

Europe Gypsum Board Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 100 pages | Mordor Intelligence

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Report description:

The Europe gypsum board market is anticipated to reach over 3,400 million sq m by the end of this year. It is expected to register a CAGR greater than 5% during the forecast period.

During the COVID-19 outbreak, there was a negative impact on the gypsum market in Europe. However, the market recovered significantly in 2021, owing to rising consumption from various end-use applications, including residential, commercial sectors, and others.

Key Highlights

Over the short term, key factors driving the market's growth include increasing product demand for residential construction and rising repair activities across Europe. They are projected to fuel the market growth throughout the forecast period.

However, gypsum boards are susceptible to water damage due to their hygroscopic qualities. Furthermore, depositing gypsum boards in landfills can cause environmental problems such as leaking harmful compounds into groundwater and releasing methane gas. Such issues are restricting the market growth expansion over the forecast period.

Nevertheless, future construction investments will likely create lucrative opportunities for the Europe gypsum board market over the forecast period.

Europe Gypsum Board Market Trends

Increasing Application in Residential Sector

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Gypsum board is a covering material used in residential structures for interior walls and ceilings. Furthermore, the product is employed to construct lightweight and long-lasting walls. The low cost and shorter building time required boost demand for these boards in the residential market. Apartments, bungalows, and villas are becoming increasingly popular in European countries, owing primarily to urbanization.

Gypsum goods such as gypsum boards, panels, finish compounds, and accessories are commonly used in residential structures. Two types of gypsum boards are used in residential construction - the standard and fire-resistance-rated boards. The second type is used where more excellent fire resistance is required. These include building fire-rated separations between garages and occupied spaces or between living areas and corridors.

The rising home construction trend, fast urban migration in significant economies, higher government expenditure in the real estate market for residential construction, and rising demand for high-class residential homes are the primary drivers of the gypsum market's expansion.

Furthermore, growing real estate values, particularly the building of single-family houses and multi-story apartments in emerging nations, propel the gypsum industry. The market is flourishing due to the rapidly expanding urban population and increased housing demand.

According to Banque de Paris et des Pays-Bas (BNP) Paribas Real Estate, around 48.8% of residential real estate investments in Germany exceeded EUR 100 million (~USD 106.19 million) in the second quarter of 2021. It significantly declined from the first quarter of 2021, which witnessed a little more than 57.5% of investment above EUR 1 million (~USD 1.05 million).

In the United Kingdom, the construction of a 40-story residential tower and a 14-story office building at Albion Street in Central Manchester, which cost USD 333 million, began in the third quarter of 2021 and is expected to be completed in 2024.

Additionally, the government intends to spend USD 122.9 billion in the United Kingdom on large-scale housing projects and critical social infrastructures like schools and hospitals. The government committed to building around 1,000,000 houses under this program.

According to the European Commission, the Italian government also launched many steps to stimulate the residential / housing sector. Italy extended the Super bonus 110% deduction deadline to June 30, 2022, under the 2021 Budget Law.

All the factors above are expected to drive the residential segment, enhancing the demand for gypsum boards in Europe during the forecast period.

France is Anticipated to Hold a Major Share of Europe

The growing construction industry fueled by rapid urbanization and growing household income is expected to generate strong demand for gypsum boards in France.

France's economy is the third biggest in Europe and the country. Because of its extensive and developing market and investment backing, France is also an appealing international investment market. Furthermore, following Brexit, Paris is projected to become the European Union's new headquarters.

Rising housing demand is expected to fuel residential buildings in the country, both in the public and private sectors. An increase in the development of tall buildings and hotels is driving the investigated market.

According to The French National Institute of Statistics and Economic Studies (INSEE), in the 1st quarter of 2021, the cost of construction index (CCI) of French residential buildings reached over 1,820.

The French government's plans to build the city for the 2024 Olympics are expected to propel the market. For example, the French government approved roughly USD 3.3 billion for constructing the Hermitage towers (two 320 m 1050 ft buildings) scheduled for completion in 2024. The infrastructure for the Olympic event demands the construction of 4,500 new homes for locals, 100,000 sq m for commercial activity, and 20,000 additional hotel rooms for guests.

According to the European Commission, the French government announced additional steps to enhance the residential building industry. It promotes housing accessibility through its Housing First Plan (Le Logement D'abord).

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The Grand Paris Express project is one of the country's most outstanding infrastructure projects, involving the construction of a new metro line network, with 85% of the network underground and around 68 new stations. The project was launched in 2007, and the entire project is expected to be finished by 2030.

Thus, all the factors mentioned above and some airport expansion projects will likely provide the increasing demand for the Europe Gypsum Board market during the forecast period.

Europe Gypsum Board Market Competitor Analysis

The Europe Gypsum Board market is consolidated in nature. Some major manufacturers in the market include Saint Gobain, Georgia-Pacific LLC, USGKnauf, Etex Group, and Fermacell, among others (in no particular order).

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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