

Global External Wall Thermal Insulation Materials Market Growth 2026-2032

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Abstracts

The global External Wall Thermal Insulation Materials market size is predicted to grow from US\$ 27736 million in 2025 to US\$ 35621 million in 2032; it is expected to grow at a CAGR of 3.6% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "External Wall Thermal Insulation Materials Industry Forecast" looks at past sales and reviews total world

External Wall Thermal Insulation Materials sales in 2025, providing a comprehensive analysis by region and market sector of projected External Wall Thermal Insulation Materials sales for 2026 through 2032. With External Wall Thermal Insulation Materials sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world External Wall Thermal Insulation Materials industry.

This Insight Report provides a comprehensive analysis of the global External Wall Thermal Insulation Materials landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on External Wall Thermal Insulation Materials portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global External Wall Thermal Insulation Materials market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for External Wall Thermal Insulation Materials and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global External Wall Thermal Insulation Materials.

This report presents a comprehensive overview, market shares, and growth opportunities of External Wall Thermal Insulation Materials market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Rock Wool

Glass Wool

EPS/XPS

PU/PIR

Others

Segmentation by System Format:

External Wall Insulation System (EWIS)

Exterior Insulation and Finish System (EIFS)

Continuous Insulation Board

Curtain Wall Insulation

Others

Segmentation by Project Stage:

New Construction

Retrofit and Renovation

Segmentation by Application:

Residential Building

Commercial Building

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global External Wall Thermal Insulation Materials market?

What factors are driving External Wall Thermal Insulation Materials market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do External Wall Thermal Insulation Materials market opportunities vary by end market size?

How does External Wall Thermal Insulation Materials break out by Type, by Application?

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