

Fire-resistant Coatings Market by Type (Intumescent Coatings, Cementitious Coatings), Technology (Solvent-borne, Water-borne), Substrates (Metal, Wood), Application Technique (Spray, Brush & Roller), Application and Region - Global Forecast to 2026

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Abstracts

The global fire-resistant coatings market size is projected to grow from USD 975 million in 2020 and is projected to reach USD 1,125 million by 2026, at a CAGR of 3.5%. Europe accounted for the largest share of the market. It is projected to reach USD 490 million by 2026, at a CAGR of 3.0%, between 2021 and 2026. The growing building & construction sector in the region is projected to drive the market.

“Increasing awareness, changing regulations, and rising emphasis on safety measures across the globe drives the fire-resistant coating market.”

The increasing number of fire accidents, which result in injuries, loss of life, and damage to property, has led to the implementation of various codes, regulations, and standards for fire safety and fire protection. In this regard, Europe and North America have the highest number of safety codes and regulations as compared to other regions. Governments, builders, and construction industries are using fire-resistant coatings as a preventive measure to ensure the utmost safety at housing, commercial, institutional, and industrial places. These factors are thereby supporting market growth.

“New rules for green and smart buildings and growing focus on obtaining green certification”

In July 2018, new rules for energy performance in buildings came into effect as a part of the Clean Energy for all European package, also called as Clean Energy Package

(CEP). Buildings are responsible for approximately 40% of the energy consumption and 36% of CO₂ emissions in the EU. These new provisions will make buildings greener and more energy efficient. To comply with pro-environment criteria and ensure the utmost safety from fires, a thin layer of intumescent coating has emerged as a better alternative to traditional fire protection systems. Also, as these coatings offer fire protection to the lightweight components of buildings, they are gaining traction in the green building sector.

“COVID-19 impact on fire-resistant coating market”

Most of the North American and European countries, especially the US, Italy, Spain, the UK, France, and Germany, are severely impacted by the COVID-19 pandemic. The suspension of operations in several manufacturing sectors has resulted in a decline in the GDP of these countries. According to the OECD, the GDP of the European Union (EU) reduced by 3.3% in the first quarter of 2020.

Due to the COVID-19 pandemic, the demand from the industrial sector had declined sharply in Q-1 and Q-2 2020. This impact was further intensified with the declining oil & gas prices and the massive gap between supply and demand. Due to economic losses, several large construction projects were halted and suspended until the recovery of the economy. This decline in construction spending in Europe will, in turn, result in a decline in the demand for fire-resistant coatings.

“Intumescent coatings segment is estimated for larger market share in 2020.”

Intumescent coatings are either solvent-borne or waterborne and are mainly used in buildings and construction. The use of cementitious coatings increases the overall weight of the structures. Intumescent coatings are advantageous over their substitutes, as they are thinner, exhibit better fire protection properties, and significantly reduce the overall weight of the structures and substrates.

“The building & construction industry is estimated to have the largest share in fire-resistant coatings market”

The building & construction industry is estimated to account for the largest share of the fire-resistant coatings market in 2020, closely followed by the industrial segment in terms of value. Increasing construction activities, along with a rise in the number of manufacturing facilities in the emerging economies in APAC and MEA, are expected to drive the market demand during the forecast period.

“Water-borne coatings technology segment is estimated to have majority share in fire-resistant coatings market.”

Based on technology, the water-borne coatings technology segment is estimated to hold the majority share of the overall fire-resistant coatings market. The major factor driving this segment is the increasing demand for green products. Water-borne coatings are easier to clean up, reduce the risk of fire, and result in less exposure to VOCs.

“By application techniques, the spray segment is estimated to have majority share in fire-resistant coatings market.”

Based on application techniques, the spray segment dominated the fire-resistant coatings market. This technique is faster, has better efficiency, requires fewer coats, provides a smoother finish, and can be used to coat complex geometries. These factors make it the preferred application technique for fire-resistant coatings.

“Europe projected to account for the largest share of the fire-resistant coatings market during the forecast period.”

Europe accounted for the largest share of the global fire-resistant coatings market in 2019. The growth of the fire-resistant coatings market in this region is mainly attributed to stringent government regulations, an industrial initiative for sustainable development, and a strong emphasis on protection against fire. Moreover, the practice of constructing green buildings and adopting green coatings offers many opportunities for the growth of the market in the region. The European market is mainly dominated by the EU-5 countries, especially Germany and the UK.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, innovation and technology directors, and other executives from various key organizations operating in the mist eliminators market.

By Company Type: Tier 1: 40%, Tier 2: 20%, and Tier 3: 40%

By Designation: C-level Executives: 20%, Directors: 20%, and Others: 60%

By Region: North America: 40%, Europe: 15%, Asia Pacific: 40%, and Rest of World: 5%

The fire-resistant coatings market comprises major manufacturers such as AkzoNobel (Netherlands), PPG (US), Jotun (Norway), Sherwin-Williams (US), Hempel (Denmark), RPM International (US), Sika (Switzerland), ETEX group (Belgium), Kansai Paints (Japan) and Teknos (Finland).

Research Coverage

The market study covers the fire-resistant coatings market across various segments. It aims at estimating the market size and the growth potential of this market across different segments based on type, application, technology, application technique, substrate and region. The study also includes an in-depth competitive analysis of key players in the market, along with their company profiles, key observations related to their products and business offerings, recent developments undertaken by them, and key growth strategies adopted by them to enhance their position in the fire-resistant coatings market.

Reasons to Buy the Report

The report is expected to help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers of the overall fire-resistant coatings market and its segments and sub-segments. This report is projected to help stakeholders understand the competitive landscape of the market and gain insights to improve the position of their businesses and plan suitable go-to-market strategies. The report also aims at helping stakeholders understand the pulse of the market and provides them with information on the key market drivers, challenges, and opportunities.

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11.3.2.1 Strong economic recovery post COVID-19 pandemic to support market growth

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*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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