

Global Clay Bricks Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 56.4 bn
Forecast (2031)	USD 72.6 bn
CAGR (2021-2031)	4.3%
Study period	2021-2031
Largest region	Asia-Pacific · 62.4%
Fastest-growing region	Middle East and Africa · 5.9%
Market concentration	Low
Licence	Individual / Company

The global clay bricks market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of market value, supported by large residential construction pipelines, established fired-clay supply chains and sustained urban expansion. Residential construction generated XX% of demand, while hollow clay bricks are the fastest-growing product category as builders prioritize thermal performance and lower wall weight. Competitive advantage is shifting toward energy-efficient kilns, premium facing products, brick slips, automated handling and verified low-carbon manufacturing.

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Executive summary

The global clay bricks market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of market value, supported by large residential construction pipelines, established fired-clay supply chains and sustained urban expansion. Residential construction generated XX% of demand, while hollow clay bricks are the fastest-growing product category as builders prioritize thermal performance and lower wall weight. Competitive advantage is shifting toward energy-efficient kilns, premium facing products, brick slips, automated handling and verified low-carbon manufacturing.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global clay brick sales totaled USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Asia-Pacific represented XX% of 2025 market value and remains the central production and consumption hub.
- Residential buildings generated XX% of global clay brick revenue in 2025.
- Solid bricks retained a XX% product share, while hollow clay bricks will record the fastest product CAGR at XX%.
- Extruded and wire-cut production accounted for XX% of market value as automated plants gained share from labor-intensive molding.
- Middle East and Africa will post the fastest regional CAGR at XX%, led by Saudi Arabia, the United Arab Emirates, Egypt and urbanizing African economies.
- Great Britain produced XXX bricks and imported XXX clay bricks in 2024, according to the UK Department for Business and Trade.
- US housing starts totaled XXX units in 2024, sustaining a substantial addressable market for residential facing and structural clay products.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Clay Bricks Market Trends and Growth Drivers

Clay brick demand sits at the intersection of housing activity, local material availability and long-established construction practice. The material's durability, non-combustibility and architectural permanence sustain demand, but the industry's high fixed costs make kiln utilization and energy procurement central to profitability.

The growth mix is separating by region. Emerging markets are adding conventional walling volumes through household formation and urban development, while mature markets are moving toward premium façades, renovation, hollow systems and brick slips. This divergence requires different plant configurations, sales channels and capital-allocation priorities.

Decarbonization is reshaping manufacturing economics. Electric firing, renewable power, alternative fuels, heat recovery, recycled feedstocks and lighter products are moving from demonstration projects into investment plans, while product-level environmental data increasingly influences specification.

Growth drivers

Urban Housing and Household Formation

Urban population expansion increases the stock of dwellings, schools, neighborhood retail and municipal buildings requiring durable walling materials. The effect is strongest in South Asia, Southeast Asia, the Middle East and Africa, where housing deficits coincide with established masonry construction practices.

Residential Construction Recovery

A normalization in borrowing costs and housing approvals will release delayed low-rise residential projects in North America, Europe and Australia. Clay brick suppliers benefit disproportionately from detached housing and suburban development because these formats use more façade masonry per dwelling.

High-Performance Hollow Wall Systems

Hollow and perforated clay units reduce wall weight while improving thermal and acoustic performance. Tighter energy codes and the industrialization of masonry are moving these systems beyond their traditional European base into the Middle East and selected Asian markets.

Fire-Safe and Durable Façades

Non-combustibility, weather resistance and long replacement cycles reinforce the position of clay façades in schools, apartments and public buildings. Post-fire-safety reviews favor mineral façade materials, while architects continue to specify brick for permanence and contextual design.

Brick Slips and Off-Site Façades

Thin brick systems extend the material into retrofit, rainscreen and prefabricated panel applications that cannot economically carry full-depth masonry. Automated slip production and factory-bonded panels shorten installation schedules and open higher-rise addressable demand.

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Kiln Efficiency and Factory Automation

Modern tunnel kilns, electric firing, heat recovery and automated material handling reduce energy use, breakage and labor intensity. These investments improve delivered-cost competitiveness and enable consistent premium finishes at industrial scale.

Restraints

Fuel and Power Cost Exposure

Drying and firing make clay brick production structurally energy-intensive, leaving margins exposed to natural-gas, coal and electricity volatility. Smaller plants with older kilns face the greatest risk of temporary shutdowns or uncompetitive price increases.

Embodied-Carbon Compliance Costs

Carbon pricing, industrial-emissions rules and buyer procurement standards are increasing the cost of operating legacy kilns. Producers must fund fuel switching, monitoring and product-level environmental declarations while defending clay against lower-carbon wall-system claims.

Substitution by Lightweight Walling

Autoclaved aerated concrete, concrete block, gypsum systems and engineered panels compete on installation speed, weight and thermal design. Substitution is most acute in high-rise structures and projects where façade appearance is secondary.

Housing-Cycle Volatility

Clay brick plants carry high fixed costs and cannot fully offset abrupt declines in housing starts through inventory management. Weak affordability and elevated financing costs therefore reduce utilization and amplify earnings volatility in mature markets.

Quarry Permitting and Freight Radius

Clay extraction approvals, land rehabilitation requirements and community opposition can constrain reserve access. The heavy, relatively low-value product also imposes an economic delivery radius that limits cross-regional balancing when local capacity is tight.

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Clay Bricks Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Urban Housing and Household Formation	XXX	XXX	XXX
Residential Construction Recovery	XXX	XXX	XXX
High-Performance Hollow Wall Systems	XXX	XXX	XXX
Fire-Safe and Durable Façades	XXX	XXX	XXX
Brick Slips and Off-Site Façades	XXX	XXX	XXX
Kiln Efficiency and Factory Automation	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Fuel and Power Cost Exposure	XXX	XXX	XXX
Embodied-Carbon Compliance Costs	XXX	XXX	XXX
Substitution by Lightweight Walling	XXX	XXX	XXX
Housing-Cycle Volatility	XXX	XXX	XXX
Quarry Permitting and Freight Radius	XXX	XXX	XXX

Source: XXX

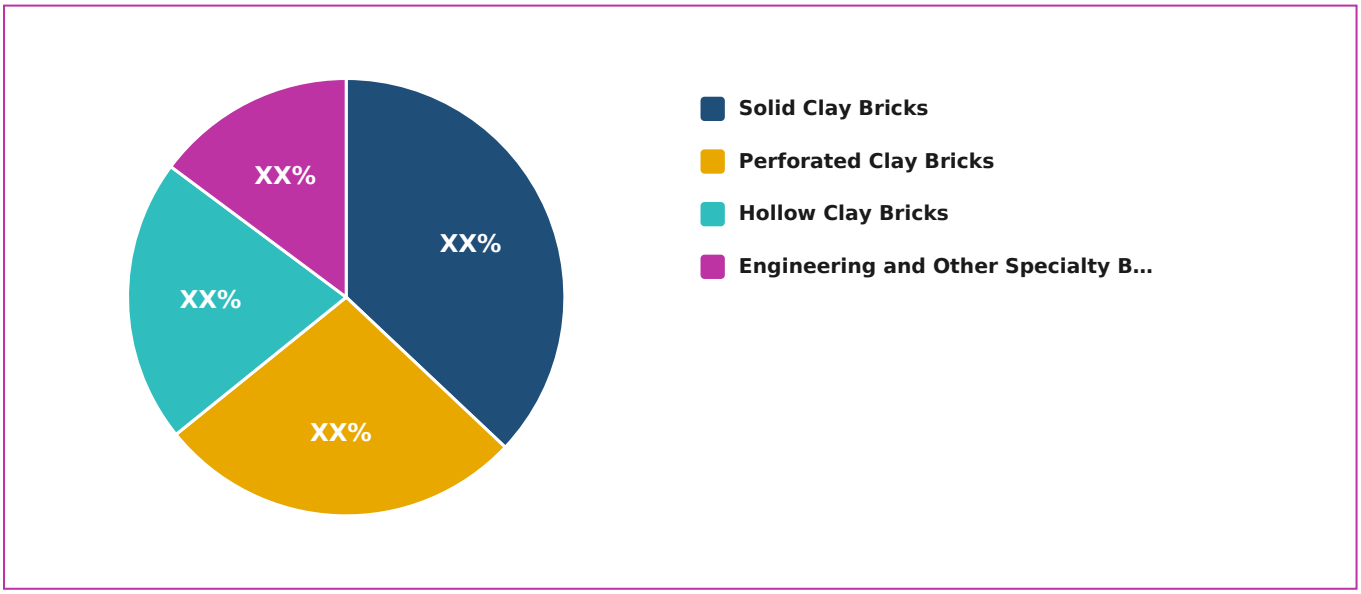
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Clay Bricks Market Segmentation Analysis by Product and End Use

By Product Type

Solid bricks retain scale through conventional load-bearing and infill applications, particularly in Asia and emerging economies. Perforated products balance strength, weight and firing efficiency in industrialized plants. Hollow units will gain the most share as energy codes, lightweight construction and system-based wall design spread beyond Europe.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Solid Clay Bricks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Perforated Clay Bricks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Hollow Clay Bricks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Engineering and Other Specialty Bricks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Manufacturing Process

Extrusion leads because continuous forming integrates efficiently with automated cutting, drying and tunnel-kiln systems. Soft-mud molding remains important for textured facing products, while dry-pressed bricks serve precision and high-density applications. Handmade output is small by volume but commands

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premium pricing in restoration and architect-led projects.

Value by manufacturing Process, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Extruded and Wire-Cut	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Soft-Mud Molded	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dry-Pressed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Handmade and Other Processes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Structural walling dominates in markets where fired clay remains a primary load-bearing or infill material. Facing bricks achieve higher unit values through color, texture, dimensional consistency and architectural specification. Pavers serve landscape and public-realm projects, while brick slips are expanding the addressable façade and retrofit market.

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Structural Walling	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Facing and Cladding	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Paving and Landscaping	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Floor and Roof Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Construction Type

New construction remains dominant because full-depth masonry is most economical when integrated into the original structural and façade design. Renovation growth is accelerating through brick slips, façade replacement, heritage repair and energy-upgrade programs. Thin systems reduce foundation loads and installation time, improving clay's competitiveness in occupied buildings.

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Value by construction Type, USD bn

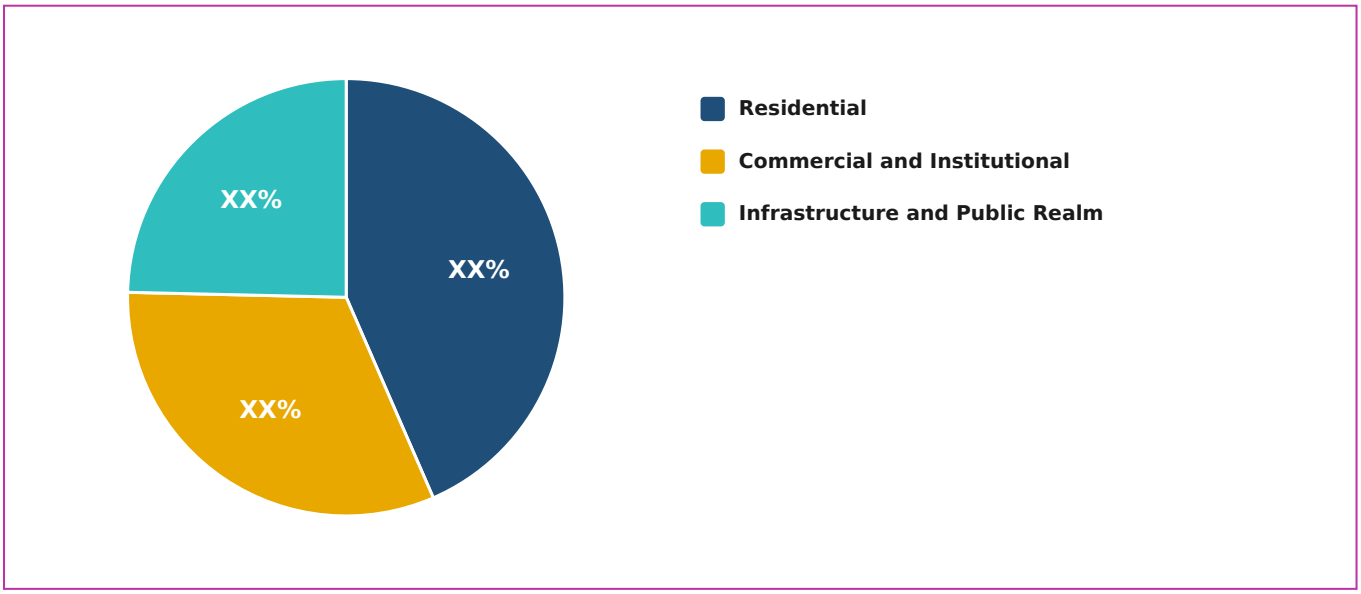
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
New Construction	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Renovation and Replacement	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End Use

Residential demand is anchored by detached housing, low-rise apartments and informal or self-built homes. Commercial and institutional buyers place greater weight on fire safety, façade longevity and architectural appearance, supporting higher-value facing products. Infrastructure and landscape applications are smaller but comparatively resilient because they draw on municipal and public-realm budgets.

Value share by end Use, 2025



Source: XXX

Value by end Use, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Residential	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Commercial and Institutional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Infrastructure and Public Realm	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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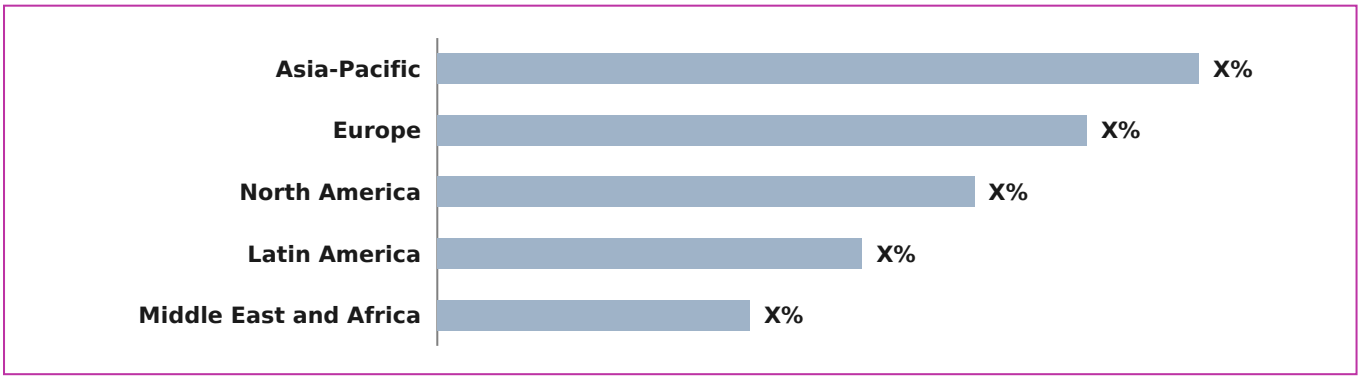
Clay Bricks Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global market value in 2025. China remains the largest national market through the scale of its building stock and brickmaking base, while India supplies the strongest absolute volume-growth opportunity as urban housing, industrial corridors and public infrastructure expand. Indonesia and Vietnam add demand from urban household formation, although plant quality and fuel systems vary widely across the region.

Europe is a technology and premium-product center rather than a volume-growth leader. Germany, the United Kingdom, Belgium, the Netherlands and Austria support demand for facing bricks, engineered hollow blocks and brick slips, while renovation and façade replacement offset subdued new housing. Carbon pricing and industrial-emissions requirements are accelerating electric kilns, heat recovery, renewable electricity and lighter product designs.

Middle East and Africa will expand at a XX% CAGR through 2031, the fastest regional rate. Saudi development programs, UAE premium construction, Egyptian housing formation and urban growth across Sub-Saharan Africa support demand, although concrete block remains a strong substitute. North America offers a higher-value facing-brick market anchored by the United States, while Latin American demand is led by Brazil, Mexico, Colombia and extensive self-build activity.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Clay Bricks Market Competitive Landscape and Company Share

The market is fragmented globally because clay deposits, building traditions and transport costs favor local production. The leading international platform is Wienerberger, supported by its European walling operations and General Shale in North America; Brickworks, Ibstock, Forterra, Vandersanden and Brampton Brick hold strong regional positions. Thousands of small and mid-sized producers account for the majority of unit volumes across Asia, Africa and Latin America.

Competition is shifting from nominal brick capacity toward energy efficiency, product mix and architectural specification. Large producers are investing in automated wire-cut plants, brick-slip lines, premium textures, digital design libraries and environmental product declarations. Commodity producers remain exposed to kiln utilization and fuel costs, while differentiated façade suppliers secure longer specification cycles and stronger margins.

Recent strategic activity centers on regional consolidation, adjacent façade products and decarbonization. Wienerberger's Terreal acquisition broadened its building-envelope platform, General Shale added Summitville Tile, Brickworks commissioned its modernized Horsley Park capacity, and Ibstock advanced the Atlas and Nostell investments. The next competitive phase will combine manufacturing rationalization with electric or hybrid firing and off-site façade partnerships.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Wienerberger AG	XXX	XXX	XXX	XXX
General Shale	XXX	XXX	XXX	XXX
Brickworks Limited	XXX	XXX	XXX	XXX
Ibstock plc	XXX	XXX	XXX	XXX
Forterra plc	XXX	XXX	XXX	XXX
Vandersanden Group	XXX	XXX	XXX	XXX
Brampton Brick Limited	XXX	XXX	XXX	XXX
Acme Brick Company	XXX	XXX	XXX	XXX
The Belden Brick Company	XXX	XXX	XXX	XXX
Röben Tonbaustoffe GmbH	XXX	XXX	XXX	XXX

Source: XXX

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Clay Bricks Market Forecast, Technology Outlook and Opportunities

The global market will add USD XXX billion between 2025 and 2031. Baseline growth is led by urban housing and nominal price realization, with volume gains concentrated in India, Southeast Asia, the Middle East and Africa. Mature markets will recover more gradually and generate a greater share of growth from premium façades, renovation and product-system innovation.

The upside scenario is driven by faster housing-finance normalization, government-backed residential programs and commercially successful electrified kilns. The downside scenario centers on prolonged housing weakness, persistent energy inflation and accelerated substitution by lightweight systems. Even under the downside case, replacement façades and premium architectural brick provide a defensible revenue base.

Winning suppliers will manage clay reserves and energy procurement as strategic assets, locate capacity within efficient freight radii and document product carbon performance. Hollow units, brick slips, glazed finishes, long-format bricks and factory-assembled façade panels will outpace conventional solid products. Partnerships with architects, modular builders and façade contractors will be as important as distributor coverage.

Opportunities

- Electrified and hybrid kiln conversion
- Thin brick and prefabricated brick-slip façade systems
- Premium glazed, textured and long-format facing bricks
- Low-carbon products supported by environmental product declarations
- Capacity expansion near high-growth African and Middle Eastern cities
- Recycled-clay and construction-spoil feedstocks
- Robotic setting, unloading and quality-control systems

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