



Freedonia Focus Reports
Global Collection

Global Mineral Wool Insulation

May 2022



CLICK TO ORDER
FULL REPORT

BROCHURE

CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Global Overview & Forecasts	5
COVID-19 Impact	5
Demand by Market	7
Nonresidential Buildings	8
Residential Buildings	8
Industrial & Plant Equipment	9
HVAC/Air Distribution	9
Other Markets	10
3. Regional Segmentation & Forecasts	11
Regional Demand Overview	11
North America	13
Western Europe	15
Asia/Pacific	17
Other Regions	19
Central & South America	20
Eastern Europe	20
Africa/Mideast	20
4. Industry Structure	22
Market Share	22
ROCKWOOL	23
Knauf Gips	23
Saint-Gobain	23
5. About This Report	25
Scope	25
Sources	25
Industry Codes	26
Freedonia Methodology	26
Resources	28

List of Tables & Figures

Figure 1 Global Mineral Wool Insulation Market Outlook, 2020 – 2025	4
Figure 2 Global Mineral Wool Insulation Demand by Market, 2010 – 2025 (mil m tons)	7
Table 1 Global Mineral Wool Insulation Demand by Market, 2010 – 2025 (000 m tons)	7
Figure 3 Global Mineral Wool Insulation Demand by Market, 2010 – 2025 (%)	10
Figure 4 Global Mineral Wool Insulation Demand by Region, 2010 – 2025 (mil m tons)	11
Table 2 Global Mineral Wool Insulation Demand by Region, 2010 – 2025 (000 m tons)	11
Figure 5 Global Mineral Wool Insulation Demand by Region, 2010 – 2025 (%)	12
Figure 6 North America: Mineral Wool Insulation Demand by Market, 2010 – 2025 (000 m tons)	13
Table 3 North America: Mineral Wool Insulation Demand by Market, 2010 – 2025 (000 m tons)	14
Figure 7 Western Europe: Mineral Wool Insulation Demand by Market, 2010 – 2025 (000 m tons)	15
Table 4 Western Europe: Mineral Wool Insulation Demand by Market, 2010 – 2025 (000 m tons)	16
Figure 8 Asia/Pacific: Mineral Wool Insulation Demand by Market, 2010 – 2025 (mil m tons)	17
Table 5 Asia/Pacific: Mineral Wool Insulation Demand by Market, 2010 – 2025 (000 m tons)	18
Figure 9 Other Regions: Mineral Wool Insulation Demand by Region, 2010 – 2025 (000 m tons)	19
Figure 10 Other Regions: Mineral Wool Insulation Demand by Market, 2010 – 2025 (000 m tons)	19
Table 6 Other Regions: Mineral Wool Insulation Demand by Region & Market, 2010 – 2025 (000 m tons)	21
Figure 11 Global Mineral Wool Insulation Market Share by Company, 2020 (%)	22
Table 7 NAICS & SIC Codes Related to Mineral Wool Insulation	26
Table 8 HS Codes Related to Mineral Wool Insulation	26
Table 9 NACE Codes Related to Mineral Wool Insulation	26

About This Report

Scope

This report forecasts to 2025 global demand for mineral wool insulation by market and major world region in metric tons. Reported markets encompass:

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

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

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

Mineral wool types encompass slag wool and rock wool. Both thermal and acoustic insulation are included in 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 Mineral Wool Insulation (FW60125) 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 7 | NAICS & SIC Codes Related to Mineral Wool Insulation

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
327993	Mineral wool manufacturing	3296	Mineral wool

Source: US Census Bureau

Table 8 | HS Codes Related to Mineral Wool 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

Source: United Nations Statistics Division

Table 9 | NACE Codes Related to Mineral Wool Insulation

NACE Code	Definition
23.99	Manufacture of other non-metallic mineral products n.e.c

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.

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

Global Mineral Wool: Insulation & Other Applications

Freedonia Industry Studies

Ceilings

EIFS Siding: Exterior Insulation Finishing Systems

Global Ceilings

Global Drywall & Building Plaster

Global Housing

Global HVAC Equipment

Global Insulation

Global Major Household Appliances

Global Prefabricated Housing

Global Roofing

Global Siding (Cladding)

Global Windows & Doors

Green (Vegetative) Roofing

HVAC Equipment

Insulation

Roofing

Siding

Windows & Doors

Freedonia Focus Reports

Construction Chemicals: United States

Foamed Plastic Insulation: United States

Industrial & OEM Insulation: Canada

Industrial & OEM Insulation: Europe

Perlite & Vermiculite: United States

Plastic Foams: United States

Roofing Accessories: United States

Freedonia Custom Research

Trade Publications

Global Insulation

Insulation Outlook

The Journal of Light Construction

Remodeling Magazine

Walls & Ceilings

Agencies & Associations

European Insulation Manufacturers Association
Eurostat
Germany Federal Statistical Office
International Monetary Fund
Mineral Wool Insulation Manufacturers Association
National Association of Home Builders
National Bureau of Statistics of China
National Insulation Association
North American Insulation Manufacturers Association
Organisation for Economic Co-operation and Development
UN Comtrade
UNdata
United States Census Bureau
United States Department of Energy
United States Environmental Protection Agency
United States Green Building Council
United States International Trade Commission
World Bank