

Europe Polyamide - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Europe Polyamide Market size is estimated at USD 4.79 billion in 2024, and is expected to reach USD 6.21 billion by 2029, growing at a CAGR of 5.33% during the forecast period (2024-2029).

Growing demand from automotive and electrical & electronics industries will drive market growth

- Polyamide has several physical properties that make it ideal for manufacturing and industrial use, including abrasion, corrosion, chemical resistance, flame resistance, flexibility, and strength. The volume of European polyamide consumption increased by 3.3% in 2019 compared to 2017 due to increased demand, primarily from the automotive and electrical and electronics industries.

- The European electrical and electronics industry has the highest consumption volume due to the surge in demand for electronic devices as a result of companies implementing work-from-home models and individuals establishing home offices. Technological advancements generate consistent demand for electronic devices year after year. The industry accounted for 26.9% of the total polyamide volume consumed in 2022, and the consumption volume increased by 1.5% in 2022 compared to 2017.

- The automotive industry has the second-largest consumption rate due to the surge in vehicle production. The industry accounted for around 26.6% of the total polyamide volume consumed in 2022. Consumers are opting for electric vehicles due to government regulations on the manufacturing and production of internal combustion engines. Polyamide sales in the region are expected to increase due to the growing production of EVs and vehicles with the latest lightweight and higher fuel efficiency requirements.

- The aerospace industry is expected to be the second fastest growing in terms of consumption value during the forecast period (2023-2029), with a CAGR of 7.97%, owing to the production of aircraft components in response to the growing demand for lighter and more fuel-efficient aircraft.

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Germany to remain dominant during the forecast period

- In 2022, Europe accounted for 25% of the global polyamide (PA) consumption by volume. Polyamide's versatile properties make it applicable in various industries such as automotive, packaging, and electrical and electronics.
- Germany was the largest market, recording a growth of 3.67% by value in 2022 compared to the previous year, attributed to the electrical and electronics and automotive industries, which held 26% and 28% of the market share, respectively, by volume. The surge in demand for electronic devices is a consequence of companies adopting work-from-home models and people setting up home offices. After months of negotiations, the EU reached an agreement to effectively ban new non-electric cars from 2035. This agreement has increased the sales of electric vehicles, which may boost the consumption of polyamides in the region.
- France was the fastest-growing market, witnessing a growth of 6.39% in terms of value in 2022 compared to 2021. The electrical and electronics and aerospace industries are at the forefront of polyamide utilization in the country. France's aerospace and defense industry is export-driven and ranks second globally.
- The market is projected to record a CAGR of 5.52% during the forecast period [2023-2029], with the packaging industry reporting the highest CAGR of 8.08% by value. The packaging production volume is expected to reach 39.8 million tons in 2029, up from 30 million tons in 2022, thereby increasing the consumption of polyamides in the future.

Europe Polyamide Market Trends

Technological innovations to boost the consumer electronics market

- Europe's electrical and electronics production registered a CAGR of over 3.8% between 2017 and 2021. The rapid pace of electronic technological innovation is driving consistent demand for newer and faster electrical and electronic products. As a result, it has also increased the demand for electrical and electronics production in the region.
- Despite the increased demand for computers and laptops due to remote working and distance learning, the average revenue per user in the European consumer electronics segment dropped by 6.3%. It generated a revenue of around USD 252.1 billion in 2020. As a result, in 2020, the electrical and electronic production in the region decreased by 2.8% by revenue compared to the previous year.
- In 2021, Europe's electrical and electronic equipment exports were around USD 228.37 billion, 12.4% higher compared to 2020. As a result, electrical and electronic production in the region increased and registered 11.6% in 2021 compared to the previous year.
- Robotics, virtual reality and augmented reality, IoT (Internet of Things), and 5G connectivity are expected to grow during the forecast period. As a result of technological advancements, demand for consumer electronics is expected to rise during the forecast period. The consumer electronics segment in the region is projected to reach a revenue of around USD 157.2 billion in 2027 from USD 121.1 billion in 2023. By 2027, Europe is projected to be the second-largest electrical and electronics production accounting for around 12.7% of the global market. As a result, the rise in consumer electronics is projected to increase the demand for electrical and electronics production in the coming years.

Europe Polyamide Industry Overview

The Europe Polyamide Market is moderately consolidated, with the top five companies occupying 58.73%. The major players in

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this market are BASF SE, Domo Chemicals, DSM, LANXESS and Radici Partecipazioni SpA (sorted alphabetically).

Additional Benefits:

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

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