

Germany Sealants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2028

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Report description:

The Germany Sealants Market size is estimated at USD 554.56 million in 2024, and is expected to reach USD 703.82 million by 2028, growing at a CAGR of 6.14% during the forecast period (2024-2028).

Growing EV production in Germany to augment the use of sealants

- The German sealants market is driven by the construction industry, followed by other end-user industries due to the diverse application of sealants in building construction, such as waterproofing, weather-sealing, cracks-sealing, and joint-sealing. The German construction industry obtained nearly 5.9% of the country's GDP, propelling the demand for sealants in the coming years. The increasing growth of residential construction projects due to the shortage in housing facilities and ongoing renovation works will augment the sealants demand in Germany during the forecast period.

- A variety of sealants are widely used in electronics and electrical equipment manufacturing for potting and protecting materials. They are used for sealing sensors and cables, etc. The German electronics market is the sixth largest in the world, generating 2.6% (2021) of revenue share, which is likely to grow in the upcoming years. This, in terms, will foster the demand for sealants in the other end-user segment.

- Germany has achieved significant development in the healthcare and automotive industries over the decades. Sealants are used in applications in healthcare, such as assembling and sealing medical device parts. The automotive industry exhibits significant applicability of sealants to various substrates, such as glass, metal, plastic, and painted surfaces. These are mostly used in engines and car gaskets. Germany has registered about 23% of the market share in terms of the production of premium cars in 2021. German automotive and OEMs focus on manufacturing electric vehicles to reduce carbon emissions and maintain vehicle weight to meet the industry standard. These factors will augment automotive and OEM production in the near future, which

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gradually influences demand.

Germany Sealants Market Trends

The government initiatives towards infrastructure including digital parks and hospitals to boost the construction industry

- Construction accounts for 11% of total industrial production output. The construction industry in the country is growing at a slow pace, majorly driven by increasing new residential construction activities.?? German construction companies are benefiting from soaring demand for real estate, increased investments in buildings, and higher state spending on infrastructure. The upswing in construction has been encouraged by the European Central Bank's ultra-low interest rates, a growing urban population, and high immigration over the past five years. The sector is also helping to propel overall economic growth. ???
- In 2021, the construction market in the country registered a 1.99% growth rate compared to the previous year. The German government has initiated the construction of the Digital Park Fechenheim on 10.7 hectares of area, with a gross floor area of 100,000 m2 in Frankfurt-Fechenheim, Hesse, Germany, with an investment of USD 1,179 million. The construction work started in Q3 2021 and is expected to be completed in Q4 2028.? In the third quarter of 2021, the country started the construction of the Central Hospital in Lorrach, Baden-Wuerttemberg, with an investment of USD 418 million, and it is expected to be completed by 2025. The project aims to build a center for mental health and a medical department store with a parking garage.??
- The growth is likely to be supported by lower interest rates, increased real disposable incomes, and numerous investments by the European Union and the German government. Therefore, with the non-residential and commercial buildings in the country expected to witness significant growth prospects, the construction industry in the country is likely to increase during the forecast period.

Despite the government regulations on carmakers, electrical vehicles demand is likely to propel the automotive industry

- The automotive manufacturing industry is the most important industry in Germany, and 24% of the domestic industry revenue is generated from this industry. Automotive production in Germany declined by 9.4% in the third quarter of 2018, as the country experienced an economic slowdown in the second half of 2018, coupled with the problems in the implementation of the new Worldwide Harmonized Light-Duty Vehicles Test Procedure (WLTP).
- Over 75% of the automotive units manufactured in Germany are destined for international markets, which are mainly the United States, China, and other EU countries. The trade conflicts between the United States and China sapped away the global demand in 2019. This, coupled with the new EU-28 standard of CO2 emissions, which mandates carmakers to achieve average CO2 emissions of 95 grams per kilometer across newly-sold vehicles, has briefly restricted automotive production in the country.
- In 2020, the COVID-19 pandemic hit hard on the already declining automotive production. In 2020, automotive production fell by 24.5% Y-o-Y, and the supply chain constraints that quickly followed, coupled with the semiconductor chip shortage in 2021, have further declined automotive production by 10.8% compared to 2020 levels. The long-lasting effects of chip shortages and supply chain restrictions are expected to restrict automotive production in Germany in the forecast period. The German government's e-mobility plan aims to achieve 15 million EVs on the road by 2030. This is expected to drive up automotive production in the country. Due to all these factors, Germany's automotive production is expected to increase during the forecast period.

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Germany Sealants Industry Overview

The Germany Sealants Market is moderately consolidated, with the top five companies occupying 43.36%. The major players in this market are 3M, H.B. Fuller Company, Henkel AG & Co. KGaA, Sika AG and Soudal Holding N.V. (sorted alphabetically).

Additional Benefits:

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

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