

Europe Roofing Tiles - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Roofing Tiles Market size is estimated at USD 7.24 billion in 2024, and is expected to reach USD 8.80 billion by 2029, growing at a CAGR of 3.98% during the forecast period (2024-2029).

In line with the COVID-19 outbreak, nationwide lockdowns around the globe, disruptions in manufacturing activities and supply chains, and production halts negatively impacted the market in 2020. However, conditions began recovering in 2021-22, and the market is expected to continue its growth trajectory during the forecast period. Over the past two years, a rise in home sales, the beginning of new projects, and the demand for dormitories and hotels have driven the market's recovery.

Key Highlights

- Besides, major factors driving the studied market include increasing demand from the construction industry and favorable government policies for green buildings.
- Roof tiles tend to be more expensive than a few other options, which is likely to hamper the market's growth. The lack of skilled workers in the construction sector is also anticipated to impede market expansion.
- Nevertheless, the development of solar roof tiles is expected to offer various lucrative opportunities for the market's growth.
- Among the European countries, Germany is expected to dominate the regional market due to growth in its construction industry.

Europe Roofing Tiles Market Trends

Consistent Growth of the Residential Segment

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- The usage of roofing tiles for residential applications is increasing because they can reduce the overall heat transfer into the attic space by almost 70%, compared to an asphalt shingle roof. Roofing tiles are available for various types of residences, including single-family homes, townhomes, condominiums, and apartment buildings. The installation of roofing tiles in residential applications is one of the most cost-effective choices due to their long lifespan.
- Strong demand from various European countries makes residential construction one of the significant markets in Europe. The UK Government, under NPIF, is planning to invest GBP 23 billion (~USD 28.37 billion) in housing, science and innovation, transport, and a 5G network over the next five years, of which around GBP 7.2 billion (~USD 8.88 billion) has been allocated to the construction of new homes and GBP 4 billion (~USD 4.93 billion) for infrastructure.
- As per the European Commission, under its Housing First Plan (Le Logement D'abord), the French government announced tax waivers. Under the budget, the housing tax was entirely removed for 80% of French households. With regard to the remaining 20%, the country's wealthiest households, there was a gradual decrease in this tax rate from 2021, followed by a complete cessation of housing tax by 2023.
- According to Spain's National Statistics Institute (INE), the net household construction is anticipated to increase at an average pace of around 135,000 units every year from 2019 to 2025. Thus, the residential construction sector is expected to grow significantly over the latter period of the forecast period.
- According to Groupe BPCE, there has been an increase in the number of residential buildings under construction in 2022, which is forecasted to reach 381 thousand units from 346 thousand units in 2021, in France. The residential construction for acquisition purposes surpassed construction work for private rental, subsidized rental, and social rental with impressive numbers, standing at 173 thousand units in 2021. The residential construction for acquisition is expected to stay dominant reaching 183 thousand units in 2022.

Germany to Dominate the Market

- The German economy is the largest in Europe and the fifth-largest in the world. In line with the country's construction industry growth, the demand for roofing tiles will likely increase over the coming years.
- In October 2021, the construction of 29,597 dwellings was permitted in Germany. Building permits from January to October 2021 increased by 4.2% compared to the same period in the previous year.
- Additionally, as of December 2021, turnover in building completion work increased by 9.1% in the third quarter of 2021 compared to the previous year's third quarter, as reported by the Federal Statistical Office (Destatis).
- According to the Federal Statistical Office (Destatis), in 2021, the construction of 380,914 dwellings was permitted in Germany, registering an increase of 3.3% or 12,325 building permits compared with 2020. Furthermore, the annual turnover in the main construction industry in 2021 was up by 1% compared to the previous year.
- Furthermore, the new German Social Democrat government is focusing heavily on the housing crisis in the country. The government is creating an entirely new ministry to supervise its housing plans. The government has pledged more than 400,000 new housing units every year from 2022, 100,000 of which will be publicly subsidized. This is expected to fuel the demand for roofing tiles from the residential segment.
- The commercial construction sector in Germany is expected to witness significant growth prospects during the forecast period. The sales in 2022 are likely to reach EUR 53.3 billion (~USD 56.78 billion) which is likely to be supported by increased real disposable incomes, and numerous investments by the European Union and the German government.
- According to Statistisches Bundesamt, the overall revenue of the building construction industry in Germany has increased by 45.88 billion, reaching EUR 98.98 billion (USD 105 billion) in 2021. Construction of commercial buildings generated about 41% of the revenues, compared to 32% from the public and road sectors in 2021. Residential buildings experienced the biggest growth of any type, increasing by 16.53 billion.
- Such factors are expected to drive the construction industry in the country, which, in turn, is likely to drive the roofing tiles

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market through the forecast period.

Europe Roofing Tiles Industry Overview

The European roofing tiles market is fragmented in nature. The major companies in the market studied (in no particular order) include Wienerberger AG, BMI Group, TERREAL, IKO Industries Ltd, and INDUSTRIE COTTO POSSAGNO SpA.

Additional Benefits:

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

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