

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

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## Abstracts

The global Acoustic Underlay market size is expected to reach \$ 2653 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

Acoustic 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, helping to mitigate footfall, dragging noise, and vibration from light equipment, and in certain assemblies supporting improved airborne sound insulation. It is typically supplied as rolls or sheets and made 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 to broaden noise control performance. Acoustic underlay is widely specified as part of complete flooring systems in multi family residential and hospitality buildings, offices and education facilities, and renovation projects, where selection is driven by assembly level acoustic outcomes as well as durability factors including long term compression creep resistance, moisture and thermal stability, fire performance, and compatibility with floating or glue down installation methods.

In 2025, global production of acoustic underlay (floor sound insulation underlayment, measured by shipped or installed area) was reasonably estimated at around 300–450 million m<sup>2</sup>. On an ex factory basis (FOB proxy), mainstream products typically fell in the range of about USD 3.5–6.0 per m<sup>2</sup>, mainly driven by material systems (recycled rubber and crumb rubber, PE or PU foams, polyester felt, cork composites, and high mass barrier laminates), thickness and surface mass, plus fire performance and durability requirements.

As urban density increases worldwide, acoustic comfort is shifting from a nice to have preference into an engineered deliverable, and floor assemblies have become one of the most noticeable pathways for everyday noise. Acoustic underlay offers a practical and scalable way to embed impact noise control into flooring builds, using resilient decoupling and damping to reduce transmitted footfall, while increasingly being packaged as part of systemized installation accessory portfolios by flooring brands. For owners and operators, the value proposition extends beyond a quieter perception of space to more standardized handover language and clearer performance expectations across project stakeholders, supporting deeper adoption in multi family housing, hospitality, office, and education settings.

At the same time, market risk is shaped by system compatibility and execution quality. Real world outcomes depend on the entire floor ceiling assembly and detailing at perimeters, penetrations, and joints, as well as long term material behavior such as compression set and creep under sustained loads and variable environmental conditions. This is pushing suppliers to translate product offerings into clearer assembly fit guidance, and to compete with auditable test documentation and project delivery support that reduce rework exposure and performance disputes, shifting the competitive center from price claims toward evidence and system reliability.

Downstream demand is increasingly influenced by renovation led growth and fast install retrofit needs, particularly in hospitality refresh cycles and multi family improvement programs. Material innovation is also moving toward stable long term performance and higher compliance readiness, with recycled rubber, felt, and cork composite systems enabling more distinct tiering across durability, comfort, and installation compatibility. As flooring manufacturers and contractors strengthen system selling models, acoustic underlay is increasingly commercialized through integrated solution bundles that combine materials, accessories, and delivery services, reshaping channels and margin pools toward project level outcomes.

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

This report is a detailed and comprehensive analysis of the world market for Acoustic 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 Underlay that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

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

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

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

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

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

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

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

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

This report profiles key players in the global Acoustic 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 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 Underlay Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Acoustic Underlay Market, Segmentation by Type:

Dedicated Acoustic Underlayment

Combination Underlayment

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

Rubber or Recycled Rubber

Cork

Composite Foam (with barrier)

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

#### Global Acoustic Underlay Market, Segmentation by Product Form:

Rolls

Sheets or Mats

Tiles or Slabs

Others (e.g., liquid applied)

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

Professional Channel (distributors, contractors)

Retail Channel (home centers, online)

#### Global Acoustic Underlay Market, Segmentation by Application:

Multi-Family Residential or Apartments

Single-Family Homes or Renovations

Commercial Spaces (e.g., offices, hotels)

Industrial and Specialized Facilities (e.g., factories, labs)

#### Companies Profiled:

Shenzhen Vinco Soundproofing Materials

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

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