

Glass Mat Market Forecasts to 2032 – Global Analysis By Product Type (Chopped Strand Mat [CSM], Continuous Filament Mat [CFM], Surfacing/Veil Mats, Stitch-Bonded/Combination Mat, and Wet-Laid Nonwoven Glass Mat), Binder Type, Basis Weight, Manufacturing Technology, Application, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Glass Mat Market is accounted for \$1.4 billion in 2025 and is expected to reach \$2.6 billion by 2032, growing at a CAGR of 8.7% during the forecast period. Glass mat is a non-woven material made from fine glass fibers bound together using a resin or chemical binder. It serves as a reinforcement layer in composite materials, providing strength, dimensional stability, and resistance to cracking. Commonly used in roofing, automotive parts, and fiberglass products, glass mats enhance durability and surface finish. Their uniform structure allows for easy molding, making them ideal for both industrial and construction applications.

According to Glass Fibre Europe (industry association), European continuous-filament glass-fibre producers produce roughly 1,000,000 tonnes of melted glass annually.

Market Dynamics:

Driver:

Growing demand from the construction and infrastructure sectors

Expanding construction and infrastructure activity is increasing demand for glass mats

used in composites, insulation, and reinforcement. Glass mats deliver strength, dimensional stability, and fire resistance, making them suitable for roofing, cladding, and precast panels. Government infrastructure programmes and private investment drive large procurement volumes, encouraging capacity additions and scale economies. Additionally, rising prefabrication and modular construction trends use composite panels where glass mats improve durability and reduce lifecycle maintenance.

Restraint:

Fluctuations in raw material prices

Volatility in costs for glass fibre feedstock, resin binders, and energy input raises production expenses and squeezes manufacturer margins. Rapid price swings for silica, chemical additives, or shipping force suppliers to revise pricing or absorb costs, reducing competitiveness. Smaller producers with limited hedging face greater exposure, while buyers may delay purchasing amid uncertainty. Unpredictable input costs complicate long-term contracts and capital planning, prompting manufacturers to focus on procurement strategies and selective product mix adjustments to protect profitability.

Opportunity:

Development of eco-friendly and recyclable glass mats

Rising regulatory pressure for sustainability and buyer demand for lower-impact materials create space for recyclable and eco-designed glass mats. Innovations in binder chemistries, recyclable resin systems, and improved process efficiencies reduce lifecycle environmental impacts and support circularity. Furthermore, certification for low-emission or recycled-content products helps suppliers win public tenders and premium private projects. Strategic partnerships between resin developers and mat manufacturers can accelerate market entry into higher-margin, sustainability-focused segments and broaden adoption in green building programs.

Threat:

Competition from low-cost producers in developing regions

The emergence of low-cost glass mat manufacturers intensifies price competition and compresses margins for established suppliers, especially in commodity-grade

segments. These competitors leverage lower labour, input, and overhead costs to offer aggressive pricing that attracts cost-sensitive buyers, risking erosion of market share in mature markets. Additionally, perceived differences in quality and after-sales service may lead some purchasers to accept lower-cost options, forcing incumbents to emphasise product differentiation, technical support, and certification to retain premium customers.

Covid-19 Impact:

The pandemic disrupted supply chains, causing temporary factory shutdowns, logistics delays, and labour shortages that reduced glass mat output and delayed projects. Construction slowdowns in certain countries lowered immediate demand for composites and insulation products, while export restrictions constrained raw material flows. However, stimulus-driven infrastructure spending and renewed focus on resilient buildings supported recovery as projects resumed, prompting manufacturers to diversify suppliers, increase inventory buffers, and accelerate digital procurement to improve supply-chain resilience and shorten lead times.

The chopped strand mat (CSM) segment is expected to be the largest during the forecast period

The chopped strand mat (CSM) segment is expected to account for the largest market share during the forecast period. CSM's versatility and cost-effectiveness underpin its position, supporting use across marine, automotive, construction, and roofing composites. Its ease of moulding, uniform strand distribution, and compatibility with a wide range of resins make it suitable for high-volume production. Manufacturers and fabricators favour CSM for panels and reinforcement where balanced mechanical properties and economical processing deliver consistent performance and attractive unit economics for both infrastructure projects and consumer applications.

The powder-bound mats segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the powder-bound mats segment is predicted to witness the highest growth rate. Technical advantages including stronger fibre bonding, reduced dust, and lower VOC profiles align with tighter environmental regulations and factory automation trends. OEMs focused on weight reduction and superior surface finish favour powder-bound solutions, and continued R&D plus scale efficiencies are lowering unit costs. These dynamics enable powder-bound mats to expand from niche high-

performance applications into broader industrial and construction use cases.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share. Asia Pacific's leadership reflects extensive manufacturing capacity, large raw-material supply chains, and vigorous demand from construction and automotive sectors. Rapid urbanisation, major infrastructure programmes, and growth in composites production drive steady consumption of glass mats. Competitive local suppliers, integrated logistics, and cost advantages support regional production for both domestic and export markets, sustaining Asia Pacific's dominant position in global glass mat volumes and revenues.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. Accelerating urbanisation, rising vehicle production, and government-backed infrastructure spending combine to drive strong regional growth. Increasing domestic composites manufacturing for automotive, wind energy, and construction supports growing glass mat demand, while foreign investment, joint ventures, and technology transfer strengthen local capabilities and product quality. Moreover, improving supply chains and rising per-capita construction activity will keep Asia Pacific as the fastest-growing market for glass mats.

Key players in the market

Some of the key players in Glass Mat Market include Owens Corning, Johns Manville Corporation, Saint-Gobain, China Jushi Co., Ltd., Chongqing Polycomp International Corporation, Taishan Fiberglass Inc., China Beihai Fiberglass Co., Ltd., Nippon Electric Glass Co., Ltd., Nitto Boseki Co., Ltd., P-D Glasseiden GmbH, AGY Holding Corporation, Taiwan Glass Industry Corporation, Jiangsu Changhai Composite Materials Co., Ltd., Jiuding New Material Co., Ltd., Valmiera Glass Group, and ?i?ecam.

Key Developments:

In October 2025, Nippon Electric Glass Co., Ltd. (Head Office: Otsu, Shiga, Japan; President: Akira Kishimoto; "NEG") received the Green Sustainability Award at the 2025 Global Partner Summit (GPS) held in September 2025 by AUO Corporation (AUO), a major display panel manufacturer in Taiwan. This award recognizes the efforts

of AUO's business partners to significantly reduce CO₂ emissions from 2022 to 2023. This was the first time NEG has received this award, in recognition of its innovative manufacturing process technology, the introduction of a mega solar power system, and the adoption of energy-saving utility facilities.

In February 2025, Owens Corning announced the sale of its glass reinforcements business, which includes glass fiber reinforcements used in various applications including glass mats, to Praana Group for \$755 million. This strategic divestment allows Owens Corning to focus more on residential and commercial building products in North America and Europe while Praana Group aims to expand and enhance competitiveness in glass fiber reinforcements globally.

In February 2025, China Jushi launched the construction for the second phase of its Huai'an Carbon-neutral Intelligent Manufacturing Base, featuring a 100,000-ton electronic glass fiber production line and a 500MW supporting facility for wind power generation.

Product Types Covered:

Chopped Strand Mat (CSM)

Continuous Filament Mat (CFM)

Surfacing/Veil Mats

Stitch-Bonded / Combination Mat

Wet-Laid Nonwoven Glass Mat

Binder Types Covered:

Emulsion-Bound Mats

Powder-Bound Mats

Silane

Other Binder Systems

Basis Weights Covered:

450 g/m²

Manufacturing Technologies Covered:

Wet-Laid Process

Dry-Laid / Carding & Needling

Stitch-Bonding / Warp-Knitting

Direct-Draw Continuous Filament Mat Lines

Hybrid/Advanced Lines

Applications Covered:

Roofing & Asphalt Shingles Reinforcement

Gypsum Board / Sheathing Facers

SMC/BMC (Compression Moulding)

Hand Lay-Up & Spray-Up

RTM/VARTM & Infusion

Pultrusion & Filament Winding

Other Applications

End Users Covered:

Building & Construction

Transportation

Marine

Electrical & Electronics

Wind Energy & Industrial Equipment

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments

- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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