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Global Cold Insulation Material Market Size Study & Forecast, by Material, End-Use Industry, and Regional Forecasts 2025–2035

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Abstracts

The Global Cold Insulation Material Market is valued at approximately USD 7.7 billion in 2024 and is anticipated to register a promising compound annual growth rate (CAGR) of 7.80% over the forecast period 2025 to 2035. Cold insulation materials are pivotal in minimizing energy losses, preserving temperature-sensitive processes, and enhancing system efficiency in a variety of industrial applications. These materials are engineered to perform under sub-ambient conditions, offering superior thermal resistance and moisture control. Increasing environmental awareness, coupled with intensifying demand for energy-efficient infrastructure, has fueled the adoption of cold insulation materials across oil & gas pipelines, cryogenic systems, refrigerated transport, and HVAC equipment. Additionally, their critical role in maintaining process integrity in chemical and food industries further underpins their rising utility worldwide.

The expanding oil and gas sector, particularly in liquefied natural gas (LNG) transport and storage applications, continues to be a major driver for cold insulation demand. As global infrastructure moves toward sustainability and cost-efficiency, companies are actively investing in phenolic foam, polyurethane foam, and fiberglass-based insulation systems due to their high compressive strength and low thermal conductivity. According to the International Energy Agency (IEA), global natural gas demand is projected to grow steadily into the 2030s, necessitating vast networks of temperature-controlled pipelines and storage units. Similarly, growth in chemical processing, HVAC systems in commercial buildings, and temperature-sensitive pharmaceutical transport further stimulates innovation in cold insulation technology, promoting the use of durable and low-emission insulation solutions.

Regionally, North America is projected to retain a significant share of the cold insulation

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material market owing to established oil & gas infrastructure, strong building codes related to energy conservation, and the presence of major chemical manufacturers. Europe is set to follow closely, backed by stringent energy efficiency regulations and active retrofitting initiatives across aging industrial facilities. However, the Asia Pacific region is forecasted to emerge as the fastest-growing market over the coming decade. The region's rapid industrialization, urban development, and expansion of cold storage logistics—particularly in India, China, and Southeast Asia—are catalyzing demand for cold insulation materials. The proliferation of refrigeration units for pharmaceuticals and food preservation amid rising e-commerce further accelerates regional market momentum.

Major market players included in this report are:

BASF SE

Owens Corning

Huntsman Corporation

Armacell International S.A.

Johns Manville

Kingspan Group plc

Dow Inc.

Aspen Aerogels Inc.

L’Isolante K-Flex S.p.A.

Rockwool International A/S

Saint-Gobain S.A.

G+H Group

Fletcher Insulation

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NMC SA

Recticel NV/SA

Global Cold Insulation Material Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Material:

Phenolic Foam

Fiber Glass

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Polystyrene Foam

Polyurethane Foam

Other

By End-Use Industry:

Oil and Gas

Chemicals

HVAC

Refrigeration

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

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- Italy
- Rest of Europe

Asia Pacific

- China
- India
- Japan
- Australia
- South Korea
- Rest of Asia Pacific

Latin America

- Brazil
- Mexico

Middle East & Africa

- UAE
- Saudi Arabia
- South Africa
- Rest of Middle East & Africa

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Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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