

Aerogel Market by Type (Silica, Polymer, and Carbon), Form (Blanket, Panel, Particle, and Monolith), Processing (Virgin, Composites, and Additives), Application (Oil & Gas, Construction, Transportation, and Performance Coating) - Global Forecast to 2025

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Abstracts

The aerogel market size is estimated to be USD 638 million in 2020 and is projected to reach USD 1,045 million by 2025, at a CAGR of 10.4% between 2020 and 2025.

Factors such as super thermal resistance, thinner and lighter alternative will drive the aerogel market. The major restraint for the market will be the high manufacturing cost, poor mechanical strength. However, the potential substitute for conventional insulation materials will act as an opportunity for the market.

“Silica based aerogel is estimated to be the largest type in 2019.”

The method of synthesizing silica aerogel is economical, and the process is very versatile. Silica aerogels are best known for tremendously combining low thermal conductivity with high optical transparency. They are transparent; however, due to the Rayleigh scattering effect, they appear to be blue and are hence commonly called frozen smoke or blue smoke. The high insulating properties, low cost, abundant raw material availability, and the versatile process of manufacturing are driving the silica-based aerogel market. Silica is the first type of aerogel to be made commercially available. Silica aerogel materials are particularly intriguing due to their ultra-low weight and transparency. A visibly transparent super-insulating material is compatible for many applications.

“Aerogel in blanket form is estimated to be the largest market in 2019.”

The blanket form is the largest segment of the aerogel market. It was the first form of commercial aerogel for various applications. The blanket material has a clear value proposition, as it is super insulating and two to three times better than particle material in terms of thermal properties. Blanket materials are used for a broad range of applications, such as oil & gas, construction, automotive, and marine and aerospace, as these can be cut and modified as per specific requirements due to their flexible physical structure.

“Virgin aerogel is estimated to be the largest market in processing segment in 2019.”

As manufactured aerogels are called virgin aerogels - the original form of aerogel, which is not loaded with any other material or chemically treated to enhance its physical structure. The only drawback of virgin aerogels is that they are extremely brittle. Virgin aerogels are used in several applications, owing to their commercial availability in comparison to fabricated aerogels. Aerogel materials in the as manufactured segment are used directly in their original forms for applications, such as the use of silica aerogel in R&D. These aerogels are functional for industrial applications without any further processing or alterations and are used in the same form produced by aerogel manufacturers. Materials in this segment do not require additional manufacturing, compounding, coating, modification, or subsequent processing to be used in applications.

“The oil & gas application is projected to account for the largest share, in terms of volume and value, of the overall aerogel market between 2020 and 2025.”

Fossil fuels play a vital role in meeting the ever-increasing demand for energy. Right from generating electricity to working of automobiles, fuels such as diesel and petrol are required in one or the other way. The oil & gas segment involves exploration, extraction, refining, and selling of products obtained from crude oil. The segment generates huge revenue making it one of the important components of the world's economy. The investments required in this segment are also quite high, considering the lead times for finding and extracting hydrocarbons. The output needs to be carefully transported to the regasification sites through long pipelines. The whole procedure takes place in challenging environments, such as subsea pipelines and rigs in Arctic waters. For the uninterrupted flow of hydrocarbons, maintaining the temperature of these pipelines is important. Hence, the oil & gas industry heavily depends on insulation.

“North America is expected to be the largest aerogel market during the forecast period, in terms of value and volume.”

North America is the largest region in terms of production and consumption of aerogel materials. Globally, it is the leading aerogel market in terms of product innovation, quality, and application development. The North American aerogel market is largely driven by the oil & gas application, where the demand for advanced solutions is extremely high due to its reduced thickness, superior insulating properties, and low thermal conductivity. The growing use of aerogel materials in the automotive, marine, and aerospace applications in North America is expected to drive the aerogel market.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees are as follows:

By Company Type: Tier 1 - 45%, Tier 2 - 30%, and Tier 3 - 25%

By Designation: C-Level - 46%, Director Level - 25%, and Others - 29%

By Region: North America - 27%, Europe - 27%, APAC - 33%, South America - 7%, and Middle East & Africa - 6%,

The key market players profiled in the report include Aspen Aerogels (US), Cabot Corporation (US), Aerogel Technologies (US), Nano tech Co. Ltd. (China), Armacell (Germany), Guangdong Alison Hi-Tech (China), Active Aerogels (Portugal), Enersens (France), JIOS Aerogel (South Korea), and BASF (Germany).

Research Coverage

This report segments the market for aerogel on the basis of type, form, processing, application, and region, and provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and mergers & acquisition associated with the market for aerogel.

Reasons to buy this report

This research report is focused on various levels of analysis — industry analysis (industry trends), market ranking analysis of top players, and company profiles, which

together provide an overall view on the competitive landscape; emerging and high-growth segments of the aerogel market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on aerogel offered by top players in the global aerogel market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the aerogel market

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for aerogel across regions

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global aerogel market

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the aerogel market

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