

Exterior Insulation & Finish System (EFIS) Market - Global Industry Size, Share, Trends, Opportunities, and Forecast 2018-2028 Segmented By Type (Polymer-Based (PB), Polymer-Modified (PM)), By Insulation Material (Expanded Polystyrene (EPS), Mineral Wool, and Others), By Component (Adhesive, Base Coat, and Others), By End-Use Industry (Residential, Non-Residential), By Region and Competition

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Abstracts

Exterior Insulation & Finish System (EFIS) Market is expected to grow during the forecast period due to the growing investment in construction activity, building related energy-efficiency policies and regulations. However, the availability of alternative green insulation material is likely to hinder the growth of the global exterior insulation & finish system (EFIS) market.

The exterior insulation and finish systems are cladding systems made of composites installed in a building. This integrated composite material system provides insulation and a water-resistant finish to the exterior walls. Growing adoption of energy-efficient homes in developed countries and rebates and tax credits from the government is fueling the demand for exterior insulation and finish systems during the forecast period. Moreover, Middle Eastern and African markets are expected to create symbolic opportunities for manufacturers in the future.

Global Exterior Insulation & Finish System (EFIS) Market: Drivers & Trends

Supportive Government Regulations on Building Insulations:

The use of insulation in buildings is regulated by several agencies and organizations all around the world. Due to this, the external insulation and finish system market is stimulated. The conditions of the thermal element determine how much of the work is managed and how much upgrading is required.

Such bodies and organizations govern the application of building insulation in various systems and structures of a building. These regulations change with the region and country, and governments are getting stringent with such policies to promote energy efficiency in construction. This has spiked the demand for exterior insulation and finish system industry across the world.

Rising Investment Requirement for Infrastructure Development:

Due to the world's rising urbanization, the residential building sector has seen tremendous expansion in recent years. Additionally, the industry's need will be supported by shifting demographic patterns, such as an increase in nuclear households. A change in consumer preference for private homes, notably in European nations, will increase industry demand. Globally, single-family homes have grown significantly. For instance, according to the 2020 census, the total number of dwelling units in the U.S. increased by 6.7% between 2010 and 2020, which is almost half the growth rate over the prior decade.

Shifting focus on renovation and remodeling projects in the residential sector will drive the industry demand. Heavy investments in renovation projects, particularly in Europe, are expected to stimulate the exterior insulation and finish the system market size. European constructions include a large number of old buildings with the necessity to renovate. Safety & security norms for remodeling projects will support business growth.

Growing infrastructure investments in public as well as private infrastructure will support the steel products market. Rising demand for consumer-oriented construction will further propel the insulation and finish system market demand. As per OECD, the China infrastructure investment was over USD 500 billion in 2016. Government promotions to increase the urbanization rate are anticipated to fuel the steel products market. For instance, China's National Urbanization Plan, between 2014-2020, was dedicated to turning migrants into urban citizens, envisaging a settlement of over 100 million urban inhabitants by 2020, raising the urbanization rate to 60%.

Infrastructure development is necessary for catering to the needs of the rising

population. Additionally, it contributes to the social and economic welfare of the country. According to Global Infrastructure Outlook, the population of Saudi Arabia will cross 40 million by 2040. The Kingdom of Saudi Arabia will need supportive infrastructure to serve its citizens. As per the report of Global Infrastructure Outlook, Saudi Arabia needs an investment of USD 613 billion at the end of 2040. The road, rail and airports segments will need investments of USD 233 billion, USD 11 billion and USD 12 billion respectively by 2040. These investments will positively influence the insulation and finish system market within the forecast period.

Rising Demand for Energy-Efficient Buildings

Insulation acts as an obstacle to heat loss and heat gain, particularly in roofs, ceilings, walls, and floors. Insulation in any building provides resistance to heat flow and lowers heating and cooling costs. Properly insulating the building not only reduces heating and cooling costs but also improves comfort. In many residential buildings, insulation is the most cost-effective way to make a house more energy-efficient, keeping it cooler in summer and warmer in winter and saving up to 80% in heating and cooling losses. In addition, insulation may reduce condensation in homes. This can provide health benefits by reducing mold and dampness.

Global Exterior Insulation & Finish System (EFIS) Market: Restraints

Fluctuating Supply and Prices of Raw Material:

Increasing fluctuations in material costs due to changes in supply and demand and production costs are among the key factors affecting sales of exterior insulation and finish system market globally. The increased demand for the product affects the upward pressure on prices. Growing competition among industry players due to the large number of regional and multinational manufacturers is also a major obstacle to the growth of the industry. Manufacturers facing downward pressure on prices due to increased competition can hamper industry demand.

Raw materials of external insulation such as glass wool, stone wool, and plastic are subject to price and supply fluctuations in the international market. There is seen an increased dependency on imports for such materials used for building insulation. This often leads to fluctuation in the final prices of the building insulation products. This hampers the market growth of the Global exterior insulation and finish system market. In addition, the high profit margins of raw material suppliers can hamper demand for the product. Fluctuations in insulation and finished product prices due to changing

economic conditions may hamper industry demand.

Availability Of Skilled Labor

The high number of construction projects across the globe creates a high demand for skilled workers. The market faces a shortage of skilled workers. The lack of skilled labor leads to an increase in the risks of contractors as it increases the likelihood of a delay. Moreover, many developing countries, such as India and China, have witnessed a severe shortage of skilled labor because of the migration of skilled workers, an aging workforce, and the lack of training. According to a skill gap report commissioned by the National Skill Development Corporation, in India, the building, construction, and real estate sector is around 31.13 million of additional skilled workforce in 2022. However, the gap between the required workforce and their employability is expected to hamper the construction industry, which would affect the growth of the market for exterior insulation and finish systems. There is a lack of experienced and trained workers and officers in the required number for the growth of the industry. It is also the reason for the concentration of manufacturing facilities in a few regions. This hampers market growth in the long run. Moreover, the ILOs Skills and Employability Program for Asia and the Pacific (SKILLS-AP) was also launched with the objective of providing solutions to the skill development issues in Asia-Pacific which might improve the conditions in the coming years.

Global Exterior Insulation & Finish System (EFIS) Market: Opportunities

Government Initiatives to Reduce Greenhouse Gas Emissions:

Global greenhouse gas emissions arise from the energy used to generate heat, with a vast majority of the residential buildings still relying on fossil fuel-powered gas boilers and building stock, which are poorly insulated and are inefficient. This gives building insulation the opportunity to cut greenhouse gas emissions and emissions of harmful pollutants. It helps the residential spaces and commercial spaces to cut money, with the most cost-effective opportunities expected to arise from better insulation and from replacing inefficient heating systems. It is important to ensure that the homes and buildings being built now and in the future are highly energy efficient. The government is committed to introducing various energy efficiency standards for new homes and buildings, which include insulation systems.

Market Segments

The global exterior insulation & finish system (EFIS) market is segmented by type, insulation material, component, end-use industry and region. Based on type, the market is segmented into Polymer-Based (PB), and Polymer-Modified (PM). Based on insulation material, the market is segmented into Expanded Polystyrene (EPS), mineral wool and others. Based on component, the market is segmented into adhesive, base coat, and others. Based on the end-use industry, the market is segmented into residential and non-residential. Based on region, the market is segmented into Europe, North America, Asia-Pacific, South America, Middle East & Africa.

Market Players

Major market players in the global Exterior Insulation & Finish System (EFIS) market are BASF SE, Wacker Chemie AG, Sto Corp., Owens Corning, Omega Products International, Durabond Products Ltd, Adex Systems Inc., Terraco Group, The Dow Chemical Company, Master Wall Inc

Report Scope:

In this report, the global exterior insulation & finish system (EFIS) market has been segmented into the following categories, in addition to the industry trends, which have also been detailed below:

Exterior Insulation & Finish System (EFIS) Market, By Type:

Polymer-Based (PB)

Polymer-Modified (PM)

Exterior Insulation & Finish System (EFIS) Market, By Insulation Material:

Expanded Polystyrene (EPS)

Mineral Wool

Others

Exterior Insulation & Finish System (EFIS) Market, By Component:

Adhesive

Base Coat

Others

Exterior Insulation & Finish System (EFIS) Market, By End-Use Industry:

Residential

Non-Residential

Exterior Insulation & Finish System (EFIS) Market, By Region:

Europe

Germany

Italy

Spain

United Kingdom

France

North America

United States

Canada

Mexico

Asia Pacific

China

India

Japan

Singapore

South Korea

Middle East & Africa

South Africa

Saudi Arabia

UAE

South America

Brazil

Argentina

Colombia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in Global Exterior Insulation & Finish System (EFIS) Market.

Available Customizations:

Global Exterior Insulation & Finish System (EFIS) Market with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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