

Insulated Concrete Form (ICF) Market Forecasts to 2030 – Global Analysis By Type (Flat Wall Systems and Grid Wall Systems), Material (Expanded Polystyrene, Extruded Polystyrene, Polyurethane Foam and Other Materials), End User and By Geography

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Abstracts

According to Statistics MRC, the Global Insulated Concrete Form (ICF) Market is accounted for \$976.7 million in 2024 and is expected to reach \$1488.2 million by 2030 growing at a CAGR of 7.2% during the forecast period. Insulated Concrete Forms (ICF) are a construction system that make use of lightweight, interlocking foam blocks or panels to form the framework of a structure. These forms are filled with concrete, which offers insulation, energy efficiency, and increased durability. ICFs are frequently used for walls in residential and commercial buildings, providing advantages such as soundproofing, thermal insulation, and resistance to fire, mold, and weather extremes, making them an economical and environmentally friendly building solution.

According to the International Energy Agency (IEA), buildings are responsible for approximately 28% of global energy-related carbon emissions.

Market Dynamics:

Driver:

Growth in urban construction projects

The rising demand for energy-efficient and disaster-resilient buildings in urban areas is

a key driver for the ICF market. Urbanization has led to increased construction activities, particularly in residential and commercial sectors, where ICFs are preferred for their durability, thermal insulation, and reduced construction time. Additionally, government incentives promoting sustainable building practices further boost the adoption of ICFs, making urban construction a significant contributor to market growth.

Restraint:

Lack of knowledge among contractors

A major restraint is the limited awareness and expertise among contractors regarding ICF systems. Specialized training is required to install ICFs effectively, which increases labor costs and discourages adoption. This knowledge gap often leads contractors to opt for traditional construction methods, thereby limiting the market's growth potential, especially in regions with less exposure to advanced building technologies.

Opportunity:

Innovations in material composition and design

Ongoing innovations in ICF materials and designs present significant opportunities. Enhanced material properties, such as improved fire resistance and environmental sustainability, along with modular designs that simplify installation, have expanded the application scope of ICFs. These advancements not only reduce costs but also increase the appeal of ICFs for diverse construction projects, driving future market expansion.

Threat:

Competition from alternatives

The availability of alternative building materials like precast concrete panels and traditional wood framing poses a threat to the ICF market. These alternatives are often more cost-effective and familiar to contractors, making them a preferred choice in certain markets. Additionally, fluctuating raw material prices for ICF production can further intensify competition from these substitutes.

Covid-19 Impact:

The COVID-19 pandemic negatively impacted the ICF market due to delays in

construction projects caused by labor shortages, supply chain disruptions, and lockdown measures. Resources were diverted toward healthcare infrastructure, reducing demand for ICFs in other sectors. However, post-pandemic recovery has been marked by a resurgence in construction activities, particularly energy-efficient projects, which is expected to drive market growth.

The expanded polystyrene (EPS) segment is expected to be the largest during the forecast period

The expanded polystyrene (EPS) segment is expected to dominate due to its superior insulating properties, durability, and cost-effectiveness. EPS-based ICFs are widely used in walls and roofs for their ability to withstand extreme weather conditions and provide energy efficiency. EPS's compatibility with various architectural designs and its growing usage in sustainable construction further reinforce its position as the largest segment during the forecast period.

The commercial construction segment is expected to have the highest CAGR during the forecast period

The commercial construction segment is expected to witness the highest CAGR owing to the growing adoption of energy-efficient and resilient building materials. ICFs cater to the rising demand for sustainable solutions in office complexes, retail spaces, and industrial facilities. The segment benefits from increasing investments in commercial infrastructure and regulatory frameworks favoring eco-friendly construction practices, driving robust growth over the forecast period.

Region with largest share:

North America is anticipated to hold the largest market share due to favorable government policies promoting energy-efficient materials and sustainable construction practices. Programs like Canada's Affordable Housing Initiative have boosted the adoption of ICFs in residential and commercial projects. High consumer awareness regarding energy efficiency further solidifies the region's dominance.

Region with highest CAGR:

Asia Pacific is anticipated to register the highest CAGR due to rising urbanization and large-scale infrastructure projects in countries like China and India. The increasing adoption of modern construction techniques and government initiatives promoting green

buildings are driving demand for ICFs. This rapid growth underscores Asia Pacific's potential as a key market for future expansion.

Key players in the market

Some of the key players in Insulated Concrete Form (ICF) Market include RPM International Inc., Amvic Inc., Logix Insulated Concrete Forms, Fox Blocks, BuildBlock Building Systems, BASF, Beco Products, Polycrete International, Rastra, SISMO, Quad-Lock Building Systems, KORE, LiteForm, SuperForm Products, Durisol and ConForm Global.

Key Developments:

In October 2024, RPM International Inc. announced that TMP Convert SAS (TMPC) has been acquired to be part of its Fibergrate Structures (Fibergrate) business, which is part of RPM's Performance Coatings Group. TMPC is based in Simandre-sur-Suran, France, and is a leading manufacturer of outdoor design and landscape products under the JOUPLAST® and OCAPE® brands. The company has annual net sales of approximately €35 million and terms of the transaction were not disclosed.

In March 2023, Amvic Building System, now comprising six organizations, will move forward into this year with a new name: Alleguard. This new brand captures the allegiance we and our customers share, as well as our commitment to providing protective foam solutions for any customer need across the industries we serve.

In October 2021, BuildBlock Building Systems, manufacturer of BuildBlock Insulating Concrete Forms (ICFs), as a primary member of the Insulating Concrete Forms Manufacturers Association is proud to partner with the National Ready Mixed Concrete Association (NRMCA) as a part of their Build with Strength 2.0 program. Through BWS2.0, the NRMCA is partnering with Habitat for Humanity International to provide safe and sustainable housing across the United States. As a partnered supplier, BuildBlock will be working with several Habitat builds over the next 5 years. BuildBlock will also be providing hands-on ICF installation training and technical support during construction. The first of many BuildBlock builds is set to begin construction in the summer of 2021.

Types Covered:

Flat Wall Systems

Grid Wall Systems

Materials Covered:

Expanded Polystyrene (EPS)

Extruded Polystyrene (XPS)

Polyurethane Foam

Other Materials

End Users Covered:

Residential Construction

Commercial Construction

Infrastructure Construction

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East &
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