

## **U.S. Spray Foam Insulation Market - Focused Insights 2025-2030**

Market Report | 2025-05-02 | 85 pages | Arizton Advisory & Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$1999.00
- Team License \$2099.00
- Enterprisewide \$2999.00

### **Report description:**

The U.S. spray foam insulation market is expected to grow at a CAGR of 5.09% from 2024 to 2030.

### **RECENT VENDOR ACTIVITIES IN THE US SPRAY FOAM INSULATION MARKET**

- In May 2022, BASF SE formed a partnership with King Long United Automotive (Suzhou) Co., Ltd. (Suzhou Kinglong) to supply spray polyurethane foam for bus insulation. This product, notable for its enhanced flame-retardant properties, also meets strict VOC regulations, demonstrating BASF's focus on providing solutions that align with safety and environmental standards in the automotive industry.

- Founded in 1897, Dow is a global leader in materials science, offering innovative solutions across various industries. In 2023, Dow introduced ENDURANCE HFDD-4201 SC Compound for Cable Systems, significantly reducing cable manufacturing degassing times and lowering GHG emissions while maintaining high quality. This new compound enhances Dow's sustainability and energy-efficient manufacturing capabilities, positioning it as a key player in the insulation and energy sectors.

### **UNITED STATES SPRAY FOAM INSULATION MARKET DEVELOPMENTS**

- By Product Type: The closed cell holds the largest market share, driven by its adoption in colder regions such as the Northeast and Midwest, where homeowners prioritize energy efficiency to lower heating costs.

- By Density: The medium & high-density segment shows the highest growth of 5.48%, as they have denser and more rigid structures, providing greater thermal resistance and durability.

- By Application: The floors, walls, & ceilings segment shows an incremental growth of USD 113 million during the forecast period. Spray foam insulation is widely used in floors, walls, and ceilings due to its superior air-sealing properties, reducing energy loss and enhancing HVAC efficiency.

- By End-Users: In 2024, the residential segment held the largest U.S. spray foam insulation market share, as homeowners and builders chose spray foam due to its superior performance in air sealing, moisture control, and noise reduction.

- Growth Factor: The U.S. spray foam insulation market is set to grow due to growth in the construction sector and a surge in

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

demand due to superior insulation performance.

## US SPRAY FOAM INSULATION MARKET TRENDS

### Focus Toward Better Thermal Insulation

Advances in spray foam technology have significantly enhanced its thermal insulation capabilities, making it one of the most efficient materials for reducing energy consumption in buildings. As energy efficiency becomes a priority for both new and retrofit construction, spray foam's superior thermal resistance helps minimize heating and cooling costs over the long term, resulting in reduced energy bills. In addition to its thermal benefits, spray foam also provides soundproofing and moisture resistance. This makes it an attractive solution for a wide range of residential, commercial, and industrial applications, as it offers more than just insulation, ensuring comfort and protection against mold growth. With the rising stringency of energy codes and environmental regulations, there's a greater push toward adopting high-performance insulation materials like spray foam. Builders, contractors, and homeowners are increasingly choosing spray foam as a solution to comply with stricter standards and improve building sustainability. The growing preference for high-performance insulation materials is encouraging more research and development in spray foam technology. This focus on improving thermal insulation properties has reinforced spray foam insulation's position in the market, leading to its continued growth as an essential component of energy-efficient building practices.

### Technological Advancements

Innovations in spray foam technology, such as smart spray systems and automated proportioning equipment, are significantly improving the application process. These advancements ensure that the correct mixture of foam is applied, reducing material waste and enhancing the overall efficiency of insulation projects. This not only improves the quality of the installation but also reduces the cost of materials, which is beneficial for both contractors and homeowners. The development of wireless remote controls and advanced spray gun designs has made the installation process much more streamlined. These tools allow contractors to apply spray foam with greater precision and efficiency, which speeds up installation time and improves project outcomes. This increased ease of use helps minimize errors and reduces the need for rework, ultimately lowering labor costs. The introduction of portable and lightweight spray foam equipment has made it easier for contractors, even on smaller-scale projects, to access and apply spray foam insulation. These technological innovations are driving significant growth in the spray foam insulation market by increasing operational efficiency, reducing waste, and making the product more attractive to a wider range of users. As a result, spray foam is becoming the insulation material of choice for modern construction and renovation projects due to its advanced application methods and cost-saving features.

## UNITED STATES SPRAY FOAM INSULATION MARKET DRIVERS

### Growth in the Construction Sector

The booming housing and commercial real estate sectors in the U.S. are driving the demand for effective insulation solutions, with spray foam insulation being a top choice due to its superior performance in energy efficiency. According to the publishing of the Commercial Real Estate Development Association in December 2024, the U.S. housing and commercial real estate sectors have seen strong growth, with 29.3 billion sq. ft. of industrial space and 12.6 billion sq. ft. of office space added since 1980. Self-storage expanded by nearly 2 billion sq. ft., now making up 91% of the current inventory, while retail grew by 14.6 billion sq. ft., highlighting ongoing development across all major segments. This growth in construction translates to a growing market for spray foam as an essential material in both new builds and renovations. Spray foam insulation's versatility in filling gaps and forming a seamless barrier makes it ideal for both new construction and retrofits, enhancing its market appeal. This adaptability ensures the continued demand for spray foam insulation as construction activity increases. The rise of urbanization and the focus on energy-efficient infrastructure in smart cities further boost the use of spray foam insulation in larger residential and commercial

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

buildings, increasing its presence in the market. As urban areas expand, the demand for high-performance insulation materials continues to grow.

#### Surge in Demand Due to Superior Insulation Performance

Spray foam insulation provides excellent thermal resistance, boasting high R-values that make it more efficient at insulating buildings compared to traditional materials such as fiberglass and cellulose. This high-performance characteristic is a key factor driving its popularity in the U.S. market. Its air-sealing properties significantly reduce heating and cooling costs, helping to lower energy bills while enhancing comfort in both residential and commercial buildings. This makes spray foam an attractive option for homeowners and business owners looking to improve energy efficiency. The long-term durability of spray foam, along with its resistance to wear and tear, ensures minimal maintenance costs. This is appealing to consumers and businesses seeking lasting solutions that will provide ongoing value over time. Spray foam's resistance to moisture also prevents mold growth, which can contribute to healthier indoor air quality—a key consideration for health-conscious consumers and businesses. This makes spray foam insulation particularly appealing in areas prone to moisture and humidity. The combination of energy efficiency, cost savings, long-lasting durability, and health benefits makes spray foam insulation the preferred choice for many construction projects, contributing to its growing adoption in the U.S. market.

#### INDUSTRY RESTRAINT

##### Competition from Alternative Insulation Materials

Fiberglass, cellulose, and rigid foam board present cost-effective alternatives to spray foam insulation, creating significant pricing pressure on spray foam manufacturers and challenging consumer preferences. The lower installation costs of traditional insulation materials make them attractive to budget-conscious consumers, reducing the demand for higher-priced spray foam insulation. Eco-friendly materials such as recycled cotton and mineral wool are increasingly preferred by some builders, who view them as more sustainable alternatives to spray foam, intensifying competition in the market. Emerging insulation technologies, including aerogels and hemp-based materials, offer comparable benefits at potentially lower costs, further challenging the growth prospects of the spray foam insulation market.

#### SEGMENTATION INSIGHTS

##### INSIGHTS BY PRODUCT TYPE

The U.S. spray foam insulation market by product type is segmented into closed-cell and open-cell. The closed cell segment accounted for the largest market share in 2024. Closed-cell spray foam has a higher R-value (about 6.7 per inch), making it a key insulator for extreme weather conditions. This has driven its adoption in colder regions such as the Northeast and Midwest, where homeowners prioritize energy efficiency to lower heating costs. As energy regulations tighten and consumers seek long-term savings, the demand for high-performance insulation solutions like closed-cell foam is expected to grow. With its rigid and dense composition, closed-cell foam adds structural integrity to buildings, making it highly suitable for commercial and industrial applications. This feature is mostly beneficial in hurricane-prone regions like Florida, where added structural strength is crucial for storm resilience. The rising frequency of extreme weather events is further driving market demand for closed-cell foam in disaster-resistant construction. Due to its durability, closed-cell spray foam is gradually being used in commercial buildings, warehouses, and cold storage facilities. The growing demand for temperature-controlled environments, such as in food storage and pharmaceutical industries, is further boosting the segment's growth. As industries expand and adopt stricter energy-efficiency standards, closed-cell spray foam is expected to see continued investment and innovation.

##### INSIGHTS BY DENSITY

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

The U.S. spray foam insulation market by density is categorized into medium & high density and low density. The medium & high-density segment shows significant growth, with the fastest-growing CAGR of 5.48% during the forecast period. Medium and high-density spray foams offer superior thermal insulation, with R-values ranging from 5.5 to 7 per inch. This high insulating efficiency makes them a preferred choice in extreme climates, mostly in the Northeast and Midwest regions, where maintaining indoor temperature is crucial during harsh winters. The rising emphasis on energy-efficient construction is driving market growth. High-density spray foam is known for its structural reinforcement capabilities, making it ideal for exterior applications, commercial buildings, and roofing insulation. As the demand for durable and weather-resistant building materials rises, especially in hurricane-prone areas like Florida and Texas, the adoption of high-density spray foam is increasing. The closed-cell structure of high-density foam makes it an effective moisture barrier, preventing water infiltration and reducing the risk of mold growth. This feature is particularly beneficial for applications in flood-prone regions, where the demand for waterproof and long-lasting insulation is growing. The increasing awareness of mold-related health hazards is further propelling market demand for moisture-resistant insulation materials.

#### INSIGHTS BY APPLICATION

The floors, walls, & ceilings application segment shows an incremental growth of USD 113 million during the forecast period. Spray foam insulation is widely used in floors, walls, and ceilings due to its superior air-sealing properties, reducing energy loss and enhancing HVAC efficiency. The rising emphasis on energy-efficient buildings in the US, driven by strict building codes and consumer demand for lower utility bills, is fueling the adoption of spray foam in this segment. Insulating walls and ceilings with spray foam improves indoor comfort by minimizing drafts and temperature fluctuations. This is particularly beneficial in regions experiencing extreme seasonal changes, such as the Midwest and Northeast, where maintaining indoor temperature is a priority. The ability of spray foam to expand and fill small gaps makes it a preferred choice for retrofitting older homes. As many US homeowners invest in upgrading insulation for improved energy efficiency, the market for spray foam in renovation projects is experiencing strong growth.

#### INSIGHTS BY END-USERS

In 2024, the residential segment held the largest U.S. spray foam insulation market share. Homeowners are increasingly adopting spray foam insulation to reduce energy costs and enhance home efficiency. With rising electricity prices and stricter energy codes, the demand for high-performance insulation solutions in the residential sector continues to grow. Many older homes in the US have inadequate insulation, leading to high heating and cooling expenses. Spray foam is widely used in retrofit projects, supported by government incentives and tax credits promoting energy-efficient home improvements. Spray foam insulation reduces drafts, noise, and airborne pollutants, contributing to better indoor air quality. This aligns with the growing trend of homeowners prioritizing health and comfort in their living spaces. High-end residential projects increasingly incorporate spray foam insulation due to its superior thermal performance and long lifespan. Builders and developers of luxury homes favor spray foam to achieve airtight, energy-efficient construction.

#### US SPRAY FOAM INSULATION MARKET COMPETITIVE INSIGHTS

The U.S. spray foam insulation market report consists of exclusive data on 24 vendors. The competitive landscape among BASF, Dow, CertainTeed, Huntsman, Johns Manville, Covestro, and Carlisle Spray Foam Insulation is shaped by their shared focus on innovation and sustainability in the spray foam insulation market. BASF and Dow are recognized leaders in material science and are heavily invested in eco-friendly and high-performance polyurethane technologies, positioning them as key players in the development of energy-efficient solutions. CertainTeed differentiates itself by offering a broad range of building materials, including spray foam insulation while capitalizing on the growing demand for green certifications. Huntsman, with its expertise in polyurethane-based solutions, competes by focusing on superior thermal performance and energy efficiency. Johns Manville,

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

backed by Berkshire Hathaway, has a strong presence in both residential and commercial sectors, offering energy-efficient and sustainable insulation options. Covestro, with its deep expertise in polymers, competes through its commitment to sustainable and low-GWP products, positioning itself as an innovator in the market. These companies maintain a competitive edge through technological advancements, sustainability efforts, and a strong commitment to meeting evolving energy regulations.

#### Key Vendors

- BASF
- Dow
- CertainTeed
- Huntsman
- Johns Manville
- Covestro
- Carlisle Spray Foam Insulation

#### Other Prominent Vendors

- Honeywell
- NCFI Polyurethanes
- SWD Urethane
- RHH Foam Systems
- Rhino Linings
- Cajun Foam Insulation
- Pittsburgh Foam Insulation
- PUFF
- Alpha Insulation & Waterproofing
- Universal Polymers Corporation (UPC)
- Enverge Spray Foam
- Accufoam
- Graco
- Owens Corning
- Genyk USA
- Elastochem
- Kraken Bond

#### SEGMENTATION & FORECASTS

- By Product Type
  - o□Closed Cell
  - o□Open Cell
- By Density
  - o□Medium & High Density
  - o□Low Density
- By Application
  - o□Floors, Walls & Ceilings
  - o□Ducts
  - o□Fireplaces

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- o□Plumbing
- o□Doors
- o□Others
- By End-Users
- o□Residential
- o□Non-Residential

KEY QUESTIONS ANSWERED:

- 1.□How big is the U.S. spray foam insulation market?
- 2.□What are the latest trends in the U.S. spray foam insulation market?
- 3.□Which product type has the largest share in the U.S. spray foam insulation market?
- 4.□Which application provides more business opportunities in the U.S. spray foam insulation market?
- 5.□Who are the key players in the U.S. spray foam insulation market?

**Table of Contents:**

CHAPTER - 1: US Spray Foam Insulation Market Overview

- Executive Summary
- Key Findings
- Key Developments

CHAPTER - 2: US Spray Foam Insulation Market Segmentation Data

- Product Type Market Insights (2021-2030)
  - o□Closed Cell
  - o□Open Cell
- Density Market Insights (2021-2030)
  - o□Medium & High Density
  - o□Low Density
- Application Market Insights (2021-2030)
  - o□Floors, Walls & Ceilings
  - o□Ducts
  - o□Fireplaces
  - o□Plumbing
  - o□Doors
  - o□Others
- End-users Market Insights (2021-2030)
  - o□Residential
  - o□Non-Residential

CHAPTER - 3: US Spray Foam Insulation Market Prospects & Opportunities

- US Spray Foam Insulation Market Drivers
- US Spray Foam Insulation Market Trends
- US Spray Foam Insulation Market Constraints

CHAPTER - 4: US Spray Foam Insulation Market Overview

- US Spray Foam Insulation Market -Competitive Landscape
- US Spray Foam Insulation Market - Key Players

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

-□US Spray Foam Insulation Market - Key Company Profiles

CHAPTER - 5: Appendix

-□Research Methodology

-□Abbreviations

-□Arizton

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**U.S. Spray Foam Insulation Market - Focused Insights 2025-2030**

Market Report | 2025-05-02 | 85 pages | Arizton Advisory & Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$1999.00
	Team License	\$2099.00
	Enterprisewide	\$2999.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com