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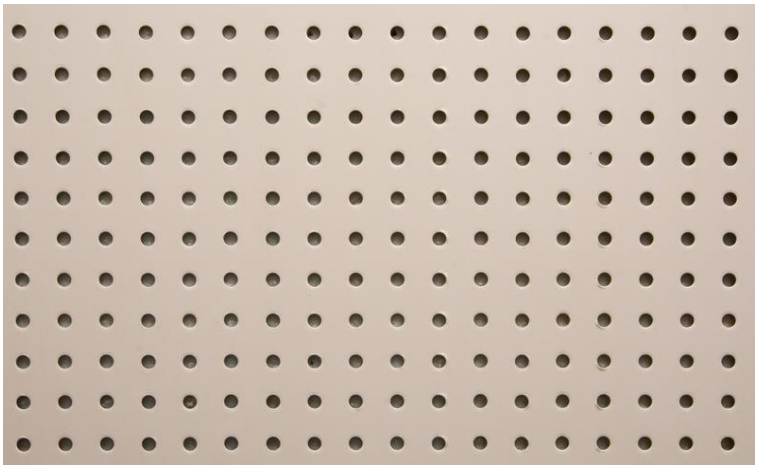

Freedonia Focus Reports
Global Collection

Global Acoustic Insulation

May 2019

www.freedoniafocusreports.com

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List of Tables & Figures

About This Report

Scope

This report forecasts to 2023 global demand for acoustic insulation by material, market, and major world region in nominal US dollars at the manufacturer level. Material segments include:

- foamed plastic
- fiberglass
- mineral wool
- other materials such as cellulose and cotton

Reported markets encompass:

- residential buildings
- nonresidential buildings
- industrial and plant equipment
- HVAC/air distribution
- transportation equipment
- other markets such as appliances, heavy machinery, and nonbuilding construction

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, material, market, and regional demand (including material and market segments) are provided for 2008, 2013, and 2018.

Acoustic insulation in residential buildings is defined as insulation installed in interior walls and floors for sound control purposes. Insulation installed in exterior walls and ceilings, attics, masonry, crawl spaces, garages, and roofs is considered to be thermal and excluded from the scope of this report.

For the purposes of this report, acoustic insulation in nonresidential buildings is defined as insulation installed in interior walls and between floors. Additionally, insulation installed as a part of acoustical ceiling systems – such as foam clouds – is considered to be acoustic insulation. However, insulation in ceiling tiles is excluded. Insulation installed in exterior walls, roofs, and all other applications is considered to be thermal and is also excluded from the scope of this report.

Acoustic insulation in appliances is defined as insulation installed in the sidewalls or doors of dishwashers, clothes dryers, and clothes washers. Insulation installed in refrigerators,

freezers, and ovens is considered to be thermal and is therefore excluded from the scope of this report.

Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Global Acoustic Insulation (FW60115) is based on 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 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 9 | NAICS & SIC Codes Related to Acoustic Insulation

NAICS/SCIAN 2017		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		
327992	Ground or treated mineral & earth manufacturing	3295	Minerals & earths, ground or otherwise treated
327993	Mineral wool manufacturing	3296	Mineral wool

Source: US Census Bureau

Table 10 | HS Codes Related to Acoustic 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
680620	Exfoliated vermiculite, expanded clays, foamed slag, and similar expanded mineral materials (including intermixtures thereof)
680690	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
701939	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 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

The Freedonia Group

Global Acoustic Insulation

Freedonia Industry Studies

Commercial Insulation Market in the US
Commercial Roofing
Global Housing
Global HVAC Equipment
Global Insulation
Global Roofing
Global Windows & Doors Market
Insulation Market in the US
Low-Slope Roofing Market in the US
Metal Roofing
Residential Insulation Market in the US
Residential Roofing
Roofing Underlay Market in the US
Roofing: US Forecasts
Siding Market in the US
US HVAC Market Forecasts

Freedonia Focus Reports

Construction Chemicals: United States
Insulation: United States
Perlite & Vermiculite: United States
Plastic Foams: United States

Freedonia Custom Research

Trade Publications

Global Insulation
Insulation Outlook
The Journal of Light Construction
Remodeling Magazine
Walls & Ceilings

Agencies & Associations

American Chemistry Council
Cellulose Insulation Manufacturers Association
China Heat & Sound Insulation Materials Association

European Insulation Manufacturers Association
Eurostat
Germany Federal Statistical Office
Mineral Wool Insulation Manufacturers Association
National Association of Home Builders
National Bureau of Statistics of China
National Insulation Association
North American Insulation Manufacturers Association
Polyurethane Foam Association
Spray Polyurethane Foam Alliance
Structural Insulated Panel Association
UNdata
United Nations Comtrade
United States Census Bureau
United States Department of Energy
United States Environmental Protection Agency
United States Green Building Council
United States International Trade Commission