

Passive Fire Protection Market Report by Product (Cementitious Materials, Intumescent Coatings, Fireproofing Cladding, and Others), Application (Structural, Compartmentation, Opening Protection, Firestopping Material), End User (Oil and Gas, Construction, Industrial, Warehousing, and Others), and Region 2024-2032

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Report description:

The global passive fire protection market size reached US\$ 4.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 6.0 Billion by 2032, exhibiting a growth rate (CAGR) of 3.5% during 2024-2032. The market is driven by stringent safety regulations, increasing awareness about fire hazards, growing emphasis on protecting lives and property, shifting focus on fire safety in the construction industry, and the rising number of commercial and residential buildings.

Passive fire protection plays a crucial role in safeguarding structures and minimizing the spread of fire. Unlike active fire protection systems that require human intervention, it is designed to operate automatically, without any external power source or activation. It encompasses various construction elements and materials that are integrated into buildings to resist fire and its effects. The advantages of passive fire protection are manifold, such as it acts as a barrier, preventing fire and smoke from spreading between compartments, thus buying valuable time for occupants to evacuate and firefighters to intervene. It also helps protect the structural integrity of buildings, reducing the risk of collapse during a fire. Additionally, passive fire protection is cost-effective as it requires minimal maintenance and has a longer lifespan compared to active systems. Some common types of passive fire protection include fire-rated walls, doors, floors, and ceilings, as well as fire-resistant coatings and firestops.

The global passive fire protection industry is influenced by stringent government regulations and building codes mandating the implementation of fire safety measures. Moreover, the increasing emphasis on safety in high-risk industries, such as oil and gas, chemicals, and power generation, is driving the adoption of passive fire protection solutions to prevent catastrophic incidents, which is creating a positive outlook for the market. Besides this, the growing awareness among individuals and organizations

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regarding the importance of fire safety and the need to protect lives and assets acts as a significant driver for the market. Furthermore, the rising number of commercial and residential construction activities and the continuous advancements in fire-resistant materials and technologies are contributing to the market expansion. Other factors, such as the availability of insurance for passive fire protection measures and the increasing frequency of fire accidents and disasters worldwide, are propelling the market growth.

Passive Fire Protection Market Trends/Drivers: Stringent Government Regulations and Building Codes

One of the primary drivers of the global passive fire protection industry is the presence of stringent government regulations and building codes that require the implementation of fire safety measures. Governments around the world have recognized the importance of fire prevention and have enacted regulations that enforce the use of passive fire protection systems in buildings and industrial facilities. These regulations aim to safeguard lives, minimize property damage, and ensure the overall safety of occupants. Compliance with these regulations has become mandatory, driving the demand for passive fire protection products and services. Additionally, the enforcement of these regulations often involves regular inspections and certifications, further stimulating the market as businesses and building owners strive to meet compliance standards.

Safety Emphasis in High-Risk Industries

High-risk industries, such as oil and gas, chemicals, and power generation, place a significant emphasis on safety due to the potentially severe consequences of fire incidents. These industries deal with hazardous materials, flammable substances, and complex machinery, making them prone to fire accidents. As a result, there is a strong demand for passive fire protection solutions to prevent and mitigate fire risks. Companies operating in these sectors invest in advanced fire-resistant materials, fire barriers, and other passive fire protection measures to safeguard their facilities, personnel, and critical assets. The continuous focus on safety and the proactive adoption of passive fire protection technologies in high-risk industries act as major drivers for the global market.

Increasing Awareness of Fire Safety

The growing awareness among individuals and organizations regarding the importance of fire safety is a key driver for the global passive fire protection industry. Over the years, there has been a shift in mindset toward prioritizing fire prevention and protection measures. Increased media coverage of fire accidents and disasters has raised public awareness and highlighted the devastating impacts of fires. As a result, individuals, businesses, and communities are increasingly recognizing the need to invest in effective fire safety solutions. Additionally, educational campaigns, fire safety training programs, and initiatives by fire protection associations and organizations have played a significant role in disseminating knowledge about fire risks and the importance of passive fire protection. This heightened awareness has contributed to the rising demand for passive fire protection products and services globally, thereby driving market growth.

Passive Fire Protection Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global passive fire protection market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on product, application and end user.

Breakup by Product:

Cementitious Materials
Intumescent Coatings

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Fireproofing Cladding
Others

Cementitious materials account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the product. This includes cementitious materials, intumescent coatings, fireproofing cladding, and others. According to the report, cementitious materials represented the largest segment.

Cementitious materials are a vital component of passive fire protection systems. They are typically available in the form of cement-based sprays, boards, or coatings that are applied to structural elements such as columns, beams, and walls. Cementitious materials offer excellent fire resistance by forming an insulating barrier when exposed to high temperatures. They provide both thermal protection and structural integrity, preventing the spread of fire and protecting the underlying substrates from damage. Cementitious materials are widely used in commercial buildings, industrial facilities, and infrastructure projects due to their affordability, ease of application, and proven fire performance.

Breakup by Application:

Structural
Compartmentation
Opening Protection
Firestopping Material

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes structural, compartmentation, opening protection, and firestopping material.

Structural protection focuses on enhancing the fire resistance of building structures like beams and columns. It accounts for a significant share of the market and is critical in safeguarding the structural integrity during a fire event.

Compartmentation involves dividing a building into fire-resistant compartments to limit the spread of fire and smoke. It is essential for both residential and commercial buildings, providing occupants with a safe area until evacuation or rescue.

Opening protection pertains to fire-resistant doors, windows, and other openings that prevent the spread of fire between compartments. These products are crucial for maintaining the effectiveness of compartmentation strategies.

Firestopping materials are used to seal openings and joints in fire-resistance-rated walls and floors. They are vital for preventing the passage of fire and smoke between compartments, ensuring a comprehensive fire safety system.

Breakup by End User:

Oil and Gas
Construction
Industrial
Warehousing
Others

The report has provided a detailed breakup and analysis of the market based on the end user. This includes oil and gas,

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construction, industrial, warehousing, and others.

In the oil and gas industry, passive fire protection is essential for safeguarding assets and personnel. The market sees a substantial demand for fire-resistant coatings and materials suitable for offshore rigs and refineries.

The construction sector extensively uses passive fire protection in both residential and commercial buildings. Products like fire-resistant drywalls and compartmentation are commonly used to meet building codes and enhance safety.

Industrial settings, such as factories and processing plants, require passive fire protection to mitigate risks associated with machinery and stored materials. This segment often employs a combination of structural protection and firestopping materials.

Warehouses store a variety of goods, making them susceptible to fire hazards. Passive fire protection methods like fire-resistant doors and compartmentation are essential to contain any potential fire and minimize damage.

Other sectors like healthcare, transportation, and data centers also utilize passive fire protection measures to various extents. These industries often have specialized requirements that necessitate custom solutions.

Breakup by Region:

North America
United States
Canada
Asia-Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

Asia Pacific leads the market, accounting for the largest passive fire protection market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United

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States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The rapid urbanization and industrialization in countries like China, India, and Southeast Asian nations have fueled the construction sector, creating a high demand for fire safety solutions in the Asia Pacific region. Growing awareness about fire hazards and stricter building regulations have further propelled the market. Additionally, the region's expanding manufacturing and energy sectors have created an increasing focus on safety, leading to the adoption of passive fire protection measures. Furthermore, the rise in infrastructure development, including airports, hospitals, and commercial complexes, drives the need for effective fire protection systems, boosting the market's growth in the Asia Pacific region.

Competitive Landscape:

The market is highly competitive, with numerous players operating at both regional and international levels. Major companies in the industry offer a wide range of products and solutions, including fire-resistant coatings, firestop systems, fire-rated doors, and fireproof walls. These players invest heavily in research and development to introduce innovative technologies and materials that enhance fire resistance and comply with stringent regulations. Additionally, strategic partnerships, acquisitions, and collaborations are common strategies employed by companies to expand their market presence and diversify their product portfolios. The competitive landscape also includes specialized service providers offering installation, inspection, and maintenance services for passive fire protection systems. Key factors influencing competition in the market include product quality, performance, pricing, customer service, and the ability to meet specific industry requirements.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

3M Company
Akzo Nobel N.V.
Contego International Inc.
Envirograf
Etex Group
Hempel A/S
Isolatek International
Lloyd Insulations (India) Limited
No-Burn Inc.
PPG Industries Inc.
Sharpfibre Limited
The Sherwin-Williams Company

Recent Developments:

In May 2023, Etex acquired Skamol, a manufacturer of fire protection and specialty insulation materials. This strategic move strengthens Etex's portfolio of sustainable solutions and expands their offering in high-temperature insulation for building and industrial applications.

In February 2023, PPG launched PPG STEELGUARD 951, a fire protection coating for the architectural market. This innovative epoxy intumescent coating provides up to three hours of fire protection and effective corrosion protection, reducing project time and costs.

In March 2023, Envirograf introduced MOULDBLOK, a three-part coating system offering mold and fire protection for walls and ceilings. The system includes MOULDBLOK AP for initial internal wall coating, MOULDBLOK FR for added protection, and MOULDBLOK EX for external wall protection against dampness and mold.

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Key Questions Answered in This Report

1. What was the size of the global passive fire protection market in 2023?
2. What is the expected growth rate of the global passive fire protection market during 2024-2032?
3. What are the key factors driving the global passive fire protection market?
4. What has been the impact of COVID-19 on the global passive fire protection market?
5. What is the breakup of the global passive fire protection market based on the product?
6. What are the key regions in the global passive fire protection market?
7. Who are the key players/companies in the global passive fire protection market?

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