Insulation Market Analysis By Product (Fiberglass, Foamed Plastic, Mineral Wool), By Application (Residential Buildings, Non-residential Buildings, Industrial, HVAC & OEM) And Segment Forecasts To 2020

Description: The global insulation market is expected to reach USD 67.16 billion by 2020. Growing consumer awareness regarding energy conservation is expected to remain a key driving factor for global insulation market. Favorable regulatory scenario in most parts of the world is also expected to have a positive influence on market growth. In addition, increasing infrastructure spending in emerging markets of Asia Pacific and Latin America is also expected to spur growth over the next five years. Volatile prices of key raw materials are expected to remain a key challenge for the market participants.

Fiberglass emerged as the leading product segment and accounted for over 40% of total market revenue in 2013. Fiberglass is a widely used material in wall insulation and blanket insulation for residential, industrial, and HVAC applications. Fiberglass is also expected to witness the highest growth of 9.1% from 2014 to 2020. Mineral wool is widely used for insulating lofts, wall cavities, internal walls, and external walls. Increasing demand for residential buildings with less sound infiltration in developed countries is expected drive the mineral wool insulation demand.

Further key findings from the report suggest:

Global insulation market was valued at USD 37.94 billion in 2013 and is expected to grow at a CAGR of 8.5% from 2014 to 2020.

Residential construction was the leading application segment and accounted for over 50% of the total market revenue in 2013. Growing awareness regarding energy conservation related to thermal insulation is expected to drive segment growth over the forecast period.

Asia Pacific was the leading regional market and accounted for over 40% of global revenue in 2013. Increasing construction spending, particularly in China, India, and Indonesia, is expected to support regional growth over the forecast period.

The industry is highly fragmented with the top four participants Rockwool, Saint-Gobain, Johns Manville, and Knauf and accounted for over 25% of the overall revenue in 2013. In August 2014, Knauf Gips KG acquired Guardian Insulation. The transaction includes Guardian Fiberglass and Guardian Laminated Building Products. Guardian Fiberglass would be incorporated with Knauf Insulation, while Guardian Laminated Building Products would become Sivercote LLC.

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