

China Thermal Insulation Material Industry Report, 2012

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Abstracts

Thermal insulation materials, with good heat-shielding properties, meet the thermal environment required by the building space or thermal equipment, and conserve energy.

In recent year, China's thermal insulation material industry has entered a stage of steady and rapid development, with output up to 4.928 million tons in 2011, more than doubled that in 2005. Following the propulsion of energy conservation and emissions reduction in China, especially the development of building energy efficiency in both depth and breadth, China's thermal insulation material output in 2012 is expected to outnumber 5.5 million tons.

China Thermal Insulation Material Industry Report, 2012 of ResearchInChina makes an analysis on the development of thermal insulation materials in China, as well as the markets for major thermal insulation material products and related key enterprises.

Thermal insulation materials, based on the material, can be divided into organic, inorganic and metal thermal insulation materials.

Among organic thermal insulation materials, polystyrene foam and polyurethane foam have always occupied the dominant position, however, due to flammability and toxic substances released by combustion, the former is gradually being replaced; the latter, despite excellent thermal insulation properties, has frequently caused fire because of low (B grade) fireproof performance.

On March 14, 2011, The Ministry of Public Security of the People's Republic of China issued the Notice on Further Specifying Fire Management Requirements on External

Thermal Insulation Materials for Civil Construction, which demanded A grade combustion performance of external thermal insulation materials for civil construction, thus directly restricting applications of polyurethane foam, etc. in the field of exterior wall insulation, while some organic insulation materials such as phenolic foam with A grade combustion performance saw a sharp rise.

In 2011, the output of phenolic foam board for exterior wall insulation in China reached 510,000 tons, an increase of nearly eight times over 2010, which also spawned a number of emerging enterprises like Lions Group, Xiamen Goot Advanced Material Co., Ltd. and Chengdu Longsheng Science & Technology Co., Ltd.

In contrast, the majority of inorganic insulation materials can meet A grade fire protection requirements; in the current Chinese market, the most commonly used materials refer to rock wool, aluminum silicate fiber, etc. Advocated by green energy-saving building materials, rock wool, glass wool and other polluting inorganic thermal insulation materials have encountered restrictions, while new materials such as aluminum silicate fiber, foam concrete, foam glass and aerated concrete have witnessed wide application.

Aluminum silicate fiber, also known as ceramic fiber, has recently seen rapid development in China, with output in 2011 exceeding 500,000 tons. Shandong Luyang Share Co., Ltd. is the largest ceramic fiber production enterprise in China.

As a kind of green energy-efficient building materials, foam concrete is deemed as one of the country's key popularized products. In 2011, relevant manufacturers amounted to more than 1,300, with output in excess of 10 million cubic meters, represented by Henan Huatai Building Materials Development Co., Ltd., Zhumadian City Yongtai Energy-Saving Building Materials Equipment Limited Company, and so on.

Relying on the advantages in fire prevention, thermal insulation and price, foam glass has achieved mass production in regions including Jiaxing (Zhejiang Province) and Lanzhou (Gansu Province), and representative enterprises include Zhejiang ZhenShen Cold Insulation Technology Co., Ltd., Zhejiang Dehe Cold Insulation Technology Co., Ltd. and Lanzhou Pengfei Heat Preservation Co., Ltd.

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