

Global Aerogel Thermal Insulation Material Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Aerogel Thermal Insulation Material market size is expected to reach \$ 2478 million by 2032, rising at a market growth of 12.4% CAGR during the forecast period (2026-2032).

Aerogel Thermal Insulation Material are commercial materials and engineered composites based on a highly porous solid network in which gas-filled nanoscale pores suppress heat transfer. The scope covers finished aerogel blankets, sheets and pads, powders and granules, and other formulated or shaped products supplied for thermal insulation, fire and thermal-runaway protection, light diffusion, acoustic control, and specialty functional uses. Flexible blankets generally combine silica aerogel with fibrous reinforcement, while sheets and pads may incorporate films, encapsulation layers, cushioning materials, or structural supports to meet dimensional, cleanliness, and handling requirements. Powders and granules are supplied as functional additives or loose-fill media for coatings, plasters, panels, daylighting systems, and other composite materials. The market is analyzed by product form, reinforcement substrate, sales channel, application, and region. Reinforcement categories include glass fiber, pre-oxidized fiber, and other specialty substrates, while channel analysis distinguishes direct and indirect sales. End-use coverage includes oil and gas, construction, electric vehicles, cold insulation, aerospace and defense, and other applications.

Key Findings

Global Aerogel Thermal Insulation Material sales volume reached 24,142 tons in 2025, reflecting continued commercialization across industrial insulation, battery protection, construction materials, and specialty thermal-management

applications.

The global average selling price was approximately US\$43.17 per kilogram in 2025.

Aerogel blankets remained the principal commercial product form. Demand was concentrated in refining, petrochemical processing, high-temperature equipment, LNG, cryogenic pipelines, and other applications where limited installation space increases the value of thin insulation systems.

Battery thermal barriers represented a higher-value growth segment. Product requirements extend beyond thermal conductivity to include thermal-runaway propagation control, dielectric insulation, compression durability, vibration resistance, and low particle shedding.

Aerogel powders and granules broadened the market beyond conventional insulation blankets. These products are increasingly incorporated into insulating coatings, plasters, building materials, industrial energy-saving materials, and formulated thermal barriers.

Market Trends

Aerogel product development is moving toward thinner, cleaner, application-specific composite systems. Industrial customers increasingly purchase prefabricated blankets, laminated cold-service products, shaped components, and fire-protection assemblies rather than undifferentiated aerogel material. Battery customers require thin pads or barriers that combine insulation, flame resistance, electrical isolation, compression management, and low particle shedding. Construction and coatings formulators are using aerogel particles as functional additives, which expands addressable demand without requiring customers to process fragile monolithic aerogel. Supplier disclosures also show that growth is uneven. Electric-vehicle thermal-barrier demand can change rapidly when incentive frameworks, vehicle programs, or OEM sourcing plans are revised. Industrial, LNG, subsea, and cryogenic demand follows a project cycle and has longer qualification periods, but it is supported by energy-efficiency, corrosion-control, and space-saving requirements. Recent product launches and manufacturing investment in low-dust, high-temperature, and cryogenic blankets indicate that suppliers are prioritizing product differentiation and regional availability over undifferentiated capacity expansion.

Market Dynamics

Drivers

Demand is driven by the ability of aerogel products to provide high thermal resistance within limited thickness and weight. In oil and gas, refining, chemical processing, LNG, offshore, and district-energy systems, aerogel blankets reduce heat loss and fit congested piping or equipment configurations. Hydrophobic products also support corrosion-under-insulation mitigation when they are incorporated into correctly designed insulation systems. Electric vehicles and battery energy storage create another important demand source because cell-to-cell barriers must delay thermal propagation without materially reducing pack energy density. Construction demand is supported by insulating plasters, composite panels, cavity-fill products, and daylighting systems where conventional insulation thickness or transparency is unsuitable. Aerospace and defense applications value low mass, temperature resistance, and the ability to formulate aerogel into specialized composites. These drivers favor engineered products with verified thermal, fire, mechanical, and environmental performance rather than basic aerogel powder sold only on nominal thermal conductivity.

Restraints

Aerogel adoption still depends on total installed economics. The material must generate sufficient value through reduced insulation thickness, lower heat loss, easier maintenance, improved battery safety, or longer asset life to justify material processing and qualification costs. Dust generation during cutting and installation remains an operational issue for some blanket products and requires ventilation, appropriate personal protection, controlled cutting, and dry-vacuum cleaning. Below-ambient and cryogenic systems also require correct vapor-barrier design; poor installation can allow moisture ingress and reduce system performance. Aerogel monoliths are intrinsically fragile, so commercial products usually require fiber reinforcement, encapsulation, coatings, or other composite structures. These additional processing steps increase manufacturing complexity and create differences in flexibility, particle shedding, compressive behavior, fire performance, and durability. Customers therefore compare complete insulation or thermal-protection systems rather than thermal conductivity alone.

Opportunities

The strongest opportunities lie in applications where conventional materials cannot simultaneously meet space, weight, fire, and thermal requirements. LNG terminals, industrial-gas facilities, subsea systems, hydrogen-related infrastructure, and dual-temperature equipment create demand for flexible products that can withstand cold operating conditions and repeated thermal cycling. Industrial retrofit projects offer another opportunity because aerogel blankets can improve thermal performance without major changes to pipe spacing, cladding, or supporting structures. In batteries, suppliers can extend beyond loose material into cell-to-cell pads, module barriers, pack-level fire protection, and integrated cushioning components. Powder and granule suppliers can expand through insulating coatings, plasters, composite boards, films, foams, and other formulated systems. Growth will increasingly depend on collaboration with converters, coating formulators, battery-component manufacturers, engineering contractors, and OEMs. Suppliers that provide testing support, fabrication guidance, application design, and regional technical service can capture more value than producers competing mainly on raw material price.

Challenges

The principal commercial challenge is converting announced capacity into qualified, consistently utilized production. Aerogel facilities require control over sol-gel chemistry, hydrophobic treatment, drying, fiber impregnation, lamination, and finishing. Small variations can affect density, thermal conductivity, dusting, thickness tolerance, and mechanical integrity. Automotive, energy, aerospace, and industrial customers also use lengthy validation procedures, so a newly completed line may not immediately generate marketable output. Customer concentration creates further volatility when a major vehicle platform, industrial project, or procurement program is delayed. Recent supplier restructuring and reassessment of previously planned capacity show that demand forecasts must be linked to identifiable customer programs rather than broad end-market growth assumptions. At the same time, rapid expansion by multiple producers can intensify price competition in standard blankets and powders. Sustainable differentiation will depend on stable quality, application certification, reliable delivery, conversion capability, and proven performance under actual operating conditions.

Industry Chain Analysis

The upstream chain includes silica sources, organosilicon modifiers, solvents, catalysts, reinforcing fibers, films, adhesives, coatings, and packaging materials. Silica aerogel is generally produced through sol-gel formation followed by aging, surface modification, and controlled drying that preserves the porous structure. Blanket production adds fiber impregnation and composite forming, commonly using glass fiber, pre-oxidized fiber, or other temperature-resistant substrates. Sheets and pads require further converting steps such as lamination, encapsulation, coating, die cutting, compression control, and cleanliness treatment. Powder and granule products may be classified by particle size, hydrophobicity, optical properties, and compatibility with different formulation systems. Midstream participants include aerogel producers, blanket manufacturers, specialty converters, coating formulators, insulation-system suppliers, and component assemblers. Downstream customers include EPC contractors, industrial asset owners, building-material producers, battery manufacturers, automotive component suppliers, aerospace contractors, distributors, and maintenance-service providers.

Value Chain Analysis

Value creation shifts significantly by product form. Powder suppliers create value through pore structure, surface treatment, particle consistency, and formulation compatibility. Blanket manufacturers add reinforcement design, temperature capability, hydrophobicity, dimensional control, and installation performance. Sheet and pad converters add further value through low-dust encapsulation, compression management, electrical insulation, flame protection, precision cutting, and integration into customer assemblies. In industrial projects, technical selection, insulation-system design, prefabrication, installation support, inspection access, and lifecycle performance influence purchasing decisions. In automotive applications, value is concentrated in co-development, testing, traceability, high-volume consistency, and platform qualification. Direct sales are therefore central to large industrial, automotive, aerospace, and customized projects. Indirect channels remain relevant for standard blankets, construction additives, maintenance demand, and geographically dispersed smaller customers. Companies positioned across material production, converting, and application engineering generally have greater control over qualification and customer retention, although their capital requirements and exposure to project delays are also higher.

Segment Insights

Aerogel blankets serve the widest range of industrial insulation conditions because they

combine thermal performance with flexibility and field installation. High-temperature blankets are used on pipes, vessels, process equipment, power systems, and industrial furnaces. Cold-service blankets require suitable moisture and vapor-management structures and are applied in LNG, industrial gases, refrigeration, offshore, and other low-temperature systems. Aerogel sheets and pads are more strongly associated with confined or precision applications. Battery products are commonly laminated, encapsulated, or combined with cushioning and flame-resistant layers to control particles and accommodate cell movement. Powder and granule products support insulating coatings, plaster, boards, daylighting, and specialty formulations. Other aerogel products include shaped parts, composite panels, preformed insulation, fire-protection assemblies, and application-specific functional materials. The competitive basis therefore varies by segment. Blankets compete on installation performance and temperature range, pads on dimensional consistency and qualification, and powders on dispersion and formulation compatibility.

Glass fiber is the mainstream reinforcement for general industrial blankets because it offers established processing, flexibility, and cost efficiency. Pre-oxidized fiber is used where higher temperature resistance, fire performance, or lower thermal shrinkage is required, including selected industrial and battery-protection products. Other substrates include ceramic fibers and specialty nonwovens designed for severe temperature, mechanical, or cleanliness conditions. The reinforcement substrate cannot be evaluated independently from aerogel loading, binder systems, hydrophobic treatment, thickness, density, and surface finishing. Channel structure also differs by product. Direct sales are important for oil and gas projects, automotive programs, cold-service systems, aerospace applications, and custom components because suppliers must participate in specification, testing, and technical support. Distributors and indirect channels are more suitable for maintenance products, standardized insulation blankets, construction additives, and smaller-volume customers. Channel effectiveness depends on local inventory, fabrication capability, application knowledge, and the ability to manage technical claims accurately.

Downstream Market Opportunities

Oil and gas remains a technically important downstream market. Refining, petrochemical, offshore, subsea, and pipeline operators require heat conservation, personnel protection, corrosion mitigation, passive fire protection, and insulation in restricted spaces. Cold insulation is developing as a more specialized segment because LNG, industrial gases, refrigeration, and dual-temperature equipment require

coordinated control of thermal transfer and moisture. These projects favor certified blanket systems, vapor-management layers, prefabricated components, and experienced installation support. Demand is project-based, so supplier performance depends on engineering specifications, approved-vendor status, project timing, and maintenance cycles. Products that reduce insulation thickness or allow easier inspection can create economic value beyond energy savings.

Electric vehicles represent a large application-development opportunity, but demand visibility depends on vehicle platforms and battery architecture. Aerogel products can be placed between cells, between modules, around battery packs, or within integrated fire-protection components. Suppliers must adapt product thickness, compressibility, particle control, dielectric properties, and flame performance to each design. Construction provides a broader but more price-sensitive opportunity through insulation plaster, panels, cavity fill, architectural membranes, and daylighting systems. Aerospace and defense remain lower-volume specialty markets that value weight reduction, extreme-temperature performance, and custom geometry. Additional opportunities may emerge in energy storage, high-temperature electronics, protective clothing, household appliances, acoustic materials, and advanced functional composites.

Regional Insights

North America is an important market for automotive thermal barriers, refining, petrochemical facilities, LNG, subsea projects, and advanced aerospace applications. The region has established aerogel technology suppliers and demanding qualification standards, but automotive demand has recently shown greater sensitivity to policy and OEM program changes. Europe combines industrial energy-efficiency demand with building renovation, offshore energy, automotive safety, and increasingly stringent environmental requirements. European customers place strong emphasis on certified performance, worker exposure, lifecycle energy savings, and compatibility with existing insulation systems.

China has a broad manufacturing base covering blankets, powders, battery pads, coatings, and other composite products. Local suppliers benefit from proximity to battery, petrochemical, construction, and industrial customers, as well as lower conversion costs and faster customization. Competition is intense in standardized products, so leading suppliers are moving toward cleaner pads, pre-oxidized-fiber blankets, cold-service systems, and engineered components. Other Asian markets are becoming more relevant for regional manufacturing and industrial energy projects.

Armacell's new aerogel facility in India illustrates the regionalization of supply for high-temperature and cryogenic products. Japan and South Korea remain important for advanced materials, electronics, automotive, and precision industrial applications, while the Middle East offers project opportunities in LNG, petrochemicals, and energy infrastructure.

Competitive Landscape Analysis

The competitive landscape includes dedicated aerogel technology companies, diversified silica-material producers, insulation-system suppliers, and specialized Chinese manufacturers. Aspen Aerogels has a strong position in industrial blankets and automotive thermal barriers. Cabot Corporation supplies aerogel particles and blankets for construction, coatings, daylighting, industrial insulation, and battery applications. Armacell focuses on flexible high-temperature, cryogenic, and dual-temperature aerogel insulation systems. Chinese suppliers cover a wide range of blankets, powders, pads, and converted components and compete through cost, local engineering support, customization, and shorter delivery cycles.

Competitive advantage is increasingly determined at the application level. Industrial customers prioritize project references, corrosion control, temperature range, low dust, fabrication efficiency, and installation support. Automotive customers focus on thermal-propagation performance, particle control, compression behavior, traceability, automated converting, and stable high-volume supply. Construction customers require formulation compatibility and acceptable system cost. Capacity alone is therefore an incomplete indicator of market position. Effective capacity must be supported by stable production, qualified products, repeat customers, and commercially viable utilization. Future consolidation may occur through partnerships between aerogel producers, converters, insulation companies, and battery-component manufacturers, while less differentiated blanket and powder suppliers face stronger price pressure.

Report Scope

This report studies the global Aerogel Thermal Insulation Material production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Aerogel Thermal Insulation Material 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 Thermal Insulation Material that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Aerogel Thermal Insulation Material total production and demand, 2021-2032, (Kilotons)

Global Aerogel Thermal Insulation Material total production value, 2021-2032, (USD Million)

Global Aerogel Thermal Insulation Material production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Aerogel Thermal Insulation Material consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Aerogel Thermal Insulation Material domestic production, consumption, key domestic manufacturers and share

Global Aerogel Thermal Insulation Material production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Aerogel Thermal Insulation Material production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Aerogel Thermal Insulation Material production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Aerogel Thermal Insulation Material 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, Cabot, IBIH, Nanotechnology, Guangdong Alison High-tech, Zhongning Technology, Armacell, Enersens, Van-Research, Aerospace Wujiang, 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 Thermal Insulation Material market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) by manufacturer, by Type, 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.

Global Aerogel Thermal Insulation Material Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Aerogel Thermal Insulation Material Market, Segmentation by

Global Aerogel Thermal Insulation Material Supply, Demand and Key Producers, 2026-2032

Type:

Aerogel Blankets

Aerogel Sheets/Pads

Powders and Granules

Others

Global Aerogel Thermal Insulation Material Market, Segmentation by Reinforced Material:

Glass Fiber

Preoxidized Fiber

Other

Global Aerogel Thermal Insulation Material Market, Segmentation by Channel:

Direct Sale

Indirect Sale

Global Aerogel Thermal Insulation Material Market, Segmentation by Application:

Oil and Gas

Construction

EV

Cold Insulation Materials

Aerospace and Defense

Others

Companies Profiled:

Aspen

Cabot

IBIH

Nanotechnology

Guangdong Alison High-tech

Zhongning Technology

Armacell

Enersens

Van-Research

Aerospace Wujiang

Aerogel Technologies

Jiangsu Jiayun New Materials

Zhongke Runzi Technology

Active Aerogels

Xiamen Namet

Benarx

Hualu Aerogel

Zhejiang UGOO Technology

Haiying Special Materials

Pan Asian Microvent Tech

Chenguang New Materials

Key Questions Answered

1. How big is the global Aerogel Thermal Insulation Material market?
2. What is the demand of the global Aerogel Thermal Insulation Material market?
3. What is the year over year growth of the global Aerogel Thermal Insulation Material market?
4. What is the total value of the global Aerogel Thermal Insulation Material market?
5. Who are the Major Players in the global Aerogel Thermal Insulation Material market?
6. What are the growth factors driving the market demand?

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