

## Insulation

**Study 2628, The Freedonia Group, Inc., Cleveland, OH, USA, 2010, 308 p., USD 4,900**

US demand for insulation materials is forecast to exceed USD 10 billion by 2014 representing a 7.4 % annual increase from 2009. The principal driver of demand will be the recovery of residential construction from weak 2009 levels. Consumption of insulation will also benefit from expanded production of major appliances and transportation equipment. These and other trends are presented in *Insulation*, a new study from The Freedonia Group, Inc. Traditionally, residential markets have consumed the largest portion of insulation demand in value terms, typically accounting 40 % or more of the total. The sharp decline in new home construction caused a steep reduction in demand, resulting in only a 29 % share in 2009.

Conversely, non residential markets accounted for an unusually high percentage of the total in 2009. Foamed plastic and fibreglass are by far the two leading insulation products in use, together accounting for more than 90 % of demand in 2009. Demand for fibreglass insulation is projected to increase annually by 9.1 %. In comparison demand for foamed plastic insulation is forecast to increase annually by 5.3 % to USD 4.4 billion in 2014. While gains in demand were slight in the 2004–2009 time frame, foamed plastic insulation did not register the same sharp decline as fibreglass, reflecting the fact that foamed plastic insulation is less heavily concentrated in residential markets. The use of cellulose insulation will post the fastest growth at more than 14 % annually to nearly USD 300 million. Consumption of reflective insulation and radiant barrier materials is also expected to increase by almost 10 % annually to USD 235 million in 2014.

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