

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

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## Abstracts

The global Building Thermal Insulation Material market size is expected to reach \$ 48110 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

Building Thermal Insulation Materials refer to material systems applied to building envelope components including roofs, exterior walls, floors, and basements, achieving reduced heating and cooling loads by inhibiting heat conduction. According to relevant technical specifications of the International Organization for Standardization, these materials use low thermal conductivity as the core performance indicator, physically blocking heat transfer between indoor and outdoor spaces. The essence of Building Thermal Insulation Materials is that they serve as a key technological carrier for building energy efficiency, with their performance directly determining energy consumption levels and carbon emission intensity during building operation phases. Based on material morphology, products can be subdivided into types including blankets, boards, spray foam, and loose fill. Based on material systems, they encompass inorganic fiber materials such as fiberglass and stone wool, organic foam materials including expanded polystyrene, extruded polystyrene, and polyurethane, as well as bio-based materials such as cellulose and wood fiber. The core value of these products lies in improving living comfort, reducing energy expenses, and providing enhanced fire resistance and acoustic performance in certain systems. As a critical link connecting upstream raw material supply and downstream green building development, the quality of Building Thermal Insulation Materials directly determines the engineering realization level of advanced design concepts such as passive houses and zero-energy buildings.

## Market Development Opportunities and Key Drivers

The structural rise in global energy costs is reshaping demand logic in the construction industry, with property owners facing continuously escalating electricity and heating expenses proactively investing in insulation retrofits to reduce long-term operating costs. Governments worldwide are implementing increasingly stringent building energy efficiency regulations and green building certification standards, with the European Union, the United States, and China all incorporating high-performance insulation materials into mandatory technical requirements for new construction. Under the global carbon neutrality trend, the construction industry, as a key emission reduction sector, has seen significantly increased demand for low-carbon insulation materials such as stone wool and fiberglass. The development of next-generation products including aerogels, vacuum insulation panels, and bio-based composite materials greatly enhances thermal performance while reducing material thickness, providing architects with greater design freedom.

### Market Challenges and Risks

Trade policy uncertainty constitutes the primary external risk for industry development, with US tariff increases on imported specialty insulation materials raising construction costs and causing delays in energy efficiency projects. Raw material price fluctuations exert continuous pressure on manufacturers' profit margins, with petrochemical raw materials required for polyurethane foam significantly influenced by international oil prices. Product quality and safety concerns also warrant attention, with substandard products in the low-end market disrupting industry order, and fire accidents caused by improper use of non-flame-retardant materials having led to industry-wide rectification. Bio-based insulation materials still face technical bottlenecks in durability, moisture sensitivity, and standardization, with large-scale engineering applications confronting construction compatibility and cost challenges.

### Downstream Demand Trends

The residential new construction market, as the largest application segment, benefits from global urbanization processes and upgrading housing demand from the middle class, maintaining stable procurement of mainstream products such as fiberglass and stone wool. The residential renovation and energy efficiency retrofit market demonstrates higher growth elasticity, with a large number of aging buildings in Europe and North America urgently needing envelope upgrades, where demand growth in the existing building stock has surpassed that of new construction. In the commercial building sector, locations with stringent indoor environmental quality requirements such as office buildings, hospitals, and hotels are driving increased adoption of high-

performance spray foam and acoustic-insulation composite materials. In healthcare facilities, new hospitals incorporate specialized insulation materials into design to maintain stable recovery environments critical for wound healing care.

## Regional Trends

The Asia-Pacific region, leveraging rapid urbanization processes and vast new construction scale, has become the core growth engine for global Building Thermal Insulation Materials, with China, India, and Southeast Asian countries contributing the main incremental growth, and China's market share continuing to lead. The European market, benefiting from stringent environmental regulations and mature passive building certification systems, maintains strong demand for bio-based, recyclable and other environmentally friendly insulation materials, with local manufacturers focusing on high-value specialty product development. The North American market, relying on a robust building energy code system and large-scale residential renovation demand, maintains stable demand for advanced insulation equipment meeting strict quality standards, though tariff policies are prompting buyers to implement supply source diversification strategies.

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

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

## Highlights and key features of the study

Global Building Thermal Insulation Material total production and demand, 2021-2032, (MT)

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

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

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

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

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

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

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

This report profiles key players in the global Building 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 Kingspan Group (IE), Saint-Gobain (FR), Rockwool International (DK), Knauf Insulation (DE), Paroc (FI), Owens Corning (US), Armacell (LU), Jablite (GB), Instagroup (GB), Cellecta (GB), 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 Building Thermal Insulation Material market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MT) and average price (USD/MT) 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 Building Thermal Insulation Material Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Building Thermal Insulation Material Market, Segmentation by Type:

Inorganic Fiber Building Thermal Insulation Material

Organic Foam Building Thermal Insulation Material

Bio-Based Building Thermal Insulation Material

Global Building Thermal Insulation Material Market, Segmentation by Material Form:

Blanket Building Thermal Insulation Material

Board Building Thermal Insulation Material

Spray Foam Building Thermal Insulation Material

Loose Fill Building Thermal Insulation Material

Global Building Thermal Insulation Material Market, Segmentation by Installation Method:

Adhesive Installed Building Thermal Insulation Material

Mechanical Fixed Building Thermal Insulation Material

Cavity Fill Building Thermal Insulation Material

Global Building Thermal Insulation Material Market, Segmentation by Application:

External Wall

Roof Building

Floor

Basement

#### Companies Profiled:

Kingspan Group (IE)

Saint-Gobain (FR)

Rockwool International (DK)

Knauf Insulation (DE)

Paroc (FI)

Owens Corning (US)

Armacell (LU)

Jablite (GB)

Instagroup (GB)

Cellecta (GB)

BASF (DE)

CIUR (GB)

Sika (CH)

Achilles Corporation (JP)

DuPont (US)

Beijing New Building Material (CN)

Ruilian Energy Saving(CN)

Huamei Group (CN)

Beipeng Building Materials (CN)

**Key Questions Answered:**

1. How big is the global Building Thermal Insulation Material market?
2. What is the demand of the global Building Thermal Insulation Material market?
3. What is the year over year growth of the global Building Thermal Insulation Material market?
4. What is the production and production value of the global Building Thermal Insulation Material market?
5. Who are the key producers in the global Building Thermal Insulation Material market?
6. What are the growth factors driving the market demand?

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