

Global Rigid Polyurethane Foam Market Size Study & Forecast, by Type (Slabstock Polyether, Slabstock Polyester, Molded Foam Parts), End-use (Building & Construction), and Regional Forecasts 2025-2035

<https://marketpublishers.com/r/R7CCDA29BD9EEN.html>

Date: June 2025

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: R7CCDA29BD9EEN

Abstracts

The Global Rigid Polyurethane Foam Market is valued at approximately USD 21.89 billion in 2024 and is projected to grow at a healthy CAGR of 5.80% over the forecast timeline of 2025–2035. The surge in demand for efficient insulation materials—fueled by mounting energy efficiency norms and tightening environmental codes—has substantially propelled the adoption of rigid polyurethane foam (RPUF). This versatile polymer solution, characterized by low thermal conductivity and structural rigidity, has emerged as a frontrunner in modern construction and industrial insulation applications. Whether in wall insulation, roof panels, or cold storage facilities, RPUFs are being integrated to optimize performance while reducing energy costs. Their light weight, low permeability, and customizable density make them ideal for architects and engineers committed to sustainable design strategies. As governments across continents continue to push climate agendas and green building certification standards, RPUF's market relevance is becoming increasingly pronounced.

In the face of global warming and shifting energy paradigms, RPUFs are being engineered not only to meet functional requirements but to align with green chemistry innovations. The emergence of low-GWP (global warming potential) blowing agents and recyclable polyurethanes is steering the market into a future-proof trajectory. Manufacturers are leveraging bio-based polyols and sustainable feedstocks to cater to evolving consumer expectations and regulatory frameworks. Moreover, the foam's inherent fire resistance and dimensional stability further expand its adoption in high-rise construction and industrial insulation systems. However, market participants must still navigate challenges such as fluctuating raw material prices and concerns regarding

recyclability and environmental footprint—issues that continue to draw scrutiny from regulatory bodies and environmentally conscious stakeholders alike.

Regionally, North America stands at the forefront of rigid polyurethane foam consumption, attributed to stringent building codes, mature construction sectors, and well-institutionalized green building practices. The United States, driven by infrastructure rejuvenation plans and increasing demand for energy-efficient retrofitting, contributes significantly to regional dominance. Europe follows closely, with countries like Germany, France, and the UK demonstrating strong uptake due to EU-led climate initiatives and deep renovation goals. Meanwhile, the Asia Pacific region is anticipated to witness the fastest growth during the forecast period, owing to rapid urbanization, industrial expansion, and government incentives favoring eco-friendly construction. In developing economies such as China and India, the combination of increasing disposable incomes and expanding real estate footprints is creating fertile ground for RPUF integration across both residential and commercial segments.

Major market player included in this report are:

BASF SE

Huntsman Corporation

Covestro AG

Dow Inc.

Recticel Group

Johns Manville

Kingspan Group

Woodbridge Foam Corporation

Carpenter Co.

Rogers Corporation

Saint-Gobain S.A.

Lapolla Industries, Inc.

Owens Corning

Bayer AG

Carlisle Companies Inc.

Global Rigid Polyurethane Foam 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 Type:

Slabstock Polyether

Slabstock Polyester

Molded Foam Parts

By End-use:

Building & Construction

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

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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