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World Insulation

Industry Study with Forecasts for **2014 & 2019**

Study #2707 | February 2011 | \$6100 | 393 pages

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Consumption in most industrializing nations will continue to expand at a healthy pace, while sales in developed countries will rebound after falling sharply in 2008 and 2009.

Global demand to rise 5% annually through 2014

World demand for insulation is forecast to increase 5.0 percent per year through 2014 to nearly 23 billion square meters of R-1 value, a substantial improvement over the 2004-2009 rate. Insulation consumption in most industrializing nations will continue to expand at a healthy pace. In developed countries, sales of insulation materials are expected to rebound after falling sharply in 2008 and 2009 because of the global financial crisis.

Home building to be primary driver of growth

Impressive residential building construction spending gains will be the primary driver of growth. Sales of insulation for residential applications in North America will rise at a double-digit pace between 2009 and 2014, as the US housing market recovers. In Western Europe, insulation demand will expand moderately, after declining between 2004 and 2009 due to a drop in residential construction activity in the latter part of the period. Ongoing rural-to-urban migration in Asia, the Africa/Mideast region, and Central and South America will stimulate housing construction in urban areas and thus insulation consumption. Nonresidential construction activity and associated insulation demand in industrializing regions are also forecast to expand at a healthy pace. The adoption of new insulation standards for buildings and the implementation of government programs

World Insulation Demand, 2014 (22.9 billion square meters of R-1 value)



Asia/Pacific
40%

North America
26%

Western Europe
21%

Other Regions
13%

photo: PRNewswire

to encourage insulation use will spur product sales in many countries. Other trends will contribute to advances in the global insulation market as well. Worldwide process manufacturing activity, appliance output and HVAC system installation are projected to increase considerably through 2014, generating additional demand for insulation. Shipments of refrigerators and freezers, for example, are expected to climb almost four percent per annum.

North American market to be fastest growing

The insulation market in North America will register the fastest growth through 2014, driven by the large US market.

Insulation consumption in the US is expected to increase more than seven percent per year during this time, after it declined dramatically between 2007 and 2009 because of turmoil in the housing sector.

More than 40 percent of all new insulation demand generated during the 2009-2014 period will be attributable to the Asia/Pacific region. Insulation consumption in the region is predicted to benefit from solid advances in process manufacturing, appliance shipments, and residential and nonresidential building construction. Several Asian countries are forecast to record rapid growth, including India, China and Indonesia.

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Sample Text, Table & Chart

ASIA PACIFIC

Japan: Insulation Supply & Demand

The insulation market in Japan totaled 790 million square meters of R-1 value in 2009, representing twelve percent of Asia/Pacific. Per capita insulation demand in Japan greatly exceeds region and is well below that of the US and Western Europe. In Japan, insulation is employed less frequently in building construction applications in smaller amounts than in other industrialized nations. This can be attributed to Japan's moderate climate, less demanding building standards and lax enforcement. The country's mature and industrial sector is typically responsible for about 40 percent of insulation sales. The appliance and chemical industries are of particular importance.

From 2004 to 2009, insulation consumption in Japan contracted by almost four percent per year. Declining fixed investment spending restrained product demand throughout this period. A massive decline in residential building construction activity and a less pronounced drop in nonresidential construction expenditures limited sales of insulation for related applications. Industrial output also fell between 2008 and 2009 because of the global financial crisis, leading to a further reduction in insulation consumption. Japan registered one of the Asia/Pacific region's worst performances between 2004 and 2009.

Through 2014, demand for insulation in Japan is forecasted at 790 million square meters of R-1 value, similar to the 2004-2009 performance. The majority of demand is concentrated in the industrial, HVAC and building construction activity in Japan recovers rapidly as building construction spending is projected to increase for insulation. Elevated energy prices and energy efficiency will lead to the more frequent use of insulation products. In November 2010, for instance, the Japanese government

188

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TABLE VII-5

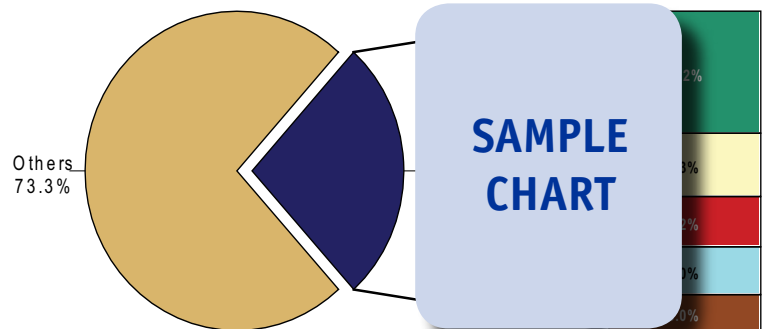
JAPAN: MACROECONOMIC INDICATORS & INSULATION DEMAND

Item	1999	2004	2009	2014	2019
Population (mil persons)	126	126	126	126	126
GDP/capita	30,000	30,000	30,000	30,000	30,000
Gross Domestic Product (bil 2008\$)	3,780	3,780	3,780	3,780	3,780
% of GDP	8	8	8	8	8
Gross Fixed Investment (bil 2008\$)	300	300	300	300	300
sq m R-1/capita	5	5	5	5	5
sq m R-1/000\$ GDP	0	0	0	0	0
sq m R-1/000\$ GFI	8	8	8	8	8
Insulation Demand (mil sq m R-1)	100	100	100	100	100

SAMPLE
TABLE

CHART IX-1

WORLD INSULATION MARKET SHARE BY COMPANY (\$31.3 billion, 2009)



SAMPLE
CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Aislantes Minerales SA de CV

Descartes No. 104
 Colonia Nueva Anzures
 Delegación Miguel Hidalgo 11590
 Mexico
 52-55-1036-0
 http://www.ro

Annual Sales:
 Employment:

Key Products expanded perlite, fiberglass, cel...ation; extruded polystyrene ins...ports

Aislantes Minerales primarily manufactures thermal and acoustic mineral wool insulation for the North and South American markets. The privately held company also distributes a range of insulation products in South America that are manufactured by other companies.

The Company competes in the world insulation industry through the manufacture of expanded polystyrene (EPS), mineral wool and expanded perlite insulation products. Aislantes Minerales' EPS insulation is made at a facility in Cuautitlan Izcalli, Mexico that operates as Espumados de Estireno SA. This EPS insulation, which is sold under the ESPUMALIT brand name, is offered in block, pipe cover, ceiling panel and plate forms. Among Aislantes Minerales' mineral wool insulation products are VITROLAN 450 preformed pipe insulation; ROLAN 1001 insulating cement, which features enhanced adhesion; ROLAN 1200 mineral wool pipe cover insulation; ROLAN metal mesh-faced blankets; and granulated and cryogenic mineral fiber. In addition, Aislantes Minerales manufactures PV SUPERTEMP mineral

TABLE VII-6

JAPAN: INSULATION SUPPLY & DEMAND (million dollars)

Item	1999	2004	2009	2014	2019
Insulation Demand (mil sq m R-1)					270
Residential Construction					110
Nonresidential Construction					165
Industrial, HVAC & OEM					95
\$/sq m R-1					40
Insulation Demand					25
Foamed Plastics					20
Fiberglass					40
Mineral Wool					31
Other					34
+ net exports					30
Insulation Production					255

**SAMPLE
TABLE**

**SAMPLE
PROFILE**

"Shipments of insulation from Japan are forecast to increase 5.0 percent annually to \$2.0 billion in 2014. As insulation demand and domestic output expand at a similar pace, the country's net trade surplus is expected to decline marginally. Locally-headquartered suppliers will boost production in response to gains in domestic product demand. Additional export opportunities in other regional countries will also contribute to growth."

--Section VII, pg. 190

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OTHER STUDIES

Green Building Materials

This study analyzes the US green building material industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by green building material product (e.g., interior, exterior, structural, building systems), end use market (e.g., residential, nonresidential) and US regional market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2733Published: March 2011 \$4900

Insulation

US demand for insulation materials will rise 7.4 percent annually through 2014, driven by a recovery in residential construction. Fiberglass insulation will offer the best growth opportunities and will surpass foamed plastic as the largest segment in value terms by 2014. Cellulose insulation will post the fastest growth from a small base. This study analyzes the \$7.1 billion US insulation industry, with forecasts for 2014 and 2019 by product, market and region. It also evaluates company market share and profiles industry players.

#2628 Published: June 2010 \$4900

Insulation in China

Consumption of insulation materials in China will grow 8.2 percent annually through 2013, driven by rising building construction spending and manufacturing activity. Foamed plastic will remain the dominant product segment and post the fastest growth. Nonresidential building construction will be the fastest growing market. This study analyzes the 24 billion yuan Chinese insulation industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates company market share and profiles industry participants.

#2617Published: March 2010 \$5300

Foamed Plastics

US foamed plastics demand will reach 8.4 billion pounds in 2013 as key construction and motor vehicle markets recover. Foamed urethane will remain the largest segment while foamed LDPE grows the fastest. Construction will provide the best opportunities based on growth in insulation and carpet underlay applications. This study analyzes the \$22.5 billion US foamed plastics industry, with forecasts for 2013 and 2018 by market and product. It also evaluates company market share and profiles industry players.

#2532Published: July 2009 \$4700

Glass Fibers

US glass fiber demand will grow 3.3 percent yearly through 2013. Glass wool fiber will lead gains based on a rebound in new home building and more intensive use of fiberglass insulation per new housing unit. Textile glass fiber will be driven mainly by use in reinforced plastics, but will be restrained by maturing markets and lower-cost imported fibers. This study analyzes the 6.1 billion pound US glass fiber industry, with forecasts for 2013 and 2018 by type and market. It also details market share and profiles industry players.

#2505 Published: June 2009 \$4700

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