



Freedonia Focus Reports
US Collection

Residential Insulation: United States

May 2018



CLICK TO ORDER
FULL REPORT

BROCHURE

CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	5
Historical Trends	5
Key Economic Indicators	6
Pricing Trends	7
Environmental & Regulatory Factors	8
3. Segmentation & Forecasts	12
Material	12
Fiberglass	13
Foamed Plastics	14
Cellulose	15
Mineral Wool	15
Other Materials	16
Housing Type	18
Single-Family	19
Multifamily	20
Manufactured Housing	20
4. Industry Structure	22
Industry Characteristics	22
Market Share	23
Owens Corning	24
Johns Manville	25
Knauf Insulation	25
5. About This Report	26
Scope & Method	26
Sources	27
Industry Codes	27
Resources	28

List of Tables & Figures

Figure 1 Key Trends in US Residential Insulation, 2017 – 2022	4
Figure 2 US Residential Insulation Demand Trends, 2007 – 2017	5
Table 1 Key Indicators for US Residential Insulation Demand, 2007 – 2022	6
Table 2 Average Insulation Prices by Material, 2007 – 2022	7
Table 3 Environmental & Regulatory Issues in the US Residential Insulation Market	9
Figure 3 Continental US Climate Zone Map & Suggested R-Values	11
Figure 4 US Residential Insulation Demand by Material, 2007 – 2022 (US\$ mil)	12
Table 4 US Residential Insulation Demand by Material, 2007 – 2022	13
Figure 5 US Residential Insulation Demand by Material, 2007 – 2022 (%)	16
Figure 6 US Residential Insulation Demand by Housing Type, 2007 – 2022 (US\$ mil)	18
Table 5 US Residential Insulation Demand by Housing Type, 2007 – 2022	18
Figure 7 US Residential Insulation Demand by Housing Type, 2007 – 2022 (%)	21
Figure 8 US Residential Insulation Market Share by Company, 2017 (%)	23
Table 6 Leading Suppliers to the US Residential Insulation Market, 2017	24
Table 7 Industry Codes Related to Residential Insulation	27

About This Report

Scope & Method

This report forecasts to 2022 US residential insulation demand in nominal US dollars at the manufacturer level and in pounds. Total demand is segmented by material in terms of:

- fiberglass
- foamed plastic
- cellulose
- mineral wool
- other materials (e.g., reflective insulation and radiant barriers)

Total demand is segmented by housing type as follows:

- single-family
- multifamily
- manufactured housing

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; the various segments are reported at five-year intervals for 2007, 2012, and 2017.

Excluded from the scope of this report are insulation used primarily for its acoustic properties and insulation used in and around HVAC equipment, including duct work.

This report 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.

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.

Sources

Residential Insulation: United States (FF60109) is based on [Residential Insulation Market in the US](#), 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 including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- 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 | Industry Codes Related to Residential Insulation

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
321219	Reconstituted wood product manufacturing	2493	Reconstituted wood products
326140	Polystyrene foam product manufacturing	3086	Plastics foam products
326150	Urethane & other foam product manufacturing, excluding polystyrene	3295	Minerals & earths, ground or otherwise treated
327992	Ground or treated mineral & earth manufacturing	3296	Mineral Wool
327993	Mineral wool manufacturing		

Source: US Census Bureau

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Residential Insulation Market in the US, May 2018

Freedonia Industry Studies

Insulation Market in the US, December 2017

Windows & Doors Market Forecasts in the US, September 2017

Roofing: US Forecasts, September 2017

Roofing Underlay Market in the US, November 2016

Freedonia Focus Reports

HVAC Equipment: United States

Roofing: United States

Siding: United States

Freedonia Custom Research

Trade Publications

Insulation Outlook

The Journal of Light Construction

Remodeling Magazine

Walls & Ceilings

Agencies & Associations

American Chemistry Council

Cellulose Insulation Manufacturers Association

Mineral Wool Insulation Manufacturers Association

National Association of Home Builders

National Insulation Association

North American Insulation Manufacturers Association

Polyurethane Foam Association

Spray Polyurethane Foam Alliance

Structural Insulated Panel Association

United States Census Bureau

United States Department of Energy

United States Environmental Protection Agency

United States Green Building Council

United States International Trade Commission