

**Fiberglass Market by Glass Type (E-Glass, ECR-Glass, H-Glass, AR-Glass, S-Glass),
Product Type (Glass Wool, Direct and Assembled Roving, Yarn, Chopped Strand),
Application (Composites, Insulation) and Region - Global Forecast 2027**

Market Report | 2022-08-11 | 301 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The global fiberglass market size is expected to grow from USD 27.5 billion in 2022 to USD 38.8 billion by 2027, at a CAGR of 7.1% during the forecast period. Fiberglass composites are being used in the construction & infrastructure, aerospace, wind energy, automotive, electronics, and other end-use industries. The increasing wind energy projects and demand of lightweight material from automotive industry support the demand for fiberglass in the wind energy and automotive end-use industry.

"S-Glass Type is the fastest-growing Glass Type of fiberglass, in terms of value."

S-glass has similar properties as E-glass but is stronger and stiffer than E-glass. High strength S-glass is made with magnesium aluminosilicate. S-glass fiber offers high-performance at elevated temperatures; it is used in applications which demand high strength and stability under extreme temperatures and corrosive environments.

S-glass is also available in the global market and is the highest-performing fibers available at present. It is produced with a higher content of silica than standard glass fiber products. This glass type is widely used for the textile and composite industries. It has high compressive strength, high-temperature resistance, and improved impact resistance.

"Chopped Strand is the fastest-growing product type of fiberglass, in terms of value."

Chopped strands are fiberglass strands that are used to provide reinforcement to thermoplastic and thermoset composites. These strands can be mixed with resins to produce reinforcing gap filler for construction activities. Chopped strands used with polyester resins produce strong, stiff, and durable laminates, which are primarily utilized to manufacture water tanks, boats, and industrial equipment. Chopped strand mats made from glass fiber filaments can be oriented either randomly or evenly. They are suitable for hand lay-up process using thermoset resins for manufacturing a wide range of products for automobile, recreation, and chemical industries.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

"Composites is the fastest-growing application of fiberglass, in terms of value."

Based on application, the fiberglass market is segmented into composites and insulation. In terms of value, the composites segment accounted for significant share of the fiberglass market in 2021. The larger share of the composites application segment can be attributed to the high growth of the construction and automotive industries in Asia Pacific and North America.

"APAC is the fastest-growing fiberglass market."

APAC is expected to be the largest market for fiberglass during forecasted years. The high market share for the region is attributed to various favorable government policies in order to protect volatile fuel prices in the region along with rules and regulations against GHGs emissions. These policies and regulations are fueling the growth of wind energy installations in the region specifically in China, India, and South Korea. The growth of end-use industries are automatically having a impact on the demand of fiberglass across the region. Europe followed by North America also contribute to significant share in the global fiberglass market.

This study has been validated through primaries conducted with various industry experts, globally. These primary sources have been divided into the following three categories:

- By Company Type- Tier 1- 60%, Tier 2- 20%, and Tier 3- 20%
- By Designation- C Level- 33%, Director Level- 33%, and Managers- 34%
- By Region- North America- 20%, Europe- 25%, APAC- 25%, Latin America-10%, MEA-20%,

The report provides a comprehensive analysis of company profiles listed below:

- China Jushi Co., Ltd. (China)
- Owens Corning (US)
- Nippon Electric Glass Co., Ltd. (Japan)
- Taishan Fiberglass Inc. (CTG) (China)
- Chongqing Polycomp International Corp. (CPIC) (China),
- Saint-Gobain Vetrotex, (US)
- Johns Manville Corp. (US)
- Asahi Fiberglass Co., Ltd., (Japan)
- Knauf Insulation, (Belgium)
- Others

Research Coverage

This report covers the global fiberglass market and forecasts the market size until 2027. The report includes the market segmentation -Glass Type (E-Glass, ECR-Glass, H-Glass, AR-Glass, S-Glass, and others), Product Type (Glass Wool, Direct and Assembled Woving, Chopped Strand, Yarn, and Others), Application (Composites, and Insulation), and Region (Europe, North America, APAC, South America, and MEA). Porter's Five Forces analysis, along with the drivers, restraints, opportunities, and challenges, are discussed in the report. It also provides company profiles and competitive strategies adopted by the major players in the global fiberglass market.

Key benefits of buying the report:

The report will help market leaders/new entrants in this market in the following ways:

1. This report segments the global fiberglass market comprehensively and provides the closest approximations of the revenues for the overall market and the sub-segments across different verticals and regions.
2. The report helps stakeholders understand the pulse of the fiberglass market and provides them with information on key market

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

drivers, restraints, challenges, and opportunities.

3. This report will help stakeholders to understand competitors better and gain more insights to better their position in their businesses. The competitive landscape section includes the competitor ecosystem, new product development, agreement, and acquisitions.

Reasons to buy the report:

The report will help market leaders/new entrants in this market by providing them with the closest approximations of the revenues for the overall fiberglass market and the sub-segments. This report will help stakeholders to understand the competitive landscape and gain more insights and position their businesses and market strategies in a better way. The report will also help stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

Table of Contents:

1	INTRODUCTION	44
1.1	STUDY OBJECTIVES	44
1.2	MARKET DEFINITION	44
1.2.1	INCLUSIONS & EXCLUSIONS	45
1.3	MARKET SCOPE	45
FIGURE 1	FIBERGLASS MARKET SEGMENTATION	45
1.3.1	REGIONS COVERED	46
1.3.2	YEARS CONSIDERED	46
1.4	CURRENCY	47
1.5	UNIT CONSIDERED	47
1.6	LIMITATIONS	47
1.7	STAKEHOLDERS	47
1.8	SUMMARY OF CHANGES	48
2	RESEARCH METHODOLOGY	49
2.1	RESEARCH DATA	49
FIGURE 2	FIBERGLASS MARKET: RESEARCH DESIGN	49
2.1.1	SECONDARY DATA	50
2.1.2	PRIMARY DATA	50
2.1.2.1	Primary interviews with top fiberglass manufacturers	50
2.1.2.2	Breakdown of primary interviews	50
2.1.2.3	Key industry insights	51
2.2	BASE NUMBER CALCULATION	51
2.2.1	APPROACH 1: SUPPLY-SIDE ANALYSIS	51
2.2.2	APPROACH 2: DEMAND-SIDE ANALYSIS	52
2.3	FORECAST NUMBER CALCULATION	52
2.3.1	SUPPLY-SIDE	52
2.3.2	DEMAND-SIDE	52
2.4	MARKET SIZE ESTIMATION	53
2.4.1	BOTTOM-UP APPROACH	53
FIGURE 3	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH	53
2.4.2	TOP-DOWN APPROACH	53
FIGURE 4	MARKET SIZE ESTIMATION: TOP-DOWN APPROACH	53
2.5	DATA TRIANGULATION	54

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 5	FIBERGLASS MARKET: DATA TRIANGULATION	54
2.6	FACTOR ANALYSIS	55
2.7	ASSUMPTIONS	56
2.8	LIMITATIONS & RISKS	56
3	EXECUTIVE SUMMARY	57
FIGURE 6	GLASS WOOL DOMINATED FIBERGLASS MARKET IN 2021	58
FIGURE 7	COMPOSITES SEGMENT ACCOUNTED FOR DOMINANT SHARE IN 2021	58
FIGURE 8	E-GLASS ACCOUNTED FOR LARGEST SHARE OF FIBERGLASS MARKET IN 2021	59
FIGURE 9	ASIA PACIFIC LED FIBERGLASS MARKET IN 2021	59
4	PREMIUM INSIGHTS	61
4.1	SIGNIFICANT OPPORTUNITIES IN FIBERGLASS MARKET	61
FIGURE 10	FIBERGLASS MARKET TO WITNESS HIGH GROWTH IN ASIA PACIFIC BETWEEN 2022 AND 2027	61
4.2	FIBERGLASS MARKET, BY PRODUCT TYPE AND REGION, 2021	61
FIGURE 11	ASIA PACIFIC WAS LARGEST MARKET FOR FIBERGLASS IN 2021	61
4.3	FIBERGLASS MARKET, BY APPLICATION, 2021	62
FIGURE 12	COMPOSITES SEGMENT OVERALL MARKET IN 2021	62
4.4	FIBERGLASS MARKET, BY GLASS TYPE	62
FIGURE 13	E-GLASS SEGMENT ACCOUNTED FOR LARGEST SHARE IN 2021	62
4.5	FIBERGLASS MARKET GROWTH, BY KEY COUNTRIES	63
FIGURE 14	INDONESIA TO BE FASTEST-GROWING FIBERGLASS MARKET, 2022-2027	63
5	MARKET OVERVIEW	64
5.1	INTRODUCTION	64
5.2	EVOLUTION	64
5.3	MARKET DYNAMICS	64
FIGURE 15	DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN FIBERGLASS MARKET	64
5.3.1	DRIVERS	65
5.3.1.1	Extensive use of fiberglass in construction & infrastructure industry	65
TABLE 1	GLOBAL CONSTRUCTION OUTPUT, SHARE OF MAJOR COUNTRIES, 2019-2030	65
5.3.1.2	Increased use of fiberglass composites in automotive industry	66
TABLE 2	EUROPEAN UNION: CO2 EMISSION STANDARDS FOR NEW PASSENGER CARS (G/KM)	66
5.3.2	RESTRAINTS	67
5.3.2.1	Issues associated with glass wool recycling	67
5.3.2.2	Lack of standardization in manufacturing technologies of various fiberglass products	67
5.3.2.3	Decline in economy due to COVID-19	67
5.3.3	OPPORTUNITIES	67
5.3.3.1	Increasing number of wind energy capacity installations	67
TABLE 3	ESTIMATED GLOBAL WIND ENERGY INSTALLATIONS, 2021-2030	68
5.3.3.2	Rising demand for composite materials in construction & infrastructure industry in Middle East & Africa	68
5.3.4	CHALLENGES	68
5.3.4.1	Capital-intensive production and complex manufacturing process of fiberglass	68
5.3.4.2	Recovery from COVID-19 pandemic	68
5.4	PORTER'S FIVE FORCES ANALYSIS	69
FIGURE 16	FIBERGLASS MARKET: PORTER'S FIVE FORCES ANALYSIS	69
5.4.1	BARGAINING POWER OF BUYERS	69
5.4.2	BARGAINING POWER OF SUPPLIERS	70
5.4.3	THREAT OF NEW ENTRANTS	70

5.4.4	THREAT OF SUBSTITUTES	70
5.4.5	INTENSITY OF COMPETITIVE RIVALRY	70
TABLE 4	FIBERGLASS MARKET: PORTER'S FIVE FORCES ANALYSIS	71
5.5	SUPPLY CHAIN ANALYSIS	71
TABLE 5	FIBERGLASS MARKET: COMPANIES AND THEIR ROLE IN ECOSYSTEM	71
5.6	KEY STAKEHOLDERS & BUYING CRITERIA	72
5.6.1	KEY STAKEHOLDERS IN BUYING PROCESS	72
FIGURE 17	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP 3 APPLICATIONS	72
TABLE 6	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP 3 APPLICATIONS	72
5.6.2	BUYING CRITERIA	73
FIGURE 18	KEY BUYING CRITERIA FOR TOP 3 APPLICATIONS	73
TABLE 7	KEY BUYING CRITERIA FOR TOP 3 APPLICATIONS	73
5.7	TECHNOLOGY ANALYSIS	74
TABLE 8	FIBERGLASS MANUFACTURING PROCESS	74
5.8	ECOSYSTEM: FIBERGLASS MARKET	75
5.9	VALUE CHAIN ANALYSIS	75
FIGURE 19	VALUE CHAIN ANALYSIS: FIBERGLASS MARKET	75
5.10	IMPACT OF COVID-19 ON FIBERGLASS VALUE CHAIN	76
5.10.1	RAW MATERIALS	76
5.10.2	OEM/ASSEMBLY	76
5.11	IMPACT OF COVID-19	76
5.11.1	IMPACT OF COVID-19 ON AUTOMOTIVE AND TRANSPORTATION INDUSTRIES	76
5.11.2	IMPACT OF COVID-19 ON MARINE AND AEROSPACE SECTORS	77
5.11.3	OPPORTUNITIES	77
5.12	KEY MARKETS FOR IMPORT/EXPORT	77
5.12.1	JAPAN	77
5.12.2	CHINA	77
5.12.3	TAIWAN	77
5.12.4	US	77
5.12.5	INDIA	78
5.13	PRICING ANALYSIS	78
5.14	AVERAGE SELLING PRICES OF KEY PLAYERS, BY APPLICATION	78
FIGURE 20	AVERAGE SELLING PRICES OF KEY PLAYERS FOR APPLICATIONS (USD/KG)	78
TABLE 9	AVERAGE SELLING PRICES OF KEY PLAYERS, BY APPLICATION (USD/KG)	78
5.15	AVERAGE SELLING PRICES, BY GLASS TYPE	79
FIGURE 21	AVERAGE SELLING PRICES FOR DIFFERENT GLASS TYPES (USD/KG)	79
5.16	AVERAGE SELLING PRICES, BY PRODUCT TYPE	79
FIGURE 22	AVERAGE SELLING PRICES BASED ON PRODUCT TYPES (USD/KG)	79
5.17	AVERAGE SELLING PRICE	80
TABLE 10	FIBERGLASS AVERAGE SELLING PRICE, BY REGION	80
5.18	FIBERGLASS MARKET: OPTIMISTIC, PESSIMISTIC, AND REALISTIC SCENARIOS	80
TABLE 11	FIBERGLASS MARKET: CAGR (BY VALUE) IN OPTIMISTIC, PESSIMISTIC, AND REALISTIC SCENARIOS	80
5.18.1	OPTIMISTIC SCENARIO	80
5.18.2	PESSIMISTIC SCENARIO	80
5.18.3	REALISTIC SCENARIO	81
5.19	KEY CONFERENCES & EVENTS	81
TABLE 12	DETAILED LIST OF CONFERENCES & EVENTS RELATED TO FIBERGLASS AND RELATED MARKETS, 2022-2023	81

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.20	TARIFF AND REGULATIONS	82
5.20.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	82
TABLE 13	NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	82
TABLE 14	EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	83
TABLE 15	ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	84
TABLE 16	REST OF THE WORLD: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	84
5.21	PATENT ANALYSIS	85
5.21.1	INTRODUCTION	85
5.21.2	METHODOLOGY	85
5.21.3	DOCUMENT TYPE	85
TABLE 17	FIBERGLASS MARKET: GLOBAL PATENTS	85
FIGURE 23	GLOBAL PATENT ANALYSIS, BY DOCUMENT TYPE	86
FIGURE 24	GLOBAL PATENT PUBLICATION TREND: 2011-2021	86
5.21.4	INSIGHTS	86
5.21.5	LEGAL STATUS OF PATENTS	86
FIGURE 25	FIBERGLASS MARKET: LEGAL STATUS OF PATENTS	87
5.21.6	JURISDICTION ANALYSIS	87
FIGURE 26	GLOBAL JURISDICTION ANALYSIS	87
5.21.7	TOP APPLICANTS' ANALYSIS	88
FIGURE 27	JOHNS MANVILLE REGISTERED HIGHEST NUMBER OF PATENTS	88
5.21.8	PATENTS BY JOHNS MANVILLE	88
5.21.9	PATENTS BY BOEING COMPANY	89
5.21.10	PATENTS BY OWENS CORNING	90
5.21.11	TOP 10 PATENT OWNERS (US) IN LAST 10 YEARS	90
5.22	CASE STUDY ANALYSIS	91
5.23	TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS	91
6	FIBERGLASS MARKET, BY GLASS TYPE	93
6.1	INTRODUCTION	94
FIGURE 28	E-GLASS SEGMENT TO LEAD FIBERGLASS MARKET DURING FORECAST PERIOD	94
TABLE 18	FIBERGLASS MARKET SIZE, BY GLASS TYPE, 2018-2021 (USD MILLION)	94
TABLE 19	FIBERGLASS MARKET SIZE, BY GLASS TYPE, 2018-2021 (KILOTON)	95
TABLE 20	FIBERGLASS MARKET SIZE, BY GLASS TYPE, 2022-2027 (USD MILLION)	95
TABLE 21	FIBERGLASS MARKET SIZE, BY GLASS TYPE, 2022-2027 (KILOTON)	95
6.2	E-GLASS	96
6.2.1	MOST WIDELY USED GLASS TYPE IN FIBERGLASS MARKET	96
FIGURE 29	ASIA PACIFIC TO BE LARGEST E-GLASS FIBER MARKET	96
6.2.2	E-GLASS FIBER MARKET, BY REGION	96
TABLE 22	E-GLASS FIBER MARKET SIZE, BY REGION, 2018-2021 (USD MILLION)	96
TABLE 23	E-GLASS FIBER MARKET SIZE, BY REGION, 2018-2021 (KILOTON)	97
TABLE 24	E-GLASS FIBER MARKET SIZE, BY REGION, 2022-2027 (USD MILLION)	97
TABLE 25	E-GLASS FIBER MARKET SIZE, BY REGION, 2022-2027 (KILOTON)	97
6.3	ECR-GLASS	98
6.3.1	ASIA PACIFIC TO BE FASTEST-GROWING MARKET FOR ECR-GLASS	98
FIGURE 30	ASIA PACIFIC TO BE LARGEST ECR-GLASS FIBER MARKET	98
6.3.2	ECR-GLASS FIBER MARKET, BY REGION	98
TABLE 26	ECR-GLASS FIBER MARKET SIZE, BY REGION, 2018-2021 (USD MILLION)	98
TABLE 27	ECR-GLASS FIBER MARKET SIZE, BY REGION, 2018-2021 (KILOTON)	99

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 28	ECR-GLASS FIBER MARKET SIZE, BY REGION, 2022-2027 (USD MILLION)	99
TABLE 29	ECR-GLASS FIBER MARKET SIZE, BY REGION, 2022-2027 (KILOTON)	99
6.4	H-GLASS	100
6.4.1	H-GLASS WIDELY USED IN ADVANCED COMPOSITES	100
6.4.2	H-GLASS FIBER MARKET, BY REGION	100
TABLE 30	H-GLASS FIBER MARKET SIZE, BY REGION, 2018-2021 (USD MILLION)	100
TABLE 31	H-GLASS FIBER MARKET SIZE, BY REGION, 2018-2021 (KILOTON)	100
TABLE 32	H-GLASS FIBER MARKET SIZE, BY REGION, 2022-2027 (USD MILLION)	101
TABLE 33	H-GLASS FIBER MARKET SIZE, BY REGION, 2022-2027 (KILOTON)	101
6.5	AR-GLASS	102
6.5.1	AR-GLASS REPLACING ASBESTOS IN CONSTRUCTION APPLICATION	102
6.5.2	AR-GLASS FIBER MARKET, BY REGION	102
TABLE 34	AR-GLASS FIBER MARKET SIZE, BY REGION, 2018-2021 (USD MILLION)	102
TABLE 35	AR-GLASS FIBER MARKET SIZE, BY REGION, 2018-2021 (KILOTON)	102
TABLE 36	AR-GLASS FIBER MARKET SIZE, BY REGION, 2022-2027 (USD MILLION)	102
TABLE 37	AR-GLASS FIBER MARKET SIZE, BY REGION, 2022-2027 (KILOTON)	103
6.6	S-GLASS	103
6.6.1	EUROPE TO BE LARGEST MARKET FOR S-GLASS SEGMENT	103
6.6.2	S-GLASS FIBER MARKET, BY REGION	103
TABLE 38	S-GLASS FIBER MARKET SIZE, BY REGION, 2018-2021 (USD MILLION)	103
TABLE 39	S-GLASS FIBER MARKET SIZE, BY REGION, 2018-2021 (KILOTON)	104
TABLE 40	S-GLASS FIBER MARKET SIZE, BY REGION, 2022-2027 (USD MILLION)	104
TABLE 41	S-GLASS FIBER MARKET SIZE, BY REGION, 2022-2027 (KILOTON)	104
6.7	OTHERS	105
6.7.1	OTHER GLASS TYPES: FIBERGLASS MARKET, BY REGION	105
TABLE 42	OTHER GLASS TYPES: FIBERGLASS MARKET SIZE, BY REGION, 2018-2021 (USD MILLION)	105
TABLE 43	OTHER GLASS TYPES: FIBERGLASS MARKET SIZE, 2018-2021 (KILOTON)	105
TABLE 44	OTHER GLASS TYPES: FIBERGLASS MARKET SIZE, 2022-2027 (USD MILLION)	106
TABLE 45	OTHER GLASS TYPES: FIBERGLASS MARKET SIZE, 2022-2027 (KILOTON)	106
7	FIBERGLASS MARKET, BY PRODUCT TYPE	107
7.1	INTRODUCTION	108
FIGURE 31	CHOPPED STRAND SEGMENT EXPECTED TO WITNESS HIGHEST CAGR DURING FORECAST PERIOD	108
TABLE 46	FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (USD MILLION)	108
TABLE 47	FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (KILOTON)	109
TABLE 48	FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (USD MILLION)	109
TABLE 49	FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (KILOTON)	109
7.2	GLASS WOOL	110
7.2.1	GLASS WOOL USED AS THERMAL INSULATOR IN RESIDENTIAL WALLS AND CEILINGS TO REDUCE POWER CONSUMPTION	110
FIGURE 32	ASIA PACIFIC TO BE LARGEST GLASS WOOL MARKET	110
7.2.2	GLASS WOOL MARKET, BY REGION	110
TABLE 50	GLASS WOOL MARKET SIZE, BY REGION, 2018-2021 (USD MILLION)	110
TABLE 51	GLASS WOOL MARKET SIZE, BY REGION, 2018-2021 (KILOTON)	111
TABLE 52	GLASS WOOL MARKET SIZE, BY REGION, 2022-2027 (USD MILLION)	111
TABLE 53	GLASS WOOL MARKET SIZE, BY REGION, 2022-2027 (KILOTON)	111
7.3	DIRECT AND ASSEMBLED ROVING	112

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

7.3.1 HIGH DEMAND FROM CONSTRUCTION, INFRASTRUCTURE, AND WIND ENERGY 112

7.3.2 DIRECT AND ASSEMBLED ROVING MARKET, BY REGION 112

TABLE 54 DIRECT AND ASSEMBLED ROVING MARKET SIZE, BY REGION,
2018-2021 (USD MILLION) 112

TABLE 55 DIRECT AND ASSEMBLED ROVING MARKET SIZE, BY REGION,
2018-2021 (KILOTON) 112

TABLE 56 DIRECT AND ASSEMBLED ROVING MARKET SIZE, BY REGION,
2022-2027 (USD MILLION) 113

TABLE 57 DIRECT AND ASSEMBLED ROVING MARKET SIZE, BY REGION,
2022-2027 (KILOTON) 113

7.4 YARN 114

7.4.1 RISING DEMAND FOR ELECTRONICS AND CONSTRUCTION 114

7.4.2 YARN MARKET, BY REGION 114

TABLE 58 YARN MARKET SIZE, BY REGION, 2018-2021 (USD MILLION) 114

TABLE 59 YARN MARKET SIZE, BY REGION, 2018-2021 (KILOTON) 114

TABLE 60 YARN MARKET SIZE, BY REGION, 2022-2027 (USD MILLION) 115

TABLE 61 YARN MARKET SIZE, BY REGION, 2022-2027 (KILOTON) 115

7.5 CHOPPED STRAND 116

7.5.1 RISING AUTOMOBILE PRODUCTION IN ASIA PACIFIC AND EUROPE 116

7.5.2 CHOPPED STRAND MARKET, BY REGION 116

TABLE 62 CHOPPED STRAND MARKET SIZE, BY REGION, 2018-2021 (USD MILLION) 116

TABLE 63 CHOPPED STRAND MARKET SIZE, BY REGION, 2018-2021 (KILOTON) 116

TABLE 64 CHOPPED STRAND MARKET SIZE, BY REGION, 2022-2027 (USD MILLION) 117

TABLE 65 CHOPPED STRAND MARKET SIZE, BY REGION, 2022-2027 (KILOTON) 117

7.6 OTHERS 118

7.6.1 OTHER PRODUCT TYPES MARKET, BY REGION 118

TABLE 66 OTHER PRODUCT TYPES MARKET SIZE, BY REGION,
2018-2021 (USD MILLION) 118

TABLE 67 OTHER PRODUCT TYPES MARKET SIZE, BY REGION, 2018-2021 (KILOTON) 118

TABLE 68 OTHER PRODUCT TYPES MARKET SIZE, BY REGION,
2022-2027 (USD MILLION) 118

TABLE 69 OTHER PRODUCT TYPES MARKET SIZE, BY REGION, 2022-2027 (KILOTON) 119

8 FIBERGLASS MARKET, BY APPLICATION 120

8.1 INTRODUCTION 121

FIGURE 33 COMPOSITES SEGMENT EXPECTED TO REGISTER HIGHER CAGR DURING FORECAST PERIOD 121

TABLE 70 FIBERGLASS MARKET SIZE, BY APPLICATION, 2018-2021 (USD MILLION) 121

TABLE 71 FIBERGLASS MARKET SIZE, BY APPLICATION, 2018-2021 (KILOTON) 121

TABLE 72 FIBERGLASS MARKET SIZE, BY APPLICATION, 2022-2027 (USD MILLION) 122

TABLE 73 FIBERGLASS MARKET SIZE, BY APPLICATION, 2022-2027 (KILOTON) 122

8.2 COMPOSITES 122

8.2.1 COMPOSITES ACCOUNTED FOR LARGER MARKET SHARE 122

FIGURE 34 ASIA PACIFIC TO BE LARGEST FIBERGLASS COMPOSITES MARKET 123

8.2.2 FIBERGLASS MARKET IN COMPOSITES, BY REGION 123

TABLE 74 FIBERGLASS MARKET SIZE IN COMPOSITES, BY REGION,
2018-2021 (USD MILLION) 123

TABLE 75 FIBERGLASS MARKET SIZE IN COMPOSITES, BY REGION,
2018-2021 (KILOTON) 123

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 76	FIBERGLASS MARKET SIZE IN COMPOSITES, BY REGION, 2022-2027 (USD MILLION)	124
TABLE 77	FIBERGLASS MARKET SIZE IN COMPOSITES, BY REGION, 2022-2027 (KILOTON)	124
8.2.3	IMPACT OF COVID-19 ON COMPOSITES INDUSTRY	124
8.2.4	FIBERGLASS MARKET SIZE IN COMPOSITES, BY END-USE INDUSTRY	125
TABLE 78	FIBERGLASS MARKET SIZE IN COMPOSITES, BY END-USE INDUSTRY, 2018-2021 (USD MILLION)	125
TABLE 79	FIBERGLASS MARKET SIZE IN COMPOSITES, BY END-USE INDUSTRY, 2018-2021 (KILOTON)	125
TABLE 80	FIBERGLASS MARKET SIZE IN COMPOSITES, BY END-USE INDUSTRY, 2022-2027 (USD MILLION)	125
TABLE 81	FIBERGLASS MARKET SIZE IN COMPOSITES, BY END-USE INDUSTRY, 2022-2027 (KILOTON)	126
8.3	CONSTRUCTION & INFRASTRUCTURE	126
8.3.1	TENSILE STRENGTH AND STRENGTH-TO-WEIGHT RATIO OF FIBERGLASS IDEAL FOR THIS SEGMENT	126
8.3.2	FIBERGLASS COMPOSITES MARKET IN CONSTRUCTION & INFRASTRUCTURE END-USE INDUSTRY, BY REGION	127
TABLE 82	FIBERGLASS COMPOSITES MARKET SIZE IN CONSTRUCTION & INFRASTRUCTURE, BY REGION, 2018-2021 (USD MILLION)	127
TABLE 83	FIBERGLASS COMPOSITES MARKET SIZE IN CONSTRUCTION & INFRASTRUCTURE, BY REGION, 2018-2021 (KILOTON)	127
TABLE 84	FIBERGLASS COMPOSITES MARKET SIZE IN CONSTRUCTION & INFRASTRUCTURE, BY REGION, 2022-2027 (USD MILLION)	127
TABLE 85	FIBERGLASS COMPOSITES MARKET SIZE IN CONSTRUCTION & INFRASTRUCTURE, BY REGION, 2022-2027 (KILOTON)	128
8.3.3	AUTOMOTIVE	128
8.3.3.1	Weight reduction, increased processing speed, and low VOC emissions encouraging fiberglass adoption	128
8.3.4	FIBERGLASS COMPOSITES MARKET IN AUTOMOTIVE END-USE INDUSTRY, BY REGION	129
TABLE 86	FIBERGLASS COMPOSITES MARKET SIZE IN AUTOMOTIVE, BY REGION, 2018-2021 (USD MILLION)	129
TABLE 87	FIBERGLASS COMPOSITES MARKET SIZE IN AUTOMOTIVE, BY REGION, 2018-2021 (KILOTON)	129
TABLE 88	FIBERGLASS COMPOSITES MARKET SIZE IN AUTOMOTIVE, BY REGION, 2022-2027 (USD MILLION)	129
TABLE 89	FIBERGLASS COMPOSITES MARKET SIZE IN AUTOMOTIVE, BY REGION, 2022-2027 (KILOTON)	130
8.3.5	WIND ENERGY	130
8.3.5.1	High tensile strength of fiberglass composites driving demand in wind turbine blades manufacturing	130
8.3.6	FIBERGLASS COMPOSITES MARKET IN WIND ENERGY END-USE INDUSTRY, BY REGION	130
TABLE 90	FIBERGLASS COMPOSITES MARKET SIZE IN WIND ENERGY, BY REGION, 2018-2021 (USD MILLION)	130
TABLE 91	FIBERGLASS COMPOSITES MARKET SIZE IN WIND ENERGY, BY REGION, 2018-2021 (KILOTON)	131
TABLE 92	FIBERGLASS COMPOSITES MARKET SIZE IN WIND ENERGY, BY REGION, 2022-2027 (USD MILLION)	131
TABLE 93	FIBERGLASS COMPOSITES MARKET SIZE IN WIND ENERGY, BY REGION, 2022-2027 (KILOTON)	131
8.3.7	ELECTRONICS	132
8.3.7.1	High thermal resistance and electrical conductivity of fiberglass fueling adoption in electronics application	132
8.3.8	FIBERGLASS COMPOSITES MARKET IN ELECTRONICS END-USE INDUSTRY, BY REGION	132
TABLE 94	FIBERGLASS COMPOSITES MARKET SIZE IN ELECTRONICS, BY REGION, 2018-2021 (USD MILLION)	132
TABLE 95	FIBERGLASS COMPOSITES MARKET SIZE IN ELECTRONICS, BY REGION, 2018-2021 (KILOTON)	132
TABLE 96	FIBERGLASS COMPOSITES MARKET SIZE IN ELECTRONICS, BY REGION, 2022-2027 (USD MILLION)	133
TABLE 97	FIBERGLASS COMPOSITES MARKET SIZE IN ELECTRONICS, BY REGION, 2022-2027 (KILOTON)	133
8.3.9	AEROSPACE	133
8.3.9.1	S-glass and E-glass most widely used glass types in aerospace applications	133

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

8.3.10 FIBERGLASS COMPOSITES MARKET IN AEROSPACE END-USE INDUSTRY,
BY REGION 134

TABLE 98 FIBERGLASS COMPOSITES MARKET SIZE IN AEROSPACE, BY REGION,
2018-2021 (USD MILLION) 134

TABLE 99 FIBERGLASS COMPOSITES MARKET SIZE IN AEROSPACE, BY REGION,
2018-2021 (KILOTON) 134

TABLE 100 FIBERGLASS COMPOSITES MARKET SIZE IN AEROSPACE, BY REGION,
2022-2027 (USD MILLION) 134

TABLE 101 FIBERGLASS COMPOSITES MARKET SIZE IN AEROSPACE, BY REGION,
2022-2027 (KILOTON) 135

8.3.11 OTHERS 135

8.3.12 FIBERGLASS COMPOSITES MARKET IN OTHER END-USE INDUSTRIES,
BY REGION 136

TABLE 102 FIBERGLASS COMPOSITES MARKET SIZE IN OTHER END-USE INDUSTRIES,
BY REGION, 2018-2021 (USD MILLION) 136

TABLE 103 FIBERGLASS COMPOSITES MARKET SIZE IN OTHER END-USE INDUSTRIES,
BY REGION, 2018-2021 (KILOTON) 136

TABLE 104 FIBERGLASS COMPOSITES MARKET IN OTHER END-USE INDUSTRIES,
BY REGION, 2022-2027 (USD MILLION) 136

TABLE 105 FIBERGLASS COMPOSITES MARKET SIZE IN OTHER END-USE INDUSTRIES,
BY REGION, 2022-2027 (KILOTON) 137

8.4 INSULATION 137

8.4.1 FIBERGLASS MARKET IN INSULATION, BY END-USE INDUSTRY 137

TABLE 106 FIBERGLASS MARKET SIZE IN INSULATION, BY END-USE INDUSTRY,
2018-2021 (USD MILLION) 137

TABLE 107 FIBERGLASS MARKET SIZE IN INSULATION, BY END-USE INDUSTRY,
2018-2021 (KILOTON) 138

TABLE 108 FIBERGLASS MARKET SIZE IN INSULATION, BY END-USE INDUSTRY,
2022-2027 (USD MILLION) 138

TABLE 109 FIBERGLASS MARKET SIZE IN INSULATION, BY END-USE INDUSTRY,
2022-2027 (KILOTON) 138

8.4.2 RESIDENTIAL CONSTRUCTION 139

8.4.2.1 Residential construction segment led fiberglass insulation market 139

8.4.3 FIBERGLASS INSULATION MARKET IN RESIDENTIAL CONSTRUCTION
END-USE INDUSTRY, BY REGION 139

TABLE 110 FIBERGLASS INSULATION MARKET SIZE IN RESIDENTIAL CONSTRUCTION,
BY REGION, 2018-2021 (USD MILLION) 139

TABLE 111 FIBERGLASS INSULATION MARKET SIZE IN RESIDENTIAL CONSTRUCTION,
BY REGION, 2018-2021 (KILOTON) 139

TABLE 112 FIBERGLASS INSULATION MARKET SIZE IN RESIDENTIAL CONSTRUCTION,
BY REGION, 2022-2027 (USD MILLION) 140

TABLE 113 FIBERGLASS INSULATION MARKET SIZE IN RESIDENTIAL CONSTRUCTION,
BY REGION, 2022-2027 (KILOTON) 140

8.4.4 NON-RESIDENTIAL CONSTRUCTION 140

8.4.4.1 Asia Pacific dominates market for fiberglass insulation in
non-residential construction 140

8.4.5 FIBERGLASS INSULATION MARKET IN NON-RESIDENTIAL CONSTRUCTION END-USE INDUSTRY, BY REGION 141

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 114	FIBERGLASS INSULATION MARKET SIZE IN NON-RESIDENTIAL CONSTRUCTION, BY REGION, 2018-2021 (USD MILLION)	141
TABLE 115	FIBERGLASS INSULATION MARKET SIZE IN NON-RESIDENTIAL CONSTRUCTION, BY REGION, 2018-2021 (KILOTON)	141
TABLE 116	FIBERGLASS INSULATION MARKET SIZE IN NON-RESIDENTIAL CONSTRUCTION, BY REGION, 2022-2027 (USD MILLION)	141
TABLE 117	FIBERGLASS INSULATION MARKET SIZE IN NON-RESIDENTIAL CONSTRUCTION, BY REGION, 2022-2027 (KILOTON)	142
8.4.6	INDUSTRIAL	142
8.4.6.1	High demand for glass wool fiber to manufacture industrial pipes, power plant boilers, and smoke flues	142
8.4.7	FIBERGLASS INSULATION MARKET IN INDUSTRIAL END-USE INDUSTRY, BY REGION	142
TABLE 118	FIBERGLASS INSULATION MARKET SIZE IN INDUSTRIAL, BY REGION, 2018-2021 (USD MILLION)	142
TABLE 119	FIBERGLASS INSULATION MARKET SIZE IN INDUSTRIAL, BY REGION, 2018-2021 (KILOTON)	143
TABLE 120	FIBERGLASS INSULATION MARKET SIZE IN INDUSTRIAL, BY REGION, 2022-2027 (USD MILLION)	143
TABLE 121	FIBERGLASS INSULATION MARKET SIZE IN INDUSTRIAL, BY REGION, 2022-2027 (KILOTON)	143
8.4.8	OTHERS	144
8.4.9	FIBERGLASS INSULATION MARKET IN OTHER END-USE INDUSTRIES, BY REGION	144
TABLE 122	FIBERGLASS INSULATION MARKET SIZE IN OTHER END-USE INDUSTRIES, BY REGION, 2018-2021 (USD MILLION)	144
TABLE 123	FIBERGLASS INSULATION MARKET SIZE IN OTHER END-USE INDUSTRIES, BY REGION, 2018-2021 (KILOTON)	144
TABLE 124	FIBERGLASS INSULATION MARKET SIZE IN OTHER END-USE INDUSTRIES, BY REGION, 2022-2027 (USD MILLION)	145
TABLE 125	FIBERGLASS INSULATION MARKET SIZE IN OTHER END-USE INDUSTRIES, BY REGION, 2022-2027 (KILOTON)	145
9	FIBERGLASS MARKET, BY REGION	146
9.1	INTRODUCTION	147
FIGURE 35	INDONESIA TO BE FASTEST-GROWING FIBERGLASS MARKET DURING FORECAST PERIOD	147
9.1.1	FIBERGLASS MARKET, BY REGION	147
TABLE 126	FIBERGLASS MARKET SIZE, BY REGION, 2018-2021 (USD MILLION)	147
TABLE 127	FIBERGLASS MARKET SIZE, BY REGION, 2018-2021 (KILOTON)	148
TABLE 128	FIBERGLASS MARKET SIZE, BY REGION, 2022-2027 (USD MILLION)	148
TABLE 129	FIBERGLASS MARKET SIZE, BY REGION, 2022-2027 (KILOTON)	148
9.2	NORTH AMERICA	149
FIGURE 36	NORTH AMERICA: FIBERGLASS MARKET SNAPSHOT	149
9.2.1	NORTH AMERICA: FIBERGLASS MARKET, BY COUNTRY	150
TABLE 130	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY COUNTRY, 2018-2021 (USD MILLION)	150
TABLE 131	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY COUNTRY, 2018-2021 (KILOTON)	150
TABLE 132	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY COUNTRY, 2022-2027 (USD MILLION)	150

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 133	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY COUNTRY, 2022-2027 (KILOTON)	150
9.2.2	NORTH AMERICA: FIBERGLASS MARKET, BY GLASS TYPE	151
TABLE 134	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY GLASS TYPE, 2018-2021 (USD MILLION)	151
TABLE 135	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY GLASS TYPE, 2018-2021 (KILOTON)	151
TABLE 136	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY GLASS TYPE, 2022-2027 (USD MILLION)	152
TABLE 137	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY GLASS TYPE, 2022-2027 (KILOTON)	152
9.2.3	NORTH AMERICA: FIBERGLASS MARKET, BY PRODUCT TYPE	152
TABLE 138	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (USD MILLION)	152
TABLE 139	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (KILOTON)	153
TABLE 140	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (USD MILLION)	153
TABLE 141	NORTH AMERICA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (KILOTON)	153
9.2.4	NORTH AMERICA: FIBERGLASS COMPOSITES MARKET, BY END-USE INDUSTRY	154
TABLE 142	NORTH AMERICA: FIBERGLASS COMPOSITES MARKET SIZE, BY END-USE INDUSTRY, 2018-2021 (USD MILLION)	154
TABLE 143	NORTH AMERICA: FIBERGLASS COMPOSITES MARKET SIZE, BY END-USE INDUSTRY, 2018-2021 (KILOTON)	154
TABLE 144	NORTH AMERICA: FIBERGLASS COMPOSITES MARKET SIZE, BY END-USE INDUSTRY, 2022-2027 (USD MILLION)	155
TABLE 145	NORTH AMERICA: FIBERGLASS COMPOSITES MARKET SIZE, BY END-USE INDUSTRY, 2022-2027 (KILOTON)	155
9.2.5	NORTH AMERICA: FIBERGLASS INSULATION MARKET, BY END-USE INDUSTRY	156
TABLE 146	NORTH AMERICA: FIBERGLASS INSULATION MARKET SIZE, BY END-USE INDUSTRY, 2018-2021 (USD MILLION)	156
TABLE 147	NORTH AMERICA: FIBERGLASS INSULATION MARKET SIZE, BY END-USE INDUSTRY, 2018-2021 (KILOTON)	156
TABLE 148	NORTH AMERICA: FIBERGLASS INSULATION MARKET SIZE, BY END-USE INDUSTRY, 2022-2027 (USD MILLION)	156
TABLE 149	NORTH AMERICA: FIBERGLASS INSULATION MARKET SIZE, BY END-USE INDUSTRY, 2022-2027 (KILOTON)	157
9.2.6	US	157
9.2.6.1	US dominates fiberglass market in North America	157
9.2.6.2	US: Fiberglass market, by product type	157
TABLE 150	US: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (USD MILLION)	157
TABLE 151	US: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (KILOTON)	158
TABLE 152	US: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (USD MILLION)	158

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 153 US: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (KILOTON) 158

9.2.7 CANADA 159

9.2.7.1 Presence of well-established aerospace industry fueling demand for fiberglass 159

9.2.7.2 Canada: Fiberglass market, by product type 159

TABLE 154 CANADA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (USD MILLION) 159

TABLE 155 CANADA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (KILOTON) 159

TABLE 156 CANADA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (USD MILLION) 160

TABLE 157 CANADA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (KILOTON) 160

9.2.8 MEXICO 160

9.2.8.1 Mexico witnessing increasing demand for fiberglass from automotive industry 160

9.2.8.2 Mexico: Fiberglass market, by product type 160

TABLE 158 MEXICO: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (USD MILLION) 160

TABLE 159 MEXICO: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (KILOTON) 161

TABLE 160 MEXICO: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (USD MILLION) 161

TABLE 161 MEXICO: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (KILOTON) 161

9.3 ASIA PACIFIC 162

FIGURE 37 ASIA PACIFIC: FIBERGLASS MARKET SNAPSHOT 162

9.3.1 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY COUNTRY 163

TABLE 162 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY COUNTRY,
2018-2021 (USD MILLION) 163

TABLE 163 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY COUNTRY,
2018-2021 (KILOTON) 163

TABLE 164 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY COUNTRY,
2022-2027 (USD MILLION) 164

TABLE 165 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY COUNTRY,
2022-2027 (KILOTON) 164

9.3.2 ASIA PACIFIC: FIBERGLASS MARKET, BY GLASS TYPE 165

TABLE 166 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY GLASS TYPE,
2018-2021 (USD MILLION) 165

TABLE 167 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY GLASS TYPE,
2018-2021 (KILOTON) 165

TABLE 168 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY GLASS TYPE,
2022-2027 (USD MILLION) 165

TABLE 169 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY GLASS TYPE,
2022-2027 (KILOTON) 166

9.3.3 ASIA PACIFIC: FIBERGLASS MARKET, BY PRODUCT TYPE 166

TABLE 170 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (USD MILLION) 166

TABLE 171 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2018-2021 (KILOTON)	166
TABLE 172 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (USD MILLION)	167
TABLE 173 ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (KILOTON)	167
9.3.4 ASIA PACIFIC: FIBERGLASS COMPOSITES MARKET, BY END-USE INDUSTRY	167
TABLE 174 ASIA PACIFIC: FIBERGLASS COMPOSITES MARKET SIZE, BY END-USE INDUSTRY, 2018-2021 (USD MILLION)	167
TABLE 175 ASIA PACIFIC: FIBERGLASS COMPOSITES MARKET SIZE, BY END-USE INDUSTRY, 2018-2021 (KILOTON)	168
TABLE 176 ASIA PACIFIC: FIBERGLASS COMPOSITES MARKET SIZE, BY END-USE INDUSTRY, 2022-2027 (USD MILLION)	168
TABLE 177 ASIA PACIFIC: FIBERGLASS COMPOSITES MARKET SIZE, BY END-USE INDUSTRY, 2022-2027 (KILOTON)	168
9.3.5 ASIA PACIFIC: FIBERGLASS INSULATION MARKET, BY END-USE INDUSTRY	169
TABLE 178 ASIA PACIFIC: FIBERGLASS INSULATION MARKET SIZE, BY END-USE INDUSTRY, 2018-2021 (USD MILLION)	169
TABLE 179 ASIA PACIFIC: FIBERGLASS INSULATION MARKET SIZE, BY END-USE INDUSTRY, 2018-2021 (KILOTON)	169
TABLE 180 ASIA PACIFIC: FIBERGLASS INSULATION MARKET SIZE, BY END-USE INDUSTRY, 2022-2027 (USD MILLION)	169
TABLE 181 ASIA PACIFIC: FIBERGLASS INSULATION MARKET SIZE, BY END-USE INDUSTRY, 2022-2027 (KILOTON)	170
9.3.6 CHINA	170
9.3.6.1 Presence of major fiberglass manufacturers fueling market	170
9.3.6.2 China: Fiberglass market, by product type	170
TABLE 182 CHINA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (USD MILLION)	170
TABLE 183 CHINA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (KILOTON)	171
TABLE 184 CHINA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (USD MILLION)	171
TABLE 185 CHINA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (KILOTON)	171
9.3.7 JAPAN	172
9.3.7.1 Direct and assembled roving segment dominates market in Japan	172
9.3.7.2 Japan: Fiberglass market, by product type	172
TABLE 186 JAPAN: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (USD MILLION)	172
TABLE 187 JAPAN: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (KILOTON)	172
TABLE 188 JAPAN: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (USD MILLION)	173
TABLE 189 JAPAN: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (KILOTON)	173
9.3.8 INDIA	173
9.3.8.1 Construction industry fueling demand for fiberglass products	173

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.3.8.2 India: Fiberglass market, by product type 174

TABLE 190 INDIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (USD MILLION) 174

TABLE 191 INDIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (KILOTON) 174

TABLE 192 INDIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (USD MILLION) 174

TABLE 193 INDIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (KILOTON) 175

9.3.9 SOUTH KOREA 175

9.3.9.1 Presence of major electronics companies propelled demand for fiberglass 175

9.3.9.2 South Korea: Fiberglass market, by product type 175

TABLE 194 SOUTH KOREA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (USD MILLION) 175

TABLE 195 SOUTH KOREA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (KILOTON) 176

TABLE 196 SOUTH KOREA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (USD MILLION) 176

TABLE 197 SOUTH KOREA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (KILOTON) 176

9.3.10 INDONESIA 177

9.3.10.1 Growing urban population and rising disposable income to drive construction industry 177

9.3.10.2 Indonesia: Fiberglass market, by product type 177

TABLE 198 INDONESIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (USD MILLION) 177

TABLE 199 INDONESIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (KILOTON) 177

TABLE 200 INDONESIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (USD MILLION) 178

TABLE 201 INDONESIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (KILOTON) 178

9.3.11 AUSTRALIA 178

9.3.11.1 Yarn segment to witness highest growth during forecast period 178

9.3.11.2 Australia: Fiberglass market, by product type 178

TABLE 202 AUSTRALIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (USD MILLION) 178

TABLE 203 AUSTRALIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (KILOTON) 179

TABLE 204 AUSTRALIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (USD MILLION) 179

TABLE 205 AUSTRALIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2022-2027 (KILOTON) 179

9.3.12 MALAYSIA 180

9.3.12.1 Growing demand for fiberglass from transportation and aerospace industries 180

9.3.12.2 Malaysia: Fiberglass market, by product type 180

TABLE 206 MALAYSIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE,
2018-2021 (USD MILLION) 180

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 207MALAYSIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (KILOTON)180

TABLE 208MALAYSIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (USD MILLION)181

TABLE 209MALAYSIA: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (KILOTON)181

9.3.13REST OF ASIA PACIFIC181

9.3.13.1Rest of Asia Pacific: Fiberglass market, by product type181

TABLE 210REST OF ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (USD MILLION)181

TABLE 211REST OF ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2018-2021 (KILOTON)182

TABLE 212REST OF ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (USD MILLION)182

TABLE 213REST OF ASIA PACIFIC: FIBERGLASS MARKET SIZE, BY PRODUCT TYPE, 2022-2027 (KILOTON)182

**Fiberglass Market by Glass Type (E-Glass, ECR-Glass, H-Glass, AR-Glass, S-Glass),
Product Type (Glass Wool, Direct and Assembled Roving, Yarn, Chopped Strand),
Application (Composites, Insulation) and Region - Global Forecast 2027**

Market Report | 2022-08-11 | 301 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2025-05-20

Signature



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com