

## **Europe Expanded Polystyrene (EPS) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 130 pages | Mordor Intelligence

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### **Report description:**

The Europe Expanded Polystyrene Market size is estimated at 2.71 Million tons in 2024, and is expected to reach 3.08 Million tons by 2029, growing at a CAGR of 2.61% during the forecast period (2024-2029).

Europe, especially Western Europe, has been one of the most heavily impacted regions by COVID-19. The stimulus packages announced by the European Union are expected to accelerate the recovery process, with the demand for expanded polystyrene likely to rise with the growing construction industry.

#### Key Highlights

- In the medium term, increasing demand from the packaging sector is expected to drive market growth.
- However, the application and development of molded pulp as a green alternative are expected to hinder the market's growth.
- Recycling in the expanded polystyrene industry is likely to act as an opportunity during the forecast period.

#### Expanded Polystyrene Market Trends

The Building and Construction Segment is Expected to Dominate the Market

- EPS has excellent mechanical properties, making it ideal for load-bearing roof insulation, sub-pavement flooring, road-building, load-bearing insulation, etc. Furthermore, EPS does not absorb moisture, and its thermal and mechanical properties are unaffected by dampness, humidity, or moisture.

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- In the construction sector, EPS is used in combination with other materials, such as steel (in sandwich panels and used for cold store construction), concrete (as an insulation core in tilt-up wall panels), gypsum, and plasterboard (as skins for ceiling panels and other prefabricated components).
- Floorings and ceilings account for the largest market share of EPS applications in the construction sector, followed by roofing systems. Moreover, EPS roofing insulation is used in roofing systems and provides cost-effective and consistent thermal performance.
- Increasing energy price is forcing consumers to work toward improving the thermal efficiency of constructions to reduce their energy consumption, thus driving the market for EPS-based roofing systems.
- The building and construction industry is the largest consumer of EPS. The consumption of EPS is increasing across the world due to growing applications. Moreover, the European construction industry is recovering.
- According to European Commission, in comparison to 2020, annual average construction production increased by 5.2% across the Euroregion and by 4.8% in the European Union in 2021. Furthermore, in December 2021, the UK monthly construction output increased by 2% compared to the previous month. With increasing building and construction activities, the demand for EPS is also expected to increase significantly.
- Therefore, the EPS market is expected to flourish over the forecast period.

#### Germany is Expected to Dominate the Market

- Germany owns the largest share in production value in the construction sector, followed by France. With annual investment flowing steadily in the past few years with the German government supporting energy-efficient renovation and construction, the construction segment is expected to grow during the forecast period.
- As per the stats released by Statistisches Bundesamt (Destatis), the federal government has set the goal of constructing 400,000 new dwellings in Germany every year. In 2021, the construction of 293,393 houses was completed in Germany compared to 306,376 new houses in 2020.
- According to Eurostat, the total construction production in Germany increased by 5.4% in Q1 2022 compared to the Q1 2021 production and increased by 3.6% compared to the previous quarter in the same year, thereby enhancing the consumption of EPS from various construction applications in the country. In April 2022, the country's production from the construction industry declined by 1.2% compared to the same month in the previous year and decreased by 2.1% compared to March 2022. Furthermore, according to the Federal Statistical Office (Destatis), in March 2022, the construction of 34,794 dwellings was permitted in Germany, registering a decline rate of 8.9%, or 3,410 building permits, compared to March 2021.
- In addition, in Germany, packaging solutions are progressively being used for customized products and innovations. Therefore, there has been increased adoption of EPS in the nation, aiding the growth of the expanded polystyrene market in German in the coming years. Smaller pack sizes are in demand across the county in the packaged food and personal care sectors. As per the data published by Statistisches Bundesamt, the revenue of the packaging industry in Germany in 2021 accounted for EUR 29.59 billion compared to EUR 26.26 billion in 2020.
- The country's food and beverage industry is the fourth-largest in terms of possibilities for growth in the future. The industry is characterized by its small- and medium-sized enterprise sectors of about 6,000 companies.
- There is a growing demand for value and quality enriched products, including organic and fair trade and health and wellness goods, indicating a favorable potential demand for packaging materials. EPS is approved for use in conjunction with food products.
- Hence, the aforementioned trends are likely to influence the overall consumption of EPS in the country during the forecast period.

#### Expanded Polystyrene Industry Overview

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The European expanded polystyrene market is concentrated, with the top five players accounting for over 50% of the production capacity in Europe. The key five players in the market (in no particular order) are Synthos Group, BASF SE, Ravago, SUNPOR, and BEWiSynbra Group.

Additional Benefits:

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

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