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

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

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Report description:

Spray Polyurethane Foam Market Analysis

The Spray Polyurethane Foam Market size is estimated at USD 2.91 billion in 2025, and is expected to reach USD 3.83 billion by 2030, at a CAGR of 5.64% during the forecast period (2025-2030). This expansion occurs as building-energy codes tighten, low-GWP regulations take effect, and cold-chain investment accelerates, driving higher-value insulation demand. Manufacturers are swapping high-GWP HFCs for hydrofluoroolefin and other next-generation blowing agents to comply with the EPA's Technology Transitions Restrictions rule that began on 1 January 2025 epa.gov. Consolidation among installers, growing retrofit activity, and ESG-linked financing further reinforce momentum across residential, commercial, and industrial projects, while innovation in CO?-based polyols positions suppliers for long-term sustainability gains.

Global Spray Polyurethane Foam Market Trends and Insights

Strict Building-Energy Codes and Retrofit Mandates

The 2024 International Energy Conservation Code elevates closed-cell spray foam as a preferred air-barrier solution, compelling architects to specify higher R-values and moisture control measures. California's 2023 standards and Florida's 2026 code update both streamline retrofit approvals, lowering removal costs and accelerating demand, particularly for low-slope commercial roofs These rule changes widen the retrofit addressable base, encourage hybrid insulation assemblies, and push contractors toward more training and equipment investment that favors two-component systems.

Rising Concerns Over GHG Emissions

Corporate net-zero goals merge with building-owner cost targets, highlighting spray foam's ability to cut heating-and-cooling energy by up to 10% according to the EPA's Energy Star program. Installed Building Products reported a 55% CO? reduction from spray foam use since 2020 while materially increasing output, showing the technology's decoupling of growth from emissions. Manufacturers such as Johns Manville logged double-digit drops in absolute emissions even as energy-saving product volumes rose, underscoring alignment between sustainability and profitability.

Competition from Fiberglass and Cellulose

Cost-focused residential builders still default to fiberglass batts, supported by long-standing installer networks and low equipment requirements. Home Innovation Research Labs data showed an 11% to 8% pullback in spray foam share amid multifamily growth and material cost saving, highlighting price sensitivity. Fiberglass makers are narrowing performance gaps with higher-density offerings, while cellulose leverages recycled content branding to appeal to eco-minded consumers. Spray foam suppliers must therefore sharpen value messaging around lifecycle energy savings to overcome higher upfront spend.

Other drivers and restraints analyzed in the detailed report include:

Growth in Cold-Chain and Refrigerated Logistics / ESG-Linked Green-Bond Financing for SPF Upgrades / Regulations and Restrictions on Di-Isocyanates /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The segment anchored by two-component high-pressure systems held a 37.62% spray polyurethane foam market share in 2024, reflecting consistent on-site mixing, superior R-values, and code acceptance in commercial construction. BASF's new isocyanate and TPU lines in Zhanjiang strengthen local supply chains, reinforcing the segment's dominance in Asia-Pacific. Semi-rigid spray foam is expanding at a 7.19% CAGR as infrastructure projects need flexibility for vibration and temperature swings. One-component cans address small-project convenience, while low-pressure kits cover sensitive substrates where reduced exothermic heat is critical.

A push for integrated brands illustrates competitive strategy: Holcim's Enverge label merges Gaco and SES portfolios, giving installers a single specification path for roof, wall, and specialty foams. Product diversification frames cross-selling opportunities, with semi-rigid innovations aimed at solar-ready roofs and bridge decks, and intumescent-infused systems targeting fire-resistance regulations. Suppliers that maintain broad catalogs and regional technical centers remain best positioned to seize specification wins.

The Spray Polyurethane Foam Market Report is Segmented by Product Type (Two-Component High-Pressure Spray Foam, Two-Component Low-Pressure Spray Foam, and More), Application (Insulation, Waterproofing, Asbestos Encapsulation, Sealant, Other Application), End-Use Industry (Residential Buildings, Commercial Buildings, Industrial and More), and Geography (Asia-Pacific, North America, Europe, South America, Middle East and Africa).

Geography Analysis

Asia-Pacific captured 48.19% of spray polyurethane foam market share in 2024 and is forecast to climb at 7.66% CAGR, driven by

rapid urbanization, factory expansions, and energy-code adoption. China's real-estate slowdown redirects stimulus toward urban renewal, boosting retrofit insulation spend, while India's HVAC sector is set to hit USD 30 billion by 2030 on a 15.8% CAGR pathway, raising demand for building envelope upgrades. Japan and South Korea enforce stringent envelope requirements in seismic zones, favoring lightweight, high-adhesion insulation such as spray foam. ASEAN nations expand cold-chain capacity for seafood and vaccine storage, pulling regional demand upward. BASF's multi-year USD 19.5 billion Asia-Pacific investment plan exemplifies supplier confidence in the region's absorption capacity.

North America remains a mature but stable arena where federal HFC phase-outs harmonize compliance and keep specification complexity low. Canada's cold climates sustain thick-layer attic spray foam usage, while Mexico emerges as the world's fourth-largest polyurethane consumer on near-shoring momentum and automotive manufacturing growth. Consolidation among contractors enables national builders to standardize envelope solutions across the US and Canada, reinforced by TopBuild's network expansion.

Europe's net-zero directives and renovation wave stimulate demand despite tepid macro-economics. Di-isocyanate training rules introduce friction but ultimately favor well-capitalized manufacturers with robust EHS programs. Covestro's DreamResource project introduces rigid foam containing 20% CO? as feedstock, demonstrating European leadership in circular chemistry. University of Liege advances isocyanate-free foams with 70-90% biobased content, underscoring regional academic-industry collaboration. In South America and the Middle East and Africa, energy-efficiency codes are tightening gradually; early movers in Brazil, Saudi Arabia, and the UAE adopt spray foam in commercial megaprojects, signaling future volume uplift.

List of Companies Covered in this Report:

BASF / Accella Polyurethane Systems / Carlisle Spray Foam Insulation / Covestro AG / Dow / FOAM-LOK (Firestone) / GACO / Huntsman Corporation LLC / ISOTHANE LTD / Johns Manville / NCFI Polyurethanes / Rhino Linings / SOPREMA Canada. / SWD Urethane /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
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Table of Contents:

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