

Global Acoustic Floor Underlay Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Acoustic Floor Underlay market size is expected to reach \$ 2606 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

Acoustic floor underlay is a resilient or composite layer installed between the structural subfloor and the finished floor covering to reduce impact noise and structure borne vibration through elastic decoupling and damping, and in certain assemblies to support improved airborne sound insulation, improving overall acoustic comfort in living and public environments. It is typically supplied as rolls or sheets and built from material systems such as recycled rubber and crumb rubber, polyethylene or polyurethane foams, polyester felt, cork and cork rubber composites, and multi layer laminates that may incorporate high mass barrier membranes. Selection is driven by thickness and surface mass, dynamic stiffness and resilience, long term compression creep resistance, moisture and thermal stability, fire and sustainability compliance, and compatibility with floating or glue down installation methods. Production is commonly concentrated in Europe and North America where high performance acoustic materials and flooring system ecosystems are strong, alongside scaled manufacturing and accessory supply chains in Asia, and the product is widely specified in multi family residential and hospitality buildings, offices and education facilities, and renovation projects as part of complete flooring system designs targeting deliverable acoustic outcomes.

In 2025, global production of acoustic floor underlay (measured by shipped or installed area) was reasonably estimated at around 300–450 million m². On an ex factory basis (FOB proxy), mainstream products typically fell in the range of about USD 3.5–6.0 per m², mainly driven by material systems and construction routes such as recycled rubber and crumb rubber, PE or PU foams, polyester felt, cork composites, and multi layer

laminates that may incorporate high mass barrier membranes, together with thickness and surface mass, fire performance and durability grades, and system bundling requirements in project delivery.

As global urban density rises, acoustic comfort is increasingly treated as an engineered deliverable rather than a subjective preference, and footfall driven impact noise and structure borne vibration have become high frequency pain points shaping occupant satisfaction and asset performance. Acoustic floor underlay offers a practical pathway to embed impact noise control into floor builds with relatively low structural disruption, using resilient decoupling and damping while being increasingly bundled with systemized installation accessories offered by flooring brands. This positions underlay not as a standalone add on, but as a core component of integrated flooring solutions, particularly within multi family housing and hospitality refresh cycles where acoustic experience directly influences reviews, retention, and long term value.

At the same time, market risk is shaped by assembly fit and execution quality. Real world outcomes depend on the entire floor ceiling system and detailing at perimeters, penetrations, and joints, as well as long term material behavior such as compression set and creep under sustained loads and changing moisture and temperature conditions. As project teams demand higher certainty, suppliers are expected to translate products into clearer assembly guidance and to support claims with robust test documentation and project delivery services that reduce rework exposure and performance disputes, shifting competition from price based claims toward evidence and system reliability.

Downstream demand is increasingly influenced by renovation led growth and fast install flooring systems, while the expansion of resilient and modular floors continues to pull underlay into bundled accessory procurement. Material innovation is moving toward stable long term performance and stronger compliance readiness, with clearer tiering across thickness, density, and composite constructions to meet a wide range of project targets from value housing to premium hospitality and education environments. As flooring brands and contractors strengthen system selling and project delivery capabilities, the commercial value of acoustic floor underlay is expected to be captured more through integrated solutions and service enabled execution than through standalone material shipments.

This report studies the global Acoustic Floor Underlay production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Acoustic

Floor Underlay and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Acoustic Floor Underlay that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Acoustic Floor Underlay total production and demand, 2021-2032, (K Sqm)

Global Acoustic Floor Underlay total production value, 2021-2032, (USD Million)

Global Acoustic Floor Underlay production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

Global Acoustic Floor Underlay consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: Acoustic Floor Underlay domestic production, consumption, key domestic manufacturers and share

Global Acoustic Floor Underlay production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)

Global Acoustic Floor Underlay production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

Global Acoustic Floor Underlay production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Acoustic Floor Underlay market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Shenzhen Vinco Soundproofing Materials, Guangdong Vibratex Acoustics Technology, Raybone Technology, Berson New Materials, Amorim Cork Solutions, Maxxon Corporation, PROFLEX Products, AcoustiTECH, Acoustiblok, Sound Isolation Company, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Acoustic Floor Underlay market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sqm) and average price (US\$/Sq m)

by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Acoustic Floor Underlay Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Acoustic Floor Underlay Market, Segmentation by Type:

Dedicated Acoustic Underlayment

Combination Underlayment

Global Acoustic Floor Underlay Market, Segmentation by Core Technology Material:

Rubber or Recycled Rubber

Cork

Composite Foam (with barrier)

Others (e.g., felt, specialized fibers)

Global Acoustic Floor Underlay Market, Segmentation by Product Form:

Rolls

Sheets or Mats

Tiles or Slabs

Others (e.g., liquid applied)

Global Acoustic Floor Underlay Market, Segmentation by Primary Sales Channel:

Professional Channel (distributors, contractors)

Retail Channel (home centers, online)

Global Acoustic Floor Underlay Market, Segmentation by Application:

Residential

Commercial

Industrial

Companies Profiled:

Shenzhen Vinco Soundproofing Materials

Guangdong Vibratex Acoustics Technology

Raybone Technology

Berson New Materials

Amorim Cork Solutions

Maxxon Corporation

PROFLEX Products

AcoustiTECH

Acoustiblok

Sound Isolation Company

Acoustical Surfaces

Hush Acoustics

REGUPOL

Pliteq

KRAIBURG Relastec (DAMTEC)

DAIKEN

iKoustic Soundproofing

Key Questions Answered:

1. How big is the global Acoustic Floor Underlay market?
2. What is the demand of the global Acoustic Floor Underlay market?
3. What is the year over year growth of the global Acoustic Floor Underlay market?
4. What is the production and production value of the global Acoustic Floor Underlay market?
5. Who are the key producers in the global Acoustic Floor Underlay market?
6. What are the growth factors driving the market demand?

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