

Acoustic Insulation Market by Material Type (Stone Wool, Glass Wool, Plastic Foam) and End User (Building & Construction, Industrial, Transportation): Global Opportunity Analysis and Industry Forecast, 2014 - 2022

<https://marketpublishers.com/r/A8845BC573AEN.html>

Date: October 2016

Pages: 140

Price: US\$ 4,999.00 (Single User License)

ID: A8845BC573AEN

Abstracts

Global acoustic insulation market was valued at \$9,878 million in 2015, and is expected to reach \$14,633 million by 2022, supported by a CAGR of 5.9% during the forecast period 2014 to 2022. Acoustic insulation is defined as a method to attenuate, deaden, or control sound and noise levels for environmental improvement and regulatory compliance.

Sound proofing and acoustic insulation materials are used either for noise reduction or noise absorption. Acoustic design is a complex facet of architecture and construction, and it is utilized to manufacture acoustic insulation systems to achieve proper acoustic quality of the buildings. Insulation prevents the transmission of airborne and structural noises between different rooms in a building. The global market for acoustic insulation was estimated to be \$9,878 million in 2015. The market is driven by the increase in health concerns towards noise pollution, rise in stringent noise pollution standards, growth in construction industry, and energy efficiency advantages provided by insulation materials. The market growth is restrained by low awareness on the importance of acoustics in emerging countries and slowdown of construction sector in Europe.

The major players profiled in the report are Saint-Gobain SA, Johns Manville, Rockwool International A/S, Owens Corning, Fletcher Insulation, Knauf Gips KG, Trelleborg AB, Paroc Group, Armacell GmbH, and BASF SE.

Other companies operating in the acoustic insulation value chain include DuPont Company, 3M Company, Hutchinson Group, JCW Group, Union Foam SpA, Dow Chemical Company, Insumate Ltd, Kingspan Group, Odenwald Faserplattenwerk GmbH, and STEICO SE.

Segment Overview:

The global market for acoustic insulation is segmented based on material type, end user, and geography. Geographically, the market is analyzed across four regions, namely, North America, Europe, Asia-Pacific, and LAMEA along with their prominent countries. Based on material type, the market is divided into stone wool, glass wool, plastic foam, and others. Plastic foam is the most dominant material type in the acoustic insulation market. It possesses excellent sound absorbing and vibration dampening quality that contribute to higher comfort and safety levels. Acoustic insulation from these materials can reduce noise by around 50% in comparison to traditional materials such as bitumen sheet or fiber belt. Stone wool is estimated to be the fastest growing material type due to its higher efficiency, excellent thermal insulation, easy installation, and super fire resistance.

Based on geography, Europe is the major contributor to the revenue, followed by Asia-Pacific. The dominance of Europe is due to the strict building regulation and large transportation market of the region. The European acoustic insulation market generated \$3,482 million in 2015 and is estimated to reach \$4,795 million by 2022.

Rise in Health Concerns: Long-term exposure to noise affects the quality of life and physical health in people, resulting in annoyance and even illness. Residential and commercial spaces are exposed to high noise levels, which can cause physical damage to the ear, lead to stress-related illnesses, and other associated symptoms. Customers globally are protecting their buildings through acoustic insulation to reduce noise annoyance and the negative health effects. The impact of this factor is presently high and is estimated to remain the same over the forecast period.

Stringent Noise Pollution Standards: The market for acoustic insulation is highly impacted by continuous rise in noise pollution-related standards. The World Health Organization (WHO) has formulated several noise guidelines in buildings in Europe, leading to reviewed effects on environmental noise on the health of people and triggering numerous initiatives and raised awareness in the urban population. The materials utilized for acoustic insulation have certain properties that help newly constructed buildings to meet the prescribed acoustic solutions required by current building regulations. The impact of this factor is presently moderate and is estimated to increase over the forecast period.

Construction Industry Growth: The market for acoustic insulation is influenced by the growing construction sector. Over the last few years, the market for new residential construction, remodeling, and repair activity is on a continuous rise as well as the commercial buildings and industrial sectors. U.S., Canada, and developing markets in

Asia and Africa have shown major growth of construction industry. The building & construction sector offers lucrative growth opportunities over the forecast period.

Low Awareness in Developing Regions: Low awareness of acoustic insulation materials in emerging economies and high capital cost of acoustic insulation in building are factors that negatively impact the market. In developing markets such as India, Africa, and other Southeast Asian countries, acoustic insulation is still considered as luxury than a necessity. These markets also show general lack of awareness of acoustics and low awareness of the significant benefits of the most economic insulation. Customers in these countries consider acoustic insulation as only a sound proofing technique, and it is only limited to entertainment rooms in the house. Increase in awareness about acoustics would present growth for this market in these regions.

Acoustic Insulation Market Key Benefits:

The study provides an in-depth analysis of the global acoustic insulation market, with current trends and future estimations to elucidate the imminent investment pockets.

The report provides information regarding key drivers, restraints, and opportunities with a detailed impact analysis.

Porter's Five Forces Model illustrates competitiveness of the market by analyzing various parameters such as threat of new entrants, threat of substitutes, strength of the buyers, and strength of the suppliers operating in the market.

The value chain analysis signifies the key intermediaries involved and elaborates their roles and value additions at every stage.

The quantitative analysis of the market from 2014 to 2022 is provided to elaborate the market potential.

ACOUSTIC INSULATION MARKET SEGMENTATION:

By Material Type

Stone Wool

Glass Wool

Plastic Foam

Others

By End-users

Building & Construction

Residential

Commercial

Industrial

Transportation

Automotive

Aerospace

Marine

Others

BY GEOGRAPHY

North America

U.S.

Canada

Mexico

Europe

Germany

UK

France

Italy

Rest of Europe

Asia-Pacific

China

Japan

South Korea

Australia

Rest of Asia-Pacific

LAMEA

Latin America

Middle East

Africa

Key companies profiled in the report

Johns Manville

Rockwool International A/S

Owens Corning

Fletcher Insulation

Knauf Gips KG

Trelleborg AB

Saint-Gobain S.A.

Paroc Group Oy

Armacell GmbH

BASF SE

Other players mentioned in the report

Industrial Insulation Group (IIG)

Cabot Corporation

Thermafiber Inc.

Aerogel Technologies

Radial Engineering Ltd

Auralex Acoustics Inc.

Beautex Industries Pvt Ltd

Mecen IPC Co., Ltd

CSR Building Products

CertainTeed Corporation

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