

Europe Construction Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The Europe Construction Chemicals Market size is estimated at 22.40 billion USD in 2024, and is expected to reach 31.07 billion USD by 2030, growing at a CAGR of 5.60% during the forecast period (2024-2030).

Increase in investments for constructions in the industrial and commercial sectors to drive the demand for construction chemicals

By 2023, Europe was expected to hold a significant share, amounting to approximately 24.99% of the global construction chemicals market. In 2022, the construction chemicals market in Europe saw a 6.15% growth in value, driven primarily by rising demand from the commercial and industrial & institutional construction sectors.

Accounting for a share of about 35.55% in 2022, the industrial and institutional construction sector emerged as the largest consumer of construction chemicals in the regional market. The sector's projected new floor area is set to rise and reach 245 million sq. ft by 2030 compared to 2023. This surge is attributed to increased investments in industrial, education, and healthcare construction across European countries. The region's construction chemicals market for the industrial and institutional sector is forecast to grow from USD 7.48 billion in 2023 to USD 10.44 billion in 2030, driven by factors like urbanization and industrialization.

The commercial construction sector in the region is poised to be the fastest-growing consumer of construction chemicals, with a projected CAGR of 6.10% during the

forecast period. The region's expanding economy is fueling demand for commercial properties, including offices, hotels, and retail malls. The sector's new floor area is anticipated to rise by 394 million sq. ft by 2030 compared to 2023. Driven by such developments, the European construction chemicals market for this sector is expected to witness a USD 2.36 billion increase from 2023 to 2030.

Construction chemicals are expected to witness high demand in Italy due to rising investments in industrial construction

Construction Chemicals, including concrete admixtures, waterproofing solutions, adhesives & sealants, anchors & grouts, and flooring resins, enhance the functionality of buildings and structures. In 2022, the value of Europe's construction chemicals market grew by 6.15% from the previous year. The European Union (EU) allocated USD 1555 billion to construction projects in 2022, contributing to the EU's construction-driven GDP of USD 15375 billion, a 3.5% increase from 2021. These investments bolstered the construction sector and fueled the demand for construction chemicals. The construction chemicals market was projected to grow by 4.44% in value in 2023, building on the momentum of the previous year.

Germany dominated the construction chemicals market in 2022, capturing a 17% market share by value. The country's construction sector attracted investments of USD 520 billion, primarily directed toward residential, civil engineering, and non-residential projects. As construction activities surged, the demand for construction chemicals followed suit, resulting in a market worth USD 3.5 billion in 2022. This market was anticipated to grow by 3.65% in value in 2023.

Italy is poised to witness the highest compound annual growth rate (CAGR) of 6.21% in the construction chemicals market. This growth is largely driven by the industrial construction segment. In line with Europe's climate goals of achieving zero emissions by 2050, companies like Repsol have committed to investing USD 550 million in renewable energy projects in Italy. Consequently, the projected new floor area for industrial construction in Italy is set to increase by 15.9 million square feet by 2030 compared to 2022, signaling a rising demand for construction chemicals.

Europe Construction Chemicals Market Trends

Office building expansion projects in countries such as Spain and Italy are boosting the

commercial construction market in Europe

Europe witnessed a 12.70% surge in the new floor area for commercial construction in 2022, driven by an increased focus on constructing energy-efficient office buildings, which aligns with the region's 2030 carbon emission targets. As employees returned to office spaces, European companies, in turn, ramped up their leasing decisions, resulting in the addition of 5.7 million square feet of new office space in 2022. This growth was expected to persist in 2023, with a projected growth rate of 2.68% over 2022.

The COVID-19 pandemic caused a significant labor and material shortage, leading to the cancellation or postponement of several commercial construction projects. However, as lockdowns eased and construction activities resumed, Europe witnessed a robust 16.60% growth in new floor area for commercial construction in 2021, with Spain being the leader with a 105.05% growth rate.

The commercial construction sector in Europe is poised for substantial growth, with the new floor area anticipated to register a CAGR of 3.88% during the forecast period. Noteworthy projects, such as the USD 65 million Milan US Consulate General Complex in Italy, slated for completion by 2025, and the USD 260 million Arteixo Office Building Expansion in Spain, spanning 1.8 million square feet and set to be operational in 2024, are expected to bolster the region's commercial construction landscape. As consumer preferences shift from online to in-person retail experiences, the new floor area is expected to increase by 428.3 million square feet for retail shopping malls in Europe by 2030 compared to 2022.

Affordable housing schemes in the UK and Europe and growth in housing project completions are expected to increase the new floor area for residential construction

Europe's residential construction sector witnessed a 2.71% growth in new floor area in 2022 compared to the previous year. This can be attributed to the escalating urbanization rate, with the urban population accounting for 75% of the total in 2022, up from 73.5% in 2020. This trend was expected to persist in 2023, with a projected growth rate of 3.21% over 2022. According to the EURO CONSTRUCT network, Europe witnessed a 2.7% rise in housing project completions in 2023, with notable increases in Hungary, Ireland, Norway, and Poland.

The COVID-19 pandemic led to an economic downturn, resulting in the cancellation or

postponement of numerous residential construction projects. Consequently, the new floor area for residential construction in Europe plummeted by 9.40% in 2020 compared to the preceding year. However, as lockdown restrictions eased and construction activities resumed, the sector rebounded strongly, with an 18.28% surge in new floor area in 2021 compared to 2020. Spain led the growth with a remarkable 40.23% increase, followed by Italy at 25.07%.

The new floor area for residential construction in Europe is projected to witness a CAGR of 3.89% during the forecast period. The United Kingdom is poised to lead this growth, recording a CAGR of 5.94%. This growth can be attributed to factors such as a mounting demand for affordable housing, particularly in urban centers grappling with population growth and limited housing supply. The UK government's Affordable Homes Programme, backed by an investment of USD 8 billion, aims to deliver 130,000 housing units by 2026, bolstering the nation's residential construction floor area.

Europe Construction Chemicals Industry Overview

The Europe Construction Chemicals Market is moderately consolidated, with the top five companies occupying 49.49%. The major players in this market are MAPEI S.p.A., MBCC Group, RPM International Inc., Saint-Gobain and Sika AG (sorted alphabetically).

Additional Benefits:

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