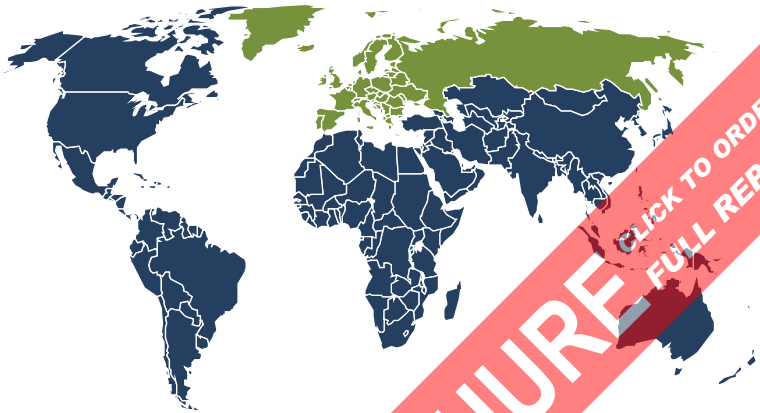




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Ceilings: Europe

July 2021



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About This Report

Scope

This report forecasts to 2025 ceilings demand in nominal US dollars at the manufacturer level in Europe. Total demand is segmented by product in terms of:

- ceiling tiles
- suspension systems
- specialty ceilings

Total demand is also segmented by market as follows:

- nonresidential
- residential

To illustrate historical trends, total demand is provided in annual series from 2010 to 2020; the various segments are reported at five-year intervals for 2010, 2015, and 2020.

Items excluded from the scope of this report include:

- drywall (which itself is typically covered by paint, joint compound, or some form of spray coating)
- open plenum (open deck or exposed upper structure) surfaces
- return vents and other in-ceiling non-ceiling products (such as recessed lights)
- ceiling accessories (wires and attachments, moulding and trim, and all other accessories such as seismic braces)

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2020.

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.

Table 5 | Countries in Western Europe

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

Note: *Major ceiling markets

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	

Note: *Major ceiling market

Source: The Freedonia Group

Sources

Ceilings: Europe (FE60073) is based on *Global Ceilings*, 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
- 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 | NACE Codes Related to Ceilings

NACE Code	Definition
23.14	Manufacture of glass fibres
23.52	Manufacture of lime and plaster

Source: European Commission

Table 8 | HS Codes Related to Ceilings

HS Code	Definition
6806	Slag, rock wool and similar mineral wools; exfoliated vermiculite, expanded clays, foamed slag, mixtures and articles of heat, sound insulating or sound-absorbing mineral materials
6808	Panels, boards, tiles, blocks and similar articles of vegetable fibre, of straw, shavings, chips, particles, sawdust or other waste, of wood, agglomerated with cement, plaster or other mineral binders
6809.19	Articles of plaster or of plaster compositions; boards, sheets, panels, tiles and similar articles, (other than faced or reinforced with paper or paperboard only), not ornamented
7308.90	Iron or steel; structures and parts thereof, n.e.c. in heading 7308
7610.90	Aluminium; structures (excluding prefabricated buildings of heading no. 9406) and parts of structures, n.e.c. in heading no. 7610, plates, rods, profiles, tubes and the like

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 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

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Global Ceilings

Freedonia Industry Studies

Building Envelope in North America

Ceilings

Global Architectural Paint

Global Cement

Global Drywall & Building Plaster

Global Flooring

Global Housing

Global Insulation

Global Siding (Cladding)

Roofing

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Construction: United States

Global Prefabricated Housing

Paint & Coatings: Europe

Plumbing Fixtures & Fittings: Europe

Plumbing Fixtures & Fittings: United Kingdom

Siding: Europe

Freedonia Custom Research

Trade Publications

Construction Dimensions

Wall & Ceilings

Agencies & Associations

Association of the Wall and Ceiling Industry

Ceilings and Interior Systems Construction Association

Eurostat

International Organization for Standardization

Organisation for Economic Co-operation and Development

United Nations Comtrade

World Bank