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Global Foamed Plastic Insulation

May 2022



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About This Report

Scope

This report forecasts to 2025 global demand for foamed plastic insulation by type, market, and major world region in metric tons. Type segments include:

- expanded polystyrene (EPS)
- polyurethane/polyisocyanurate (PUR/PIR)
- extruded polystyrene (XPS)
- other types such as polyolefin, elastomeric, and phenolic

Reported markets encompass:

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

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

To illustrate historical trends, world, type, market, and regional demand (including type and market segments) are provided for 2010, 2015, and 2020.

Both thermal and acoustic insulation are included in the scope of this report. Blowing agents are excluded from the scope.

Other various topics are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Global Foamed Plastic Insulation (FW60118) 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 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 8 | NAICS & SIC Codes Related to Foamed Plastic Insulation

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
326140	Polystyrene foam product manufacturing	3086	Plastic foam products, NEC
326150	Urethane & other foam product manufacturing, excluding polystyrene	3089	Plastics products, NEC
326199	All other plastics product manufacturing		

Source: US Census Bureau

Table 9 | HS Codes Related to Foamed Plastic Insulation

HS Code	Definition
3909	Amino-resins, phenolic resins, and polyurethanes in primary forms
3903.11	Styrene polymers, expandable polystyrene, in primary forms
3903.19	Styrene polymers, other than expandable, in primary forms
3909.50	Polyurethanes, in primary forms

Source: United Nations Statistics Division

Table 10 | NACE Codes Related to Foamed Plastic Insulation

NACE Code	Definition
22.26	Manufacture of other plastic products

Source: European Commission

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 Foamed Plastic Insulation

Freedonia Industry Studies

Commercial Roofing

Global Drywall & Building Plaster

Global Flooring

Global Housing

Global HVAC Equipment

Global Insulation

Global Plumbing Products

Global Roofing

Global Siding (Cladding)

Global Windows & Doors

HVAC Equipment

Insulated Packaging Containers & Shippers

Insulation

Low-Slope Roofing

Gutters & Downspouts

Protective Packaging

Residential Roofing

Roofing Underlayment

Roofing

Siding

Windows & Doors

Freedonia Focus Reports

Construction Chemicals: United States

Plastic Foams: United States

Polystyrene: United States

Polyurethane: 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
European Insulation Manufacturers Association
Eurostat
Germany Federal Statistical Office
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