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Acoustic Insulation Market Research Report - Global Forecast till 2030

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Description:

Global Acoustic Insulation Market Overview

The acoustic insulation market size was valued at USD 15.1 billion in 2022. The acoustic insulation industry is projected to grow from USD 15.85 billion in 2023 to USD 23.43 billion by 2032, exhibiting a compound annual growth rate (CAGR) of 5.00% during the forecast period (2023 - 2032). Increasing awareness regarding noise pollution, stringent noise pollution standards, growing living standards, energy efficiency, and consumers' growing interest in acoustic insulation for commercial and residential purposes are the key market drivers enhancing the market growth.

Acoustic Insulation Market Share

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Acoustic Insulation Market Trends

- **Rising health issue associated with noise pollution is driving the market growth.**

Market CAGR for acoustic insulation is driven by the growing health issues of noise pollution. Noise pollution has affected people since the start of industrialization in the late 18th century. It is proven that long-term noise exposure can cause various health effects, including sleep disturbance, hearing loss, annoyance, risks of stress, negative effects on the cardiovascular and metabolic system, and cognitive impairment in children. According to European Environment Agency (EEA), around 20% of Europe's population is exposed to harmful and unhealthy long-term noise levels. Moreover, as per current data, from EEA, environmental noise contributes to 48,000 new cases of ischemic heart disease every year, along with 12,000 premature deaths. In addition, approximately 22 million people suffer from chronic high annoyance, and 6.5 million suffer from high sleep disturbance.

Furthermore, it is estimated that 12,500 school children suffering from reading impairment in school in 2020 as a result of aircraft noise. According to a European Union (EU) publication, around 40% of the population in EU countries is disclosed to road traffic noise at levels exceeding 55 db(A), 20% is exposed to levels exceeding 65 dB(A) during the daytime, and more than 30% is exposed to levels exceeding 55 dB(A) at night. Thus, to overcome this issue, regulations limiting noise are being imposed by the governments of different countries.

Various acoustic insulation market manufacturers adopt acquisition, product establishment, partnership, and collaborations as essential developing approaches to keep ahead of the competition and expand their product line. For instance, in January 2021, Armacell partnered with the German TITK Group and Melamine. Armacell will manufacture effective acoustic insulation products with melamine resin-based nonwovens. This high-performance material has various emission needs and is UV and flame resistant. It does not burn or melt, making it an outstanding thermal and acoustic insulator for transportation. Similarly, In June 2019, Knauf Insulation launched its new Acoustic Batt at African Construction Expo, specifically developed to meet the demand for a noise-reducing acoustic insulation slab for the South African market. Such advanced products from key players positively drive the acoustic insulation market revenue.

Acoustic Insulation Market Segment Insights

Acoustic Insulation Material Type Insights

The acoustic insulation market segmentation, based on material type, includes stone wool, glass wool, plastic foam, and others. The glass wool segment dominated the market, accounting for major market revenue over the forecast period. This is owing to its efficiency in reducing sound transmission. In automotive, it provides a robust acoustic barrier and maintains noise pollution levels to make driving a pleasant experience. It is regarded as one of the market's most efficient and ecologically benign insulating materials. High thermal qualities assist customers in conserving energy and reducing the environmental effect. The porous, elastic structure offers efficient acoustic insulation attenuation at working temperatures of up to 300°C.

Figure 1: Acoustic Insulation Market by Material Type, 2022 & 2032 (USD billion)

Acoustic Insulation Market by Material Type

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Acoustic Insulation End-User Insights

The acoustic insulation market segmentation, based on end-user, includes building & construction {residential and commercial}, industrial, transportation {automotive, aerospace, marine, and others}. The building & construction category generated the most income during the forecast period. The introduction of cutting-edge construction technologies influences the development of acoustic insulation design, the presence of various sound sources, such as current high-decibel audio systems in homes, and growing awareness of noise pollution in society, fueling market growth.

Acoustic Insulation Regional Insights

By region, the study provides market insights into North America, Europe, Asia-Pacific, and the Rest of the World. The Asia Pacific acoustic insulation market will dominate over the forecast period owing to rising construction investments, demand energy-efficient buildings, and smart infrastructure. Moreover, heavy industrialization, improved infrastructure, and high consumer acceptance of the product are key factors driving the demand in the region. Moreover, China acoustic insulation market held the largest market share, and the Indian acoustic insulation market was the fastest-growing market in the Asia-Pacific region.

Further, the major countries studied in the market report are The U.S., Canada, German, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 2: ACOUSTIC INSULATION MARKET SHARE BY REGION 2022 (%)

ACOUSTIC INSULATION MARKET SHARE BY REGION 2022

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Europe acoustic insulation market accounts for the second-largest market share due to supportive government policies associated with noise control. Rising demand for acoustic insulation materials for commercial applications is also a key factor driving market revenue growth in the region. Further, the German acoustic insulation market held the largest market share, and the UK acoustic insulation market was the fastest-growing market in the European region.

The North America acoustic insulation market is expected to grow at the fastest CAGR from 2023 to 2032. This is due to a rise in acoustic insulation infrastructure investments, the growing preference among individuals for indoor acoustic insulation, and increased expenditure on leisure activities and automobiles in the region. Moreover, China acoustic insulation market held the largest market share, and the Indian acoustic insulation market was the fastest-growing market in the North America region.

Acoustic Insulation Key Market Players & Competitive Insights

Leading market players are investing heavily in research and development to expand their product lines, which will help the acoustic insulation market grow even more. Market participants are also undertaking various strategic activities to expand their footprint, with important market developments including new product launches, contractual agreements, mergers and acquisitions, higher investments, and collaboration with other organizations. To expand and survive in a more competitive and rising market climate, the acoustic insulation industry must offer cost-effective items.

Manufacturing locally to minimize operational costs is one of the key business tactics manufacturers use in the acoustic insulation industry to benefit clients and increase the market sector. Major players in the acoustic insulation market, including Compagnie de Saint-Gobain S.A., Owens Corning, Rockwool International, Armacell International S.A., Kingspan Group plc, Knauf Insulation, and others, are attempting to increase market demand by

investing in research and development operations.

Armacell International GmbH manufactures foam plastics and specialized acoustic insulation materials. The Company produces light and flexible acoustic insulation foam products for commercial and residential construction, industrial, oil, gas, and automotive industries. Armacell International serves customers worldwide. In August 2020, Armacell launched ArmaGel DT. ArmaGel product delivers good thermal and acoustic insulation solutions to customers around the globe with an excellent quality/cost ratio.

Compagnie de Saint-Gobain is a construction and building product manufacturing company. Its portfolio includes various types of plastics, pipes, related products, home improvement materials, gypsum, industrial mortar, roofing, and exterior wall products. The company also offers mineral ceramics, performance polymers, and glass fabrics. It markets these products under various brands, including ADFORS, BRITISH GYPSUM, CERTAINTEED, CHRYSO, GCP APPLIED TECHNOLOGIES, NORTON, RIGIPS, WEBER, Saint-Gobain Gla, and Isover. Saint-Gobain's products find application in the automotive, aeronautical, health, defense, energy, security, and food and beverage industries. The company operates with its subsidiaries and affiliates in the Americas, Europe, the Middle East, Africa, and Asia-Pacific. Saint-Gobain is headquartered in Courbevoie, Ile-de-France, France. In January 2020, Saint-Gobain acquired Sonex in Brazil, a company specializing in the manufacture and supply of acoustic insulation ceiling systems, marketed in particular under the Sonex, Nexacoustic, and Fiberwood brands. This acquisition strengthened the group's position in Brazil.

Key Companies in the Acoustic Insulation market include

- Compagnie de Saint-Gobain S.A.
- Owens Corning
- Rockwool International
- Armacell International S.A.
- Kingspan Group plc
- Knauf Insulation
- BASF
- Johns Manville
- Fletcher Insulation
- CollectaLtd.
- International Cellulose Corporation
- Hush Acoustics
- Siderise
- L'Isolante K-Flex S.p.A.
-

Acoustic Insulation Industry Developments

September 2022: Toray Textiles Central Europe (TTCE) and Toray Advanced Materials Korea (TAK) established a new factory in the Czech Republic to develop Europe's Airlite automobile interior sound acoustic insulation business. This material improves passenger comfort by reducing noise from driving, vibrations, and other cars. This new factory, located at TTCE's current location in Prostjov, will be operational in October 2022, with a capacity for annual production of 1,200 metric tons.

March 2022: Rockfon, a ROCKWOOL Group company, announced a design collaboration with AKUART, a Copenhagen-based company that produces and manufactures acoustic insulation equipment to generate exceptional room acoustic insulation. ROCKWOOL has also bought a minority investment in AKUART A/S to deepen the two businesses' partnership.

July 2020: Insultech, LLC has announced the completion of its expansion at its plant in Yuma, Arizona, in the United States, effectively doubling manufacturing space at the site. The new site will be dedicated to producing foil-encapsulated acoustic insulation blankets for industrial, transportation, and aerospace applications.

Acoustic Insulation Market Segmentation

Acoustic Insulation Material Type Outlook

- Stone Wool
- Glass Wool
- Plastic Foam
- Others

Acoustic Insulation End-User Outlook

- Building & Construction
 - Residential
 - Commercial
- Industrial
- Transportation
 - Automotive
 - Aerospace

- Marine
- Others

Acoustic Insulation Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific
- Rest of the World
 - Middle East
 - Africa
 - Latin America

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