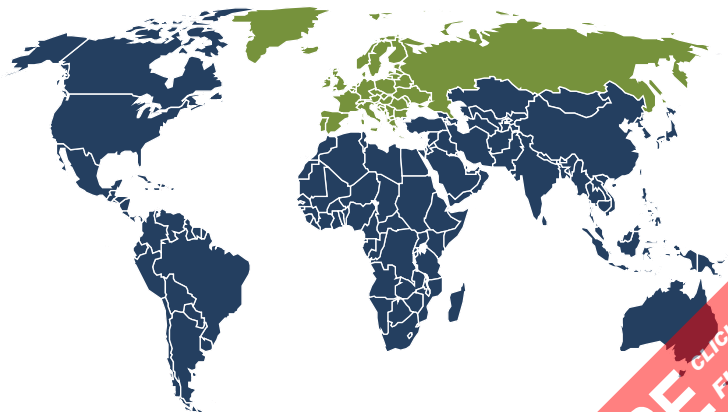




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# Geosynthetics: Europe

June 2020



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# Table of Contents

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<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>5</b>
Historical Trends	5
Key Economic Indicators	7
Near-Term Impact of COVID-19	8
Environmental & Regulatory Factors	9
Demand by Country	12
<b>3. Segmentation &amp; Forecasts</b>	<b>13</b>
Products	13
Geotextiles	15
Geomembranes	15
Geogrids	16
Geonets	17
Other Products	18
Markets	20
Building Construction	21
Transport Infrastructure	21
Landfill	22
Mining	23
Other Markets	24
<b>4. Industry Structure</b>	<b>27</b>
Industry Characteristics	27
Market Leaders	28
NAUE	28
Officine Maccaferri	29
Royal Ten Cate	29
<b>5. About This Report</b>	<b>30</b>
Scope	30
Sources	31
Industry Codes	32
Freedonia Methodology	32
Resources	34

# List of Tables & Figures

---

Figure 1   Key Trends in Europe Geosynthetics Demand, 2019 – 2024	3
Figure 2   Europe Geosynthetics Demand Trends, 2009 – 2019	5
Table 1   Key Indicators for Europe Geosynthetics Demand, 2009 – 2024 (2018US\$ bil)	7
Figure 3   Europe Geosynthetics Demand by Country, 2019 (%)	12
Figure 4   Europe Geosynthetics Demand by Product, 2009 – 2024 (mil sq m)	13
Table 2   Europe Geosynthetics Demand by Product, 2009 – 2024 (mil sq m)	13
Figure 5   Europe Geosynthetics Demand by Product, 2009 – 2024 (%)	19
Figure 6   Europe Geosynthetics Demand by Market, 2009 – 2024 (mil sq m)	20
Table 3   Europe Geosynthetics Demand by Market, 2009 – 2024 (mil sq m)	20
Figure 7   Europe Geosynthetics Demand by Market, 2009 – 2024 (%)	26
Table 4   Leading Suppliers to the European Geosynthetics Market by Product Line	28
Table 5   Countries in Western Europe	31
Table 6   Countries in Eastern Europe	31
Table 7   HS Code Related to Geosynthetics	32

# About This Report

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## Scope

This report forecasts to 2024 European geosynthetics demand in square meters. Total demand is segmented by product in terms of:

- geotextiles
- geomembranes
- geogrids
- geonets
- other products such as geosynthetic clay liners, preformed geocomposites, and geofoams

Total demand is also segmented by market as follows:

- building construction
- transport infrastructure
- landfill
- mining
- other markets such as agriculture, liquid containment, and oil and gas construction

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; the various segments are reported at five-year intervals for 2009, 2014, and 2019.

Unless stated otherwise, “geotextiles” refers only to synthetic geotextiles, as natural fiber geotextiles are not included in the scope of this report. Plastic geopipes also are excluded.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

## About This Report

**Table 5 | Countries in Western Europe**

Major Geosynthetics Markets	Other Western Europe		
France	Andorra	Guernsey	Netherlands
Germany	Austria	Iceland	Norway
Italy	Belgium	Ireland	Portugal
Spain	Channel Islands	Isle of Man	Saint Pierre and Miquelon
United Kingdom	Faeroe Islands	Jersey	San Marino
	Finland	Liechtenstein	Sweden
	Gibraltar	Luxembourg	Switzerland
	Greece	Malta	Vatican City
	Greenland	Monaco	

Source: The Freedonia Group

**Table 6 | Countries in Eastern Europe**

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

\*Major geosynthetics markets.

Source: The Freedonia Group

## Sources

*Geosynthetics: Europe* (FE15021) is based on *Global Geosynthetics*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group

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- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 7 | HS Code Related to Geosynthetics

HS Code	Definition
5603	Nonwovens, whether or not impregnated, coated, covered, or laminated

Source: United Nations Statistics Division.

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of

## About This Report

determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Geosynthetics*

### Freedonia Industry Studies

*Coated Fabrics*

*Construction Chemicals in the US*

*Global Cement*

*Global Cement & Concrete Additives*

*Global Construction Aggregates*

*Global Industrial Rubber Products*

*Global Membrane Separation Technologies*

*Global Mining Equipment*

*Global Nonwovens*

*Global Thermoplastic Elastomers*

*Global Water Treatment Equipment & Chemicals*

*Nonwovens Market in the US*

*Pipe Products & Markets*

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*Cement & Concrete Additives: United States*

*Coated Fabrics: United States*

*Construction: United States*

*Industrial Rubber Products: United Kingdom*

*Industrial Rubber Products: United States*

*Membrane Separation Technologies: United Kingdom*

### Freedonia Custom Research

### Trade Publications

*Civil Engineering*

*ENR/Engineering News Record*

*Geosynthetics*

*Textile World*

*World Highways*

### Agencies & Associations

Geosynthetica

Geosynthetic Materials Association

Industrial Fabrics Association International

International Geosynthetics Society