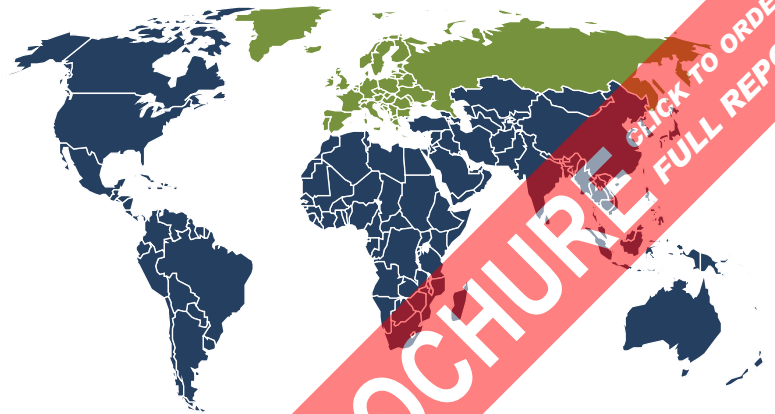




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Industrial & OEM Insulation: Europe

February 2020



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About This Report

Scope

This report forecasts to 2023 industrial and original equipment manufacturer (OEM) insulation demand in metric tons in Europe. Total demand is segmented by material in terms of:

- mineral wool
- foamed plastic
- fiberglass
- other materials such as aerogels, foamed glass, radiant barriers, and reflective insulation

Total demand is also segmented by market as follows:

- industrial and plant equipment
- commercial heating, ventilation, and air conditioning (HVAC)/air distribution
- major household appliances
- transportation equipment
- other markets such as bedding, furniture, and insulated packaging

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Both thermal and acoustic insulation are included in the scope of this report. Demand for insulation in both residential and commercial buildings installed in wall, ceiling, attic, floor, roof, crawl space, and garage applications is excluded from the scope of this report. HVAC/air distribution insulation used for ductwork in the residential market is also excluded from this report.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

About This Report

Table 5 | Countries in Western Europe

Major Industrial & OEM Insulation Markets	Other Western Europe		
France	Andorra	Greenland	Monaco
Germany	Austria	Guernsey	Netherlands
Italy	Belgium	Iceland	Norway
Spain	Channel Islands	Ireland	Portugal
United Kingdom	Denmark	Isle of Man	Saint Pierre and Miquelon
	Faeroe Islands	Jersey	San Marino
	Finland	Liechtenstein	Sweden
	Gibraltar	Luxembourg	Switzerland
	Greece	Malta	Vatican City

Source: The Freedonia Group

Table 6 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland	

*Major industrial insulation & OEM market

Source: The Freedonia Group

Sources

Industrial & OEM Insulation: Europe (FE60121) is based on [Global Industrial & OEM Insulation](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and nongovernmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group

About This Report

- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | HS Codes Related to Industrial & OEM Insulation

HS Code	Definition
6806	Slag, rock wool, and similar mineral wools; exfoliated vermiculite, expanded clays, foamed slag, mixtures and articles of heat, sound insulating, or sound-absorbing mineral materials
6806.20	Exfoliated vermiculite, expanded clays, foamed slag, and similar expanded mineral materials (including intermixtures thereof)
6806.90	Minerals; mixtures and articles of heat-insulating, sound-insulating, or sound-absorbing mineral materials, other than those of heading no. 6811 or 6812 or of chapter 69
7019.39	Glass fibres; webs, mattresses, boards, and similar non-woven products excluding mats and thin sheets

Source: United Nations Statistics Division

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term

About This Report

historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

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Global Industrial & OEM Insulation

Freedonia Industry Studies

Commercial Insulation in the US

Commercial Roofing

Global Acoustic Insulation

Global Drywall & Building Plaster

Global Flooring

Global Foamed Plastic Insulation

Global Housing

Global HVAC Equipment

Global Insulation

Global Roofing

Global Siding (Cladding)

Global Windows & Doors

HVAC Equipment

Insulation

Low-Slope Roofing

Metal Roofing Market in the US

Residential Insulation Market in the US

Residential Roofing

Roofing Underlay Market in the US

Roofing

Siding

Windows & Doors

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Global Windows & Doors

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Industrial Rubber Products: United Kingdom

Motorcycles: United Kingdom

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Plastic Foams: United States

Polystyrene: United States

Polyurethane: United States

Transport Equipment: United States

Windows & Doors: United Kingdom

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Eurostat

Federal Statistical Office of Germany

International Organization for Standardization

National Insulation Association

Organisation for Economic Co-operation and Development

Polyurethane Foam Association

Spray Polyurethane Foam Alliance

Structural Insulated Panel Association

United Nations Comtrade

World Bank

World Health Organization