

Europe Fire-Resistant Glass Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 100 pages | Mordor Intelligence

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Report description:

The fire-resistant glass market in Europe is expected to register a CAGR of over 8% during the forecast period.

The outbreak of the COVID-19 pandemic witnessed economic activities being brought to a standstill with the prevalence of strict social-distancing norms, prolonged lockdowns, and the uncertainties associated with the future. The building and construction industry was particularly impacted heavily by the lack of labor and supply chain disruptions, diminishing demand for fire-resistant glass. However, with the lifting of social-distancing curbs and other restrictions, the building and construction industry is expected to register a steady recovery, driving demand for fire-resistant glass during the forecast period.

Key Highlights

With growing construction activities across the European region and the rise in stringent fire safety norms, demand for fire-resistant glass is expected to rise substantially across the region.

On the flip side, high prices of fire-resistant glasses and the prevalence of quality control issues could potentially hinder market growth.

However, rising investments in the marine industry, and the growing demand for fireproof cabins on ships used in naval and commercial applications, are anticipated to further strengthen this demand.

Germany with its growing marine industry and the rising construction sector is expected to lead the fire-resistant glass market across the European region.

Europe Fire-Resistant Glass Market Trends

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Fire-resistant glass has been widely used in several applications, such as glazing, windows, and doors, to help resist the spread of fire, smoke, and heat in case of a fire. Construction of new buildings or expansion of existing buildings has to adhere to regulations imposed by the governing authorities, with a rise in regulations concerning safety and protection from fire hazards observed during the study period.

Different countries across the European region adopt different approaches to fire safety regulations. For instance, fire regulations are categorized as 'performance-based' with the specific characteristics of the construction being assessed according to the engineering principles and mathematical models associated with the building under 'the Fire Safety Order.'

According to the Modern Building Alliance report published in 2021, fatalities from fire outbreaks have decreased by 65% across the European region in the last three decades. This could be seen as a result of the comprehensive approaches undertaken in the construction and fire-proofing of buildings. However, recent statistics indicate that every year around 5000 people are killed in building fires, indicating the need for further efforts to fire-proof residential and commercial buildings.

The construction sector across Europe is witnessing steady recovery from the aftermath of the COVID-19 outbreak. According to Eurostat, building construction saw a year-on-year increase of 3.9% between May 2021-2022, across the EU.

The demand for residential construction is expected to rise with the National Housing Federation (NHF) and Crisis from Heriot-Watt University estimating that until 2031, 340,000 new homes are required to be built every year in England to support rising demand.

Commercial construction is also witnessing strong recovery, with the commencement of many office building construction in 2022. For instance, the Milan US Consulate General Complex in Italy is one of the major projects initiated across Europe. With an investment of approximately USD 351 million, the project is expected to be completed by the end of 2025.

The growth of the construction sector across Europe, and the regulations concerning strict adherence to fire safety norms are expected to drive demand for fire-resistant glass market during the forecast period.

Germany Set to Lead the European Market

Concerning the fire safety norms associated with building construction, Germany operates under the National Model Building Code. These norms rely on prescriptive rules with the possibility of additional regulations being applied depending on the specific type or purpose of the building being constructed. Depending on the Federal State, the country also applies different rules on fire safety.

Germany is the leading construction market in all of Europe while being home to the largest building stock across the continent. According to a statistical report by FIEC, in 2021, the total value of orders for the construction industry reached EUR 94.6 billion (USD 112 billion), registering a year-on-year growth of 9.4%.

Similarly, in 2021, the volume of permits for new buildings (excluding civil construction) reached EUR 110 billion (USD 130 billion), registering a year-on-year growth of 8.0%. The new federal government also intends to increase the number of new flats and houses built across the region to 400,000 units per year, indicating great promise for residential construction.

Various commercial projects are also being initiated across the country, indicating strong growth potential for commercial construction. For instance, the Frechen NEOBEL Mixed-Use Development project is being undertaken at an investment of approximately USD 163 million, with the project commencing in Q2 of 2022. A total of 25,000 sq. mt. of the area is being allocated for the development of residential quarters, while commercial facilities have been allocated an area of 16,400 sq. mt. of area.

Widening usage of fire-resistant glass in the construction of cabins on ships used in both naval and commercial activities is also expected to drive demand, during the forecast period. According to Eurostat, Germany handled over 3.5 tonnes per capita gross weight of all seaborne freights during FY2021. The future outlook for the German maritime industry looks promising, with the 'Maritime Agenda 2025' aimed at deciding the course of action across nine different fields.

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Europe Fire-Resistant Glass Market Competitor Analysis

The fire-resistant glass market in Europe is partially consolidated. A few key players in the market include AGC Glass Europe, Schott, Nippon Sheet Glass Co., Ltd., POLFLAM Sp.z o. o., Saint Gobain S.A, and others.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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