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World Insulation

Industry Study with Forecasts for **2012 & 2017**

Study #2434 | February 2009 | \$5800 | 405 pages



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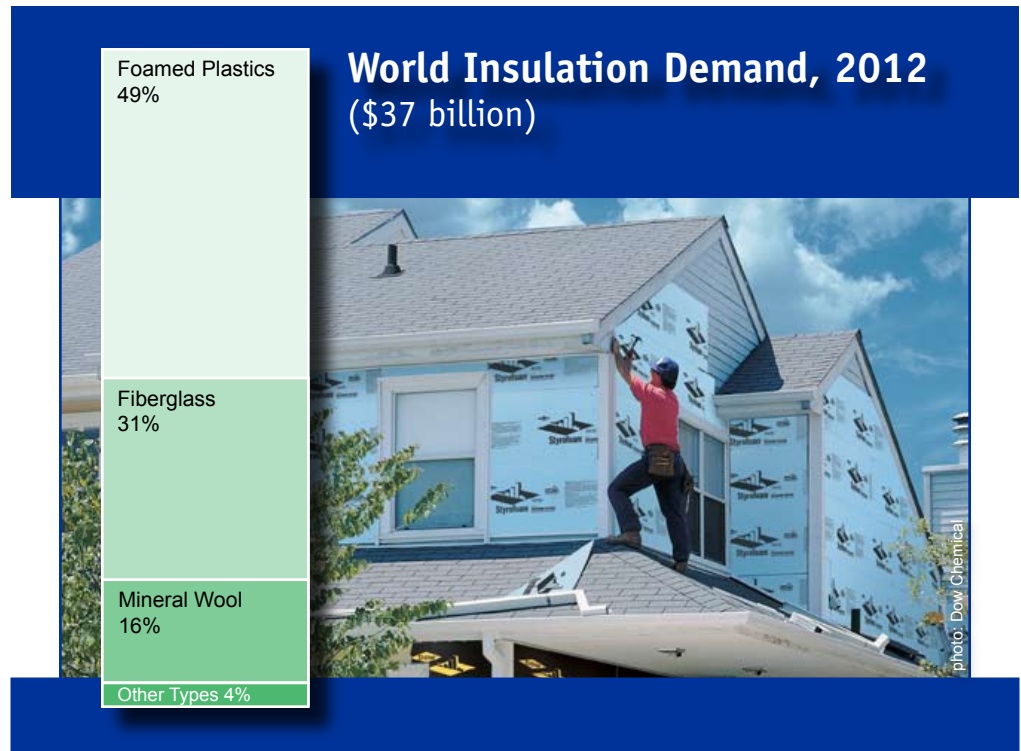
Foamed plastic insulation will remain the largest market segment through 2012, driven by expanding building construction and household appliance production in developing countries.

Global demand to expand 3.8% yearly through 2012

Worldwide consumption of insulation materials is projected to expand 3.8 percent per year through 2012 to 21.5 billion square meters of R-1 value. In dollar terms, demand for insulation materials will expand to \$37 billion, primarily reflecting gains in volume, coupled with moderating increases in unit prices. Foamed plastic insulation will continue to account for the largest portion of total demand in dollar terms through 2012. Economic expansion in the developing countries of Asia will raise demand for foamed plastic, both in building construction and in the production of household appliances. Fiberglass insulation will expand its presence outside of North America and will increase its overall market share. Mineral wool will see its share of the market shrink, primarily due to competition from fiberglass. Other materials will continue to be niche products, finding use on the basis of their low cost or environmental advantages.

Developing Asian countries to post fastest growth

The most rapid rates of growth will be posted in the developing countries of Asia, boosted by strong building construction activity and increasing production of products that incorporate insulation materials, such as refrigerators and freezers. In particular, building construction will continue to expand in China,



sparking strong annual growth in the value of insulation demand through 2012. Insulation demand in China will also benefit from government initiatives to encourage more energy-efficient building construction. Overall, China will account for 41 percent of all new demand between 2007 and 2012. However, because of lower production costs, China accounted for 20 percent of world demand by weight in 2007, but only ten percent of demand in dollars.

In the mature insulation markets of the industrialized countries of North America, Western Europe and Japan, growth will trail the world average. Slowing residential construction in Western Europe and outright declines in Canada will limit

gains in these nations. However, a rebound in residential construction activity in the United States from a weak 2007 base will help to boost insulation demand in North America. In Western Europe, insulation demand will decelerate from the 2002-2007 period, reflecting slowing new construction activity, moderated in part by European Union directives on energy conservation to reduce carbon emissions, which will benefit retrofit building applications. The insulation market in Japan is expected to reverse the downward trend (in terms of thermal insulating value) which characterized the 1997-2007 period. Growth in construction activity in Japan will support increased demand for insulation.

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Sample Text, Table & Chart

ASIA/PACIFIC

Thailand: Insulation Supply & Demand

Demand for insulation materials in Thailand in 2007 totaled 130 million square meters of R-1 value. As with several other countries in the region, Thailand recorded a weak market for insulation in the 1990s and into the 2000s in the wake of the Asian financial crisis. Demand stagnated, so that overall growth between 1997 and 2007 totaled only 1.3 percent annually. In residential markets, demand decelerated from 1997 through 1999 before recovering strongly through 2002. In nonresidential construction markets, a similar pattern occurred, with demand in 2002 actually slightly lower than in 1997. In both construction sectors, demand for insulation regrouped through 2007, posting strongly positive growth.

Going forward, demand for insulation materials in Thailand is projected to increase to 150 million square meters of R-1 value in 2012, a gain of 15 percent from the 2007 level. This represents a deceleration from the growth posted in the 2002-2007 time frame, as insulation unit sales slow in response to weakening construction markets, coupled with less rapid growth in insulation production.

In value terms, demand for insulation materials in Thailand is expected to increase 5 percent to \$1.2 billion in 2012. This represents a deceleration from the growth posted in the 2002-2007 time frame, as insulation unit sales slow in response to weakening construction markets, coupled with less rapid growth in insulation production.

Foamed plastic insulation products dominate demand in Thailand, accounting for more than 60 percent of total demand in 2007. Fiberglass materials accounted for 29 percent of demand, mineral wool accounted for eight percent, and other products accounted for two percent. Fiberglass insulation will post the fastest gains in 2012, as this material gains share in construction markets.

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TABLE VII-16

THAILAND INSULATION SUPPLY & DEMAND
(million dollars)

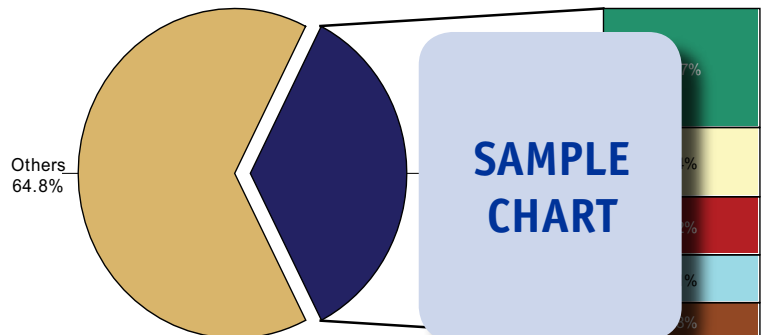
Item	1997	2002	2007	2012	2017
Construction Expenditures (bil 2006\$)	111	146	242	323	425
sq m R-1/000\$ expenditures	78	8			
Insulation Demand (mil sq m R-1)	0	0	6	4	
Residential Construction					
Nonresidential Construction					
Industrial, HVAC & OEM					
\$/sq m R-1	6				
Insulation Demand	5	0	0	0	5
Foamed Plastics					
Fiberglass					
Mineral Wool					
Other					
+ net exports	0				
Insulation Production					

SAMPLE
TABLE

SAMPLE
TEXT

CHART IX-1

WORLD INSULATION MARKET SHARE BY COMPANY, 2007
(\$29.2 billion)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VII-15
THAILAND MACROECONOMIC INDICATORS & INSULATION DEMAND

Item	1997	2002	2007	2012	2017
Population (millions)	59	61	63	65	68.4
GDP/capita	600	650	700	750	800
Gross Domestic Product (bil 2006\$)	35	40	45	50	54
% of GDP	4	4	4	4	4
Fixed Investment (bil 2006\$)	14	15	16	17	18
sq m R-1/capita	1	1	1	1	1.49
sq m R-1/000\$ GDP	0.00028	0.00028	0.00028	0.00028	0.00028
sq m R-1/000\$ GFI	0.00028	0.00028	0.00028	0.00028	0.00028
Insulation Demand (mil sq m R-1)	92	98	128	145	170

**SAMPLE
TABLE**

COMPANY PROFILES

Byucksan Corporation

Gwanghui Building
 216 Gwanghui-dong 1-ga
 Jung-gu, Seoul
 South Korea
 82-2-2266-1111
 http://www.byucksan.com

Sales: \$1.5 billion
 Employed: 1,000

Key Products: glass wool, mineral wool and mineral wool insulation

**SAMPLE
PROFILE**

Byucksan manufactures such general building materials as gypsum board, insulation and roofing. The Company offers five main product lines: ceiling systems, floor systems, insulation systems, exterior wall systems and ventilation systems.

The Company participates in the world insulation industry through the production of glass wool, extruded polystyrene (XPS) foam and mineral wool insulation products. Glass wool insulation is offered in mate, board and pipe cover forms. Byucksan's XPS foam insulation is marketed under the ISOPINK tradename and is designed to provide compressive strength and thermal insulation. In addition, ISOPINK insulation features moisture resistance. Mineral wool insulation is sold in pipe cover, felt and blanket models. The Company also makes COATROCK mineral wool insulation, which is engineered for the insulation of steel-framed buildings. COATROCK insulation is a fire-resistant, sound-absorbing thermal cladding material produced from calcium silicate ore.

"Thailand is a net importer of insulation materials, with a deficit in 2007 of more than \$20 million. However, as Thailand continues to expand its insulation production, the reliance on imported material will decline. Production of insulation materials in Thailand is projected to expand more than six percent annually to \$325 million in 2012."

--Section VII, pg. 224

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OTHER STUDIES

Construction Outlook in China

This study analyzes the construction sector in China. It presents historical demand data (1998, 2003 and 2008) and forecasts for 2013 and 2018 by type of construction (residential building, nonresidential building, nonbuilding), market (new construction, additions and alterations, maintenance and repair) and Chinese geographic region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2507 05/2009..... \$5200

Green Building Materials

US "green" building material demand is projected to rise 7.2% yearly through 2013, driven mainly by a recovery of the residential market. Forest Stewardship Council (FSC)-certified lumber and wood panels, water-efficient plumbing fixtures and fittings, and energy-efficient lighting fixtures will grow at double-digit rates. This study analyzes the \$60 billion US green building material industry, with forecasts for 2013 and 2018 by type, market and region. It also considers market environment factors and profiles industry players.

#2459 02/2009..... \$4700

Siding

Demand for siding materials in the US will exceed 115 million squares in 2012. Gains will derive largely from a recovery in residential construction, particularly in single-family housing. Demand in the key vinyl siding segment will be moderated by competition from fiber cement siding. Stucco and related materials will also outpace vinyl. This study analyzes the \$10.4 billion US siding industry, with forecasts for 2012 and 2017 by material, market and region. It also evaluates market share and profiles industry players.

#2376 07/2008..... \$4700

Insulation

US insulation demand will rise 5.3% annually through 2012, based on renewed growth in housing construction. Fiberglass will remain the leading insulation material and outpace demand for the second largest type, foamed plastic. Reflective insulation and radiant barriers will see the fastest growth, albeit from a small base. This study analyzes the \$8.5 billion US insulation industry, with forecasts for 2012 and 2017 by product, market and US region. It also evaluates company market share and profiles major players.

#2302 03/2008..... \$4600

Insulation in China

Insulation demand in China will grow 9% yearly through 2011. Gains will be fueled by strong building construction activity, increasing production of items that use insulation (e.g., refrigerators, freezers) and continued initiatives to boost energy efficiency. Foamed plastic will remain the largest segment and grow the fastest. This study analyzes the ¥18.4 billion Chinese insulation industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2266 01/2008..... \$5100

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