

## **Expanded Polypropylene (EPP) Foam - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

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### **Report description:**

Expanded Polypropylene (EPP) Foam Market Analysis

The expanded polypropylene foam market size in 2026 is estimated at USD 1.29 billion, growing from 2025 value of USD 1.21 billion with 2031 projections showing USD 1.78 billion, growing at 6.66% CAGR over 2026-2031. Heightened regulatory pressure on vehicle mass, corporate net-zero agendas in logistics, and building efficiency retrofits are expanding the addressable scope for EPP by rewarding lightweight design, shape recovery, and closed-loop recyclability. U.S. fleet-average CO<sub>2</sub> limits that tighten from Model Year 2027 onward are accelerating the shift from steel and aluminum to energy-absorbing foams in bumper systems, while the EU's Ecodesign for Sustainable Products Regulation (ESPR) requires reusable packaging with proven recyclability. E-commerce growth is amplifying the need for multi-impact protective containers that can withstand high-velocity fulfillment networks. Meanwhile, district-heating build-outs in Europe are utilizing EPP-insulated phase-change modules to store energy cost-effectively. Consolidation among vertically integrated suppliers-exemplified by Knaufl's acquisition of BASF's Neopolen facility-signals a market where scale, IATF 16949 certification, and recycled-content portfolios are key factors in determining contract wins.

Global Expanded Polypropylene (EPP) Foam Market Trends and Insights

Non-Toxic and Recyclable Material Properties

EPP's compliance with FDA CFR Title 21 and EU Regulation 10/2011 permits direct food contact without additional migration tests, enabling the use of repeated-use containers in grocery and pharmaceutical supply chains. TU Dresden's 2024 GePart project

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demonstrated that molded parts can incorporate more than 70% recycled content without compromising their mechanical integrity. General Industries Deutschland launched the EPP Loop program in 2025 with a target to recycle 75% of German EPP waste by 2030, providing a domestic feedstock that reduces resin costs for molders. JSP's ARPRO RE, RC, and REvolution grades demonstrate the viable use of nearly 100% post-consumer polypropylene, meeting automotive OEM Scope 3 mandates. Collectively, these initiatives turn recyclability from a reputational perk into a procurement prerequisite.

### Automotive Lightweighting and Safety Demand

The EPA's Model Year 2027-plus rules enforce steep CO<sub>2</sub> reductions, pushing automakers to replace metal with polymer foams in bumper cores, seat pads, and trunk liners. EPP maintains energy absorption after multiple impacts, validated under CPSC 16 CFR Part 1203 tests that cap peak acceleration at 300 g. JSP holds about 50% global share of automotive-grade EPP and is commissioning plants in Pune (2024) and Ramos Arizpe (2025) to supply Hyundai, Volkswagen, GM, and Toyota programs locally. Hanwha Advanced Materials leverages 1.12 million t of captive polypropylene capacity to secure resin in volatile cycles, reinforcing its position on headliners and trunk trims. Germany's VDA 4560 now restricts single-use EPP unless a documented return loop exists, deepening demand for reusable transport boxes fitted with RFID tags.

### Polypropylene Price Volatility

The propylene monomer price fluctuated by 15-20% during 2024-2025, following force-majeure outages at Middle East crackers and shifting Chinese export flows, which increased raw material costs that account for nearly 70% of the EPP part value. Specialty bead grades face extra premiums and are supplied by a handful of resin makers-BASF, LG Chem, Hanwha, and Braskem-creating procurement bottlenecks when auto launches spike demand. Contract prices lag behind spot market movements by up to 60 days, forcing molders to either hold costly inventory or renegotiate mid-term with OEMs that resist surcharges. Vertically integrated groups, such as Hanwha, mitigate exposure by utilizing in-house resin, whereas independents endure margin compression that slows capacity additions.

Other drivers and restraints analyzed in the detailed report include:

Boom in E-Commerce Protective Packaging Thermal-Energy-Storage Use-Cases Competition from Cheaper EPS and Other Foams

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

### Segment Analysis

Synthetic grades accounted for 91.74% of the 2025 demand in the expanded polypropylene foam market size. Bio-based polypropylene accounted for a smaller portion of global bioplastics output, held back by feedstock scarcity and a price that can triple that of fossil-based polypropylene, limiting take-up to high-margin applications such as dashboards and consumer electronics housings. The expanded polypropylene foam market, therefore, remains tied to crude-derived propylene economics, although developments in recycled content are tempering that dependence.

JSP and TU Dresden have validated parts with 70% post-industrial PP, allowing OEMs to meet decarbonization goals without paying a bio-premium. EPP Loop's voluntary take-back scheme could redirect up to 55 kilotons of waste into virgin-replacement streams by 2030. If successful, recycled synthetic PP may outpace bio-PP as the preferred low-carbon lever, especially once ESPR's digital product passport makes recycled content transparent to brand owners.

The Epp Foam Market Report Segments the Industry Into Raw Material (Synthetic Polypropylene, Bio-Based Polypropylene), Foam (Fabricated EPP, Molded EPP, Other Foams), Application (Automotive, Dunnage, Furniture, Food Packaging, HVAC, Sports and

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Leisure, Other Applications), and Geography (Asia-Pacific, North America, Europe, South America, Middle-East and Africa).

## Geography Analysis

Asia-Pacific delivered 41.65% of 2025 revenue and will grow 7.15% annually to 2031 on the back of rising vehicle output in China, India, and Thailand. JSP's Pune plant adds 14 kilotons of bead capacity, cutting lead times to Hyundai and Tata assembly lines, while its Mexican site supplies Honda and GM in North America. Kaneka's Eperan PP lines across Malaysia and China, all IATF-certified, further anchor regional supply for Ford, VW, and Nissan.

North America benefits from reshoring initiatives and USMCA rules, with molded EPP parts shipped in sequence to assembly plants in Alabama, Tennessee, and Ontario. Hanwha's sites in Virginia and Mexico integrate resin into finished parts, buffering price swings and trimming logistics emissions. Zotefoams will add a second low-pressure vessel in Kentucky by Q2 2025 to scale high-performance grades for aerospace customers demanding tight density windows.

Europe's demand is shaped by ESPR and Germany's VDA 4560, which collectively phase out single-use packaging and impose take-back on automotive containers. Knauf's 2024 pickup of BASF's Neopolen plant secures captive bead supply for 35 sites across the continent, signaling a pivot to regional self-sufficiency as resin freight costs rise. EPP Loop's network of collection depots in Germany, France, and Benelux further supports closed-loop ambitions.

South America remains small but strategically important for Brazilian auto plants. The Middle East and Africa are showing nascent traction in cold-chain pharmaceutical distribution, with South African vaccine campaigns adopting reusable EPP coolers approved under the WHO prequalification.

## List of Companies Covered in this Report:

ALPLA Armacell BASF BEWi (IZOBLOK) Clark Foam Products Corporation Foampartner Furukawa Electric Co., Ltd. Hanwha Solutions JSP K K Nag Pvt. Ltd Kaneka Corporation Knauf Industries Polyfoam Australia Pty Ltd Sekisui Plastics Co. Signode Industrial Group Llc Sonoco Products Company SSW PearlFoam GmbH Woodbridge Zotefoams Plc

## Additional Benefits:

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

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