

Europe Calcium Silicate Blocks Market Report and Forecast 2025-2034

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Report description:

The Europe calcium silicate blocks market size reached around USD 836.22 Million in 2024. The market is projected to grow at a CAGR of 5.90% between 2025 and 2034 to reach nearly USD 1483.47 Million by 2034.

Europe Calcium Silicate Blocks Market Growth

Calcium silicate insulation is composed of non-combustible materials, it can tolerate exposure to fire and withstand temperatures of up to 927 degrees Celsius. Calcium silicate blocks are widely employed across different industry verticals such as cement, steel and iron, power plants, and petrochemicals due to their high efficiency and insulating properties.

In cement production plants, calcium silicate blocks find applications as insulators, to insulate high-temperature pipes and equipment. In 2022, the EU produced around 183 Mt of cement. The EU's five largest regional cement producers are Germany, France, Italy, the UK, and Spain.

Figure: Annual Cement Production in Europe, 2018-2022 (MT)

Key Trends and Developments

Expanding construction sector; Europe's emission reduction strategies; increasing steel production; and rising adoption of calcium silicate in the residential sector are the key trends impacting the Europe calcium silicate blocks market growth.

Expanding aluminium manufacturing

The European region has a well-established aluminium value chain, comprising of multinationals and small to medium-sized enterprises (SMEs). While international companies often own smelters and rolling mills, SMEs operate extrusion and recycling plants. The yearly demand for primary aluminium in Europe is 9 million tonnes. By 2050, the primary aluminium demand is

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predicted to reach 18 million tonnes.

Rising steel manufacturing

The steel market in Europe is global leader in terms of sustainability and innovation. According to the European Steel Association, as of 2022, the European steel sector produces 152 million tonnes of steel annually with turnover of over USD 141.2 billion. Across 22 EU Member States, more than 500 steel-producing facilities employ millions of Europeans directly and indirectly. Calcium silicate blocks are deployed as insulation for blast furnace shaft, soaking pits, and waste heat boilers in the steel sector.

Growth of the petrochemical, fertiliser sectors

By 2025, the economic growth in Europe is expected to grow by 1.7% in the EU and 1.5% in the euro area. Calcium silicate blocks find applications in the petrochemical, fertiliser, and refinery sectors due to their fire resistance and high-temperature insulation properties.

Growing glass packaging sector

The glass packaging sector is a growing market in Europe. In 2021, European countries produced over 83.3 billion glass bottles and jars. In the glass industry, calcium silicate blocks enhance the safety of glass production and reduce heat loss.

Growth of the construction sector aids the market for cement

Calcium silicate blocks are lightweight, non-combustible and durable insulating material. The expanding construction sector in Europe aids the demand for construction materials, like cement. In the cement industry, calcium silicate insulation provides a long operating life for cement production facilities combined with energy savings.

Calcium silicate blocks can help the EU reduce its emissions

By 2030, the EU aims to reduce GHG emissions by at least 55% from the 1990 levels. Calcium silicate blocks are an ideal insulation for the industrial sector to help it save energy and space, reduce CO2 emissions and enhance safety.

Rising steel production aids the demand for calcium silicate blocks

In 2022, EU's steel sector produced carbon steel alloy (77.0%), carbon steel other alloy (18.5%), and stainless steel (4.5%). The EU also produces a range of steel products, such as quarto plate, hot rolled wide strip, and wire rods. The rising steel production aids the Europe calcium silicate blocks market.

Growth of the real estate sector and the use of the blocks in buildings due to their excellent thermal insulation

In the EU, real estate accounts for around 40% of total energy consumption and 36% of GHG emissions. The heat conductivity coefficient of calcium silicate board is 0.11. Furthermore, its insulation property is five times more than that of glass, three times greater than that of fireclay, and ten times greater than that of regular concrete. Consumers across Europe are investing in high quality insulation, such as calcium silicate blocks due to the rising costs of gas, heating oil and electricity.

Europe Calcium Silicate Block Market Trends

Calcium silicate blocks are reusable and being a precast construction material provide time efficiency and enhance building

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quality. By 2030, the EU aims to reduce its energy consumption by 11.7% compared to the 2020 level. A reduction in energy consumption is expected to help the EU meet its target of reducing GHG emissions by at least 55% by 2030 compared to 1990 levels. Calcium silicate bricks/ blocks are highly energy efficient and have a lower carbon footprint (300 kgs/ton) compared to clay-fired bricks (900 kgs/ton). This is expected to significantly favour the Europe calcium silicate blocks market expansion.

Germany is a significant cement producer in Europe, with a production of 32.9 million metric tonnes in 2022. The rising demand for cement from the construction sector is expected to drive the use of calcium silicate blocks in the precalcinator, klin riser duct, firing hood, grate-cooler, tertiary air duct, and flue gas ducts due to the block's ability to withstand high temperature.

Europe Calcium Silicate Blocks Industry Segmentation

"Europe Calcium Silicate Blocks Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by End Use

- Cement Industry
- Steel and Iron Industry
- Power Plants
- Fertiliser, Refinery, and Petrochemical Industry
- Aluminum Industry
- Sugar Industry
- Glass Industry
- Others

Market Breakup by Country

- Germany
- United Kingdom
- France
- Italy
- Spain
- Poland
- Netherlands
- Others

Europe Calcium Silicate Blocks Market Share

Based on end use, the cement industry is a major contributor to the Europe calcium silicate blocks market revenue

Calcium silicate blocks help cement production facilities save on energy costs due to their robust insulating properties. The major applications of calcium silicate blocks in the steel and iron industry include insulating blast furnace shafts, stove and bustle pipes, soaking pits, reheat and annealing furnaces, and waste heat boilers. According to industry reports, Germany is among the world's ten largest steel producers. In January 2024, German steelmakers increased production by 4.9% to 3.07 million tons compared to January 2023.

Leading Europe Calcium Silicate Blocks Manufacturers

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The market players are engaging in pricing strategies, a strong distributor network, and active involvement in ESG activities, to gain a competitive advantage.

Etex NV

Etex Group is one of the leading global manufacturers in the building materials sector, specialising in lightweight construction solutions. Founded in 1905, The company organises its operations into five core divisions: Building Performance, Exteriors, Insulation, Industry, and New Ways.

Bauroc AS

Bauroc, the largest producer of autoclaved aerated concrete (AAC) in Northern Europe, has a diverse product portfolio suitable for various construction projects, including private homes, multistorey buildings, and industrial structures. The calcium silicate units of the company are sold under the "silroc" brand.

Xella International GmbH

The company is recognised as one of the world's largest manufacturers of autoclaved aerated concrete and calcium silicate materials. Founded in 1929, Xella leads in building materials made from autoclaved aerated concrete (AAC) and calcium silicate through its brands including Ytong, Silka and Hebel.

Johns Manville

Johns Manville is a prominent manufacturer of premium insulation and commercial roofing solutions, based in the United States. The company operates 44 manufacturing facilities, located across North America and Europe.

Other notable players operating in the Europe calcium silicate blocks market are Carmeuse Coordination Center SA, and Anglitemp Limited, among others.

Europe Calcium Silicate Blocks Market Analysis by Country

In 2023, Germany produced around 2,975,752 tonnes of aluminium in total, which constituted primary aluminium and recycled aluminium production of 189, 471 tons and 2,786, 282 tons, respectively, in the same year.

During H1 2022, Poland produced about 9.3Mt of cement, up by 8.6% year-on-year from the same period in 2021.

Netherlands occupies a top position in the European chemical sector, with the presence of leading multinational chemical companies such as AkzoNobel, Royal Dutch Shell, DSM, Purac, MSD and ECN. In 2022, the Netherlands exported about EUR 49 billion worth of chemicals to countries outside the EU.

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