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**PRESS RELEASE**

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## **THE EUROPEAN MARKET FOR THERMAL INSULATION PRODUCTS**

**IAL Consultants is pleased to announce the publication of the tenth edition of its popular study on The Market for Thermal Insulation in Europe**

This new study updates and expands upon the information included in our previous study published in 2013, with **all data available for the first time in our online database platform** enabling the customer greater ease of comparison and data manipulation. The report contains **market data by material type and end-use application** for the base year of 2014. **Data is presented in both volume** (cubic metres and tonnes) **and value** (€ million). Unique to this edition is that **the update shows five-year forecasts to 2019**.

The information contained within this report is based upon an extensive programme of interviews throughout the industry and across the different geographies in Europe. This has been further supported by an analysis of economic indicators and relevant legislation and/or technical issues affecting demand for thermal insulation materials. The analysis covers **27 countries** (including all major European thermal insulation markets) split into **15 individual country volumes**, and covering all of the most commonly used insulation materials. An additional **4 material volumes** focus on a specific insulant type individually (mineral fibre, EPS, XPS & PU/PIR) and present data for the regions of Western, Central and Eastern Europe, and then for the same 27 countries.

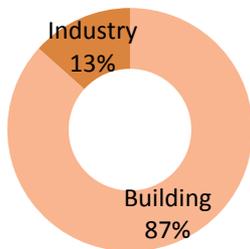
*Purchasers of the complete study set will receive an Executive Summary volume free of charge.*

### **Market Summary**

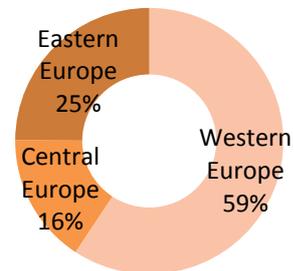
The total market for thermal insulation products in Europe stood at just under **234.6 million m<sup>3</sup>** in 2014 (7.4 million tonnes). **This equates to an approximate market value of €11.5 billion.**

Commercial and domestic buildings continue to represent the bulk of the demand for thermal insulation materials in Europe, with the overall use in industrial applications remaining smaller.

**European Thermal Insulation Market by Main Application Type, 2014**

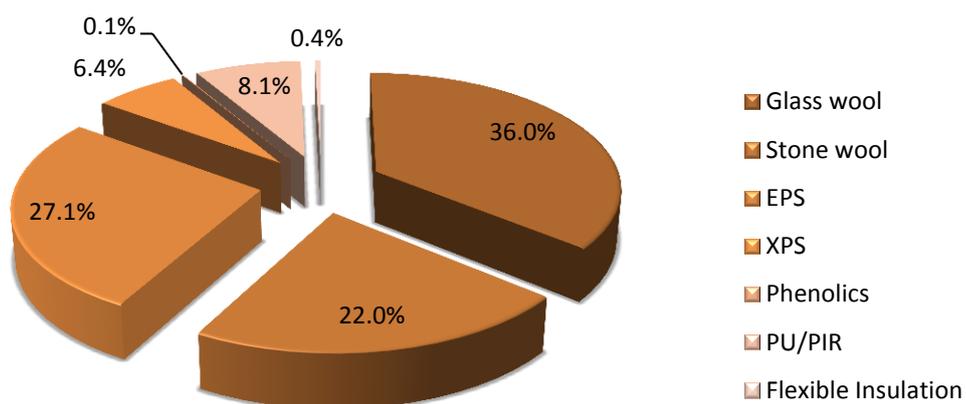


**European Thermal Insulation Market by Region, 2014**



Although the construction industry has remained relatively subdued ever since the outbreak of the financial crisis in 2008, concerns over improved energy efficiency in buildings and rising energy prices are making insulation materials a popular solution. Regulatory authorities are highlighting the importance of minimising heat loss through the building envelope and are adopting legislation encouraging zero energy buildings. Retrofit construction is now also regulated and minimum energy performance standards have been set, which are a key driver for thermal insulation materials.

**European Thermal Insulation Market, 2014 (m<sup>3</sup>)**



Likewise, product awareness is on the rise. There is much talk about the fire performance of the different insulation materials and the mineral wools are well

positioned in this respect. Glass wool and stone wool are well established, and combined represent 58% of the European thermal insulation market. Manufacturers are promoting their 'natural' fire protection characteristics and lobbying against the use of other plastic foam insulation materials, especially EPS. Whilst EPS remains a very popular material in external wall insulation in much of the region, EPS consumption in many Western European countries has started suffering from its behaviour in case of fire. This is not necessarily the case in Eastern Europe, where the lower price of EPS continues to favour its use in construction.

The higher requirements for thermal insulation materials are inherently increasing the thicknesses of these. Polyurethanes offer the competitive advantage of being slimmer than other materials.

The thermal insulation market is poised to **grow at a rate of 2.8% year-on-year** to 2019. The growth in Central and Eastern Europe combined (3.2% CAGR) is expected to surpass that of Western Europe (2.5% CAGR), where the thermal insulation market is more mature. The economies in Central and Eastern Europe are developing more vibrantly than those in their Western counterparts. Provided these growth rates are sustained, the total demand for thermal insulation products in Europe would reach a total of **269.3 million m<sup>3</sup> by 2019**. At the current time, interesting growth is reported in countries including Germany, Italy, the United Kingdom and Turkey.

***The European Market for Thermal Insulation Products*** is now available from IAL Consultants. Prices start at €1,100 for single country volumes. The whole report is priced at €8,000.

***All data in this report plus additional historical trends and forecasts are now available in our unique online database. Introductory discounts are available.***

To purchase the report or for more information please contact:

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