

# **Germany Protective Films Market Assessment, By Type [Low-density Polyethylene, Polyvinyl Chloride, Polypropylene, Polyolefin, Polyethylene, Polyethylene Terephthalate, Paper, Others], By Product Type [Surface Protection Film, Self-adhesive Protection Film], By End-use Industry [Building & Construction, Transport, Electrical & Electronics, Healthcare, Furniture, Others], By Region, Opportunities and Forecast, 2016-2030F**

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## **Abstracts**

Germany protective films market size was valued at USD 505.96 million in 2022, which is expected to grow to USD 730.6 million in 2030, with a CAGR of 4.7% during the forecast period between 2023 and 2030. The rising construction activities associated with the new commercial projects in Germany and the increasing demand for protective films to maintain robust protection against road rash debris, chemical resistance, and bugs are key trends accelerating the market growth for protective films in Germany.

The growth of commercial construction projects in Germany is attributed to increasing demand for larger floor areas for new offices, new commercial green buildings, and others. Moreover, the rising innovations in automation technology to ensure superior efficiency in automotive production, recent ventures to develop new electric vehicle manufacturing facilities, and others are prominent aspects bolstering the automotive industry growth in Germany. Thus, the booming industries such as building & construction and automotive are accelerating the demand for protective films in Germany to ensure shielding against humidity and dirt. It, in turn, is boosting the Germany protective films market growth.

## Increasing Commercial Construction Projects are Supplementing the Market Growth

Protective films, including surface protection film and self-adhesive protection film, have various beneficial properties such as UV Resistance, protection against hot or cold temperatures, shielding against scratches & abrasions, and others. Thus, due to the properties mentioned above, the adoption of protective films is increasing in commercial construction projects to ensure efficient chemical resistance. The rising government investments in institutional development projects and increasing demand for larger commercial space are some of the prominent aspects increasing the growth of the commercial construction activities in Germany.

For instance, in Q2 of 2023, various office construction projects commenced in Germany, including Sch?neberger Eck High-Rise Building Development (project completion year Q1 of 2025), Augsburg Offices – The Lofts (project completion year Q4 of 2024), and others. Hence, the increasing commercial construction activities in Germany are spurring the demand for protective films to ensure superior resistance against moisture and UV resistance, accelerating the country's market growth.

## Rising Adoption of Surface Protection Film in the Automotive Industry

Automotive vehicles are highly prone to environmental conditions, which frequently result in abrasion. As a result, the deployment of surface protection film is increasing in the automotive sector to maintain superior resistance against wear & tear. The increasing technological innovations in the upgraded automobile models and the development of new automotive manufacturing plants are several major determinants fostering the automotive industry growth in Germany.

For instance, according to the recent data published by the Organisation Internationale des Constructeurs d'Automobiles (OICA), in 2021, the production of German automotive was 3,308,692 units. In 2022, it was 3,677,820, an increase of 11%. Therefore, the bolstering of automotive production in Germany is fueling the adoption of surface protection film to protect vehicles from various environmental elements, which, in turn, is propelling the market growth.

## Innovations in Protective Films Range to Augment Market Growth

The leading market players in the manufacturing of protective film products in Germany are investing in developing a new range of protective films to maintain superior UV

resistance. Henceforth, the recent innovations are fostering the launch of a new range of protective films with advanced features in Germany, which will create a prominent growth opportunity for the market in the coming years.

For instance, in August 2023, ORAFOL Europe GmbH introduced ORACAL Safety Window Films, a new range of protective film for glass. As a result, the increasing advancements in the product innovations of protective films in Germany are expected to ensure superior chemical resistance, creating a lucrative opportunity for market growth.

### Impact of COVID-19

The COVID-19 pandemic in 2020-2021 significantly boosted the demand for personal protective equipment and plastic face shields. Adopting protective films increased due to using polyvinyl chloride and polypropylene protective films to protect sensitive plastic surfaces. For instance, in March 2021, Mondi Gronau, a leading packaging manufacturer in Germany, launched a new line of medical-grade face masks. The medical-grade face mask manufacturing facility had a production capacity of 1 million face masks per day. Henceforth, the increase in the demand for personal protective equipment and plastic face shields during the COVID-19 outbreak accelerated the revenue expansion of the protective films market in 2020-2021.

### Impact of Russia-Ukraine War

Russia is among the leading exporters of crude oil to Germany, a vital material employed in producing protective film materials such as polyvinyl chloride, polypropylene, and others. Also, the Russia-Ukraine war has impacted the supply of essential materials and boosted the prices of construction materials, including protective films in Germany.

For instance, according to the recent construction report published by the European Construction Industry Federation (FIEC), the Russia-Ukraine war resulted in a steep increase in construction materials prices in Germany, which impacted construction services. Construction services registered an increase of 15.9%, the highest in the decade in 2022. Thus, the increase in the construction material prices and construction services in Germany due to Russia's invasion of Ukraine posed a bottleneck for the protective films market growth in the country during the first half of 2022.

### Key Players Landscape and Outlook

The leading market players in the Germany protective films industry include BASF SE, Covestro AG, RENOLIT SE, ORAFOL Europe GmbH, and others. The above-listed prominent players involved in the manufacturing of protective films in Germany are investing in strategies such as new product innovation, acquisitions, and expansion to increase their market share in the Germany protective films market.

For instance, in June 2023, POLIFILM GROUP, a Germany-based manufacturer of protective films, launched PF582CS, a laser protection film. The prime focus of the product launch was to ensure an increase in the product offering of cost-effective protective films in the Germany market.

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\*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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