

Mineral Industry Surveys

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GYPSUM IN THE FIRST QUARTER 2019

Producers mined 5.14 million metric tons (Mt) of gypsum during the first quarter of 2019 (table 1). That was slightly less than that of the fourth quarter of 2018 and 3% less than that of the first quarter of 2018. Synthetic gypsum used was estimated to be 5.0 Mt in the first quarter of 2019 (table 1), which was unchanged from that of the fourth quarter of 2018 and the first quarter of 2018. During the first quarter of 2019, synthetic gypsum accounted for approximately 44% of the 11.5-Mt total supply of gypsum in the United States. Both mined and synthetic gypsum are used as raw material for wallboard. The wallboard industry is the leading domestic consumer of gypsum.

The supply of calcined gypsum for the first quarter of 2019 (table 1) was 4.23 Mt, which was 7% less than that of the fourth quarter of 2018 and 11% more than that of the first quarter of 2018. Sales of board products (table 2) were 5.23 Mt, equivalent to approximately 583 million square meters (6.27 billion square feet), which were slightly more than those of the fourth quarter of 2018 and 10% more than the first quarter of 2018.

Sales of uncalcined gypsum in the first quarter of 2019, primarily for portland cement and agricultural uses, were 6.40 Mt (table 2), which were unchanged from those of the fourth quarter of 2018 and also unchanged from those of the first quarter of 2018.

The occurrence of quarterly fluctuations is not unusual in the production and consumption of gypsum, synthetic gypsum, and calcined gypsum. These variances are often the result of differences in weather conditions, which can impede or encourage construction activities, coupled with market demands that are usually driven by residential and commercial building activity.

According to the U.S. Census Bureau, imports of crude gypsum in the first quarter of 2019 were 1.35 Mt (table 3), 25%

more than those of the fourth quarter of 2018 and 24% more than those of the first quarter of 2018. Mexico was the leading source with 35% of crude imports, followed by Spain with 33% and Canada with 23%.

According to the U.S. Census Bureau, gypsum wallboard imports for the first quarter of 2019 were 116,000 t, equivalent to about 12.9 million square meters (139 million square feet). These imports were 11% more than those of the fourth quarter of 2018 and slightly less than those of the first quarter of 2018. Mexico was the source of 70% of wallboard imports, followed by Canada with 29%.

Wallboard exports to 32 countries and territories in the first quarter of 2019 were 120,000 t, equivalent to 13.3 million square meters (144 million square feet). These were unchanged from those of the fourth quarter of 2018 and 22% less than those of the first quarter of 2018. Most wallboard exports were shipped to Canada, which accounted for 93% of the total.

Changes in import and export wallboard data are frequently amplified as a result of relatively small quantities of traded material.

All percentages in this report were calculated based on unrounded data.

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TABLE 1
GYPSUM SUPPLY^{1,2}

(Metric tons)

| | 2018 | | | | 1st quarter– 4th quarter ³ | 2019 1st quarter |
|-------------------------------|-------------------------|-------------------------|-------------------------|-------------------------|--|---------------------|
| | 1st quarter | 2d quarter | 3d quarter | 4th quarter | | |
| Crude: | | | | | | |
| Mined ⁴ | 5,280,000 | 5,430,000 | 5,530,000 | 5,160,000 | 21,400,000 | 5,140,000 |
| Imported ⁵ | 1,090,000 | 1,500,000 | 1,510,000 | 1,080,000 | 5,190,000 | 1,350,000 |
| Synthetic gypsum ⁶ | 5,000,000 ^r | 5,000,000 ^r | 5,000,000 ^r | 5,000,000 ^r | 20,000,000 ^r | 5,000,000 |
| Total supply | 11,400,000 ^r | 11,900,000 ^r | 12,000,000 ^r | 11,200,000 ^r | 46,600,000 ^r | 11,500,000 |
| Crude, exported ⁵ | 7,300 | 10,200 | 8,070 | 10,300 | 35,900 | 8,330 |
| Consumption | 11,400,000 | 11,900,000 | 12,000,000 | 11,200,000 | 46,500,000 | 11,500,000 |
| Calcined: | | | | | | |
| Produced | 3,820,000 | 4,620,000 | 4,320,000 | 4,560,000 | 17,300,000 | 4,230,000 |
| Imported ⁷ | 4,040 | 5,550 | 5,380 | 6,610 | 21,600 | 6,160 |
| Total supply | 3,820,000 | 4,620,000 | 4,320,000 | 4,570,000 | 17,300,000 | 4,230,000 |
| Exported ⁷ | 27,400 | 35,500 | 28,900 | 26,300 | 118,000 | 25,400 |
| Consumption | 3,800,000 | 4,590,000 | 4,300,000 | 4,540,000 | 17,200,000 | 4,210,000 |

^rRevised.

¹Includes data from the Gypsum Association.

²Data are rounded to no more than three significant digits; may not add to totals shown.

³May include revisions to previously published data.

⁴Includes estimated data.

⁵Import and export data are for "Gypsum; anhydrite," Harmonized Tariff Schedule 2520.10.0000.

⁶Estimated, based on American Coal Ash Association data for utilized FGD gypsum.

⁷Import and export data are for "Plaster," Harmonized Tariff Schedule 2520.20.0000.

TABLE 2
GYPSUM SOLD OR USED BY PRODUCERS, BY USE^{1,2}

(Metric tons, unless otherwise specified)

| | 2018 | | | | 1st quarter– 4th quarter ³ | 2019 1st quarter |
|---|-------------|------------|------------|-------------|--|---------------------|
| | 1st quarter | 2d quarter | 3d quarter | 4th quarter | | |
| Uncalcined: ⁴ | | | | | | |
| Portland and masonry cement ^e | 1,200,000 | 1,200,000 | 1,200,000 | 1,200,000 | 4,800,000 | 1,200,000 |
| Agriculture and other ^{e,5} | 5,200,000 | 5,200,000 | 5,200,000 | 5,200,000 | 20,800,000 | 5,200,000 |
| Total | 6,400,000 | 6,400,000 | 6,400,000 | 6,400,000 | 25,600,000 | 6,400,000 |
| Calcined: | | | | | | |
| Board products ⁶ | 4,740,000 | 5,750,000 | 5,140,000 | 5,100,000 | 20,700,000 | 5,230,000 |
| Plaster | 19,000 | 21,600 | 20,400 | 18,700 | 79,600 | 20,100 |
| Total | 4,760,000 | 5,770,000 | 5,160,000 | 5,120,000 | 20,800,000 | 5,250,000 |
| Board products: (thousand square feet) ⁷ | | | | | | |
| Regular board | 2,970,000 | 3,570,000 | 3,240,000 | 3,230,000 | 13,000,000 | 3,240,000 |
| Type X board | 1,970,000 | 2,430,000 | 2,110,000 | 2,080,000 | 8,580,000 | 2,190,000 |
| Other | 759,000 | 893,000 | 819,000 | 817,000 | 3,290,000 | 845,000 |
| Total supply | 5,690,000 | 6,900,000 | 6,170,000 | 6,130,000 | 24,900,000 | 6,270,000 |

^eEstimated.

¹Includes data from the Gypsum Association.

²Data are rounded to no more than three significant digits; may not add to totals shown.

³May include revisions to previously published data.

⁴Does not include synthetic gypsum from electric powerplants.

⁵Includes gypsum used for infrastructure purposes, unspecified uses, and estimated under-reported amount.

⁶Includes weight of paper and other materials.

⁷One square meter equals 10.78 square feet.

TABLE 3
CRUDE GYPSUM IMPORTED FOR CONSUMPTION^{1,2}

(Metric tons)

| Country or locality | 2018 | | | | 1st quarter– | 2019 |
|---------------------|-------------|------------|------------|-------------|--------------|-------------|
| | 1st quarter | 2d quarter | 3d quarter | 4th quarter | 4th quarter | 1st quarter |
| Australia | -- | 1 | -- | -- | 1 | -- |
| Belgium | -- | 2 | -- | -- | 2 | -- |
| Brazil | -- | 4 | -- | -- | 4 | 1 |
| Canada | 200,000 | 518,000 | 300,000 | 351,000 | 1,370,000 | 312,000 |
| China | 2 | 2 | 1 | 3 | 8 | -- |
| Dominican Republic | 7,510 | -- | -- | -- | 7,510 | -- |
| Germany | 15 | 40 | 380 | -- | 435 | 4 |
| Guatemala | 41 | 24 | 40 | -- | 105 | 40 |
| Japan | 1 | -- | -- | -- | 1 | -- |
| Malaysia | 8 | -- | -- | -- | 8 | -- |
| Mexico | 471,000 | 557,000 | 605,000 | 468,000 | 2,100,000 | 476,000 |
| Morocco | 57 | 1 | 71 | 57 | 186 | 27,400 |
| Spain | 367,000 | 419,000 | 572,000 | 262,000 | 1,620,000 | 448,000 |
| Taiwan | -- | -- | -- | -- | -- | 457 |
| Thailand | 30 | 80 | 49 | 44 | 203 | 40 |
| Turkey | 44,800 | 8,800 | 34,000 | -- | 87,600 | 90,100 |
| United Kingdom | -- | 95 | 57 | 76 | 228 | 1 |
| Venezuela | -- | 160 | -- | -- | 160 | -- |
| Total | 1,090,000 | 1,500,000 | 1,510,000 | 1,080,000 | 5,190,000 | 1,350,000 |

-- Zero.

¹Data are rounded to no more than three significant digits; may not add to totals shown.

²May include revisions to previously published data.

Source: U.S. Census Bureau.

TABLE 4
CRUDE GYPSUM IN THE UNITED STATES^{1,2}

(Thousand metric tons)

| Period | Consumption ³ | Production ⁴ | Imports ⁵ | Exports ⁵ |
|-------------------------|--------------------------|-------------------------|----------------------|----------------------|
| 2018: | | | | |
| 1st quarter | 6,360 | 5,280 | 1,090 | 7 |
| 2d quarter | 6,920 | 5,430 | 1,500 | 10 |
| 3d quarter | 7,040 | 5,530 | 1,510 | 8 |
| 4th quarter | 6,230 | 5,160 | 1,080 | 10 |
| 1st quarter–4th quarter | 18,500 | 21,400 | 5,190 | 35 |
| 2019, 1st quarter | 6,480 | 5,140 | 1,350 | 8 |

¹Excludes synthetic gypsum.

²Data are rounded to no more than three significant digits; may not add to totals shown.

³Consumption calculated by adding production and imports and subtracting exports. Quarterly inventory changes are not included.

⁴Production data derived from semiannual gypsum canvasses of non-wallboard producers, annual canvass of all producers, and quarterly data provided by the Gypsum Association.

⁵Data from U.S. Census Bureau.

TABLE 5
SALES OF GYPSUM BOARD PRODUCTS, BY SALES REGIONS IN 2019^{1,2}

(Thousand square feet)³

| | New England | Middle Atlantic | E. North Central | W. North Central | South Atlantic | E. South Central | W. South Central | Mountain | Pacific | Exports | Total |
|--------------------------------|----------------|--------------------|---------------------|---------------------|-------------------|---------------------|---------------------|----------|---------|---------|-----------|
| 1st quarter: | | | | | | | | | | | |
| Veneer base | 49,300 | 2,860 | 10,600 | 348 | 6,450 | 47 | 10 | 94 | 1,550 | -- | 71,200 |
| Sheathing | 3,600 | 10,700 | 8,530 | 6,790 | 20,200 | 5,650 | 19,300 | 8,550 | 21,300 | 16,000 | 120,000 |
| Regular gypsum board | 59,600 | 270,000 | 346,000 | 197,000 | 925,000 | 248,000 | 534,000 | 328,000 | 275,000 | 59,100 | 3,240,000 |
| Type X gypsum board | 69,900 | 222,000 | 249,000 | 142,000 | 419,000 | 83,000 | 309,000 | 243,000 | 404,000 | 46,700 | 2,190,000 |
| Liner panel | 2,360 | 9,090 | 4,020 | 1,330 | 24,400 | 1,710 | 5,540 | 5,780 | 4,310 | 1,070 | 59,600 |
| Predecorated board | 507 | 1,530 | 1,890 | 852 | 3,120 | 857 | 2,180 | 810 | 1,580 | 570 | 13,900 |
| 5/16 Mobile home board | -- | 1,620 | 3,860 | -- | 594 | 3,900 | 1,180 | -- | 27 | 69 | 11,200 |
| Water/moisture resistant board | 27,700 | 129,000 | 58,300 | 27,300 | 124,000 | 24,800 | 63,500 | 29,200 | 63,200 | 20,900 | 568,000 |
| Total | 213,000 | 647,000 | 682,000 | 375,000 | 1,520,000 | 367,000 | 935,000 | 616,000 | 771,000 | 144,000 | 6,270,000 |

-- Zero.

¹Data are rounded to no more than three significant digits; may not add to totals shown.

²Sales region equivalent to U.S. Census Bureau Geographic Division as follows: New England (CT, MA, ME, NH, RI, VT); Middle Atlantic (NJ, NY, PA); East North Central (IL, IN, MI, OH, WI); West North Central (IA, KS, MN, MO, NE, ND, SD); South Atlantic (DC, DE, FL, GA, MD, NC, SC, VA, WV); East South Central (AL, KY, MS, TN); West South Central (AR, LA, OK, TX); Mountain (AZ, CO, ID, MT, NM, NV, UT, WY); Pacific (AK, CA, HI, OR, WA).

³One square meter equals 10.78 square feet.

Source: Gypsum Association.