

## **Polymer Foam Market Size Analysis Report - Market Share, Forecast Trends and Outlook (2025-2034)**

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### **Report description:**

The global polymer foam market reached a value of USD 130.90 Billion in 2024. During the forecast period of between 2025 and 2034, the market is expected to grow at a CAGR of 4.20% to reach a value of around USD 197.52 Billion by 2034.

#### Polymer Foam Market Growth

Polymer foam is a polymer matrix with a lot of small foam holes inside of it. When compared to bulkier polymer materials, polymer foam has several benefits, such as low density, effective sound insulation, good corrosion resistance, proficient heat insulation, and high specific strength. Polymer foam is one of the most widely used polymer materials and is important to the polymer industry. Thus, the growth of the polymer foam market is accelerated by these features of polymer foams.

#### Key Trends and Recent Developments

The use of polymer foams across various industries, its usage for automobiles cushioning and environment friendly polyols are shaping the polymer foam market dynamics and trends.

#### September 2023

Covestro and Polish construction chemicals producer Selena Group have joined forces to come up with a new line of more sustainable polyurethane insulating foams for better building insulation. Selena applied Covestro's bio-attributed methylene diphenyl diisocyanate (MDI) in an improved formulation of Ultra Fast 70 one-component foam, designed to affix different types of structural elements in a window and a door setting.

#### Usage across various industries

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The polymer foam demand is anticipated to increase due to growing uses in a number of industries, including furniture and bedding, packaging, and the automotive sector. Polymer foams are incredibly light and adaptable, exceedingly strong, mould and mildew resistant, and dermatologically friendly. They are safe and advisable for many consumer applications due to these qualities. This is propelling the market growth.

#### Usage in automobile seat cushions

In order to develop lightweight, fuel-efficient, and long-lasting automotives, polymer foams are increasingly used in a variety of passenger automobile seat cushions, airbags, head rests, gasket seals, cushioned instrument panels, and other components. Polyurethane foams are anticipated to have high demand in the automotive industry due to the advantages they offer and their wide range of applications.

#### Environment friendly polyols

A key trend in the polymer foam market is that key companies in the global market could benefit from the growing demand for polyols derived from biomaterials and carbon dioxide. Environmentally friendly polyols include those made from carbon dioxide and biological sources. Additionally, they provide tremendous environmental advantages such as enhanced fire resistance and heat generation capabilities. They also reduce toxicity and volume of the smoke produced. In the near future, all of these factors will support and strengthen the global polymer foam market.

#### Polymer Foam Market Trends

It is anticipated that during the forecast period, the building and construction sector will dominate the end-users of polymer foam. One of the primary uses of polymer foams in the construction industry is in the insulation of building elements including doors, roofs, sealants, and the foundations of doors and windows. The rise in demand for insulated polymer foams in the building and construction sector is driving the polymer foam industry growth.

#### Industry Outlook

Polymer Foam Finds Wide Applications In The Construction And Automotive Industries.

The construction sector growth is directly related to the polymer foam industry.

France's construction sector rose from 5.5% of GDP in 2022 to 5.6% of GDP in 2023, indicative of modest growth. The construction contribution from Germany increased to 6.2% in 2023 from 5.7% in 2022, displaying strong construction output growth. There was growth also in Greece, where the industry's contribution moved up from 1.9% to 2.1%, though it remains very low as compared to other European states. The Italian construction sector, on the other hand, decreased marginally to 5.3% from 5.4%. The construction contribution from the Netherlands remained constant at 5% in each of the two years. This was a learning from Brexit with a 6.2% contribution made by the United Kingdom in 2022.

For automobiles, innovation in polymer foam serves as the safeguard covering all the exterior and interior automobile parts. As per the 2023, report of the International Organization of Motor Vehicle Manufacturers (OICA), the global market leader remains the same, and the production number of vehicles has rocketed past 30 million, where it is seen to have made approximately 26 million cars and 4 million commercial vehicles, thereby up surging by 12%. The United States comes second with a significantly large output of more than 10.6 million vehicles, driven mainly by a solid commercial vehicle sector that produces almost 8.9 million units posting a 6% growth. Japan was also another key contender with approximately 9 million vehicles produced, of which

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7.8 million were cars and almost near a 4% growth. Such factors are becoming the new trend of the polymer foam market.

One of the largest players in the automotive industry, Germany, manufactured more than 4.1 million vehicles, showing growth in production of 18%, largely in cars. Total production reported by South Korea was around 4.2 million vehicles, growing at 13%, driven by the making of around 3.9 million cars. The performance in the automotive sector of Mexico fared well and crossed over 4 million, including over 3 million commercial vehicles, estimating a rise of 14%.

Among others noticeable are Brazil, the state manufactured 2 324 951 vehicles, but the output decreased by 2%, and India which grew by 7% to the discharge of 5 810 213 vehicles. The United Kingdom and France achieved growth in vehicle production by 17% and 9%.

#### Global Polymer Foam Industry Segmentation

"Global Polymer Foam Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Based on foam type, the market is divided into:

- Flexible Foam
- Rigid Foam

The market on the basis of resin type can be segmented into:

- Polyurethane Foam
- Polystyrene Foam
- PVC Foam
- Phenolic Foam
- Polyolefin Foam
- Melamine Foam
- Others

On the basis of application, the market can be segmented into:

- Packaging
- Building And Construction
- Furniture And Bedding
- Automotive, And Marine
- Others

The regional markets for polymer foam can be divided into:

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

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## Polymer Foam Market Share

### Polyurethane Foam Segment To Gain Traction Owing To Its High Impact Resistance

As per polymer foam market analysis, during the forecast period, the polyurethane foam segment is predicted to dominate the polymer foam market. Numerous products, including carpets, furniture, and cushions, use this kind of foam. High impact resistance and strong load bearing capacity of polyurethane foams are qualities that are likely to increase their use in the building sector.

Polystyrene foam, on the other hand, is anticipated to experience significant increase over the course of the forecast period. Polystyrene foam is employed in a variety of settings, such as carpets, pillows, and furniture. Due to its exceptional qualities, including its lightweight, low heat and sound transmission, high energy dissipation, and insulation, it has a large customer base.

As it has high strength to weight ratios, expanded polystyrene foam, one of the lightest materials, is used in packing, which lowers fuel consumption and shipping costs. It is also utilised in rail applications, such as building rail embankments and extending train station platforms.

### Polymer Foam Market Regional Analysis

The polymer foam market in Asia Pacific is anticipated to be the dominant regional market throughout the forecast period. The rise of the regional market is anticipated to be the outcome of a strong outlook for the manufacturing sector, growing emphasis on research and development, as well as favourable initiatives by governments in the region to attract investments.

Over the forecast period, it is anticipated that rapid industrialisation, increased manufacture of automotive parts and interiors, and the packaging sector in rising economies like China and India will increase the demand for the polymer foam in Asia Pacific.

As per polymer foam industry analysis, construction is one of the industries that frequently uses polyolefin foams. In the building and construction and aerospace industries, these foams are being received positively. As emerging countries in the Asia Pacific region experience rapid expansion in infrastructure creation and construction activities, the market growth for polymer foam is expected to surge in this region.

### Competitive Landscape

Key players in the polymer foam market are providing fuel to innovation through the development of new and advanced materials and technologies. They enhance the performance and application of products in various industries, targeting efficiency, sustainability, and changing market demand.

#### Armacell International S.A.

Armacell International S.A. manufactures lightweight, foam-based, flexible insulation products suitable for industrial, automotive, and construction industries. Established in 1994 and based in Luxembourg, the company provides innovative solutions for thermal, acoustic, and mechanical insulation applications.

#### Covestro AG

Covestro AG was established in 2015 and has its headquarters in Leverkusen, Germany. It is a world leader in the production of advanced polymers and innovative materials. The range of its products consists of polyurethanes, polycarbonates, coatings,

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adhesives, and thermoplastic polyurethane elastomers, servicing cutting-edge polymer solutions for application in different sectors.

## BASF SE

With 1865 as the year of establishment and headquartered in Ludwigshafen, Germany, BASF SE is one of the largest chemical companies with a well-diversified product portfolio. The product portfolio includes chemicals, polymers, performance goods, and crop protection products used within the construction, automotive, and electronics industries.

Other market players include Arkema S.A. and Borealis AG, among others.

### Competitive Factors in the Global Polymer Foam Market:

- These firms that invest in conducting research and development leading to the creation of functional properties that are attractive in the polymer foams in terms of strength, flexibility, and thermal insulation will have the upper hand.
- Competitive cost by effective manufacturing technique, by scale of economies, and by sourcing value-added raw materials strategically.
- Diversification is done by the production of environment-friendly foams-like products and adherence to strict environmental rules, boosting the polymer foam market revenue.
- Those plants that have the flexibility to concentrate on the type of products to produce and the ratio of different types of outputs for high-volume use can gain substantial market share.
- Companies equipped with solid logistics capabilities, and possessing trustworthy suppliers and distributors, help further ensure the availability of their products in the market.
- A proactive player that can get and secure the required certifications and treatments accordingly shall avoid legal problems and earn the trust of its customers and stakeholders.
- Being agile in responding to changes in market conditions and technological improvements will help a firm very much in mitigating the risks.

### Key Indicators for Demand in the Global Polymer Foam Market

- The primary government regulations for the polymer foams are environmental variables and safety regulations. Therefore, the efforts made in compliance will be directed towards the reduction of polluting emissions.
- If the prices of energy go high, then the cost of manufacturing will increase also and hence it may lead to the high increase of prices of the final products.
- It is the level of competition in the market for the polymer foam that influences how prices are set, directly affecting the polymer foam industry revenue.
- Technological development in the polymer foam industries, for example, more efficient technology lines or other new advanced types of raw materials that have better performances, might impact the costs.

### Major Price Drivers in the Ecosystem of Polymer Foam

- The major influence of the cost of the labour force in the manufacturing of polymer foams. In those areas where the labouring charge is high then naturally the manufacturing cost relatively rises thus the price.
- Freight costs for moving raw materials into manufacturing units and forwards on finished goods to the hands of the customers play a pricing effect in the polymer foam market.
- General economic scenarios in terms of inflation, interest rate, and economic growth are relevant economic factors to play a price-determining effect on polymer foams.

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- A significant factor affecting the cost price/ unit cost of polymer foams is economies of scale.

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