Spray Polyurethane Foam - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The Spray Polyurethane Foam Market is expected to register a CAGR of greater than 5% during the forecast period.

Key Highlights
- COVID-19 caused disruption in the supply chain and raw materials, leading to a slowdown in industries like automotive and construction, owing to which the production of spray polyurethane foams decreased. The spray polyurethane market is expected to reach its pre-pandemic level by the end of the forecast period, which is 2021. This is because the economy started to get better and the supply situation got better.
- Growing concerns about greenhouse gas emissions and the market's strong potential as a key part of a building's durability management strategy are the main things that will drive the market's growth in the short term.
- On the other hand, fiberglass and cellulose insulation products are becoming more popular, which will likely slow the growth of the market.
- In the next few years, the market is likely to have more chances to make money because foam lifting is becoming more popular in the concrete raising business.
- Asia-Pacific holds a significant share in the consumption of spray polyurethane foam (SPF) materials. The region is also expected to witness the fastest growth during the forecast period, powered by the increase in energy-efficient construction and asbestos encapsulation applications.

Spray Polyurethane Foam Market Trends

Increasing Usage in the Insulation Applications

- Spray polyurethane foam has been used in insulation applications, and its consumption has steadily grown over time. However, spray polyurethane foam insulation has experienced exponential growth during the past decade.
- The Energy Saving Trust calculates that 25% of heat loss in homes is through the roof, 35% is through the walls, 25% is through windows or draughts, and 15% is through the floor. Hence, cavity walls and loft or roof insulation are two of the most effective energy efficiency measures anyone may install.
- The widespread use of spray polyurethane foam in building envelope assemblies, including walls, ceilings, floors, attics, crawl spaces, and roofing, is linked directly to code-mandated improvements in energy efficiency and, specifically, requirements for reducing building air leakage.
- Across the Asia-Pacific region, demand for residential construction has been rising owing to the growing population and rapid urbanization across major economies. According to a study done by Global Construction Perspectives and Oxford Economics, India will need to build 31,000 homes every day for the next 14 years to keep up with the growing demand for housing in the country. By the end of 2030, this will add up to 170 million homes.
- More and more strict building codes, like Title 24 in California and the International Energy Conservation Code from the International Code Council, force builders to use materials that use less fossil fuel and save energy.
- Furthermore, according to the Harvard Joint Center for Housing Studies, Americans alone spend more than USD 400 billion per year on residential renovations and repairs, which may include the use of insulation, which in turn increases their demand.
- The demand for building insulation is expected to rise in Germany as residential construction expands.As per data published by Eurostat, building construction revenue increased significantly in 2021.
- Because of all of these things, the use of SPF for insulation is likely to grow the market for spray polyurethane foam over the next few years.

Asia-Pacific Region to Dominate the Market

- Asia-Pacific is expected to be the largest market during the forecast period because the government is spending more on the construction and coating industries there.
- China is the largest economy in the Asia-Pacific region in terms of GDP. The growth rate in the country remains high but is gradually diminishing, and the economy is rebalancing from investment to consumption, manufacturing to services, and external to internal demand.
- According to China's 14th five-year plan, the number of permanent urban residents is supposed to rise to 65% by 2025. This is expected to increase demand for the market studied in the years to come.
- As China recovered from the pandemic, many residential construction projects kicked off in the country. Hong Kong's housing authorities launched a number of initiatives to jumpstart the construction of low-cost housing.The officials aim to provide 301,000 public housing units in 10 years, until 2030.
- Government reforms aided significant growth in industrial production as well as end-user demand for automobiles in India.Initiatives, such as "Atma Nirbhar Bharat" and "Make in India," are expected to boost the automotive industry, thereby positively impacting the demand for spray polyurethane foams in the coming years.
- Under the NAP 2021, the automotive manufacturing industry in Malaysia is expected to produce 1.47 million vehicles annually by 2030. From now until 2030, this is expected to increase the demand for spray polyurethane foam used to make cars in the country.
- Owing to all the aforementioned factors, the Asia-Pacific region is expected to dominate the spray polyurethane foam market during the forecast period.

The spray polyurethane foam market is consolidated by nature. Some of the major players in the market include (in no particular order) BASF SE, Huntsman International LLC, Johns Manville, Dow, and CERTAINTED, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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