

THE EUROPEAN MARKET FOR THERMAL INSULATION PRODUCTS

Volume 1 – Germany

**© IAL CONSULTANTS
APRIL 2009**

CP House, 97-107 Uxbridge Road, Ealing, London W5 5TL
Tel: +44 (0) 20 8832 7780 Fax: +44 (0) 20 8566 4931
Email: ial@brg.co.uk
Web site: www.ialconsultants.com

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form, or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior permission of the copyright owner.

NOTE

The information given in this report has been compiled from published sources and interpreted from fieldwork based on informed opinions. Whilst every care has been taken in the preparation of the report, there may have been some errors in the information obtained. Although it is impossible to verify every single detail by cross checking, we believe the general picture provided is reasonably accurate and comprehensive.

Many IAL reports contain an overview of selected company financial information and capabilities based on published sources where available. Although the companies represented are believed to be the major suppliers the profiles are meant to be indicative rather than definitive.

It is fundamental to the philosophy of IAL Consultants to constantly seek to extend and improve our service to clients. In pursuit of these aims, we shall be pleased to consider all requests for regular or periodic updating of all or any part of the information contained in this report, or for extensions in coverage in terms of product areas, market sectors and/or geographic regions.

We are, of course, always happy to discuss with any subscriber the possibility of undertaking further work, whether arising out of this report or in different business areas.

MORE INFORMATION ON IAL CONSULTANTS

Should you require more information on either our published reports or our private client services, please contact us at the address given.

Full details on all IAL Consultants published studies (including full tables of contents and tables of tables) and ad-hoc research services can be found on our website:

www.ialconsultants.com

CONTENTS

1. INTRODUCTION.....	1
1.1 SCOPE OF THE STUDY	1
1.2 METHODOLOGY.....	1
1.3 PRODUCTS COVERED	1
1.3.1 Mineral Fibres	1
1.3.2 Expanded Polystyrene (EPS)	2
1.3.3 Extruded Polystyrene (XPS).....	2
1.3.4 Polyurethane Foams	2
1.3.5 Phenolic Foams.....	3
1.3.6 Flexible Insulation	3
1.4 END-USE SECTORS	4
1.4.1 Building.....	4
1.4.2 Industrial.....	4
1.5 PRICES	5
1.6 UNITS OF VOLUME.....	7
1.7 FORECASTS	9
2. MARKET SUMMARY AND FORECASTS TO 2013	11
2.1 MARKET REVIEW – 2008	11
2.2 MARKET FORECAST – 2013.....	14
3. MARKET REVIEW	17
3.1 THE MARKET BY MATERIAL TYPE - 2008-2013.....	17
3.2 THE MARKET BY END-USE APPLICATION - 2008-2013	19
3.3 THE MARKET IN BUILDING & INDUSTRY – 2008.....	21
3.4 GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2008-2013	23
3.5 GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE, 2008-2013	24
4. MARKET INFLUENCES	25
4.1 MACROECONOMIC TRENDS	25
4.2 MATERIAL TRENDS AFFECTING THE GERMAN INSULATION MARKET	26
4.2.1 General indicators	26
4.2.2 Glasswool.....	26
4.2.3 Stonewool.....	26
4.2.4 Expanded Polystyrene	26
4.2.5 Extruded Polystyrene	26
4.2.6 PUR/PIR.....	27
4.2.7 Phenolics.....	27
4.2.8 Flexible Insulation ENR & PE.....	27
4.3 LEGISLATIVE AND ENVIRONMENTAL FACTORS AFFECTING THE USE OF THERMAL INSULATION PRODUCTS.....	28
4.3.1 CO ₂ Emission	28
4.3.2 Energy Pass.....	29
4.3.3 EU Fire Classification	29
5. SUPPLIERS AND MANUFACTURERS OF THERMAL INSULATION PRODUCTS	31
5.1 MARKET SHARES OF LEADING INSULATION SUPPLIERS	31
5.2 PROFILES OF KEY EUROPEAN SUPPLIERS	33
5.2.1 Armacell.....	33
5.2.2 BASF.....	36
5.2.3 CRH.....	40
5.2.4 Dow Chemical.....	43
5.2.5 Kingspan	47
5.2.6 Knauf Insulation.....	51

5.2.7	URSA.....	54
5.2.8	Recticel.....	57
5.2.9	Rockwool.....	61
5.2.10	Saint-Gobain Isover.....	64
5.3	DIRECTORY OF SUPPLIERS.....	67
5.3.1	Expanded Polystyrene.....	67
5.3.2	Extruded Polystyrene.....	69
5.3.3	Flexible Insulation (ENR).....	69
5.3.4	Flexible Insulation (PE).....	69
5.3.5	Mineral Fibre.....	70
5.3.6	PU/Polyisocyanurate.....	71
6.	SOURCES OF INFORMATION.....	77
6.1	AUSTRIA.....	77
6.2	BELGIUM.....	77
6.3	CZECH REPUBLIC.....	78
6.4	DENMARK.....	78
6.5	FINLAND.....	78
6.6	FRANCE.....	79
6.7	GERMANY.....	79
6.8	IRELAND.....	80
6.9	ITALY.....	80
6.10	NETHERLANDS.....	81
6.11	NORWAY.....	81
6.12	POLAND.....	81
6.13	PORTUGAL.....	81
6.14	ROMANIA.....	82
6.15	SLOVENIA.....	82
6.16	SPAIN.....	82
6.17	SWEDEN.....	83
6.18	SWITZERLAND.....	84
6.19	TURKEY.....	84
6.20	UNITED KINGDOM.....	84
7.	ACKNOWLEDGEMENTS.....	85

TABLE OF TABLES

1. INTRODUCTION.....	1
1.1 SCOPE OF THE STUDY	1
1.2 METHODOLOGY.....	1
1.3 PRODUCTS COVERED	1
1.4 END-USE SECTORS	4
1.5 PRICES	5
Prices Used, €m ³ (2008)	6
1.6 UNITS OF VOLUME.....	7
Densities Used, kg/m ³ (2008)	8
1.7 FORECASTS	9
2. MARKET SUMMARY AND FORECASTS TO 2013	11
2.1 MARKET REVIEW – 2008	11
Total German Thermal Insulation Market Volume by Type and End-use, 2008 (m ³).....	11
Total German Thermal Insulation Market Volume by Type and End-use, 2008 (Tonnes).....	12
Total German Thermal Insulation Market Value by Type and End-use, 2008 (€Million).....	13
2.2 MARKET FORECAST – 2013.....	14
Total German Thermal Insulation Market Volume by Type and End-use, 2013 (m ³).....	14
Total German Thermal Insulation Market Volume by Type and End-use, 2013 (Tonnes).....	15
Total German Thermal Insulation Market Value by Type and End-use, 2013 (€Million).....	16
3. MARKET REVIEW	17
3.1 THE MARKET BY MATERIAL TYPE - 2008-2013.....	17
The German Thermal Insulation Market by Type, 2008-2013 (m ³)	17
The German Thermal Insulation Market by Type, 2008-2013 (Tonnes).....	17
The German Thermal Insulation Market by Type, 2008-2013 (€Million).....	18
3.2 THE MARKET BY END-USE APPLICATION - 2008-2013	19
The German Thermal Insulation Market by End-use, 2008-2013 (m ³)	19
The German Thermal Insulation Market by End-use, 2008-2013 (Tonnes)	19
The German Thermal Insulation Market by End-use, 2008-2013 (€Million).....	20
3.3 THE MARKET IN BUILDING & INDUSTRY – 2008.....	21
The German Market for Thermal Insulation in Building and Industry, 2008 (m ³)	21
The German Market for Thermal Insulation in Building and Industry, 2008 (Tonnes)	21
The German Market for Thermal Insulation in Building and Industry, 2008 (€Million).....	22
3.4 GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2008-2013	23
% Growth Rates for Thermal Insulation by Material Type in Germany, 2008-2013 (m ³).....	23
% Growth Rates for Thermal Insulation by Material Type in Germany, 2008-2013 (Tonnes).....	23
3.5 GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE, 2008-2013	24
% Growth Rates for Thermal Insulation by End-use in Germany, 2008-2013 (m ³)	24
% Growth Rates for Thermal Insulation by End-use in Germany, 2008-2013 (Tonnes)	24
4. MARKET INFLUENCES	25
4.1 MACROECONOMIC TRENDS	25
Construction Volume in Germany by Type, 2008-2011 (€Million/Annual % change)	25
4.2 MATERIAL TRENDS AFFECTING THE GERMAN INSULATION MARKET	26
4.3 LEGISLATIVE AND ENVIRONMENTAL FACTORS AFFECTING THE USE OF THERMAL INSULATION PRODUCTS.....	28
5. SUPPLIERS AND MANUFACTURERS OF THERMAL INSULATION PRODUCTS	31
5.1 MARKET SHARES OF LEADING INSULATION SUPPLIERS	31
Leading German Suppliers of Thermal Insulation.....	31
5.2 PROFILES OF KEY EUROPEAN SUPPLIERS	33
BASF Group Sales by Business Segment, 2007 & 2008 (€Million).....	36
BASF Group Sales by Location of Customer, 2007 & 2008 (€Million).....	37
BASF Plastics Division Sales, 2008 (€Million).....	37
CRH Group Sales by Region, 2007-2008 (€Million)	41
CRH Group: Sales by Business Segment, 2007-2008 (€Million).....	41

	The Dow Chemical Company: Group Sales by Region, 2006-2008 (US\$ Million)	44
	The Dow Chemical Company Group: Sales by Business Segment, 2006-2008 (US\$ Million).....	44
	Dow's European Manufacturing Sites for Styrofoam and Polyurethanes.....	46
	Table of Materials, Brand Names and Applications Available from Knauf	52
	Table of Knauf Production Sites in Europe for the Production of Insulation	53
	Uralita's Financial Results by Business Group, 2008 (%).....	55
	Recticel International: Net Sales by Business Segment, 2007-2008 (€Million)	58
	Recticel Insulation: Net Sales by Business Segment, 2006-2007 (€Million).....	58
	Rockwool Group Sales by Region, 2008 (%)	62
5.3	DIRECTORY OF SUPPLIERS	67
6.	SOURCES OF INFORMATION.....	77
6.1	AUSTRIA	77
6.2	BELGIUM	77
6.3	CZECH REPUBLIC	78
6.4	DENMARK	78
6.5	FINLAND	78
6.6	FRANCE.....	79
6.7	GERMANY	79
6.8	IRELAND.....	80
6.9	ITALY.....	80
6.10	NETHERLANDS.....	81
6.11	NORWAY.....	81
6.12	POLAND	81
6.13	PORTUGAL	81
6.14	ROMANIA.....	82
6.15	SLOVENIA.....	82
6.16	SPAIN	82
6.17	SWEDEN	83
6.18	SWITZERLAND	84
6.19	TURKEY	84
6.20	UNITED KINGDOM.....	84
7.	ACKNOWLEDGEMENTS.....	85
