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Global Aerogel Insulation for EV Battery Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Aerogel Insulation for EV Battery market size is expected to reach $ 1013 million by 2032, rising at a market growth of 8.1% CAGR during the forecast period (2026-2032).

Aerogel Insulation for EV Battery refers to ultra-low-thermal-conductivity thermal insulation and thermal-runaway protection materials incorporating silica aerogel, polymer aerogel or other aerogel structures and engineered for installation within electric-vehicle traction-battery modules and packs. Commercial products are principally supplied as insulation pads, sheets, composite blankets and coated or laminated thermal barriers positioned between adjacent cells, between modules, or between battery components and pack structures. The aerogel core is commonly reinforced with glass fiber, ceramic fiber, pre-oxidized fiber or other carriers and may be laminated with PET or PI films, pressure-sensitive adhesive, protective coatings and compressible layers to provide thermal insulation, flame resistance, electrical insulation, mechanical cushioning and accommodation of cell expansion. Typical commercial battery-grade products use thin structures of approximately 0.4–5 mm, although customized designs extend outside this range, while room-temperature thermal conductivity commonly falls around 0.020–0.035 W/(m·K). The study focuses on aerogel-containing materials specifically used in electric-vehicle traction batteries for cell-to-cell, module-to-module and battery-pack thermal protection, including integrated products that combine thermal-runaway barriers with compression management or electrical insulation. Cabot's ENTERA platform illustrates the upstream material route in which aerogel particles are incorporated into pads, sheets, films, foams and coatings, while finished products increasingly use engineered multilayer structures adapted to pouch and prismatic battery cells.

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Key Findings

Silica aerogel remains the principal material system for commercial EV battery thermal barriers

Cell-to-cell thermal-runaway protection represents the core application for thin aerogel insulation products

The 2025 global manufacturer-level average selling price is estimated at approximately US$10 per square meter

Aerogel barriers are evolving toward combined thermal insulation, compression management and electrical insulation functions

China has developed a broad manufacturing base while North American suppliers are expanding commercial-scale EV aerogel capacity

Market Trends

Aerogel insulation for EV batteries is shifting from relatively simple encapsulated insulation sheets toward highly engineered multifunctional thermal-barrier components. Automotive customers increasingly require a single thin component to deliver low thermal conductivity, flame and heat resistance, electrical isolation, controlled compression behavior, low particle shedding and compatibility with automated module assembly. This is particularly important for pouch and prismatic cells, where dimensional expansion throughout battery life requires thermal barriers to maintain both insulation performance and controlled stack pressure. Alkegen's AlkeGel Prism, for example, combines aerogel insulation with compression-pad functionality and is designed to withstand temperatures up to approximately 1,260°C, while JIOS positions Thermal Blade as a compressible cell-to-cell thermal-runaway barrier. Another important trend is diversification of aerogel integration technology. Conventional silica-aerogel fiber mats remain dominant, but aerogel particles are increasingly incorporated into coatings, foams, films and other thin composite structures, giving battery designers greater flexibility in thickness, geometry and manufacturing processes. Low-dust materials, direct lamination, die cutting, pressure-sensitive adhesive integration and reduced encapsulation requirements are becoming important areas of product differentiation because they lower conversion cost and improve assembly cleanliness. Alkegen entered full-scale commercial production of fiber-enhanced EV battery aerogel in 2025, demonstrating that competition is expanding beyond the established first

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generation of battery aerogel suppliers.

Market Dynamics

Drivers

The principal demand driver is the increasing importance of controlling thermal-runaway propagation in high-energy lithium-ion traction batteries. Higher battery energy density, fast charging, tighter cell packaging and increasingly complex pack architectures increase the consequences of localized thermal events and place greater emphasis on passive thermal barriers between cells and modules. Aerogel offers exceptionally low thermal conductivity at comparatively low thickness and weight, making it particularly suitable where battery manufacturers must balance safety, energy density and available pack space. Regulatory requirements are also becoming more demanding. China's GB 38031-2025 mandatory standard for electric-vehicle traction-battery safety came into force on July 1, 2026, strengthening the industry's focus on battery-system safety and reinforcing investment in thermal-propagation management technologies.

Restraints

Aerogel insulation remains more expensive than many conventional thermal-protection materials such as mica, ceramic-fiber papers, silicone foams and selected inorganic fiber composites. Cost pressure is particularly significant in mass-market electric vehicles where material qualification must be balanced against aggressive battery-pack cost targets. Traditional silica aerogel products can also generate dust during converting and assembly, requiring encapsulation or surface treatment and thereby adding process steps, material cost and thickness. Different cell chemistries and pack architectures do not require the same level or configuration of inter-cell insulation, and designs that reduce the number of discrete cell-to-cell barriers can limit material consumption per vehicle even as EV production increases.

Opportunities

The largest opportunity lies in moving from a single-function insulation sheet to an integrated thermal-management component. Aerogel structures that simultaneously provide thermal-runaway resistance, compression control, electrical isolation, cushioning and flame protection can replace multiple individual layers in a battery pack

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and improve their value per unit area. Cabot's ENTERA materials support numerous barrier forms including blankets, pads, sheets, films, foams and coatings, while Alkegen's commercialized AlkeGel platform targets integrated cell-spacer and compression-pad applications. Further opportunities exist in thinner and cleaner composite products, localized protection around high-risk components, structural battery designs, high-voltage fast-charging platforms and the adaptation of EV-qualified aerogel technologies to adjacent energy-storage applications. Asian suppliers also have an opportunity to expand from material production into precision die-cutting, lamination and complete battery thermal-protection component supply.

Challenges

A major technical challenge is maintaining thermal and mechanical performance throughout a vehicle's service life under repeated cell swelling, vibration, thermal cycling and exposure to battery-pack chemicals. Materials must retain very low heat transfer while remaining thin enough to avoid reducing cell packing density. Manufacturers also need to control dimensional tolerances, dust generation, compression recovery, flame behavior and dielectric properties at large production volumes. Qualification cycles with automotive OEMs and battery manufacturers are lengthy, and differences in pouch, prismatic and cylindrical cell architectures require substantial product customization. As more material suppliers enter the sector, manufacturers face simultaneous pressure to reduce aerogel production cost, improve process consistency and demonstrate reliable high-temperature thermal-runaway performance.

Industry Chain Analysis

The upstream of the Aerogel Insulation for EV Battery industry includes silica precursors such as sodium silicate and organosilicon compounds, solvents, surface-modification agents, glass fiber, ceramic fiber, pre-oxidized fiber, polymer films, adhesives, coatings and other reinforcing or encapsulation materials, together with aerogel synthesis, drying, coating, lamination and converting equipment. Midstream manufacturers perform aerogel synthesis, fiber-aerogel compounding, blanket and sheet formation, surface treatment, lamination, encapsulation, die cutting and integration of compression or adhesive layers. Cabot represents an upstream-material model by supplying ENTERA aerogel particles specifically for EV thermal barriers, whereas manufacturers such as Aspen Aerogels, JIOS, IBIH, Alkegen and numerous Chinese suppliers participate further downstream in engineered pads, spacers and finished barriers. Cabot

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specifies thermal conductivity of approximately 12 mW/m·K for ENTERA EV5200 and EV5400 particles, illustrating the exceptionally low conductivity available at the aerogel-material level. Downstream customers include traction-battery cell manufacturers, module and pack manufacturers, battery-system suppliers and vehicle OEMs. Value creation is concentrated in reducing heat transfer without materially increasing pack thickness or weight, maintaining insulation under severe thermal events, managing cell expansion, ensuring electrical isolation and delivering automotive-grade consistency at high manufacturing volumes.

Segment Insights

By product form, aerogel insulation pads and sheets constitute the core commercial category because they can be installed directly between pouch or prismatic cells and readily customized by thickness, shape, film encapsulation and adhesive structure. Composite blankets are more relevant where larger-area or conformable pack protection is required, while aerogel-containing coatings and other thin barrier technologies represent an emerging route for geometrically complex or space-constrained designs. By base material, silica aerogel dominates commercial EV battery applications because of its mature manufacturing technology, very low thermal conductivity and high-temperature performance. Polymer and hybrid aerogels provide opportunities where mechanical flexibility, dust control or multifunctional integration is particularly important, while carbon-based materials remain comparatively specialized.

Thermal conductivity is one of the most important technical segmentation parameters. Commercial battery insulation commonly falls within approximately 0.020–0.035 W/(m·K) at room temperature, although the precise value depends on density, reinforcement, encapsulation, compression and test method. Products at or below approximately 0.025 W/(m·K) are attractive for thin, high-performance barriers, while materials above this range can remain commercially competitive when they offer superior compression behavior, cleanliness, flame resistance or lower cost. For example, VAN-Research specifies ?0.035 W/(m·K) for its battery aerogel insulation pad and offers structures with thickness ranging from approximately 0.5 to 6 mm.

Downstream Market Opportunities

Passenger vehicles represent the principal downstream opportunity because of their large battery-electric and plug-in hybrid production volumes and the growing use of large-format pouch and prismatic cells. Aerogel thermal barriers are particularly attractive in high-energy battery packs where manufacturers seek to delay cell-to-cell

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propagation without sacrificing volumetric energy density. Commercial vehicles form a smaller but strategically attractive application because buses, trucks and specialized electric vehicles may use larger battery systems with demanding durability and safety requirements. Future opportunities will increasingly depend on battery architecture rather than vehicle category alone: high-energy packs, fast-charging systems and battery platforms requiring controlled cell compression provide stronger aerogel demand intensity than designs where thermal protection is concentrated at module or pack level.

Regional Insights

China is the most important manufacturing and demand center for EV battery aerogel insulation, supported by the country's large traction-battery and electric-vehicle supply chains and a deep base of domestic aerogel producers and converting specialists. Companies such as IBIH, Guangdong Alison Technology, Nano Tech, VAN-Research, Pan Asian MicroVent Tech and other Chinese suppliers have developed battery-oriented insulation products, creating strong competition in thin silica-aerogel pads and laminated thermal barriers. IBIH reports that its thermal-management business has supplied fire-resistant aerogel insulation pads for more than six million electric vehicles, illustrating the scale already achieved by Chinese producers.

North America remains strategically important because of automotive OEM qualification activity and the position of Aspen Aerogels, Cabot and Alkegen. Alkegen announced full-scale commercial production of its EV battery fire-protection aerogel in June 2025 and operates manufacturing across North America and Europe, increasing the availability of alternative large-scale supply. Europe is an important technology and automotive-development market, with suppliers such as Enersens participating in advanced thermal-barrier development. Japan and South Korea are important battery and automotive markets, although dedicated domestic commercial aerogel thermal-barrier manufacturing is currently less visible than in China and North America.

Competitive Landscape Analysis

The competitive landscape combines vertically integrated aerogel producers, specialty battery thermal-barrier manufacturers and upstream aerogel-material suppliers. Aspen Aerogels is one of the most established international participants in dedicated EV battery thermal barriers through its PyroThin platform, while IBIH has developed significant commercial scale in China. Alkegen has intensified competition by entering

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full commercial production of fiber-enhanced AlkeGel EV battery aerogel, and JIOS competes through its Thermal Blade cell-to-cell barrier technology. Cabot occupies a differentiated upstream position by supplying ENTERA aerogel particles to manufacturers of pads, sheets, films, foams and coatings rather than relying solely on finished barrier products. Chinese manufacturers including Guangdong Alison Technology, Nano Tech, Sino Aerogel, VAN-Research, Pan Asian MicroVent Tech, Ningbo Surnano Aerogel, Guixiang New Materials, Xinxiang Xinqiyuan Technology and other specialist producers create a broad second competitive group centered on silica-aerogel production, lamination, die cutting and cost-efficient battery insulation. Competitive differentiation is increasingly based not only on thermal conductivity but also on high-temperature resistance, compression characteristics, dust control, thickness consistency, automated-converting compatibility, automotive qualification capability and the ability to supply high-volume customized components.

Report Scope

This report studies the global Aerogel Insulation for EV Battery production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Aerogel Insulation for EV Battery and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Aerogel Insulation for EV Battery that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Aerogel Insulation for EV Battery total production and demand, 2021-2032, (K Sqm)

Global Aerogel Insulation for EV Battery total production value, 2021-2032, (USD Million)

Global Aerogel Insulation for EV Battery production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

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Global Aerogel Insulation for EV Battery consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: Aerogel Insulation for EV Battery domestic production, consumption, key domestic manufacturers and share

Global Aerogel Insulation for EV Battery production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)

Global Aerogel Insulation for EV Battery production by Product Form, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

Global Aerogel Insulation for EV Battery production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Aerogel Insulation for EV Battery market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Aspen Aerogels, Cabot Corporation, JIOS Aerogel, Nano Tech Co., Ltd., Sino Aerogel, Enersens, Guangdong Alison Technology Co., Ltd., Alkegen, Wedge India, Namate New Materials Technology Co., Ltd. (AerogelZone), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Aerogel Insulation for EV Battery market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Sqm) and average price (US$/Sq m) by manufacturer, by Product Form, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

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Global Aerogel Insulation for EV Battery Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Aerogel Insulation for EV Battery Market, Segmentation by Product Form:

Aerogel Insulation Pad

Aerogel Insulation Sheet

Aerogel Composite Blanket

Aerogel-coated Thermal Barrier

Others

Global Aerogel Insulation for EV Battery Market, Segmentation by Base Material:

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Silica Aerogel

Polymer Aerogel

Carbon Aerogel

Hybrid Aerogel

Others

Global Aerogel Insulation for EV Battery Market, Segmentation by Thermal Conductivity:

Below 0.020 W/(m·K)

0.020–0.025 W/(m·K)

0.025–0.030 W/(m·K)

Above 0.030 W/(m·K)

Global Aerogel Insulation for EV Battery Market, Segmentation by Application:

Passenger Vehicle

Commercial Vehicle

Companies Profiled:

Aspen Aerogels

Cabot Corporation

JIOS Aerogel

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Nano Tech Co., Ltd.

Sino Aerogel

Enersens

Guangdong Alison Technology Co., Ltd.

Alkegen

Wedge India

Namate New Materials Technology Co., Ltd. (AerogelZone)

IBIH Advanced Materials Co., Ltd.

VAN-Research

Sailong Glass Fiber Co., Ltd.

Jiangsu Jiayun Advanced Materials Co., Ltd.

Shenzhen Aerogel Technology Co., Ltd.

Zhongke Runzi Technology Co., Ltd.

Ningbo Surnano Aerogel Co., Ltd.

Guixiang New Materials

Xinxiang Xinqiyuan Technology Co., Ltd.

Pan Asian MicroVent Tech

Key Questions Answered

1. How big is the global Aerogel Insulation for EV Battery market?

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2. What is the demand of the global Aerogel Insulation for EV Battery market?
3. What is the year over year growth of the global Aerogel Insulation for EV Battery market?
4. What is the total value of the global Aerogel Insulation for EV Battery market?
5. Who are the Major Players in the global Aerogel Insulation for EV Battery market?
6. What are the growth factors driving the market demand?

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