

## Gypsum Call for Competitiveness

### How to maintain a successful and competitive European gypsum industry

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#### *A solution-oriented industry “made in Europe” by nature*

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The European gypsum industry is currently composed of **European companies**, strongly connected to the **EU**, but also in **leading positions** across the **world**. The industry provides **solutions** to Europe’s **climate** and **social** policy objectives.

Gypsum is a **mineral** supplied **domestically** and used primarily in construction. Besides traditional plaster products which were already applied in Spain’s Moresque architecture (spanning the 8th to 15th centuries) and widely used to protect wooden structures from fire, today’s main gypsum-based products are modern **plasterboard-based dry construction solutions**. Fit for a wide range of **applications** in walls, partitions, cavity systems and ceilings, these **industrialised** lightweight construction solutions combine outstanding **fire resistance** properties with **acoustic comfort**, **temperature** and **moisture** equilibration. They are therefore materials of choice for the **renovation**, the **repurposing** of existing buildings and in **new** constructions.

**Key features** of Europe’s gypsum sector are as follows:

- **209** gypsum quarries
- **146** factories manufacturing plasterboard and other plaster products
- **18,600** employees
- **23 million tonnes** of raw materials processed every year (mainly natural gypsum, but also recycled gypsum from construction, renovation and demolition waste, and synthetic gypsum as by-product of other manufacturing processes)
- **1.7 billion m<sup>2</sup>** plasterboard produced annually
- **8.4 million tonnes** of plaster and other gypsum-based products manufactured every year

With products made in Europe from Europe’s natural resources and supplying European markets to build new homes and renovate Europeans’ buildings, the gypsum sector is **still firmly anchored in Europe**.

Gypsum-based lightweight solutions for buildings have a lower **carbon footprint** than many traditional construction materials. Eurogypsum’s Roadmap Towards Climate Neutrality showed that the footprint of European made plaster is on average 0.1 kg CO<sub>2</sub>/kg, and 2 kg CO<sub>2</sub>/m<sup>2</sup> for plasterboard. The European gypsum industry has also embarked into further **decarbonisation** of production and plays



a major part in Europe's climate policy ambitions. Gypsum-based solutions are indispensable components to **retrofit buildings**; they limit temperature and moisture changes in the room, and help creating comfortable spaces with outstanding acoustic comfort.

## *An increasingly exposed sector investing in decarbonisation*

Due to our industry's relatively low carbon footprint and a traditionally strong domestic basis in Europe, the gypsum sector is not included among the most protected sectors in the EU **Emissions Trading System** (ETS). The largest market segment of the gypsum industry, plasterboard manufacturing, is indeed no longer considered at risk of carbon leakage, in spite of the already significant competition from imported goods from nearby non-EU countries in some markets. None of our segments are currently covered by the **Carbon Border Adjustment Mechanism** (CBAM) and our industries cannot claim eligibility under **industrial support** mechanisms such as the Clean Industrial Deal State Aid Framework (CISAF).

Recent **geopolitical** and **economic** developments are bringing along major challenges for our industry. **Energy costs** still represent around a quarter of our production costs, hence our industry's classification as **energy intensive**. In light of the current geopolitical context, with rising **energy** and **carbon** costs, our sector faces a negative impact on our overall production costs, especially given our very limited eligibility to public support for innovation and decarbonisation.

Another major part of the production costs is the sourcing of **raw materials**. While gypsum reserves are abundant in Europe, access to the resource has proven to be increasingly challenging, due to long and complex permitting procedures in the Member States and a competing use of land. The significance of gypsum is recognised in the latest European Strategy for Housing Construction. However, these essential raw materials are not considered as priorities in the allocation of extractive permits and do not benefit from streamlined measures, unlike critical or strategic raw materials. This is particularly regrettable, since gypsum extraction sites only cover a very small portion of Europe's territory, the use of land is temporary and subject to strict requirements regarding restoration or renaturation after and even during operations.

In parallel, **aggressive unfair competition** from non-EU players has been increasing in other industrial sectors. Recent signals are showing a growing interest from the side of non-EU companies to become active in our industrial segments (including e.g., in offsite construction where gypsum-based products are combined into systems). With ambitious goals for building renovations and housing supply becoming a major political priority for the EU and its Member States, the construction sector has increasingly been targeted by foreign economic operators. Other sectors' experience with such threats demonstrates the need for preparedness and quick action before the damage to the domestic industries becomes real.

In our industry's case, the **absence of protection mechanisms**, which may be justified in a situation with little unfair competition from outsiders, now represents



a serious threat for the future. This is all the more acute since European players are engaged in decarbonisation pathways, which require costly investments with a long return on investment.

### *The case for a genuine level-playing field*

In this context, the following policies are indispensable to allow the European gypsum sector to compete fairly and contribute fully to the EU's housing and decarbonisation agendas:

- **Secured long-term access to domestic primary and secondary raw materials:** The access to domestic construction raw materials (such as gypsum) must be secured in the long term and recognised as a fundamental condition for delivering Europe's housing objectives. Further, this access should be safeguarded through faster permitting. To boost the share of material coming from recycling, effective support measures are key - e.g. deterring the landfill of recyclable materials or setting up well-functioning sorting and recycling systems.
- **A clear framework to maintain production in Europe:** EU industries need a forward-looking system for the protection from unfair competition and foreign direct investment (FDI) practices. This could be achieved through an adjustment of carbon leakage rules or the introduction of CBAM as an automatic protection for sectors ineligible for carbon leakage. Moreover, an extension of the Industrial Accelerator Act's (IAA's) provisions on FDI to other sectors including the manufacturing of plaster products, as well as plaster products combined into systems, is essential. Pro-actively mapping of unfair competition in the building materials sector, monitoring direct and indirect measures which distort a fair level playing field, taking into consideration the local market characteristics of the construction industry, is key. Actively preparing measures to address unfair competition, with a catalogue of actions which can be implemented immediately depending on the scenario which would unfold, is a must. Such catalogue should include potential tariffs, the examination of direct investments and European content criteria.
- **An accelerator to decarbonise easier-to-abate sectors:** Besides the much-welcomed IAA provisions on facilitated permits for innovative and more sustainable facilities, a revised ETS should ensure better reallocation of the revenues to industries which require smaller-scale interventions and face barriers in accessing EU decarbonisation funding. Access to incentives for electrification (e.g. industrial electricity price), energy infrastructure, or the use of alternative energy sources should be accessible to a broader scope of industries, not only those already at a significant risk of carbon leakage.
- **Demand-driving measures:** Public procurement has a key role to play in boosting demand for construction products made in Europe and avoiding unfair competition from other countries. Standardisation efforts are an important enabler to support the uptake of modern methods of construction (e.g. offsite) produced in Europe, and should guarantee the safety and quality of construction.



The European gypsum sector is very much attached to EU's objectives such as the climate policy goals and an open trade environment. However, the right mechanisms need to be in place, in order to avoid that one policy agenda becomes a "Trojan horse" for the other. We believe that the competitiveness of Europe's domestic industries needs to be maintained against the risks of unfair competition.

Eurogypsum encourages European institutions to adopt an ambitious industrial policy which duly protects the competitiveness of Europe's industries while allowing them to carry out the necessary transition and contribute to policy and societal objectives.

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**Eurogypsum** is a European federation of national associations of producers of gypsum products (i.e. plaster and plasterboard). It is one of the few fully integrated industries (from cradle to cradle) within the construction products field. The companies which mine gypsum also process it and manufacture the value-added products and systems used extensively in construction and other industries.

With a turnover of EUR 7 billion, the European gypsum and anhydrite industry operates some 146 factories and 209 quarries and generates employment directly to 18,600 people and indirectly for 300,000 people. The gypsum industry provides jobs to 1,100,000 plasterers and plasterboard installers. It trains around 25,000 people per year across Europe.

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