

Global External Wall Thermal Insulation Materials Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global External Wall Thermal Insulation Materials market size is expected to reach \$ 37014 million by 2032, rising at a market growth of 3.4% CAGR during the forecast period (2026-2032).

External wall thermal insulation materials refer to thermal insulation materials applied to building facades, external walls, curtain wall assemblies, rainscreen systems, and external thermal insulation composite systems to reduce heat transfer through the building envelope, mitigate thermal bridging, improve energy efficiency, enhance fire safety, and support acoustic and indoor comfort performance.

The upstream supply chain includes styrene, polystyrene resin, MDI/TDI, polyether polyols, phenolic resin, basalt, diabase, slag, recycled glass, quartz sand, blowing agents, flame retardants, binders, and facing materials. Downstream include new-build external wall insulation, building retrofit, facade insulation, curtain wall fire-safe insulation, passive house envelopes, nearly zero-energy buildings, commercial buildings, and residential building envelope upgrades.

In 2025, global external wall thermal insulation materials production reached approximately 14 million tons, with an average global market price is \$2,000 per ton.

From a global industry perspective, external wall thermal insulation materials have evolved from conventional energy-saving construction materials into core components of building energy efficiency, low-carbon renovation and green building systems. Building envelope design directly affects heating and cooling demand, comfort, indoor environmental quality and embodied carbon performance, and the IEA identifies envelope design as critical to these outcomes. Globally, building operations remain a

major source of energy use and emissions: IEA data shows that building operations account for around 30% of global final energy consumption and about 26% of global energy-related emissions, while the GlobalABC 2024/25 report also highlights the large contribution of buildings and construction to global energy demand and CO₂ emissions. As a result, external wall thermal insulation material is no longer valued only for reducing heat loss; it is increasingly linked to building codes, retrofit programs, indoor comfort, energy security and lifecycle carbon management.

In terms of industry trends, external wall thermal insulation materials are moving toward higher thermal performance, stronger fire safety, thinner systems, better durability, system-based installation, lower-carbon materials and recyclable solutions. Traditional demand focused mainly on thermal conductivity and installation cost, while current projects increasingly evaluate whole-system performance, including fire classification, water absorption, dimensional stability, crack resistance, weatherability, compatibility with renders, adhesives and anchors, thermal-bridge control and long-term fade durability. Fire-safety concerns in high-rise and public buildings are supporting demand for non-combustible mineral wool systems in many markets, while low-conductivity foam materials, vacuum insulation panels and aerogels are gaining relevance where wall thickness is constrained or energy-performance targets are demanding. The EU Energy Performance of Buildings Directive continues to support higher building energy performance and is linked with building renovation, energy-performance standards and low-carbon transition policies, reinforcing the long-term upgrade path for exterior wall insulation systems.

The main growth drivers come from three areas. First, global pressure to reduce building energy use and emissions is increasing, and the high energy share of buildings makes exterior wall insulation an important measure for reducing heating and cooling loads, improving energy efficiency and lowering operational carbon emissions. Second, demand for renovation of existing buildings is increasing, particularly in mature markets such as Europe; the EU Renovation Wave aims to renovate 35 million buildings by 2030 and at least double the annual rate of energy renovations, directly supporting demand for external wall insulation, cavity insulation, facade insulation and envelope retrofit systems. Third, extreme weather, energy-price volatility, green building certification and stricter building regulations are pushing owners, developers and governments to pay more attention to long-term energy savings, comfort, fire safety and lifecycle cost of building envelopes.

This report studies the global External Wall Thermal Insulation Materials production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global External Wall Thermal Insulation Materials total production and demand, 2021-2032, (Kilotons)

Global External Wall Thermal Insulation Materials total production value, 2021-2032, (USD Million)

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

Global External Wall Thermal Insulation Materials consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: External Wall Thermal Insulation Materials domestic production, consumption, key domestic manufacturers and share

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

Global External Wall Thermal Insulation Materials production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global External Wall Thermal Insulation Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global External Wall Thermal Insulation Materials 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, Saint-Gobain, Owens Corning, ROCKWOOL Group, Knauf Insulation, Johns Manville, Ravago Building Solutions, DuPont, URSA, TechnoNICOL, 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 External Wall Thermal Insulation Materials 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 External Wall Thermal Insulation Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global External Wall Thermal Insulation Materials Market, Segmentation by Type:

Rock Wool

Glass Wool

EPS/XPS

PU/PIR

Others

Global External Wall Thermal Insulation Materials Market, Segmentation by System
Format:

External Wall Insulation System (EWIS)

Exterior Insulation and Finish System (EIFS)

Continuous Insulation Board

Curtain Wall Insulation

Others

Global External Wall Thermal Insulation Materials Market, Segmentation by Project
Stage:

New Construction

Retrofit and Renovation

Global External Wall Thermal Insulation Materials Market, Segmentation by Application:

Residential Building

Commercial Building

Others

Companies Profiled:

Kingspan Group

Saint-Gobain

Owens Corning

ROCKWOOL Group

Knauf Insulation

Johns Manville

Ravago Building Solutions

DuPont

URSA

TechnoNICOL

Beipeng Building Materials Group

Taishi Energy Conservation Materials

Asia Cuanon Technology

UNILIN Insulation

Recticel

Oriental Yuhong

Insulfoam

SOPREMA

Austrotherm

KCC Corporation

Asahi Kasei Construction Materials

Hunter Panels

Hongbaoli

Shanghai ABM Rock Wool

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

- 1.1 External Wall Thermal Insulation Materials Introduction
- 1.2 World External Wall Thermal Insulation Materials Supply & Forecast
 - 1.2.1 World External Wall Thermal Insulation Materials Production Value (2021 & 2025 & 2032)
 - 1.2.2 World External Wall Thermal Insulation Materials Production (2021-2032)
 - 1.2.3 World External Wall Thermal Insulation Materials Pricing Trends (2021-2032)
- 1.3 World External Wall Thermal Insulation Materials Production by Region (Based on Production Site)
 - 1.3.1 World External Wall Thermal Insulation Materials Production Value by Region (2021-2032)
 - 1.3.2 World External Wall Thermal Insulation Materials Production by Region (2021-2032)
 - 1.3.3 World External Wall Thermal Insulation Materials Average Price by Region (2021-2032)
 - 1.3.4 North America External Wall Thermal Insulation Materials Production (2021-2032)
 - 1.3.5 Europe External Wall Thermal Insulation Materials Production (2021-2032)
 - 1.3.6 China External Wall Thermal Insulation Materials Production (2021-2032)
 - 1.3.7 Japan External Wall Thermal Insulation Materials Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 External Wall Thermal Insulation Materials Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 External Wall Thermal Insulation Materials Major Market Trends

2 DEMAND SUMMARY

- 2.1 World External Wall Thermal Insulation Materials Demand (2021-2032)
- 2.2 World External Wall Thermal Insulation Materials Consumption by Region
 - 2.2.1 World External Wall Thermal Insulation Materials Consumption by Region (2021-2026)
 - 2.2.2 World External Wall Thermal Insulation Materials Consumption Forecast by Region (2027-2032)
- 2.3 United States External Wall Thermal Insulation Materials Consumption (2021-2032)
- 2.4 China External Wall Thermal Insulation Materials Consumption (2021-2032)
- 2.5 Europe External Wall Thermal Insulation Materials Consumption (2021-2032)

- 2.6 Japan External Wall Thermal Insulation Materials Consumption (2021-2032)
- 2.7 South Korea External Wall Thermal Insulation Materials Consumption (2021-2032)
- 2.8 ASEAN External Wall Thermal Insulation Materials Consumption (2021-2032)
- 2.9 India External Wall Thermal Insulation Materials Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World External Wall Thermal Insulation Materials Production Value by Manufacturer (2021-2026)
- 3.2 World External Wall Thermal Insulation Materials Production by Manufacturer (2021-2026)
- 3.3 World External Wall Thermal Insulation Materials Average Price by Manufacturer (2021-2026)
- 3.4 External Wall Thermal Insulation Materials Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global External Wall Thermal Insulation Materials Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for External Wall Thermal Insulation Materials in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for External Wall Thermal Insulation Materials in 2025
- 3.6 External Wall Thermal Insulation Materials Market: Overall Company Footprint Analysis
 - 3.6.1 External Wall Thermal Insulation Materials Market: Region Footprint
 - 3.6.2 External Wall Thermal Insulation Materials Market: Company Product Type Footprint
 - 3.6.3 External Wall Thermal Insulation Materials Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: External Wall Thermal Insulation Materials Production Value Comparison

4.1.1 United States VS China: External Wall Thermal Insulation Materials Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: External Wall Thermal Insulation Materials Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: External Wall Thermal Insulation Materials Production Comparison

4.2.1 United States VS China: External Wall Thermal Insulation Materials Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: External Wall Thermal Insulation Materials Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: External Wall Thermal Insulation Materials Consumption Comparison

4.3.1 United States VS China: External Wall Thermal Insulation Materials Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: External Wall Thermal Insulation Materials Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based External Wall Thermal Insulation Materials Manufacturers and Market Share, 2021-2026

4.4.1 United States Based External Wall Thermal Insulation Materials Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers External Wall Thermal Insulation Materials Production Value (2021-2026)

4.4.3 United States Based Manufacturers External Wall Thermal Insulation Materials Production (2021-2026)

4.5 China Based External Wall Thermal Insulation Materials Manufacturers and Market Share

4.5.1 China Based External Wall Thermal Insulation Materials Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers External Wall Thermal Insulation Materials Production Value (2021-2026)

4.5.3 China Based Manufacturers External Wall Thermal Insulation Materials Production (2021-2026)

4.6 Rest of World Based External Wall Thermal Insulation Materials Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based External Wall Thermal Insulation Materials Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers External Wall Thermal Insulation Materials Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers External Wall Thermal Insulation Materials

Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World External Wall Thermal Insulation Materials Market Size Overview by Type:
2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Rock Wool

5.2.2 Glass Wool

5.2.3 EPS/XPS

5.2.4 PU/PIR

5.2.5 Others

5.3 Market Segment by Type

5.3.1 World External Wall Thermal Insulation Materials Production by Type
(2021-2032)

5.3.2 World External Wall Thermal Insulation Materials Production Value by Type
(2021-2032)

5.3.3 World External Wall Thermal Insulation Materials Average Price by Type
(2021-2032)

6 MARKET ANALYSIS BY SYSTEM FORMAT

6.1 World External Wall Thermal Insulation Materials Market Size Overview by System
Format: 2021 VS 2025 VS 2032

6.2 Segment Introduction by System Format

6.2.1 External Wall Insulation System (EWIS)

6.2.2 Exterior Insulation and Finish System (EIFS)

6.2.3 Continuous Insulation Board

6.2.4 Curtain Wall Insulation

6.2.5 Others

6.3 Market Segment by System Format

6.3.1 World External Wall Thermal Insulation Materials Production by System Format
(2021-2032)

6.3.2 World External Wall Thermal Insulation Materials Production Value by System
Format (2021-2032)

6.3.3 World External Wall Thermal Insulation Materials Average Price by System
Format (2021-2032)

7 MARKET ANALYSIS BY PROJECT STAGE

7.1 World External Wall Thermal Insulation Materials Market Size Overview by Project Stage: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Project Stage

7.2.1 New Construction

7.2.2 Retrofit and Renovation

7.3 Market Segment by Project Stage

7.3.1 World External Wall Thermal Insulation Materials Production by Project Stage (2021-2032)

7.3.2 World External Wall Thermal Insulation Materials Production Value by Project Stage (2021-2032)

7.3.3 World External Wall Thermal Insulation Materials Average Price by Project Stage (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World External Wall Thermal Insulation Materials Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Residential Building

8.2.2 Commercial Building

8.2.3 Others

8.3 Market Segment by Application

8.3.1 World External Wall Thermal Insulation Materials Production by Application (2021-2032)

8.3.2 World External Wall Thermal Insulation Materials Production Value by Application (2021-2032)

8.3.3 World External Wall Thermal Insulation Materials Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Kingspan Group

9.1.1 Kingspan Group Details

9.1.2 Kingspan Group Major Business

9.1.3 Kingspan Group External Wall Thermal Insulation Materials Product and Services

9.1.4 Kingspan Group External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.1.5 Kingspan Group Recent Developments/Updates
- 9.1.6 Kingspan Group Competitive Strengths & Weaknesses
- 9.2 Saint-Gobain
 - 9.2.1 Saint-Gobain Details
 - 9.2.2 Saint-Gobain Major Business
 - 9.2.3 Saint-Gobain External Wall Thermal Insulation Materials Product and Services
 - 9.2.4 Saint-Gobain External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.2.5 Saint-Gobain Recent Developments/Updates
 - 9.2.6 Saint-Gobain Competitive Strengths & Weaknesses
- 9.3 Owens Corning
 - 9.3.1 Owens Corning Details
 - 9.3.2 Owens Corning Major Business
 - 9.3.3 Owens Corning External Wall Thermal Insulation Materials Product and Services
 - 9.3.4 Owens Corning External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Owens Corning Recent Developments/Updates
 - 9.3.6 Owens Corning Competitive Strengths & Weaknesses
- 9.4 ROCKWOOL Group
 - 9.4.1 ROCKWOOL Group Details
 - 9.4.2 ROCKWOOL Group Major Business
 - 9.4.3 ROCKWOOL Group External Wall Thermal Insulation Materials Product and Services
 - 9.4.4 ROCKWOOL Group External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 ROCKWOOL Group Recent Developments/Updates
 - 9.4.6 ROCKWOOL Group Competitive Strengths & Weaknesses
- 9.5 Knauf Insulation
 - 9.5.1 Knauf Insulation Details
 - 9.5.2 Knauf Insulation Major Business
 - 9.5.3 Knauf Insulation External Wall Thermal Insulation Materials Product and Services
 - 9.5.4 Knauf Insulation External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Knauf Insulation Recent Developments/Updates
 - 9.5.6 Knauf Insulation Competitive Strengths & Weaknesses
- 9.6 Johns Manville
 - 9.6.1 Johns Manville Details
 - 9.6.2 Johns Manville Major Business

- 9.6.3 Johns Manville External Wall Thermal Insulation Materials Product and Services
- 9.6.4 Johns Manville External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 Johns Manville Recent Developments/Updates
- 9.6.6 Johns Manville Competitive Strengths & Weaknesses
- 9.7 Ravago Building Solutions
 - 9.7.1 Ravago Building Solutions Details
 - 9.7.2 Ravago Building Solutions Major Business
 - 9.7.3 Ravago Building Solutions External Wall Thermal Insulation Materials Product and Services
 - 9.7.4 Ravago Building Solutions External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 Ravago Building Solutions Recent Developments/Updates
 - 9.7.6 Ravago Building Solutions Competitive Strengths & Weaknesses
- 9.8 DuPont
 - 9.8.1 DuPont Details
 - 9.8.2 DuPont Major Business
 - 9.8.3 DuPont External Wall Thermal Insulation Materials Product and Services
 - 9.8.4 DuPont External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 DuPont Recent Developments/Updates
 - 9.8.6 DuPont Competitive Strengths & Weaknesses
- 9.9 URSA
 - 9.9.1 URSA Details
 - 9.9.2 URSA Major Business
 - 9.9.3 URSA External Wall Thermal Insulation Materials Product and Services
 - 9.9.4 URSA External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 URSA Recent Developments/Updates
 - 9.9.6 URSA Competitive Strengths & Weaknesses
- 9.10 TechnoNICOL
 - 9.10.1 TechnoNICOL Details
 - 9.10.2 TechnoNICOL Major Business
 - 9.10.3 TechnoNICOL External Wall Thermal Insulation Materials Product and Services
 - 9.10.4 TechnoNICOL External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 TechnoNICOL Recent Developments/Updates
 - 9.10.6 TechnoNICOL Competitive Strengths & Weaknesses
- 9.11 Beipeng Building Materials Group

- 9.11.1 Beipeng Building Materials Group Details
- 9.11.2 Beipeng Building Materials Group Major Business
- 9.11.3 Beipeng Building Materials Group External Wall Thermal Insulation Materials Product and Services
- 9.11.4 Beipeng Building Materials Group External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 Beipeng Building Materials Group Recent Developments/Updates
- 9.11.6 Beipeng Building Materials Group Competitive Strengths & Weaknesses
- 9.12 Taishi Energy Conservation Materials
 - 9.12.1 Taishi Energy Conservation Materials Details
 - 9.12.2 Taishi Energy Conservation Materials Major Business
 - 9.12.3 Taishi Energy Conservation Materials External Wall Thermal Insulation Materials Product and Services
 - 9.12.4 Taishi Energy Conservation Materials External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Taishi Energy Conservation Materials Recent Developments/Updates
 - 9.12.6 Taishi Energy Conservation Materials Competitive Strengths & Weaknesses
- 9.13 Asia Cuanon Technology
 - 9.13.1 Asia Cuanon Technology Details
 - 9.13.2 Asia Cuanon Technology Major Business
 - 9.13.3 Asia Cuanon Technology External Wall Thermal Insulation Materials Product and Services
 - 9.13.4 Asia Cuanon Technology External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Asia Cuanon Technology Recent Developments/Updates
 - 9.13.6 Asia Cuanon Technology Competitive Strengths & Weaknesses
- 9.14 UNILIN Insulation
 - 9.14.1 UNILIN Insulation Details
 - 9.14.2 UNILIN Insulation Major Business
 - 9.14.3 UNILIN Insulation External Wall Thermal Insulation Materials Product and Services
 - 9.14.4 UNILIN Insulation External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 UNILIN Insulation Recent Developments/Updates
 - 9.14.6 UNILIN Insulation Competitive Strengths & Weaknesses
- 9.15 Recticel
 - 9.15.1 Recticel Details
 - 9.15.2 Recticel Major Business
 - 9.15.3 Recticel External Wall Thermal Insulation Materials Product and Services

9.15.4 Recticel External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Recticel Recent Developments/Updates

9.15.6 Recticel Competitive Strengths & Weaknesses

9.16 Oriental Yuhong

9.16.1 Oriental Yuhong Details

9.16.2 Oriental Yuhong Major Business

9.16.3 Oriental Yuhong External Wall Thermal Insulation Materials Product and Services

9.16.4 Oriental Yuhong External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 Oriental Yuhong Recent Developments/Updates

9.16.6 Oriental Yuhong Competitive Strengths & Weaknesses

9.17 Insulfoam

9.17.1 Insulfoam Details

9.17.2 Insulfoam Major Business

9.17.3 Insulfoam External Wall Thermal Insulation Materials Product and Services

9.17.4 Insulfoam External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 Insulfoam Recent Developments/Updates

9.17.6 Insulfoam Competitive Strengths & Weaknesses

9.18 SOPREMA

9.18.1 SOPREMA Details

9.18.2 SOPREMA Major Business

9.18.3 SOPREMA External Wall Thermal Insulation Materials Product and Services

9.18.4 SOPREMA External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 SOPREMA Recent Developments/Updates

9.18.6 SOPREMA Competitive Strengths & Weaknesses

9.19 Austrotherm

9.19.1 Austrotherm Details

9.19.2 Austrotherm Major Business

9.19.3 Austrotherm External Wall Thermal Insulation Materials Product and Services

9.19.4 Austrotherm External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.19.5 Austrotherm Recent Developments/Updates

9.19.6 Austrotherm Competitive Strengths & Weaknesses

9.20 KCC Corporation

9.20.1 KCC Corporation Details

- 9.20.2 KCC Corporation Major Business
- 9.20.3 KCC Corporation External Wall Thermal Insulation Materials Product and Services
- 9.20.4 KCC Corporation External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.20.5 KCC Corporation Recent Developments/Updates
- 9.20.6 KCC Corporation Competitive Strengths & Weaknesses
- 9.21 Asahi Kasei Construction Materials
 - 9.21.1 Asahi Kasei Construction Materials Details
 - 9.21.2 Asahi Kasei Construction Materials Major Business
 - 9.21.3 Asahi Kasei Construction Materials External Wall Thermal Insulation Materials Product and Services
 - 9.21.4 Asahi Kasei Construction Materials External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.21.5 Asahi Kasei Construction Materials Recent Developments/Updates
 - 9.21.6 Asahi Kasei Construction Materials Competitive Strengths & Weaknesses
- 9.22 Hunter Panels
 - 9.22.1 Hunter Panels Details
 - 9.22.2 Hunter Panels Major Business
 - 9.22.3 Hunter Panels External Wall Thermal Insulation Materials Product and Services
 - 9.22.4 Hunter Panels External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.22.5 Hunter Panels Recent Developments/Updates
 - 9.22.6 Hunter Panels Competitive Strengths & Weaknesses
- 9.23 Hongbaoli
 - 9.23.1 Hongbaoli Details
 - 9.23.2 Hongbaoli Major Business
 - 9.23.3 Hongbaoli External Wall Thermal Insulation Materials Product and Services
 - 9.23.4 Hongbaoli External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.23.5 Hongbaoli Recent Developments/Updates
 - 9.23.6 Hongbaoli Competitive Strengths & Weaknesses
- 9.24 Shanghai ABM Rock Wool
 - 9.24.1 Shanghai ABM Rock Wool Details
 - 9.24.2 Shanghai ABM Rock Wool Major Business
 - 9.24.3 Shanghai ABM Rock Wool External Wall Thermal Insulation Materials Product and Services
 - 9.24.4 Shanghai ABM Rock Wool External Wall Thermal Insulation Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.24.5 Shanghai ABM Rock Wool Recent Developments/Updates

9.24.6 Shanghai ABM Rock Wool Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 External Wall Thermal Insulation Materials Industry Chain

10.2 External Wall Thermal Insulation Materials Upstream Analysis

10.2.1 External Wall Thermal Insulation Materials Core Raw Materials

10.2.2 Main Manufacturers of External Wall Thermal Insulation Materials Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 External Wall Thermal Insulation Materials Production Mode

10.6 External Wall Thermal Insulation Materials Procurement Model

10.7 External Wall Thermal Insulation Materials Industry Sales Model and Sales Channels

10.7.1 External Wall Thermal Insulation Materials Sales Model

10.7.2 External Wall Thermal Insulation Materials Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World External Wall Thermal Insulation Materials Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World External Wall Thermal Insulation Materials Production Value by Region (2021-2026) & (USD Million)

Table 3. World External Wall Thermal Insulation Materials Production Value by Region (2027-2032) & (USD Million)

Table 4. World External Wall Thermal Insulation Materials Production Value Market Share by Region (2021-2026)

Table 5. World External Wall Thermal Insulation Materials Production Value Market Share by Region (2027-2032)

Table 6. World External Wall Thermal Insulation Materials Production by Region (2021-2026) & (Kilotons)

Table 7. World External Wall Thermal Insulation Materials Production by Region (2027-2032) & (Kilotons)

Table 8. World External Wall Thermal Insulation Materials Production Market Share by Region (2021-2026)

Table 9. World External Wall Thermal Insulation Materials Production Market Share by Region (2027-2032)

Table 10. World External Wall Thermal Insulation Materials Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World External Wall Thermal Insulation Materials Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. External Wall Thermal Insulation Materials Major Market Trends

Table 13. World External Wall Thermal Insulation Materials Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kilotons)

Table 14. World External Wall Thermal Insulation Materials Consumption by Region (2021-2026) & (Kilotons)

Table 15. World External Wall Thermal Insulation Materials Consumption Forecast by Region (2027-2032) & (Kilotons)

Table 16. World External Wall Thermal Insulation Materials Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key External Wall Thermal Insulation Materials Producers in 2025

Table 18. World External Wall Thermal Insulation Materials Production by Manufacturer (2021-2026) & (Kilotons)

Table 19. Production Market Share of Key External Wall Thermal Insulation Materials Producers in 2025

Table 20. World External Wall Thermal Insulation Materials Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global External Wall Thermal Insulation Materials Company Evaluation Quadrant

Table 22. World External Wall Thermal Insulation Materials Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and External Wall Thermal Insulation Materials Production Site of Key Manufacturer

Table 24. External Wall Thermal Insulation Materials Market: Company Product Type Footprint

Table 25. External Wall Thermal Insulation Materials Market: Company Product Application Footprint

Table 26. External Wall Thermal Insulation Materials Competitive Factors

Table 27. External Wall Thermal Insulation Materials New Entrant and Capacity Expansion Plans

Table 28. External Wall Thermal Insulation Materials Mergers & Acquisitions Activity

Table 29. United States VS China External Wall Thermal Insulation Materials Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China External Wall Thermal Insulation Materials Production Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 31. United States VS China External Wall Thermal Insulation Materials Consumption Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 32. United States Based External Wall Thermal Insulation Materials Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers External Wall Thermal Insulation Materials Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers External Wall Thermal Insulation Materials Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers External Wall Thermal Insulation Materials Production (2021-2026) & (Kilotons)

Table 36. United States Based Manufacturers External Wall Thermal Insulation Materials Production Market Share (2021-2026)

Table 37. China Based External Wall Thermal Insulation Materials Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers External Wall Thermal Insulation Materials Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers External Wall Thermal Insulation Materials

Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers External Wall Thermal Insulation Materials Production, (2021-2026) & (Kilotons)

Table 41. China Based Manufacturers External Wall Thermal Insulation Materials Production Market Share (2021-2026)

Table 42. Rest of World Based External Wall Thermal Insulation Materials Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers External Wall Thermal Insulation Materials Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers External Wall Thermal Insulation Materials Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers External Wall Thermal Insulation Materials Production, (2021-2026) & (Kilotons)

Table 46. Rest of World Based Manufacturers External Wall Thermal Insulation Materials Production Market Share (2021-2026)

Table 47. World External Wall Thermal Insulation Materials Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World External Wall Thermal Insulation Materials Production by Type (2021-2026) & (Kilotons)

Table 49. World External Wall Thermal Insulation Materials Production by Type (2027-2032) & (Kilotons)

Table 50. World External Wall Thermal Insulation Materials Production Value by Type (2021-2026) & (USD Million)

Table 51. World External Wall Thermal Insulation Materials Production Value by Type (2027-2032) & (USD Million)

Table 52. World External Wall Thermal Insulation Materials Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World External Wall Thermal Insulation Materials Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World External Wall Thermal Insulation Materials Production Value by System Format, (USD Million), 2021 & 2025 & 2032

Table 55. World External Wall Thermal Insulation Materials Production by System Format (2021-2026) & (Kilotons)

Table 56. World External Wall Thermal Insulation Materials Production by System Format (2027-2032) & (Kilotons)

Table 57. World External Wall Thermal Insulation Materials Production Value by System Format (2021-2026) & (USD Million)

Table 58. World External Wall Thermal Insulation Materials Production Value by System Format (2027-2032) & (USD Million)

Table 59. World External Wall Thermal Insulation Materials Average Price by System Format (2021-2026) & (US\$/Ton)

Table 60. World External Wall Thermal Insulation Materials Average Price by System Format (2027-2032) & (US\$/Ton)

Table 61. World External Wall Thermal Insulation Materials Production Value by Project Stage, (USD Million), 2021 & 2025 & 2032

Table 62. World External Wall Thermal Insulation Materials Production by Project Stage (2021-2026) & (Kilotons)

Table 63. World External Wall Thermal Insulation Materials Production by Project Stage (2027-2032) & (Kilotons)

Table 64. World External Wall Thermal Insulation Materials Production Value by Project Stage (2021-2026) & (USD Million)

Table 65. World External Wall Thermal Insulation Materials Production Value by Project Stage (2027-2032) & (USD Million)

Table 66. World External Wall Thermal Insulation Materials Average Price by Project Stage (2021-2026) & (US\$/Ton)

Table 67. World External Wall Thermal Insulation Materials Average Price by Project Stage (2027-2032) & (US\$/Ton)

Table 68. World External Wall Thermal Insulation Materials Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World External Wall Thermal Insulation Materials Production by Application (2021-2026) & (Kilotons)

Table 70. World External Wall Thermal Insulation Materials Production by Application (2027-2032) & (Kilotons)

Table 71. World External Wall Thermal Insulation Materials Production Value by Application (2021-2026) & (USD Million)

Table 72. World External Wall Thermal Insulation Materials Production Value by Application (2027-2032) & (USD Million)

Table 73. World External Wall Thermal Insulation Materials Average Price by Application (2021-2026) & (US\$/Ton)

Table 74. World External Wall Thermal Insulation Materials Average Price by Application (2027-2032) & (US\$/Ton)

Table 75. Kingspan Group Basic Information, Manufacturing Base and Competitors

Table 76. Kingspan Group Major Business

Table 77. Kingspan Group External Wall Thermal Insulation Materials Product and Services

Table 78. Kingspan Group External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Kingspan Group Recent Developments/Updates

Table 80. Kingspan Group Competitive Strengths & Weaknesses

Table 81. Saint-Gobain Basic Information, Manufacturing Base and Competitors

Table 82. Saint-Gobain Major Business

Table 83. Saint-Gobain External Wall Thermal Insulation Materials Product and Services

Table 84. Saint-Gobain External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Saint-Gobain Recent Developments/Updates

Table 86. Saint-Gobain Competitive Strengths & Weaknesses

Table 87. Owens Corning Basic Information, Manufacturing Base and Competitors

Table 88. Owens Corning Major Business

Table 89. Owens Corning External Wall Thermal Insulation Materials Product and Services

Table 90. Owens Corning External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Owens Corning Recent Developments/Updates

Table 92. Owens Corning Competitive Strengths & Weaknesses

Table 93. ROCKWOOL Group Basic Information, Manufacturing Base and Competitors

Table 94. ROCKWOOL Group Major Business

Table 95. ROCKWOOL Group External Wall Thermal Insulation Materials Product and Services

Table 96. ROCKWOOL Group External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. ROCKWOOL Group Recent Developments/Updates

Table 98. ROCKWOOL Group Competitive Strengths & Weaknesses

Table 99. Knauf Insulation Basic Information, Manufacturing Base and Competitors

Table 100. Knauf Insulation Major Business

Table 101. Knauf Insulation External Wall Thermal Insulation Materials Product and Services

Table 102. Knauf Insulation External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Knauf Insulation Recent Developments/Updates

Table 104. Knauf Insulation Competitive Strengths & Weaknesses

Table 105. Johns Manville Basic Information, Manufacturing Base and Competitors

Table 106. Johns Manville Major Business
Table 107. Johns Manville External Wall Thermal Insulation Materials Product and Services
Table 108. Johns Manville External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Johns Manville Recent Developments/Updates
Table 110. Johns Manville Competitive Strengths & Weaknesses
Table 111. Ravago Building Solutions Basic Information, Manufacturing Base and Competitors
Table 112. Ravago Building Solutions Major Business
Table 113. Ravago Building Solutions External Wall Thermal Insulation Materials Product and Services
Table 114. Ravago Building Solutions External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Ravago Building Solutions Recent Developments/Updates
Table 116. Ravago Building Solutions Competitive Strengths & Weaknesses
Table 117. DuPont Basic Information, Manufacturing Base and Competitors
Table 118. DuPont Major Business
Table 119. DuPont External Wall Thermal Insulation Materials Product and Services
Table 120. DuPont External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. DuPont Recent Developments/Updates
Table 122. DuPont Competitive Strengths & Weaknesses
Table 123. URSA Basic Information, Manufacturing Base and Competitors
Table 124. URSA Major Business
Table 125. URSA External Wall Thermal Insulation Materials Product and Services
Table 126. URSA External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. URSA Recent Developments/Updates
Table 128. URSA Competitive Strengths & Weaknesses
Table 129. TechnoNICOL Basic Information, Manufacturing Base and Competitors
Table 130. TechnoNICOL Major Business
Table 131. TechnoNICOL External Wall Thermal Insulation Materials Product and Services
Table 132. TechnoNICOL External Wall Thermal Insulation Materials Production

(Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. TechnoNICOL Recent Developments/Updates

Table 134. TechnoNICOL Competitive Strengths & Weaknesses

Table 135. Beipeng Building Materials Group Basic Information, Manufacturing Base and Competitors

Table 136. Beipeng Building Materials Group Major Business

Table 137. Beipeng Building Materials Group External Wall Thermal Insulation Materials Product and Services

Table 138. Beipeng Building Materials Group External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Beipeng Building Materials Group Recent Developments/Updates

Table 140. Beipeng Building Materials Group Competitive Strengths & Weaknesses

Table 141. Taishi Energy Conservation Materials Basic Information, Manufacturing Base and Competitors

Table 142. Taishi Energy Conservation Materials Major Business

Table 143. Taishi Energy Conservation Materials External Wall Thermal Insulation Materials Product and Services

Table 144. Taishi Energy Conservation Materials External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Taishi Energy Conservation Materials Recent Developments/Updates

Table 146. Taishi Energy Conservation Materials Competitive Strengths & Weaknesses

Table 147. Asia Cuanon Technology Basic Information, Manufacturing Base and Competitors

Table 148. Asia Cuanon Technology Major Business

Table 149. Asia Cuanon Technology External Wall Thermal Insulation Materials Product and Services

Table 150. Asia Cuanon Technology External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Asia Cuanon Technology Recent Developments/Updates

Table 152. Asia Cuanon Technology Competitive Strengths & Weaknesses

Table 153. UNILIN Insulation Basic Information, Manufacturing Base and Competitors

Table 154. UNILIN Insulation Major Business

Table 155. UNILIN Insulation External Wall Thermal Insulation Materials Product and Services

Table 156. UNILIN Insulation External Wall Thermal Insulation Materials Production

(Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. UNILIN Insulation Recent Developments/Updates

Table 158. UNILIN Insulation Competitive Strengths & Weaknesses

Table 159. Recticel Basic Information, Manufacturing Base and Competitors

Table 160. Recticel Major Business

Table 161. Recticel External Wall Thermal Insulation Materials Product and Services

Table 162. Recticel External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Recticel Recent Developments/Updates

Table 164. Recticel Competitive Strengths & Weaknesses

Table 165. Oriental Yuhong Basic Information, Manufacturing Base and Competitors

Table 166. Oriental Yuhong Major Business

Table 167. Oriental Yuhong External Wall Thermal Insulation Materials Product and Services

Table 168. Oriental Yuhong External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Oriental Yuhong Recent Developments/Updates

Table 170. Oriental Yuhong Competitive Strengths & Weaknesses

Table 171. Insulfoam Basic Information, Manufacturing Base and Competitors

Table 172. Insulfoam Major Business

Table 173. Insulfoam External Wall Thermal Insulation Materials Product and Services

Table 174. Insulfoam External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Insulfoam Recent Developments/Updates

Table 176. Insulfoam Competitive Strengths & Weaknesses

Table 177. SOPREMA Basic Information, Manufacturing Base and Competitors

Table 178. SOPREMA Major Business

Table 179. SOPREMA External Wall Thermal Insulation Materials Product and Services

Table 180. SOPREMA External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. SOPREMA Recent Developments/Updates

Table 182. SOPREMA Competitive Strengths & Weaknesses

Table 183. Austrotherm Basic Information, Manufacturing Base and Competitors

Table 184. Austrotherm Major Business

Table 185. Austrotherm External Wall Thermal Insulation Materials Product and Services

Table 186. Austrotherm External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. Austrotherm Recent Developments/Updates

Table 188. Austrotherm Competitive Strengths & Weaknesses

Table 189. KCC Corporation Basic Information, Manufacturing Base and Competitors

Table 190. KCC Corporation Major Business

Table 191. KCC Corporation External Wall Thermal Insulation Materials Product and Services

Table 192. KCC Corporation External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. KCC Corporation Recent Developments/Updates

Table 194. KCC Corporation Competitive Strengths & Weaknesses

Table 195. Asahi Kasei Construction Materials Basic Information, Manufacturing Base and Competitors

Table 196. Asahi Kasei Construction Materials Major Business

Table 197. Asahi Kasei Construction Materials External Wall Thermal Insulation Materials Product and Services

Table 198. Asahi Kasei Construction Materials External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 199. Asahi Kasei Construction Materials Recent Developments/Updates

Table 200. Asahi Kasei Construction Materials Competitive Strengths & Weaknesses

Table 201. Hunter Panels Basic Information, Manufacturing Base and Competitors

Table 202. Hunter Panels Major Business

Table 203. Hunter Panels External Wall Thermal Insulation Materials Product and Services

Table 204. Hunter Panels External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 205. Hunter Panels Recent Developments/Updates

Table 206. Hunter Panels Competitive Strengths & Weaknesses

Table 207. Hongbaoli Basic Information, Manufacturing Base and Competitors

Table 208. Hongbaoli Major Business

Table 209. Hongbaoli External Wall Thermal Insulation Materials Product and Services

Table 210. Hongbaoli External Wall Thermal Insulation Materials Production (Kilotons),

Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 211. Hongbaoli Recent Developments/Updates

Table 212. Hongbaoli Competitive Strengths & Weaknesses

Table 213. Shanghai ABM Rock Wool Basic Information, Manufacturing Base and Competitors

Table 214. Shanghai ABM Rock Wool Major Business

Table 215. Shanghai ABM Rock Wool External Wall Thermal Insulation Materials Product and Services

Table 216. Shanghai ABM Rock Wool External Wall Thermal Insulation Materials Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 217. Shanghai ABM Rock Wool Recent Developments/Updates

Table 218. Shanghai ABM Rock Wool Competitive Strengths & Weaknesses

Table 219. Global Key Players of External Wall Thermal Insulation Materials Upstream (Raw Materials)

Table 220. Global External Wall Thermal Insulation Materials Typical Customers

Table 221. External Wall Thermal Insulation Materials Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. External Wall Thermal Insulation Materials Picture

Figure 2. World External Wall Thermal Insulation Materials Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World External Wall Thermal Insulation Materials Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World External Wall Thermal Insulation Materials Production (2021-2032) & (Kilotons)

Figure 5. World External Wall Thermal Insulation Materials Average Price (2021-2032) & (US\$/Ton)

Figure 6. World External Wall Thermal Insulation Materials Production Value Market Share by Region (2021-2032)

Figure 7. World External Wall Thermal Insulation Materials Production Market Share by Region (2021-2032)

Figure 8. North America External Wall Thermal Insulation Materials Production (2021-2032) & (Kilotons)

Figure 9. Europe External Wall Thermal Insulation Materials Production (2021-2032) & (Kilotons)

Figure 10. China External Wall Thermal Insulation Materials Production (2021-2032) & (Kilotons)

Figure 11. Japan External Wall Thermal Insulation Materials Production (2021-2032) & (Kilotons)

Figure 12. External Wall Thermal Insulation Materials Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World External Wall Thermal Insulation Materials Consumption (2021-2032) & (Kilotons)

Figure 15. World External Wall Thermal Insulation Materials Consumption Market Share by Region (2021-2032)

Figure 16. United States External Wall Thermal Insulation Materials Consumption (2021-2032) & (Kilotons)

Figure 17. China External Wall Thermal Insulation Materials Consumption (2021-2032) & (Kilotons)

Figure 18. Europe External Wall Thermal Insulation Materials Consumption (2021-2032) & (Kilotons)

Figure 19. Japan External Wall Thermal Insulation Materials Consumption (2021-2032) & (Kilotons)

Figure 20. South Korea External Wall Thermal Insulation Materials Consumption (2021-2032) & (Kilotons)

Figure 21. ASEAN External Wall Thermal Insulation Materials Consumption (2021-2032) & (Kilotons)

Figure 22. India External Wall Thermal Insulation Materials Consumption (2021-2032) & (Kilotons)

Figure 23. Producer Shipments of External Wall Thermal Insulation Materials by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for External Wall Thermal Insulation Materials Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for External Wall Thermal Insulation Materials Markets in 2025

Figure 26. United States VS China: External Wall Thermal Insulation Materials Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: External Wall Thermal Insulation Materials Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: External Wall Thermal Insulation Materials Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers External Wall Thermal Insulation Materials Production Market Share 2025

Figure 30. China Based Manufacturers External Wall Thermal Insulation Materials Production Market Share 2025

Figure 31. Rest of World Based Manufacturers External Wall Thermal Insulation Materials Production Market Share 2025

Figure 32. World External Wall Thermal Insulation Materials Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World External Wall Thermal Insulation Materials Production Value Market Share by Type in 2025

Figure 34. Rock Wool

Figure 35. Glass Wool

Figure 36. EPS/XPS

Figure 37. PU/PIR

Figure 38. Others

Figure 39. World External Wall Thermal Insulation Materials Production Market Share by Type (2021-2032)

Figure 40. World External Wall Thermal Insulation Materials Production Value Market Share by Type (2021-2032)

Figure 41. World External Wall Thermal Insulation Materials Average Price by Type (2021-2032) & (US\$/Ton)

- Figure 42. World External Wall Thermal Insulation Materials Production Value by System Format, (USD Million), 2021 & 2025 & 2032
- Figure 43. World External Wall Thermal Insulation Materials Production Value Market Share by System Format in 2025
- Figure 44. External Wall Insulation System (EWIS)
- Figure 45. Exterior Insulation and Finish System (EIFS)
- Figure 46. Continuous Insulation Board
- Figure 47. Curtain Wall Insulation
- Figure 48. Others
- Figure 49. World External Wall Thermal Insulation Materials Production Market Share by System Format (2021-2032)
- Figure 50. World External Wall Thermal Insulation Materials Production Value Market Share by System Format (2021-2032)
- Figure 51. World External Wall Thermal Insulation Materials Average Price by System Format (2021-2032) & (US\$/Ton)
- Figure 52. World External Wall Thermal Insulation Materials Production Value by Project Stage, (USD Million), 2021 & 2025 & 2032
- Figure 53. World External Wall Thermal Insulation Materials Production Value Market Share by Project Stage in 2025
- Figure 54. New Construction
- Figure 55. Retrofit and Renovation
- Figure 56. World External Wall Thermal Insulation Materials Production Market Share by Project Stage (2021-2032)
- Figure 57. World External Wall Thermal Insulation Materials Production Value Market Share by Project Stage (2021-2032)
- Figure 58. World External Wall Thermal Insulation Materials Average Price by Project Stage (2021-2032) & (US\$/Ton)
- Figure 59. World External Wall Thermal Insulation Materials Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 60. World External Wall Thermal Insulation Materials Production Value Market Share by Application in 2025
- Figure 61. Residential Building
- Figure 62. Commercial Building
- Figure 63. Others
- Figure 64. World External Wall Thermal Insulation Materials Production Market Share by Application (2021-2032)
- Figure 65. World External Wall Thermal Insulation Materials Production Value Market Share by Application (2021-2032)
- Figure 66. World External Wall Thermal Insulation Materials Average Price by

Application (2021-2032) & (US\$/Ton)

Figure 67. External Wall Thermal Insulation Materials Industry Chain

Figure 68. External Wall Thermal Insulation Materials Procurement Model

Figure 69. External Wall Thermal Insulation Materials Sales Model

Figure 70. External Wall Thermal Insulation Materials Sales Channels, Direct Sales, and Distribution

Figure 71. Methodology

Figure 72. Research Process and Data Source

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