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Global Industrial & OEM Insulation

February 2020



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About This Report

Scope

This report forecasts to 2023 global demand for industrial and original equipment manufacturer (OEM) insulation by material, market, and major world region in metric tons. Material segments include:

- foamed plastic
- fiberglass
- mineral wool
- other materials such as radiant barriers, vacuum panels, and vermiculite

Reported markets encompass:

- industrial and plant equipment
- commercial heating, ventilation, and air conditioning (HVAC) and air distribution equipment
- major household appliances
- transportation equipment
- other markets such as insulated packaging, heavy off-road equipment, and nonbuilding/infrastructure 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.

The metric measures of thermal value used in this report cannot be converted to English units (those used in The Freedonia Group's US insulation reports) simply by converting square meters to square feet. The metric version of thermal value defines heat transfer in metric units (watts) and is based on a material sample one meter thick; the English version of thermal value defines heat transfer in British thermal units and is based on a material sample 1 inch thick.

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 Industrial & OEM Insulation (FW60121) is based on [*Global Industrial & OEM Insulation*](#), a comprehensive industry study published by The Freedonia Group. Reported

About This Report

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 9 | NAICS & SIC Codes Related to Industrial & OEM 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	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

Table 10 | 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 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 Industrial & OEM Insulation

Freedonia Industry Studies

Commercial Insulation in the US

Commercial Roofing

Global Acoustic Insulation

Global Drywall & Building Plaster

Global Flooring

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

Roofing Underlay Market in the US

Siding

Windows & Doors

Freedonia Focus Reports

Construction Chemicals: United States

Insulation: Canada

Perlite & Vermiculite: 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

About This Report

Remodeling Magazine
Walls & Ceilings

Agencies & Associations

American Chemistry Council
European Insulation Manufacturers Association
Eurostat
Federal Statistical Office of Germany
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