

Brick & Paving Industry Digital Outlook 2025–2030

Strategic Insights for Global
Manufacturers and Distributors

toimi

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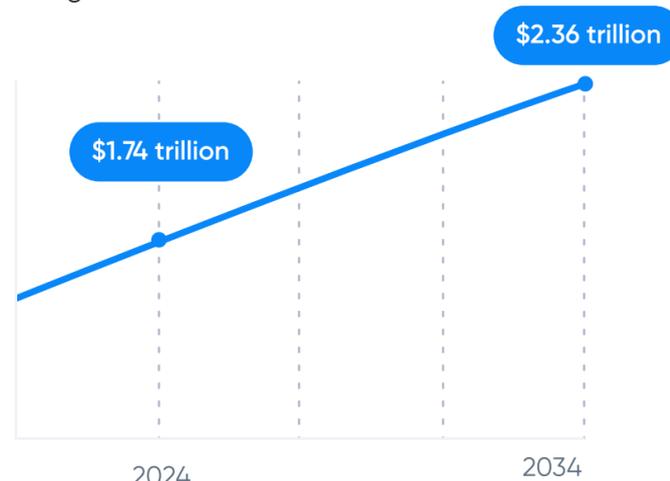
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Executive summary

The global brick market was valued at \$1.74 trillion in 2024 and is projected to reach \$2.36 trillion by 2034 (CAGR 3.09%).

By 2025, **digital transformation is becoming a key competitive factor**, while increasing pressure from environmental standards marks a turning point for the industry.

The global brick market value



The purpose of this report is to show how manufacturers and suppliers **can leverage digital solutions to grow amid shifting demand**, emerging sales channels, and rising sustainability requirements.

Key Trends for 2025–2029

- Growth of DIY segment and online ordering
- Shift toward eco-friendly and modular products
- Investment in automation and omnichannel sales
- Transition from traditional firing to decorative and prefabricated formats

Key Players: Wienerberger (Austria), Malpesa (Spain), Michelmersh (UK), and Holcim (Switzerland) are setting industry standards in automation, sustainability, and product diversity.

Regional Landscape:

- EMEA – mature market focused on innovation
- APAC – the global growth driver
- North America – undergoing digital transformation
- LATAM – price-sensitive but infrastructure-hungry

By Brick Type:

- Clay bricks – 41% market share in 2024
- Concrete bricks – fastest-growing segment (CAGR 4.1%)

By Application:

- Residential construction – 32% market share
- Infrastructure – most dynamic growth segment

Challenges Ahead:

- Return rates expected to reach up to 54% by 2029
- Lack of integration between online and offline channels
- Outdated websites and poor UX
- Difficulties with personalization and logistics

Overview

The global brick manufacturing industry is experiencing steady growth, with the market valued at USD 1.74 trillion in 2024 and projected to reach USD 2.36 trillion by 2034, growing at a CAGR of approximately 3.1%.

This expansion is fueled by **rising demand for bricks** in infrastructure, residential housing, and commercial developments—particularly in high-growth regions like Asia-Pacific, the Middle East, and parts of Africa.

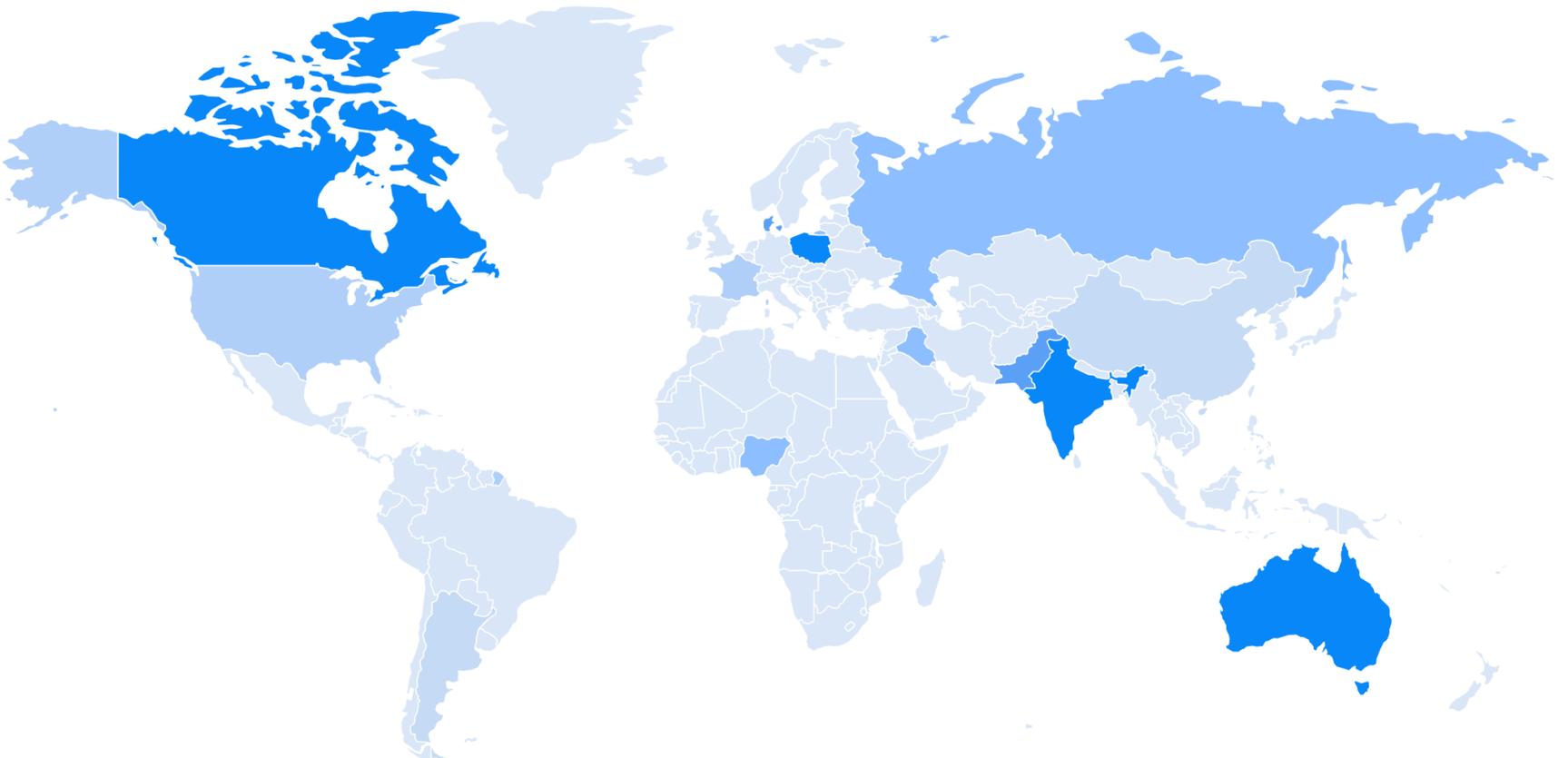
A major industry shift is the **move toward sustainable and low-carbon materials**. Manufacturers are increasingly **adopting eco-friendly alternatives** like fly-ash bricks, carbon-sequestering concrete, and clay alternatives, in response to environmental regulations and consumer demand for green construction. This is particularly urgent in regions facing carbon pricing and emissions caps, such as Europe.

Bricks Market Size 2025 to 2034 (USD Trillion)



Source: <https://www.precedenceresearch.com/bricks-market>

Bricks Market Size



In parallel, brick production is becoming more **technologically advanced**. Plants are integrating **automation, AI-driven quality control, and energy-efficient kiln designs** (e.g., zigzag and vertical kilns) to lower costs and reduce waste. These innovations are key to improving margins as raw material and energy prices remain high.

There is also a growing trend toward product diversification, with manufacturers expanding their offerings to include decorative bricks, thin veneers, interlocking blocks, and custom architectural formats for facades and landscaping. **This allows brands to enter higher-margin market segments and meet evolving design needs.**

Market Size by region:

EMEA:

- Mature market with demand for innovation
- 11 million employed in construction (2022), cement production grew by 6.4%
- Market leader: Wienerberger (200+ factories in 28 countries)
- Exports exceed imports (€263M surplus)
- Price growth: Italy +45% in 2022, +15% in 2023

North America:

- 39% of global revenue (2024)
- Strong infrastructure investment (\$143B in roads and bridges)
- Increasing trend toward digitalization and omnichannel sales
- Labor shortage and high raw material costs

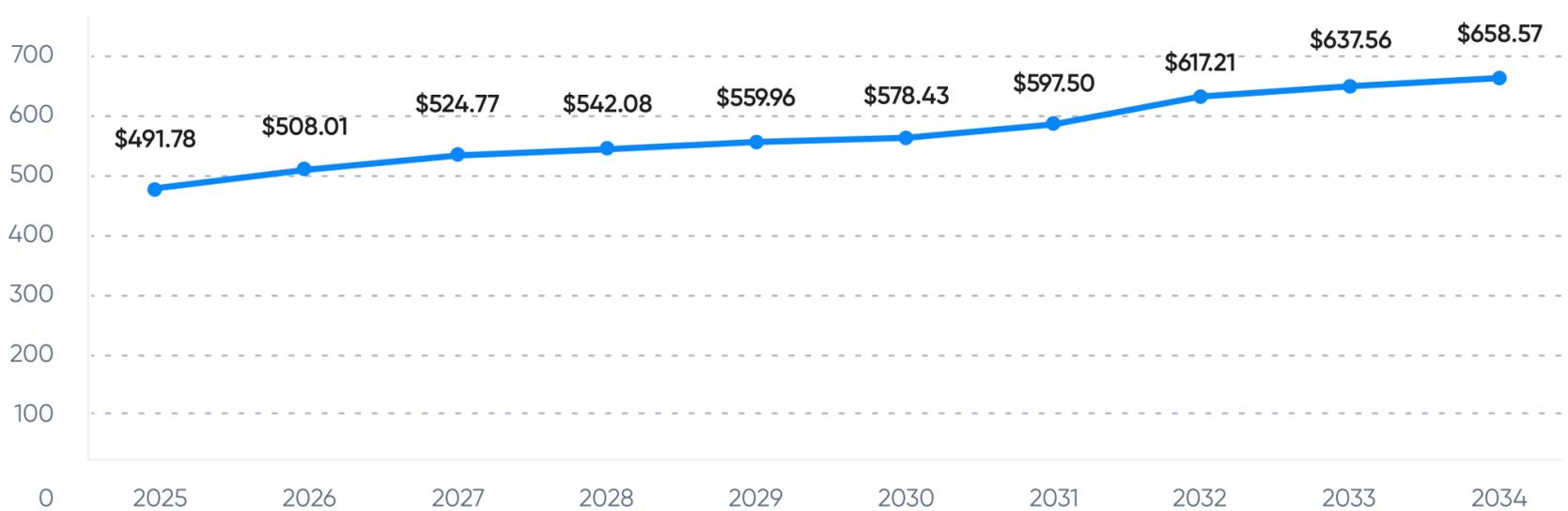
APAC:

- Fastest-growing region
- China accounts for 50% of global production
- Demand for lightweight and eco-friendly blocks
- R&D and government support for green construction (India, Vietnam)

LATAM:

- High infrastructure needs
- Price-sensitive market
- 267 manufacturers in Brazil, 45 in Colombia, 37 in Argentina
- Local leaders operate at national factory level

US Bricks Market Size 2025 to 2034 (USD Trillion)



Source: <https://www.precedenceresearch.com/bricks-market>

Market Size (2024):	\$1.74 trillion
2034 Forecast:	\$2.36 trillion (CAGR 3.09%)
Top Region:	North America (39% of global revenue in 2024)
Fastest Growing:	APAC
Leading Product Type:	Clay bricks (41%)
Fastest Growing Product:	Concrete bricks (CAGR 4.1%)
By Size:	Standard (48%), but modular – fastest
By Application:	Residential – 32%, infrastructure – fastest

Global Trends in Brick Manufacturing 2024–2025

1. Modest but Steady Market Growth

The global brick market was valued at approximately USD 1.73 trillion in 2025, with projections reaching USD 1.99 trillion by 2030, reflecting a CAGR of ~2.9%.

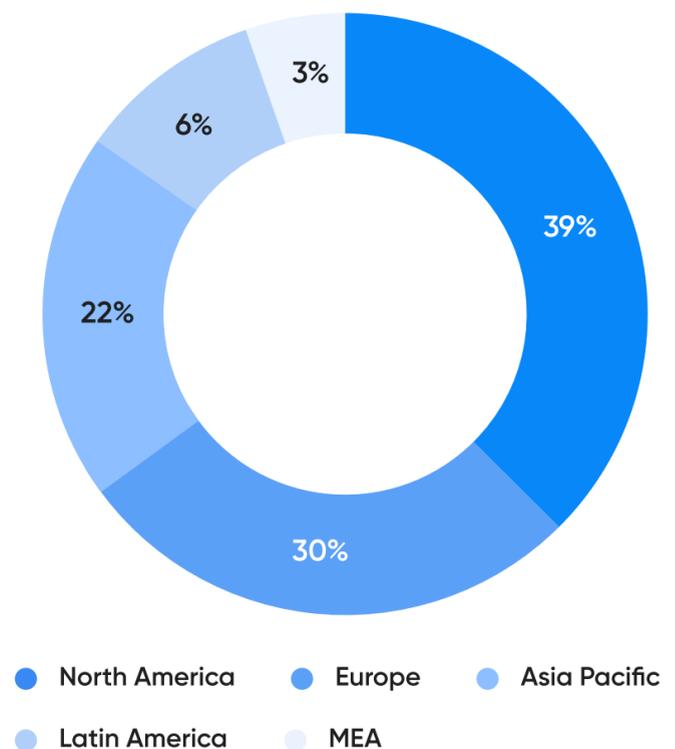
Growth is stable, supported by ongoing demand in both public and private construction sectors.

2. Asia-Pacific Leads in Size and Growth

Asia-Pacific was the largest regional market in 2024, contributing nearly 48% of global demand, and **remains the fastest-growing region** with a projected 3.44% CAGR through 2030.

Especially in China, India, and Southeast Asia—fuel this trend.

Bricks Market Share, By Region, 2024 (%)



Source: <https://www.precedenceresearch.com/bricks-market>

3. Product Shifts Toward Sustainable Materials

- Clay bricks hold the largest share (~65% in 2024), but fly-ash, sand-lime, and calcium-silicate bricks are growing faster (e.g. ~3.22% CAGR) due to environmental regulations and sustainability priorities.
- Pressure to comply with carbon policies like CBAM has accelerated **adoption of low-emission materials** in Europe and North America.

4. Growing Infrastructure & Non-Residential Construction

- Buildings account for ~60% of current brick consumption, but non-residential applications (e.g. industrial, warehouse, infrastructure) are growing faster—at ~3.34% CAGR through 2030.
- Growth in digital logistics, data centers, and public infrastructure underpins **demand for higher-performance masonry units**.

5. Distribution: Project Channels Gaining Ground

- Dealer/retail networks captured ~60% of brick revenue in 2024.
- Meanwhile, project-based direct sales are growing faster (~3.7% CAGR) as developers streamline **procurement with fewer intermediaries**.

Brick Industry Challenges

2024–2025

1. Rising Raw Material & Energy Costs

Energy alone can make up 30% of brick production costs. Ongoing price volatility from inflation and fuel markets is pressuring margins and accelerating the shift toward more energy-efficient kilns and cleaner fuels.

2. Scarcity of High-Quality Clay Reserves

Natural clay is becoming harder to source due to overuse and environmental restrictions. Many manufacturers are turning to recycled or alternative materials, which often cost more or compromise quality.

3. Labor Shortages and Skills Gap

The industry is experiencing a shortage of skilled workers. Aging labor forces and a lack of apprentices – especially in Europe – are increasing wage pressure and slowing production timelines.

4. Environmental & Regulatory Pressure

Stricter carbon and air quality regulations are forcing manufacturers to upgrade kilns and reduce emissions. Non-compliance can lead to fines or shutdowns, particularly in the EU and UK.

5. Supply Chain Disruption & Trade Complexity

From Brexit to global shipping delays, brick manufacturers face higher logistics costs and supply interruptions. Sourcing raw materials and replacement parts is slower and less predictable.

6. Technology Lag in Manufacturing

Many plants still rely on outdated processes. Companies slow to adopt automation, AI, or energy-saving technologies risk falling behind more modern competitors in cost, speed, and quality.

7. Environmental & Regulatory Pressure

High interest rates and cautious developers have delayed construction starts. This has led to inconsistent demand, making forecasting and cash flow more difficult for brick producers.

What This Means for Online Brick Sales & Presence

Price Fluctuations	→	Rising material and energy costs make pricing less stable online, reducing buyer confidence.
Stock Uncertainty	→	Clay shortages and supply delays cause inventory issues , yet many websites lack real-time availability.
Slow Response Times	→	Labor shortages lead to delayed order handling and poor customer support online.
Lack of Eco Transparency	→	Growing demand for sustainable materials isn't matched by clear environmental info on product pages.
Territory Confusion	→	Inconsistent regional routing causes misdirected inquiries and inefficient sales handoffs.
Outdated Digital Presence	→	Many manufacturers still rely on basic, non-interactive websites – falling behind in user expectations.
Underinvestment in Digital	→	Economic uncertainty limits budget for SEO, configurators, and online tools – just when customers are moving online.

Opportunity ⚡

Companies that modernize their web presence – with clear product data, regional targeting, and automation – can **turn industry disruption into competitive digital advantage.**

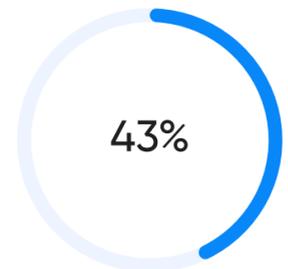
What's holding back digital in construction

– and where the growth points are

1. High return rates

According to industry research in e-commerce, up to 43% of returns are caused by **wrong choices or unmet product expectations**. By 2029, this figure is projected to reach 54%.

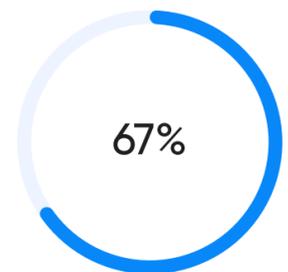
A key reason: lack of visualization tools and inaccurate product descriptions.



2. Outdated websites and poor UX

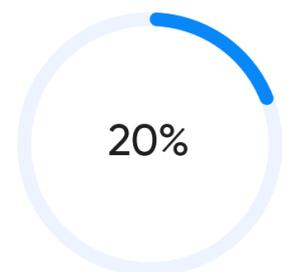
The average bounce rate in the construction sector is 67% – significantly higher than the e-commerce average of ~60% (source: [Backlinko](#)/[Databox](#)).

This trend reflects a lack of visitor engagement and poor interface quality.



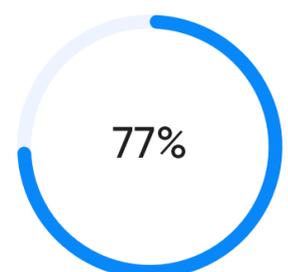
3. Lack of digital integration and configurators

More than 60% of customers expect online configuration tools for construction goods – but less than 20% of manufacturers provide them.



4. Manual order processing and inefficient logistics

About 77% of AEC (Architecture, Engineering, Construction) companies plan to invest in digital tools to automate orders and processes – clear evidence of gaps in current logistics and operations.



Opportunities

AR / 3D Visualization

Helps reduce return rates by addressing mismatched expectations

DIY content & configurators

Meet the demand of over 60% of B2C-DIY users, increase engagement, reduce bounce

Omnichannel (online + offline)

Combining physical stores with online ordering is expected by 77% of customers

AI tools & process automation

Tech investments improve efficiency, reduce errors and speed up logistics

Growing Interest & Opportunities in Digital Tools

Global construction markets show a steady shift toward technologies that drive engagement and cut costs.

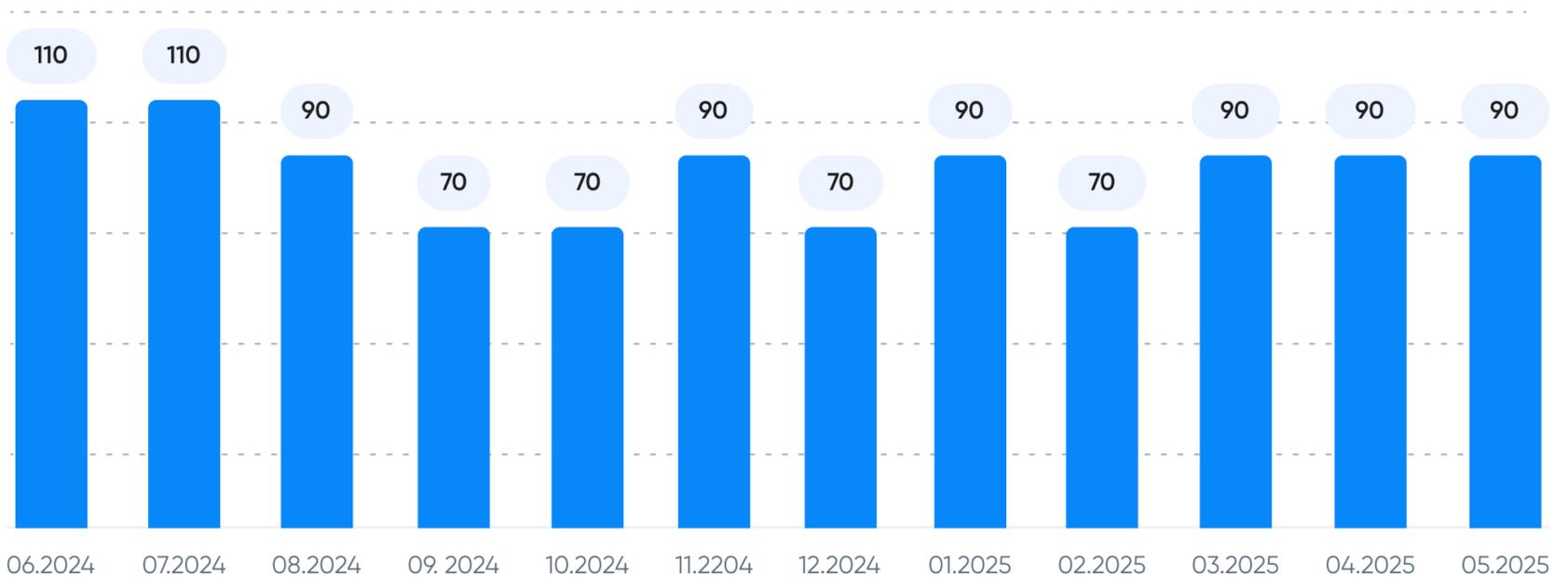
The fastest growth areas: AR/VR experiences and AI-driven solutions.

These tools help:

- visualize products and reduce purchase uncertainty,
- speed up decision-making,
- improve conversion through interactive experiences.

Search data backs this trend:

- Core query "online room planner" averages ~90 searches/month.
- Combined with "free" and "3D" → ~320 searches/month.



Source: Similarweb, May 2025

Why it matters:

- Entry points via free or interactive product versions are becoming **critical for user acquisition.**
- **It's cheaper to engage users through tools** than through informational content alone.
- As informational traffic declines (e.g., due to AI disruption), **tool + content bundles and AR/VR formats outperform in engagement and retention.**

How Content Affects Traffic

in the Building Materials Industry: Data & Case Studies

Average market traffic	~35–40K visits/month (for major players)
Average session duration	<1 minute for most websites
Engagement leader	Braer.ru – 20,800 visits/month, average session – 12 min 21 sec
Typical content	How-to and installation articles
SEO competition	Medium, with gaps – the niche is open for targeted entry

Source: Similarweb, February 2025

Key Takeaways

Content is the entry point to the funnel.

How-to articles, guides, and instructions attract more traffic than plain product pages.

UX issues.

Most websites show weak engagement (sessions < 1 min), which signals ineffective interfaces.

Open niche.

Only 2–3 players dominate; the rest of the market is still open for new digital solutions.

Braer as a benchmark digital model.

A site with a thoughtful structure, applied content, and strong SEO delivers measurable results.

Case Study: Braer as a Digital Strategy Benchmark

Braer.ru demonstrates an effective digital model:

- 20,800 visits/month – nearly **5× more than the next competitor**
- Average session duration: 12 min 21 sec – indicates **deep engagement**
- Almost **60% of all keyword searches** in the category (February 2025)

Braer sets the industry standard. Its strategy combines useful content, intuitive navigation, and SEO optimization – ensuring stable traffic and strong user retention.

What You Can Do Right Now



Audit your website and content

Evaluate structure, SEO, user engagement, and how well the site meets user expectations.



Build an MVP configurator

Even a simple online selection tool (not necessarily 3D) can already improve results.



Package your content funnel

Step-by-step guides, case studies, and visuals engage users more effectively than product cards alone.



Develop an omnichannel strategy

Connect online and offline touchpoints with unified UX, end-to-end analytics, and a seamless user journey.



Enable behavior analytics

Heatmaps, user tracking, and conversion funnels – a foundation for data-driven hypotheses and improvements.

Ready to move forward?

Want a UX or website audit? Need an MVP configurator or tile visualization online?

👉 Reach out – and we'll tailor the right solution for your market.

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