

Technical Insulation Market by Product Type (Flexible, Rigid, MMF), Application (Heating & Plumbing, HVAC, Refrigeration, Industrial Process, Acoustic), End-use (Industrial & OEM, Energy, Transportation, Commercial), and Region - Global Forecast to 2024

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Abstracts

The technical insulation market is projected to register a CAGR of 4.0%, in terms of value, between 2019 and 2024.

The technical insulation market is projected to grow from USD 7.6 billion in 2019 to USD 9.2 billion by 2024, at a CAGR of 4.0% between 2019 and 2024. The major driving factors in the technical insulation market are the presence of stringent regulations regarding insulation of equipment and pipes and growing demand in the oil & gas sector.

However, volatile raw material prices are expected to restrain the growth of the market. The growing opportunities from emerging economies will bring new growth opportunities for this market. Corrosion under insulation leading to health and safety-related incidents is a challenges expected to be faced by this market during the forecast period.

The man-made mineral fibers segment is expected to grow at the highest CAGR during the forecast period.

Man-made mineral fiber can be divided into stone wool, fiberglass, cellular glass, calcium silicate, microporous insulation, aerogel, and vacuum insulated panels. This segment is projected to register the highest CAGR, in terms of value, between 2019 and 2024. This is because it is used in high-temperature applications in power, oil & gas, and other industries. Exceptional temperature sustainability, recyclability, long term

stability, and availability in different forms, such as boards, pipes, foams, and blankets result in the extensive usage of these materials in diverse end-use industries, which has subsequently led to a stable rise in the use of man-made mineral fiber in the technical insulation market.

Industrial & OEM segment is expected to be the largest and fastest-growing end-use industry during the forecast period

The industrial & OEM end-use industry dominated the technical insulation market in 2018. The huge industrial base and necessity to insulate industrial plants are expected to drive this demand in the global marketplace. In industrial pipelines, high compressive strength insulation is used to maintain nominal thickness during and after installation of the insulation. Low thermal conductivity, low water absorption, effective noise reduction, and corrosion resistance are the other properties of insulation materials required for industrial insulation. These factors are expected to drive the demand for technical insulation in the industrial segment.

APAC is expected to be the largest region in the technical insulation market during the forecast period.

APAC was the largest market for technical insulation in the industrial application in 2018. The large market size in the region is attributed to the growth of manufacturing and mining industries in the region. Major manufacturing companies are shifting their base from Europe and North America to APAC due to low labor and raw-material costs.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in technical insulation market, and information was gathered from secondary research to determine and verify the market size of several segments and subsegments.

By Company Type: Tier 1 – 40%, Tier 2 – 30%, and Tier 3 – 30%

By Designation: C Level – 20%, D Level – 30%, and Others – 50%

By Region: North America – 20%, APAC – 40%, Europe – 20%, South America-10%, and the Middle East & Africa – 10%

The key companies profiled in this report are the Zotefoams Plc (UK), Owens Corning (US), Kingspan Group Plc (Ireland), ETEX Group SA (Belgium), Rockwool International A/S (Denmark), Recticel NV/SA (Belgium), Morgan Advanced Materials plc (UK), Armacell International S.A. (Luxembourg), Aspen Aerogels, Inc. (US), Knauf Insulation (Germany), L'ISOLANTE K-FLEX S.P.A. (Italy), Johns Manville (US), Saint-Gobain ISOVER (France), NMC SA (Belgium), Palziv Inc. (Israel), Unifrax I LLC (US), Durkee (Wuhan) Insulation Material Co., Ltd. (China), Huamei Energy-Saving Technology Group Co., Ltd. (China), Wincell Insulation Material Co., Ltd (China), and INTEREP SAS (France).

Research Coverage:

This report provides detailed segmentation of the technical insulation market based on product type, application, end-use industry, and region. Product type is divided into flexible foams, rigid foams, and man-made mineral fibers. Based on application, the technical insulation market has been segmented into heating & plumbing, HVAC, refrigeration, industrial processes, and acoustic. Based on end-use industry, the market has been segmented into industrial & OEM, energy, transportation, and commercial buildings. Based on region, the market has been segmented into North America, Europe, APAC, the Middle East & Africa, and South America.

Key Benefits of Buying the Report

From an insight perspective, this research report focuses on various levels of analyses — industry analysis (industry trends), market share ranking of top players, and company profiles, which together comprise and discuss the basic views on the competitive landscape; emerging and high-growth segments of the market; high growth regions; and market drivers, restraints, opportunities, and challenges.

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