

Refrigeration Insulation Materials Market by Material Type (Elastomeric Foam, PU & PIR), Application (Commercial, Industrial), End-Use Industry (Food & Beverage, Chemicals & Pharmaceuticals, Oil & Gas and Petrochemicals) Region - Global Forecast to 2025

<https://marketpublishers.com/r/RE9951373531EN.html>

Date: April 2020

Pages: 163

Price: US\$ 4,950.00 (Single User License)

ID: RE9951373531EN

Abstracts

Increasing demand for refrigeration equipment and systems is expected to drive the global market.

The refrigeration insulation materials market size is projected to reach USD 4.8 billion by 2025, at a CAGR of 6.0% between 2020 and 2025. Refrigeration insulation materials are very crucial for efficient cooling operations. The sales of commercial and industrial refrigerators have increased significantly in the last couple of years, as per the International Institute of Refrigeration. The need for insulation in cryogenic operations has also grown. These factors are greatly influencing the market for refrigeration insulation. One of the biggest restraints to this market is the full-scale adoption of the Kigali Agreement, which mandates the phasing out of HFCs and HCFCs as blowing agents as early as possible. Group 1 countries like Germany, France, and the UK have already implemented the agreement and pushed alternative blowing agents in the respective countries. HFCs and HCFCs are important for foaming process. Thus manufacturers need to employ alternatives as soon as possible. This might slow down the growth rate of some plastic foams as using other foaming agents such as R290 is expensive, which will increase the price of plastic foam insulation.

Phenolic foam is expected to be the fastest-growing segment in the overall market between 2020 and 2025.

Phenolic foams are related to PU & PIR foams. They have similar properties and are

made up of almost the same raw material. However, phenolic foam offers better insulation capabilities as compared to PU & PIR at a cheaper cost. Its R-value is very high, which means much lighter and thinner phenolic foam-based insulation is required for the same area as compared to PU & PIR.

Commercial application segment is estimated to witness the highest growth rate between 2020 and 2025

The commercial application consists of retail outlets, refrigerated warehouses, food storages, and so on. These establishments need to expand refrigerated storage to keep various products and cater to the growing demand for frozen food & cold beverage. Thus, the growth in the food & beverage industry is a key factor for the growth of refrigeration insulation materials in commercial applications.

Other end-use industries segment is estimated to witness the highest growth rate between 2020 and 2025.

Other industries include energy & utilities, healthcare, semiconductor, and textile. The growth of semiconductor and electronic device production is one of the major factors influencing the growth of refrigeration insulation in the others segment. Semiconductor fabrication plants where integrated circuits are manufactured are kept at controlled temperatures. Wind and solar power plant components need to be kept at a certain temperature so that the whole system does not over heated. Refrigeration systems are essential for their smooth operation. Thus, the energy and utility sector will also play a major role in the market.

Europe is expected to account for the largest market share.

Europe dominated the refrigeration insulation materials market, in terms of value, in 2019. Europe is one of the most industrialized regions in the world. The industrial infrastructure is vast, especially, chemical, petrochemical, and food processing. Europe has the most stringent policies regarding industry practices. The EU has mandated the use of insulation products for energy efficiency. It also specifies the type of materials to be employed in refrigeration insulation. With the Kigali Agreement already in force, along with the EU's low emission and high energy efficiency policy, the market for refrigeration insulation in the region is expected to grow steadily.

In-depth interviews were conducted with chief executive officers marketing directors, innovation and technology directors, and executives from various key organizations

operating in the refrigeration insulation materials market

By Company Type: Tier 1 - 37%, Tier 2 - 50%, and Tier 3 - 13%

By Designation: C-Level - 50%, Director Level - 31%, and Others - 19%

By Region: North America - 32%, Europe - 39%, APAC - 13%, Middle East & Africa 10%, Latin America 6%

The key players profiled in the report include Armacell (Germany), Owens Corning (US), Kingspan Group Plc (Ireland), Morgan Advanced Materials (UK), Etex (Belgium), Isover (France), BASF SE (Germany), Kflex (Italy), and Aspen Aerogel (US).

Research Coverage

This report segments the market for refrigeration insulation materials based on material type, application, and end-use industry. It provides estimations of the overall market size across various regions. A detailed analysis of the key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and acquisitions associated with the market.

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 of the competitive landscape; emerging and high-growth segments of the refrigeration insulation materials market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on refrigeration insulation materials offered by top players in the global market

Product Development/Innovation: Detailed insights on upcoming technologies, R&D activities, and new product launches in the refrigeration insulation materials market

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

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

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

Contents

1 INTRODUCTION

- 1.1 OBJECTIVES OF THE STUDY
- 1.2 MARKET DEFINITION
- 1.3 MARKET SCOPE
 - 1.3.1 REGIONS COVERED
 - 1.3.2 YEARS CONSIDERED FOR THE STUDY
- 1.4 CURRENCY
- 1.5 LIMITATIONS
- 1.6 STAKEHOLDERS

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - 2.1.1 PRIMARY AND SECONDARY RESEARCH
 - 2.1.2 SECONDARY DATA
 - 2.1.2.1 Key data from secondary sources
- 2.2 MARKET SIZE ESTIMATION
 - 2.2.1 BOTTOM-UP APPROACH
 - 2.2.2 TOP-DOWN APPROACH
 - 2.2.3 PRIMARY DATA
 - 2.2.3.1 Key data from primary interviews
 - 2.2.3.2 Breakdown of primary interviews
- 2.3 DATA TRIANGULATION
- 2.4 RESEARCH ASSUMPTION

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

- 4.1 REFRIGERATION INSULATION MATERIALS WILL HELP RESOLVE THE FOOD SECURITY ISSUE
- 4.2 REFRIGERATION INSULATION MATERIALS MARKET, BY REGION
- 4.3 REFRIGERATION INSULATION MATERIALS MARKET SHARE, BY APPLICATION
- 4.4 REFRIGERATION INSULATION MATERIALS MARKET, BY END-USE INDUSTRY
- 4.5 EUROPE: REFRIGERATION INSULATION MATERIALS MARKET, BY TYPE AND

COUNTRY

4.6 REFRIGERATION INSULATION MATERIALS MARKET ATTRACTIVENESS

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 Growth in sales of refrigeration equipment

5.2.1.2 Increasing demand for cryogenic applications

5.2.1.3 Growing demand for food and increased emphasis on food security

5.2.1.4 Rise in consumption of cold beverages and beer

5.2.2 RESTRAINTS

5.2.2.1 Fluctuating availability and prices of raw materials

5.2.2.2 Government regulations on insulation materials

5.2.3 OPPORTUNITIES

5.2.3.1 Development of more effective and environmentally friendly materials

5.2.3.2 Increased infrastructure spending in emerging economies

5.2.3.3 Increase in demand from the energy industry and niche applications

5.2.4 CHALLENGES

5.2.4.1 Lack of awareness and non-compliance of regulations in emerging markets

5.2.4.2 High capital cost and lack of skilled labor for installation

5.3 SHIFT IN REVENUE STREAMS DUE TO MEGATRENDS IN END-USE INDUSTRIES

5.4 PORTER'S FIVE FORCES ANALYSIS

5.4.1 THREAT OF NEW ENTRANTS

5.4.2 BARGAINING POWER OF SUPPLIERS

5.4.3 THREAT OF SUBSTITUTES

5.4.4 BARGAINING POWER OF BUYERS

5.4.5 INTENSITY OF COMPETITIVE RIVALRY

5.5 MACROECONOMIC INDICATORS

5.5.1 GDP TRENDS AND FORECAST OF MAJOR ECONOMIES

6 REFRIGERATION INSULATION MATERIALS MARKET, BY MATERIAL TYPE

6.1 INTRODUCTION

6.2 POLYURETHANE & POLYISOCYANURATE (PU & PIR)

6.2.1 EXTENSIVE APPLICATION OF PU& PIR FOAMS IN COLD PIPING

6.3 ELASTOMERIC FOAM

6.3.1 GROWING DEMAND FOR REFRIGERATION IN COMMERCIAL APPLICATIONS TO DRIVE THE MARKET

6.4 POLYSTYRENE FOAM

6.4.1 POSITIVE IMPACT OF GROWING COLD CHAIN MARKET

6.5 FIBERGLASS

6.5.1 LOW COST OF FIBERGLASS IN REFRIGERATION INSULATION

6.6 PHENOLIC FOAM

6.6.1 HIGHER FIRE RATING IN COMPARISON TO OTHER INSULATION MATERIALS HELPING THE PHENOLIC FOAM MARKET TO GROW

6.7 OTHERS

7 REFRIGERATION INSULATION MATERIALS MARKET, BY APPLICATION

7.1 INTRODUCTION

7.2 COMMERCIAL

7.3 INDUSTRIAL

7.4 CRYOGENIC

7.5 REFRIGERATED TRANSPORT

8 REFRIGERATION INSULATION MATERIALS MARKET, BY END-USE INDUSTRY

8.1 INTRODUCTION

8.2 FOOD & BEVERAGE

8.2.1 FRESH FRUITS & VEGETABLES

8.2.2 MEAT, POULTRY & FISH PROCESSING

8.2.3 DAIRY & ICE CREAM PROCESSING

8.2.4 BEVERAGES

8.3 CHEMICALS & PHARMACEUTICALS

8.4 OIL & GAS AND PETROCHEMICALS

8.5 OTHERS

9 REFRIGERATION INSULATION MATERIALS MARKET, BY REGION

9.1 INTRODUCTION

9.2 NORTH AMERICA

9.2.1 US

9.2.2 CANADA

9.2.3 MEXICO

9.3 EUROPE

- 9.3.1 GERMANY
- 9.3.2 UK
- 9.3.3 FRANCE
- 9.3.4 ITALY
- 9.3.5 RUSSIA
- 9.3.6 SPAIN
- 9.4 APAC
 - 9.4.1 CHINA
 - 9.4.2 JAPAN
 - 9.4.3 INDIA
 - 9.4.4 SOUTH KOREA
 - 9.4.5 INDONESIA
- 9.5 MIDDLE EAST & AFRICA
 - 9.5.1 SAUDI ARABIA
 - 9.5.2 IRAN
 - 9.5.3 UAE
- 9.6 SOUTH AMERICA
 - 9.6.1 BRAZIL
 - 9.6.2 ARGENTINA

10 COMPETITIVE LANDSCAPE

- 10.1 OVERVIEW
- 10.2 COMPETITIVE LEADERSHIP MAPPING (OVERALL MARKET)
 - 10.2.1 DYNAMIC DIFFERENTIATORS
 - 10.2.2 INNOVATORS
 - 10.2.3 VISIONARY LEADERS
 - 10.2.4 EMERGING PLAYERS
- 10.3 MARKET RANKING, 2019
 - 10.3.1 NEW PRODUCT LAUNCHES
 - 10.3.2 EXPANSIONS
 - 10.3.3 ACQUISITIONS
 - 10.3.4 CONTRACTS, PARTNERSHIP, JOINT VENTURES & AGREEMENTS

11 COMPANY PROFILES

(Business overview, Products offered, Recent Developments, Winning Imperatives, Current Focus and Strategies, Threat from Competition, Right to Win)*

11.1 OWENS CORNING

- 11.2 KINGSPAN GROUP PLC
- 11.3 ARMACELL INTERNATIONAL S.A.
- 11.4 SAINT-GOBAIN ISOVER
- 11.5 L'ISOLANTE K-FLEX S.P.A.
- 11.6 ASPEN AEROGELS
- 11.7 BASF SE
- 11.8 MORGAN ADVANCED MATERIALS
- 11.9 ETEX
- 11.10 ZHEJIANG ZHENSHEN INSULATION TECHNOLOGY CORP. LTD.
- 11.11 JOHNS MANVILLE
- 11.12 NMC SA
- 11.13 ZOTEFOAMS
- 11.14 CABOT CORPORATION
- 11.15 LYDALL INC.
- 11.16 OTHER KEY MARKET PLAYERS

*Business overview, Products offered, Recent Developments, Winning Imperatives, Current Focus and Strategies, Threat from Competition, Right to Win might not be captured in case of unlisted companies.

12 APPENDIX

- 12.1 INSIGHTS OF INDUSTRY EXPERTS
- 12.2 DISCUSSION GUIDE
- 12.3 KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL
- 12.4 AVAILABLE CUSTOMIZATIONS
- 12.5 RELATED REPORTS
- 12.6 AUTHORS DETAILS

List Of Tables

LIST OF TABLES

TABLE 1 INCLUSIONS AND EXCLUSIONS

TABLE 2 TRENDS AND FORECAST OF GDP, BY MAJOR ECONOMIES, 2017–2024
(USD BILLION)

TABLE 3 REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL
TYPE, 2018–2025 (USD MILLION)

TABLE 4 PU & PIR MARKET SIZE FOR REFRIGERATION INSULATION MATERIALS,
BY REGION, 2018–2025 (USD MILLION)

TABLE 5 ELASTOMERIC FOAM: REFRIGERATION INSULATION MATERIALS
MARKET SIZE, BY REGION, 2018–2025 (USD MILLION)

TABLE 6 POLYSTYRENE FOAM: REFRIGERATION INSULATION MATERIALS
MARKET SIZE, BY REGION, 2018–2025 (USD MILLION)

TABLE 7 FIBERGLASS: REFRIGERATION INSULATION MATERIALS MARKET SIZE,
BY REGION, 2018–2025 (USD MILLION)

TABLE 8 PHENOLIC FOAM: REFRIGERATION INSULATION MATERIALS MARKET
SIZE, BY REGION, 2018–2025 (USD MILLION)

TABLE 9 OTHER MATERIALS: REFRIGERATION INSULATION MATERIALS
MARKET SIZE, BY REGION, 2018–2025 (USD MILLION)

TABLE 10 REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY
APPLICATION, 2018–2025 (USD MILLION)

TABLE 11 REFRIGERATION INSULATION MATERIALS MARKET SIZE IN
COMMERCIAL REFRIGERATION APPLICATION, BY REGION, 2018–2025 (USD
MILLION)

TABLE 12 REFRIGERATION INSULATION MATERIALS MARKET SIZE IN
INDUSTRIAL APPLICATION, BY REGION, 2018–2025 (USD MILLION)

TABLE 13 REFRIGERATION INSULATION MATERIALS MARKET SIZE IN
CRYOGENIC APPLICATION, BY REGION, 2018–2025 (USD MILLION)

TABLE 14 REFRIGERATION INSULATION MATERIALS MARKET SIZE IN
REFRIGERATED TRANSPORT APPLICATION, BY REGION, 2018–2025 (USD
MILLION)

TABLE 15 REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE
INDUSTRY, 2018–2025 (USD MILLION)

TABLE 16 REFRIGERATION INSULATION MATERIALS MARKET SIZE IN FOOD &
BEVERAGE INDUSTRY, BY REGION, 2018–2025 (USD MILLION)

TABLE 17 REFRIGERATION INSULATION MATERIALS MARKET SIZE IN FOOD &
BEVERAGE INDUSTRY, BY SUB-TYPE, 2018–2025 (USD MILLION)

TABLE 18 REFRIGERATION INSULATION MATERIALS MARKET SIZE FOR FRESH FRUITS & VEGETABLES, BY REGION, 2018–2025 (USD MILLION)

TABLE 19 REFRIGERATION INSULATION MATERIALS MARKET SIZE FOR MEAT, POULTRY & FISH PROCESSING, BY REGION, 2018–2025 (USD MILLION)

TABLE 20 REFRIGERATION INSULATION MATERIALS MARKET SIZE FOR DAIRY & ICE CREAM PROCESSING, BY REGION, 2018–2025 (USD MILLION)

TABLE 21 REFRIGERATION INSULATION MATERIALS MARKET SIZE FOR BEVERAGES, BY REGION, 2018–2025 (USD MILLION)

TABLE 22 REFRIGERATION INSULATION MATERIALS MARKET SIZE IN CHEMICALS & PHARMACEUTICALS INDUSTRY, BY REGION, 2018–2025 (USD MILLION)

TABLE 23 APPLICATIONS OF REFRIGERATION IN OIL & GAS INDUSTRY

TABLE 24 REFRIGERATION INSULATION MATERIALS MARKET SIZE IN OIL & GAS AND PETROCHEMICALS INDUSTRY, BY REGION, 2018–2025 (USD MILLION)

TABLE 25 REFRIGERATION INSULATION MATERIALS MARKET SIZE IN OTHER END-USE INDUSTRIES, BY REGION, 2018–2025 (USD MILLION)

TABLE 26 REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY REGION, 2018-2025 (USD MILLION)

TABLE 27 NORTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY COUNTRY, 2018-2025 (USD MILLION)

TABLE 28 NORTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018–2025 (USD MILLION)

TABLE 29 NORTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018–2025 (USD MILLION)

TABLE 30 NORTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 31 NORTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE IN

FOOD & BEVERAGE, BY SUB-TYPE, 2018-2025 (USD MILLION)

TABLE 32 US: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 33 US: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 34 US: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 35 CANADA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 36 CANADA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 37 CANADA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 38 MEXICO: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 39 MEXICO: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 40 MEXICO: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 41 EUROPE: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY COUNTRY, 2018-2025 (USD MILLION)

TABLE 42 EUROPE: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 43 EUROPE: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 44 EUROPE: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY 2018-2025 (USD MILLION)

TABLE 45 EUROPE: REFRIGERATION INSULATION MATERIALS MARKET SIZE IN FOOD & BEVERAGE INDUSTRY, BY SUB-TYPE, 2018-2025 (USD MILLION)

TABLE 46 GERMANY: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 47 GERMANY: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 48 GERMANY: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 49 UK: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 50 UK: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 51 UK: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 52 FRANCE: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 53 FRANCE: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 54 FRANCE: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 55 ITALY: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 56 ITALY: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY

APPLICATION, 2018-2025 (USD MILLION)

TABLE 57 ITALY: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 58 RUSSIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 59 RUSSIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 60 RUSSIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 61 SPAIN: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 62 SPAIN: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 63 SPAIN: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 64 APAC: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY COUNTRY, 2018–2025 (USD MILLION)

TABLE 65 APAC: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018–2025 (USD MILLION)

TABLE 66 APAC: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018–2025 (USD MILLION)

TABLE 67 APAC: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018–2025 (USD MILLION)

TABLE 68 APAC: REFRIGERATION INSULATION MATERIALS MARKET SIZE FOR FOOD & BEVERAGE INDUSTRY, BY SUB-TYPE, 2018–2025 (USD MILLION)

TABLE 69 CHINA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018–2025 (USD MILLION)

TABLE 70 CHINA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018–2025 (USD MILLION)

TABLE 71 CHINA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018–2025 (USD MILLION)

TABLE 72 JAPAN: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018–2025(USD MILLION)

TABLE 73 JAPAN: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018–2025 (USD MILLION)

TABLE 74 JAPAN: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018–2025 (USD MILLION)

TABLE 75 INDIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018–2025 (USD MILLION)

TABLE 76 INDIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018–2025 (USD MILLION)

TABLE 77 INDIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018–2025 (USD MILLION)

TABLE 78 SOUTH KOREA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018–2025 (USD MILLION)

TABLE 79 SOUTH KOREA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018–2025 (USD MILLION)

TABLE 80 SOUTH KOREA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018–2025 (USD MILLION)

TABLE 81 INDONESIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018–2025 (USD MILLION)

TABLE 82 INDONESIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018–2025 (USD MILLION)

TABLE 83 INDONESIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018–2025 (USD MILLION)

TABLE 84 MIDDLE EAST & AFRICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY COUNTRY, 2018-2025 (USD MILLION)

TABLE 85 MIDDLE EAST & AFRICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 86 MIDDLE EAST & AFRICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 87 MIDDLE EAST & AFRICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 88 MIDDLE EAST & AFRICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE IN FOOD & BEVERAGE INDUSTRY, BY SUB-TYPE, 2018-2025 (USD MILLION)

TABLE 89 SAUDI ARABIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 90 SAUDI ARABIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 91 SAUDI ARABIA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 92 IRAN: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 93 IRAN: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 94 IRAN: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 95 UAE: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 96 UAE: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 97 UAE: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 98 SOUTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY COUNTRY, 2018-2025 (USD MILLION)

TABLE 99 SOUTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 100 SOUTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 101 SOUTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 102 SOUTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SIZE IN FOOD & BEVERAGE INDUSTRY, BY SUB-TYPE, 2018-2025 (USD MILLION)

TABLE 103 BRAZIL: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 104 BRAZIL: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 105 BRAZIL: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 106 ARGENTINA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY MATERIAL TYPE, 2018-2025 (USD MILLION)

TABLE 107 ARGENTINA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY APPLICATION, 2018-2025 (USD MILLION)

TABLE 108 ARGENTINA: REFRIGERATION INSULATION MATERIALS MARKET SIZE, BY END-USE INDUSTRY, 2018-2025 (USD MILLION)

TABLE 109 MAJOR REFRIGERATION INSULATION MATERIAL PRODUCERS

TABLE 110 NEW PRODUCT LAUNCHES, 2017–2019

TABLE 111 EXPANSIONS, 2017-2019

TABLE 112 ACQUISITIONS, 2017-2019

TABLE 113 CONTRACTS, PARTNERSHIP, JOINT VENTURES & AGREEMENTS, 2017-2020

List Of Figures

LIST OF FIGURES

FIGURE 1 MARKET SEGMENTATION

FIGURE 2 GLOBAL MARKET CALCULATION

FIGURE 3 MARKET CALCULATION, BY MATERIAL TYPE

FIGURE 4 MARKET CALCULATION, BY APPLICATION

FIGURE 5 MARKET CALCULATION, BY END-USE INDUSTRY

FIGURE 6 MARKET CALCULATION, BY REGION

FIGURE 7 REFRIGERATION INSULATION MATERIALS MARKET: BOTTOM-UP APPROACH

FIGURE 8 REFRIGERATION INSULATION MATERIALS MARKET: TOP-DOWN APPROACH

FIGURE 9 REFRIGERATION INSULATION MATERIALS MARKET: DATA TRIANGULATION

FIGURE 10 COMMERCIAL APPLICATION LED THE REFRIGERATION INSULATION MATERIALS MARKET

FIGURE 11 PU & PIR TO BE THE LARGEST SEGMENT OF REFRIGERATION INSULATION MATERIALS MARKET

FIGURE 12 FOOD & BEVERAGE TO BE THE LARGEST END-USE INDUSTRY FOR REFRIGERATION INSULATION MATERIALS

FIGURE 13 EUROPE TO BE THE LARGEST MARKET BETWEEN 2020 AND 2025

FIGURE 14 GROWTH IN FOOD PROCESSING ACTIVITIES IS PROPELLING THE MARKET FOR REFRIGERATION INSULATION MATERIALS

FIGURE 15 EUROPE TO BE THE LARGEST REFRIGERATION INSULATION MATERIALS MARKET BETWEEN 2020 AND 2025

FIGURE 16 COMMERCIAL APPLICATION LED THE REFRIGERATION INSULATION MATERIALS MARKET

FIGURE 17 FOOD & BEVERAGE TO REMAIN THE LARGEST END-USE INDUSTRY

FIGURE 18 GERMANY ACCOUNTED FOR THE LARGEST MARKET SHARE FOR REFRIGERATION INSULATION MATERIALS

FIGURE 19 CHINA TO WITNESS HIGHEST GROWTH IN REFRIGERATION INSULATION MATERIALS MARKET

FIGURE 20 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN THE REFRIGERATION INSULATION MATERIALS MARKET

FIGURE 21 PORTER'S FIVE FORCES ANALYSIS: REFRIGERATION INSULATION MATERIALS MARKET

FIGURE 22 PU & PIR TO DOMINATE THE MARKET DURING THE FORECAST

PERIOD

FIGURE 23 COMMERCIAL REFRIGERATION TO BE THE LARGEST APPLICATION OF REFRIGERATION INSULATION MATERIALS

FIGURE 24 FOOD & BEVERAGE TO BE LARGEST END-USE INDUSTRY IN REFRIGERATION INSULATION MATERIALS MARKET

FIGURE 25 FRESH FRUITS & VEGETABLES TO LEAD FOOD & BEVERAGE SEGMENT

FIGURE 26 EUROPE TO BE THE LARGEST REFRIGERATION INSULATION MATERIALS MARKET

FIGURE 27 NORTH AMERICA: REFRIGERATION INSULATION MATERIALS MARKET SNAPSHOT

FIGURE 28 EUROPE: REFRIGERATION INSULATION MATERIALS MARKET SNAPSHOT

FIGURE 29 GERMANY REMAINS LARGEST MARKET FOR REFRIGERATION INSULATION MATERIALS

FIGURE 30 APAC: REFRIGERATION INSULATION MATERIALS MARKET SNAPSHOT

FIGURE 31 CHINA TO REMAIN THE LARGEST REFRIGERATION INSULATION MATERIALS MARKET IN APAC

FIGURE 32 THE UAE TO LEAD REFRIGERATION INSULATION MATERIALS MARKET

FIGURE 33 BRAZIL TO REMAIN THE LARGEST REFRIGERATION INSULATION MATERIALS MARKET IN SOUTH AMERICA

FIGURE 34 REFRIGERATION INSULATION MATERIALS MARKET (GLOBAL) COMPETITIVE LEADERSHIP MAPPING, 2019

FIGURE 35 OWENS CORNING: COMPANY SNAPSHOT

FIGURE 36 OWENS CORNING: WINNING IMPERATIVES

FIGURE 37 KINGSPAN GROUP PLC: COMPANY SNAPSHOT

FIGURE 38 KINGSPAN: WINNING IMPERATIVES

FIGURE 39 ARMACELL INTERNATIONAL S.A.: COMPANY SNAPSHOT

FIGURE 40 ARMACELL: WINNING IMPERATIVES

FIGURE 41 SAINT-GOBAIN ISOVER: WINNING IMPERATIVES

FIGURE 42 ASPEN AEROGELS: COMPANY SNAPSHOT

FIGURE 43 ASPEN AEROGELS: WINNING IMPERATIVES

FIGURE 44 BASF SE: COMPANY SNAPSHOT

FIGURE 45 BASF SE: WINNING IMPERATIVES

FIGURE 46 MORGAN ADVANCED MATERIALS: COMPANY SNAPSHOT

FIGURE 47 MORGAN ADVANCED MATERIALS: WINNING IMPERATIVES

FIGURE 48 ETEX: COMPANY SNAPSHOT

FIGURE 49 ETEX: WINNING IMPERATIVES

FIGURE 50 ZOTEFOAMS: COMPANY SNAPSHOT

FIGURE 51 CABOT CORPORATION: COMPANY SNAPSHOT

FIGURE 52 LYDALL: COMPANY SNAPSHOT

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