

Europe Single-Ply Membrane Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Europe Single-ply Membrane Market was estimated to be USD 355.77 million in the current year. It is forecasted to register a CAGR of 5.84% during the forecasted period. The demand for single-ply membranes has been negatively impacted by Covid-19. The need for construction products has decreased as COVID-19 instances have risen. Many businesses involved in the production of single-ply membranes have encountered difficulties in marketing their product.

Moreover, the shortage of skilled personnel has impacted the single-ply membrane industry because of COVID-19's growing effects. Single-ply membranes have been used on a wide scale in the construction industry, especially in residential and commercial construction, owing to their flexibility, ease of installation, and ability to improve the energy efficiency of the structure. The single-ply membranes market is anticipated to expand in lockstep with the building sector.

Key Highlights

The superior properties of single-ply membranes, including ease of installation, improving the structure's energy efficiency, and flexibility, promote its demand in the construction industry, thereby propelling the market growth.

The construction industries have been increasingly concerned about the skills shortage, which is getting worse with time. Hence, the lack of awareness about how to use the product and unskilled labor will negatively affect the growth of the single-ply membranes market during the forecast period.

Nevertheless, the increasing focus of various economies on achieving carbon neutrality commitments and increasing trends for sustainable building materials will likely create lucrative growth opportunities for the global market soon.

The United Kingdom is expected to dominate the market during the forecast period. This growth is attributed to the bullish demand for construction in the residential, commercial, industrial, and infrastructure sectors.

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Europe Single-ply Membrane Market Trends

Increasing Consumption of Single-ply Membrane Materials in the Infrastructural End-use Industry

Single-ply membranes are used in infrastructural construction projects such as airports, subway stations, etc. They serve the purposes of weatherproofing, waterproofing, and UV exposure protection, among others.

Single-ply membranes are preferred over bituminous membranes because of their ease of installation, safety, functional properties, durability, and affordability.

Single-ply membranes are used in infrastructural structures like airports with large coverage areas. Reflective single-ply membranes are installed to reduce the energy costs of air conditioning in large systems and make them energy efficient. The Global Gateway is a European project created by the European Union to develop new infrastructures. The European Commission said the European Fund for Sustainable Development will make up to EUR 135 billion (~USD 159.23 billion) available for guaranteed investments in infrastructure projects between 2021 and 2027.

According to the European Investment Bank Group, the bank provided EUR 99 million (~USD 117.13 million) to Hemso Fastighets AB to create more energy-efficient social infrastructure in Sweden and Finland. Nine buildings for social services will be built, including nursing homes, a medical facility, preschools, and school services.

According to the European Investment Bank Group, it contributed EUR 50 million (~USD 59.16 million) to the construction of one of Europe's largest research infrastructure projects: The European Spallation Source (ESS).

Considering all the above facts and factors, the usage and demand of single-ply membrane materials for infrastructural construction applications are expected to grow in the forecast period.

United Kingdom Region to Dominate the Market

The United Kingdom dominated the Europe market with a significant market share and is projected to maintain its dominance during the forecast period. The significantly increased construction activities are the primary factor driving the growth of the target industry.

Construction is a sector where Britain has a strong competitive edge over other countries in Europe. The United Kingdom has world-class expertise in design, architecture, and engineering. British companies are also leading the way in sustainable construction solutions.

As per the Office of National Statistics of the United Kingdom, the monthly construction output increased by 1.5% in volume terms in May 2022, with a record high in monthly-level terms (EUR 15,053 million) since records began in January 2010.

The increase in monthly construction output in May 2022 was due to an increase in new work, as repair and maintenance work saw a slight decline of 0.4% compared to the previous month in 2021.

At the sector level, the key contributors to the increase seen in May 2022 were private new housing and private commercial new work, which increased by 7.2% and 12.1%, respectively.

According to the National House Building Council (NHBC), private sector registrations are the key driver in the United Kingdom, and the registrations rose from 80,475 in 2020 to 114,477 in 2021, an increase of more than 40%.

To provide better infrastructure to the population across the country, the government has planned to invest 1-2% of its GDP in construction and infrastructure between 2020 and 2050 as part of the National Productivity Investment Fund (NPIF).

According to Office for National Statistics, monthly construction output increased 0.4% in volume terms in September 2022, which is the third consecutive monthly growth following small upward revisions, to 0.6% in August 2022 and 0.2% in July.

According to Office for National Statistics, total construction new orders increased 6.4% in Quarter 3 2022 compared with Quarter 2 (Apr to Jun) 2022; this quarterly growth came mainly from private commercial new orders, which rose 27.7%.

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All the above-mentioned factors are likely to fuel the growth of the United Kingdom's single-ply membrane market over the forecast time frame.

Europe Single-ply Membrane Market Competitor Analysis

The global single-ply membrane market is partially consolidated in nature, with the presence of various established players. Some major companies (in no particular order) are Sika AG, Kingspan Group, Holcim, Standard Industries Inc., and Carlisle Construction Materials.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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