

Wallpaper - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Wallpaper Market size is worth USD 2.34 Billion in 2025, growing at an 3.59% CAGR and is forecast to hit USD 2.79 Billion by 2030.

Wallpapers, crafted from non-woven paper or specialized fabrics, are adorned with stenciled, printed, or painted designs. They are the most convenient and cost-effective means to enhance any room.

Key Highlights

- Rising disposable incomes and urbanization are reshaping global lifestyles, fueling the demand for wallpapers in residential and commercial spaces. With many designs, colors, and patterns, wallpapers enhance aesthetics.
- Notably, a surge in home renovations, particularly in North America, Europe, and Asia, is evident. This trend is bolstered by the rise of remote work, prompting individuals to tailor their homes to accommodate dedicated workspaces. Home Improvement Research Institute data highlights a consistent uptick in home improvement spending over the past two years in the United States. In 2023, 35% of homeowners upped their expenditures, a trend anticipated to persist through 2024.
- Furthermore, the burgeoning real estate sector in Asian countries, notably India, is a pivotal driver of the wallpaper market. IBEF data underscores this, revealing that in FY23, India's residential property market witnessed a remarkable surge. Home sales values soared to a record INR 3.47 lakh crore (USD 42 billion), marking a 48% annual increase. Concurrently, sales volume rose by 36%, reaching 379,095 units.
- Additionally, the rising preference for eco-friendly options is propelling the demand for vinyl-based wallpapers. Notably, the energy consumption for manufacturing vinyl wallpapers is merely half that of paper variants. This eco-conscious shift is prompting manufacturers to expand their offerings, catering to a growing appetite for aesthetically pleasing and environmentally friendly wall coverings.

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- In the wallpaper market, a significant challenge for many customers is pricing. Wallpaper and paint are available at a spectrum of price points, from budget-friendly to premium. Typically, wallpaper, with its costs for rolls, supplies, and installation, tends to be pricier than paint, potentially impeding the market's expansion.

Wallpaper Market Trends

The Non-woven Segment is Expected to Hold a Significant Share in the Market

- Non-woven wallpapers are known for their durability and resistance to damage. Crafted from non-woven fabric, their foundation gives them flexibility and tear resistance, making them ideal for high-traffic areas like living rooms and hallways.
- These wallpapers come in different designs, patterns, and textures, catering to diverse interior design tastes. They can convincingly mimic fabrics, textured surfaces, and even murals, offering homeowners and designers a versatile and visually appealing choice.
- Leading non-woven wallpaper manufacturers emphasize innovative designs and often provide wallpapers with paper backing, ensuring easy installation and removal. These wallpapers are washable, abrasion-resistant, and sound-absorbing. Their 100% solution-dyed nature and flexibility further fuel their popularity, especially in high-traffic settings.
- The market receives a boost from the increasing export of wallpapers and wall coverings, particularly from European nations like Germany. According to the International Trade Centre (ITC), Germany's wallpaper exports increased from USD 178.99 million in 2022 to USD 183.47 million in 2023.

Europe is Expected to Hold a Significant Share in the Market

- The European wallpaper market is a pivotal player in the global wallpaper industry. It is buoyed by Europe's deep-rooted history, architectural splendor, and design ethos, which fuels the demand for wallpapers in the region. Furthermore, the market is witnessing a surge, propelled by innovative offerings and shifting consumer tastes.
- More companies are embracing digital printing for their wallpaper collections, drawn to its visual appeal and eco-friendly advantages. Digital printing slashes waste by eliminating the necessity for plates and consuming just a fraction of the ink traditional methods require. AS Creation Tapetan AG stands out, prioritizing sustainable raw materials and boasting a remarkable 60% recycling rate for wallpaper waste, bolstering the local circular economy.
- Europe's real estate sector, rebounding from recent interest rate fluctuations and geopolitical tensions, like the Russia-Ukraine conflict, is witnessing a gradual expansion. This growth is further fueled by a surge in construction projects, both for commercial and residential spaces, across various European countries, thereby boosting the demand for wallpapers.
- Industrie Emiliana Parati SpA, a European manufacturer, provides top-of-the-range products made with particular embossing techniques, such as pearlescent and metallic colors, gold, and silver. The company manufactures a wide range of innovative vinyl wallpapers on non-woven backing, which drives the market's growth in the region.
- Additionally, as per the European Commission, Europe's urbanization rate is forecasted to hit approximately 83.7% by 2050. This shift is accompanied by a steady rise in urban populations, while rural areas witness a relative decline. The functional urban areas (FUAs) in Europe are poised for an average population growth of 4% by 2050. This increasing urbanization trend is set to further bolster the region's wallpaper market.

Wallpaper Industry Overview

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The wallpaper market is highly fragmented, with major players such as York Wall Coverings Inc., Asian Paints, F. Schumacher & Co, AS Creation Tapeten AG, and Sangetsu Corporation. Players are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain a sustainable competitive advantage in the global market.

- July 2024: Asian Paints, an Indian paint company, inaugurated a physical studio in Guwahati, showcasing a diverse array of offerings. These include modular kitchens, decorative lighting, furniture, wallpapers, wall coverings, rugs, and an extensive selection. With this broad product portfolio, Asian Paints is positioning itself as India's premier luxury home decor hub.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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