

## **Europe Expanded Polystyrene (EPS) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Europe Expanded Polystyrene Market size is estimated at 2.20 million tons in 2025, and is expected to reach 2.62 million tons by 2030, at a CAGR of greater than 3.5% during the forecast period (2025-2030).

#### Key Highlights

- In the medium term, increasing demand from the food packaging and construction sectors is expected to drive the growth of the EPS market.
- However, stringent government regulations and green alternatives 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.

#### Europe Expanded Polystyrene (EPS) Market Trends

The Building and Construction Segment is Expected to Dominate the Market

- Expanded polystyrene, owing to its properties like low weight, durability, thermal efficiency, shock absorption, moisture resistance, usability, etc., is used in the building and construction sector. It is used in making roofs, walls, floor insulation, closed cavity walls, road construction, etc.
- EPS is an inert material that does not rot and provides no nutritional benefits to vermin. Therefore, it does not attract pests, such as rats or termites. Its strength, durability, and lightweight nature make it a versatile and popular building product.
- It is used in insulated panel systems for both residential and commercial building fronts, as well as walls, roofs, and floors.

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Moreover, it is utilized as a lightweight fill in the construction of roads and railways, as a void-forming fill material in civil engineering projects, and as a floatation material in the construction of marinas and pontoons.

- As per the Eumeps, approximately 75% of the EPS produced in Europe is used in the construction sector. Houses are renovated using EPS as insulation to improve their energy efficiency.
- As per the Eurostat, the annual average production in construction for the year 2023, compared with 2022, increased by 0.2% in Europe and by 0.1% in the European Union. The highest annual increases in construction production were recorded in Romania (+30.7%), Poland (+18.9%), and Belgium (+10.7%). The largest decreases were observed in Slovakia (-10.4%), Austria (-8.7%) and Sweden (-6.1%). Moreover, in 2022, Europe's construction sector grew by 2.5% because of new investments from the EU Recovery Fund. As per the European Commission and Eurostat, the biggest concern in the European Union's construction sector (EU-27) was the shortage of labor.
- According to Euroconstruct, the volume of residential renovation in Europe was projected at EUR 456.8 billion in 2023. In 2019, the value stood at EUR 448.5 billion.
- Moreover, overall investment in non-residential construction has increased significantly in recent times and is likely to continue over the study period, which will influence the product demand.
- Therefore, the European EPS market is expected to flourish over the forecast period.

### Germany is Expected to Dominate the Market

- Germany has the most significant construction industry in Europe. The construction industry in the country has been growing at a slow pace, majorly driven by increasing new residential construction activities. It is one of the leading markets for expanded polystyrene owing to high demand from the building and construction sector. Expanded polystyrene finds applications in this industry due to its shape formation properties, easy molding, and other versatile benefits.
- In recent years, Germany witnessed a rising demand for expanded polystyrene use in green building design applications owing to its excellent environmental advantages, enhanced durability, maximized energy efficiency, and improved indoor environment.
- 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 March 2023, the construction of 24,500 dwellings was permitted in Germany.
- Germany granted permission for 24,500 homes to be built in March 2023. According to the Federal Statistical Office (Destatis), this represents a drop in building permits of 10,300, or 29.6%, from March 2022. A total of 68,700 residential building licenses were issued from January to March 2023, a decrease of 25.7% from the same period in the previous year (January to March 2022: 92,500 building permits). The drop in construction projects is most likely being caused by the high cost of building materials and the worsening financial situation.
- The construction of hotels in Germany is also expected to witness a sharp rise during the forecast period. As of 2021, a total of 360 new hotels with 56,565 rooms had been in the pipeline. The year 2022 was projected to witness the launch of 89 new hotels and 15,780 rooms. 78 more projects with 13,073 keys were mooted for 2023. The pipeline of hotels is anticipated to stay strong for 2024 and beyond, with 153 projects and 22,769 rooms already in the works.
- The German government initiated the construction of the Digital Park Fechenheim on a 10.7-ha area, with a gross floor area of 100,000 sq. m 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 by 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. 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.
- According to the Federal Statistical Office, Germany's GDP from construction declined from 62.01 EUR billion in the fourth quarter of 2022 to 51.61 EUR billion in the first quarter of 2023.
- Additionally, in Germany, packaging solutions are progressively being used for customized products and developing innovation. Therefore, there has been increased adoption of EPS in the nation, aiding the German expanded polystyrene market to grow

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further 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 2022 accounted for EUR 35.04 billion compared to EUR 29.59 billion in 2021.

- The key companies operating in the German EPS market are focusing on developing and launching innovative products that will further support the market's growth. For instance, in March 2022, BASF expanded its graphitic expandable polystyrene (EPS) granulate portfolio. Neopor F5 Mycled contains 10% recycled material and is suitable for numerous building applications, particularly facade insulation. The new raw material is produced using the extrusion process and offers the same proven mechanical properties and optimized insulation performance as Neopor F 5200 Plus.
- The aforementioned trends are likely to influence the overall consumption of EPS in Germany during the forecast period.

## Europe Expanded Polystyrene (EPS) Industry Overview

The European expanded polystyrene market is partially concentrated, with the top five players accounting for a considerable share of the production capacity in Europe. The five key 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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