

# Global Cold Storage Phase Change Materials Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Cold Storage Phase Change Materials competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, the global production of cold storage phase change materials is 187,500 tons, with an average selling price of US\$8/kg. Cold-storage phase change materials (PCMs) are functional materials that absorb or release large amounts of latent heat through physical state changes (such as solid-to-liquid transitions) at specific temperatures. They are used to store and release cold energy. Their core principle is that at the phase change temperature, the material absorbs heat from the environment and melts, or releases heat and solidifies when the temperature drops, thereby achieving stable temperature control. PCMs are widely used in cold chain transportation, building energy efficiency, data center temperature control, and pharmaceutical storage and transportation. They are particularly suitable for providing passive temperature control in environments with power outages, high energy consumption, or large temperature fluctuations. Compared to traditional cooling methods, PCMs offer advantages such as low energy consumption, fast response, flexible structure, and recyclability, making them a key component of green energy storage and intelligent temperature control.

**Market Overview** The global cold storage phase change material market has entered a steady development phase, with overall market size maintaining moderate growth. Despite slowing growth, the market structure is maturing, and application scenarios are expanding, gradually penetrating from traditional cold chain logistics to high-value-added sectors such as building energy conservation, data center thermal management, and medical textiles. Material types are diversifying, with organic paraffin waxes still dominating the market, while inorganic salts and composite microcapsules are experiencing rapid growth in performance-driven

applications. **Regional Market Landscape** The Asia-Pacific region is the world's largest demand center, primarily driven by China and India, with cold chain infrastructure development and green building policies as key drivers. The European market is primarily focused on building energy conservation and medical applications, with strict technical standards and high value-added products. The North American market focuses on data centers and the pharmaceutical cold chain, with high requirements for material performance and certification. Other regions, while limited in market share, offer unique growth potential in military and customized applications. **Major Manufacturers and Industry Competition** The industry's competitive landscape demonstrates a combination of regionalization and specialization. European companies have technological advantages in the building and medical sectors, while US manufacturers lead in bio-based materials and military-grade products. Indian companies are rapidly expanding in the cold chain market through cost control and composite material innovation. Overall, leading companies are establishing differentiated competitive barriers through material innovation and application customization, while small and medium-sized enterprises are leveraging regional channels and pricing advantages to participate in the market. **Technological Trends and Innovation Directions** Technological evolution is shifting from single materials to composite structures. Microencapsulation technology improves the cyclic stability and safety of materials, while nano-enhancement significantly enhances thermal conductivity and response speed. Intelligent temperature control systems and sensor integration are becoming key R&D priorities for next-generation products. Furthermore, the rise of bio-based PCMs reflects the industry's focus on sustainable and environmentally friendly materials. **Upstream and Downstream Structure** The upstream segment uses paraffin wax, inorganic salts, and bio-oil as base materials, supplemented by thermal conductivity enhancers and encapsulation materials such as graphite and metal powder. The midstream segment includes cold storage component manufacturing and system integration, with product forms including cold storage panels, wall modules, and cold chain boxes. Downstream applications are widely distributed in end-use scenarios such as food transportation, vaccine distribution, green buildings, and medical apparel, forming a relatively complete closed-loop industrial chain. **Policies and Driving Factors** Regional policy guidance plays a key role in driving market development. Cold chain subsidies and green building standards in the Asia-Pacific region, energy-saving regulations and textile innovation policies in Europe, and FDA cold chain regulations and data center energy efficiency requirements in North America are collectively driving multi-dimensional market growth. Furthermore, carbon neutrality and ESG trends are prompting companies to accelerate their transition to environmentally friendly materials. **Future Outlook** The future market will evolve towards high performance, intelligence, and sustainability. Composite materials and intelligent cold storage

systems will become mainstream, with applications expanding to wearable devices, military equipment, and high-end electronic thermal management. Regional technology transfer and standard convergence will also accelerate global market integration, shifting industry competition from price-driven to a comprehensive competition based on performance and system integration capabilities.

The global Cold Storage Phase Change Materials market size was estimated at USD 1500.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 6.30% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Cold Storage Phase Change Materials market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Cold Storage Phase Change Materials market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Cold Storage Phase Change Materials market.

## **Global Cold Storage Phase Change Materials Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

BASF  
Honeywell  
Cryopak  
Climator  
Phase Change Energy Solutions  
Outlast  
Chemours  
Rubitherm  
Va-Q-Tec  
Sonoco ThermoSafe  
Pluss Advanced Technologies  
Guangzhou Zhongjia  
Zhongke Optimal New Materials  
Shandong Qiyuan New Materials  
Shanghai Shengsheng  
Songleng Technology  
Baojia International

### **Market Segmentation (by Type)**

Organic  
Inorganic

### **Market Segmentation (by Application)**

Cold Chain Logistics  
Building Energy Efficiency  
Data Center  
Others

## **Geographic Segmentation**

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

## **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Cold Storage Phase Change Materials Market

Overview of the regional outlook of the Cold Storage Phase Change Materials Market:

## **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

## **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Cold Storage Phase Change Materials Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan,

merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Cold Storage Phase Change Materials, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

### **Customization of the Report**

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