gobain S.A.

Etex Group

Report Scope:

In this report, the Global Dry Construction Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Dry Construction Market, By Material:

Plasterboard

Metal

Plastic

Wood

Others

Global Dry Construction Market, By Type:

Supporting Framework

Boarding

Global Dry Construction Market, By System:

Ceiling System

Wall System

Flooring System

Others

Global Dry Construction Market, By Application:

Residential

Non-Residential

Global Hazard Control 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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Dry Construction Market.

Available Customizations:

Global Dry Construction Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following

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customization options are available for the report:

Company Information

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

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14. STRATEGIC RECOMMENDATIONS

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