

Global Polyisocyanurate (PIR) Sandwich Panel Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G697FF4FA317EN.html>

Date: August 2026

Pages: 154

Price: US\$ 4,480.00 (Single User License)

ID: G697FF4FA317EN

Abstracts

The global Polyisocyanurate (PIR) Sandwich Panel market size is expected to reach \$ 9313 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Polyisocyanurate (PIR) Sandwich Panels are factory-manufactured insulated building envelope products consisting of a rigid closed-cell PIR foam core permanently bonded between two metal facings through continuous or discontinuous foaming and lamination processes. Major products include roof panels, external wall panels, internal wall and ceiling panels, cold storage panels, cleanroom panels, and a limited range of cold room floor panels. The facings are generally made of pre-painted galvanized steel or aluminum-zinc coated steel, while stainless steel, aluminum, and hygienic film-laminated steel are used in more demanding applications, with typical core thicknesses ranging from approximately 40 mm to 200 mm. Key upstream inputs include coated steel coil, stainless steel and aluminum coil, polymeric isocyanate, polyester polyols, catalysts, flame retardants, blowing agents, foam stabilizers, sealing materials, and packaging materials. Major downstream customers include industrial building envelope contractors, cold storage and cold-chain engineering companies, warehouse and logistics developers, food and pharmaceutical cleanroom contractors, commercial construction companies, and modular building manufacturers. Principal applications include factories, warehouses, logistics centers, refrigerated and frozen storage facilities, food processing plants, pharmaceutical cleanrooms, data centers, and modular buildings. On a panel-only factory-gate basis, global effective production capacity is estimated at approximately 184 million square meters in 2025, with sales volume of around 136.5 million square meters, theoretical capacity utilization of approximately 74.2%, and a global weighted average selling price of approximately USD 43.8 per square meter. The industry's average gross margin is estimated at

approximately 18%?26%.

The global Polyisocyanurate (PIR) Sandwich Panel market is characterized by the coexistence of large international building envelope groups and regional manufacturers, with production and sales remaining highly localized. Because the panels are bulky, relatively costly to transport over long distances, and vulnerable to surface damage during handling, major suppliers generally rely on regional manufacturing facilities and nearby delivery networks. Leading international companies maintain advantages in mid- and high-end industrial, cold-chain, and public building projects through large-scale material procurement, continuous production, product certification, and integrated envelope solutions. Regional manufacturers compete primarily through pricing, delivery speed, and customized specifications in standardized factories, warehouses, and cold storage projects.

Market demand is mainly driven by the continued development of industrial buildings, logistics warehouses, cold-chain facilities, food processing plants, pharmaceutical cleanrooms, data centers, and modular construction. Compared with site-built masonry and multilayer insulation systems, PIR sandwich panels integrate thermal insulation, enclosure, weather protection, and surface finishing into factory-made components, helping shorten construction schedules, reduce wet trades, and improve building airtightness. Refrigerated warehouses, freezer facilities, and food and pharmaceutical buildings require strong insulation, reliable joint sealing, hygienic surfaces, and long-term dimensional stability, making them important sources of market growth. Rising energy-efficiency requirements and renovation of existing industrial buildings will also support demand for roof and wall panels.

Future product development will focus on improving complete-system fire performance, lowering thermal conductivity, enhancing joint airtightness, and reducing lifecycle carbon emissions. Manufacturers are expected to make greater use of lower-impact blowing agents, lower-carbon steel, recycled metal facings, and traceable raw materials while strengthening control over foam density, closed-cell content, facing adhesion, and long-term thermal aging. In premium applications, product evaluation will increasingly shift from isolated core properties toward the integrated performance of the complete panel system under fire, wind pressure, air leakage, water penetration, corrosion, and long-term service conditions. Compatibility with photovoltaic roofing, digital design, standardized joint systems, and prefabricated construction will also become increasingly important.

The industry continues to face constraints from raw-material price volatility, changing

construction investment cycles, stricter fire regulations, and intense competition in standardized products. Fluctuations in coated steel, polymeric isocyanate, and polyol prices directly affect manufacturing costs, while project-based sales may delay the pass-through of higher input costs. Mineral wool sandwich panels may substitute for PIR products in high-rise buildings, densely occupied facilities, and industrial sites with elevated fire risks. Market share is therefore expected to become increasingly concentrated among suppliers with stable continuous production, comprehensive certification, local service networks, lower-carbon material solutions, and reliable project delivery capabilities, while low-end producers will face mounting pressure from both price competition and product-quality risks.

This report studies the global Polyisocyanurate (PIR) Sandwich Panel production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Polyisocyanurate (PIR) Sandwich Panel 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 Polyisocyanurate (PIR) Sandwich Panel that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Polyisocyanurate (PIR) Sandwich Panel total production and demand, 2021-2032, (K Sqm)

Global Polyisocyanurate (PIR) Sandwich Panel total production value, 2021-2032, (USD Million)

Global Polyisocyanurate (PIR) Sandwich Panel production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

Global Polyisocyanurate (PIR) Sandwich Panel consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: Polyisocyanurate (PIR) Sandwich Panel domestic production, consumption, key domestic manufacturers and share

Global Polyisocyanurate (PIR) Sandwich Panel production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)

Global Polyisocyanurate (PIR) Sandwich Panel production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

Global Polyisocyanurate (PIR) Sandwich Panel production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Polyisocyanurate (PIR) Sandwich Panel 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, Nucor Corporation, ArcelorMittal, Tata Steel, SSAB, Isopan, Metecno Group, Assan Panel, Nippon Steel Corporation, Paneltech, 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 Polyisocyanurate (PIR) Sandwich Panel 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 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 Polyisocyanurate (PIR) Sandwich Panel Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polyisocyanurate (PIR) Sandwich Panel Market, Segmentation by Type:

Roof Panels

External Wall Panels

Internal Wall and Ceiling Panels

Floor Panels

Other

Global Polyisocyanurate (PIR) Sandwich Panel Market, Segmentation by Panel Thickness:

Up to 60 mm

61-100 mm

101-150 mm

Above 150 mm

Global Polyisocyanurate (PIR) Sandwich Panel Market, Segmentation by Facing Material:

Pre-painted Galvanized or Al-Zn Coated Steel

Stainless Steel

Aluminum

Other

Global Polyisocyanurate (PIR) Sandwich Panel Market, Segmentation by Application:

Industrial Buildings

Cold Storage and Cold Chain

Warehousing and Logistics

Commercial and Public Buildings

Other

Companies Profiled:

Kingspan Group

Nucor Corporation

ArcelorMittal

Tata Steel

SSAB

Isopan

Metecno Group

Assan Panel

Nippon Steel Corporation

Paneltech

Emirates Industrial Panel

Wiskind

Wanhua Energysav Science & Technology Group

BRD New Materials

KINDUS

PH Insulation

Key Questions Answered:

1. How big is the global Polyisocyanurate (PIR) Sandwich Panel market?
2. What is the demand of the global Polyisocyanurate (PIR) Sandwich Panel market?
3. What is the year over year growth of the global Polyisocyanurate (PIR) Sandwich Panel market?
4. What is the production and production value of the global Polyisocyanurate (PIR) Sandwich Panel market?
5. Who are the key producers in the global Polyisocyanurate (PIR) Sandwich Panel market?
6. What are the growth factors driving the market demand?

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