

**South America Thermal Insulation Market Forecast to 2028 - COVID-19 Impact and Regional Analysis - by Material Type (Fiber Glass, Plastic Foam, Stone Wool, Calcium Silicate, Cellular Glass, and Others) and Industry Vertical (Building and Construction, Oil and Gas, Chemical, Aerospace and Defense, Automotive, Pharmaceutical, and Others)**

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**AVAILABLE LICENSES:**

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**Report description:**

The SAM thermal insulation market is expected to grow from US\$ 2,044.74 million in 2022 to US\$ 2,383.86 million by 2028. It is estimated to grow at a CAGR of 2.6% from 2022 to 2028.

**Expansion of Aerospace Industry in Emerging Economies**

The aerospace industry is growing significantly with the rising activities from both the defense and civil aviation sectors. With an increasing demand for large aircraft from emerging economies, and a focus on Powered by Hour Contracts (PBH), many aerospace services and manufacturing activities are expected to be carried out over the coming years. The emerging demand for thermal insulating materials is linked to the expansion of the aerospace industry with advantages such as lower noise and vibration levels during flying hours. The rising usage of composites in commercial aircraft will promote the development of different aerostructures, resulting in significant aerospace industry potential. The growing demand for lightweight insulating materials, combined with the high demand for composite materials from the General Aviation (GA) and business jet industries to reduce cabin noise, is likely to boost the thermal insulation market growth. The enhanced user safety due to the minimal thermal conductivity of materials and growing demand for energy-efficiency boosting products across the region is expected to propel the growth of the market. Additionally, increasing commercial aircraft deliveries, passenger traffic, and adoption of low-cost composite materials is expected to fuel the market growth. The high demand for air transport, declining cost of composite

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materials, and surging industrialization are also projected to boost the market growth.

## Market Overview

The thermal insulation market in SAM is segmented into Brazil, Argentina, and the Rest of SAM. According to Evidence and Lessons from Latin America' (ELLA), in SAM, buildings including residential as well as commercial consume 21% of treated water and 42% of electricity while producing 25% of CO2 emissions and 65% of waste. Green buildings are defined as structures that are environmentally responsible and resource efficient. By transitioning to green buildings, the building and construction sector could reduce energy consumption by ~50%, water use by 40%, CO2 emissions by 39%, and solid waste by 70%. Thus, the transition to green buildings will increase the demand for thermal insulation across the region. The growing aerospace industry will positively impact the thermal insulation market. According to the data provided by the world's largest aircraft manufacturers (Boeing, Airbus, Embraer, and Bombardier), the future of SAM's aviation industry is highly promising. Although a few countries are in recession, air traffic demand is growing at an annual rate of 5.6% (surpassing projections for the rest of the globe). Furthermore, the region's aeronautical sector will have to double - or even triple - its fleet over the next 20 years to meet this growing demand for aircrafts, especially in regional and domestic markets. The biggest purchase orders are already coming from SAM companies. According to the Federal Aviation Administration (FAA), in its latest 20-year aviation forecast, SAM will experience an expected and significant growth. Thus, the growing aerospace industry will provide growth opportunities for the thermal insulation market across the region.

## SAM Thermal Insulation Market Revenue and Forecast to 2028 (US\$ Million)

### SAM Thermal Insulation Market Segmentation

The SAM thermal insulation market is segmented based on material type, industry vertical, and country.

Based on material type, the SAM thermal insulation market is segmented into fiber glass, plastic foam, stone wool, calcium silicate, cellular glass, and others. The fiber glass segment held the largest share of the market in 2022. Based on industry vertical, the SAM thermal insulation market is segmented into building and construction, oil and gas, chemical, aerospace and defense, automotive, pharmaceutical, and others. The building and construction segment held the largest share of the market in 2022. Based on country, the SAM thermal insulation market is segmented into Brazil, Argentina, and the Rest of SAM. Brazil dominated the market in 2022. Asahi Kasei Corporation, BASF SE, Bayer AG, Dow Chemicals Company, DuPont, Johns Manville, Kingspan Group PLC, Owens Corning, ROCKWOOL A/S, and Saint Gobain S.A. are the leading companies operating in the SAM thermal insulation market.

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