

Glass Wool or Fiberglass Insulation - A Global Market Overview

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Report description:

Global Fiberglass (Glass Wool) Insulation Market Trends and Outlook

Glass wool or fiberglass insulation is vital across industries due to its excellent thermal and acoustic insulation properties, lightweight nature, low-cost, and durability. In construction, it reduces energy consumption, enhances comfort, and provides fire resistance. In automotive and aerospace industries, it improves noise control, thermal efficiency, and fuel economy. Industrial applications benefit from reduced heat loss in machinery and noise dampening. It is critical in oil and gas, power plants, and renewable energy facilities for temperature regulation and corrosion protection. In marine, refrigeration, and cold storage, it ensures temperature maintenance and energy efficiency.

The global fiberglass (glass wool) insulation industry experienced significant volatility between 2019 and 2024, driven by fluctuations in demand due to the COVID-19 pandemic, geopolitical tensions, supply chain disruptions, and high inflation rates. After a sharp decline in 2020 as the pandemic unfolded, the market rebounded in 2021 with the easing of restrictions and a surge in construction and industrial activity. Increased home improvement efforts and pent-up demand for appliances like refrigerators, dishwashers, and ovens further boosted fiberglass insulation demand in appliance applications. The residential market also saw strong growth due to the recovery of housing construction in many countries. Similarly, the transportation sector experienced a resurgence in 2021 as automotive and aerospace production recovered, supported by increased road and air travel as travel restrictions eased and businesses shifted back to in-office operations.

However, the market faced significant challenges from 2022 to 2024 due to supply chain disruptions and escalating inflation, particularly in Europe and North America. These issues led to shortages of fiberglass insulation, causing delays in building projects and driving up prices as materials became scarce. The resulting price spikes significantly increased the market's value, especially during 2022, despite a slowdown in volume demand during this period. Despite these challenges, the fiberglass insulation market demonstrated resilience, driven by the recovery in key sectors such as construction, appliances, and transportation, highlighting its critical role across industries.

Going forward, global value demand for glass wool/fiberglass insulation is projected to rise at a CAGR of 3.4% between 2021 and 2030 reaching US\$12.4 billion in 2030 from an estimated market size of US\$10.2 billion in 2024. In volume terms, consumption of glass wool/fiberglass insulation worldwide is forecast to grow at a CAGR of 3% over the outlook period to reach 6.4 million metric

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tons in 2030. Major factors driving demand for glass wool (or fiberglass) insulation include recovery in building construction activity, stringent building codes and enhanced requirement for energy efficiency in developed regions; and rapid growth in commercial, industrial and civil construction sectors, and increasing demand for appliances in developing world.

VIPs containing fiberglass (or glass wool) as a core material corner the largest share of the global Vacuum Insulation Panels (VIPs) market estimated at 71% share in 2024, attributed to wide usage of fiberglass VIPs in Asia-Pacific's refrigerators & freezers industry, and further projected to advance at a robust 2024-2030 CAGR of 16%.

Major companies operating in the global Fiberglass (Glass Wool) Insulation market include Huamei Group, Johns Manville, Knauf Insulation, Owens Corning and Saint Gobain among others.

Fiberglass (Glass Wool) Insulation Regional Market Analysis

The report reviews, analyses and projects the Glass Wool/Fiberglass Insulation market for global and regional markets including North America, Europe, Asia-Pacific and Rest of World. The regional markets further analyzed for 14 independent countries across North America - the United States and Canada; Europe - Germany, France, Italy, the United Kingdom and Spain; Asia-Pacific - China, Japan, India and South Korea; Rest of World - Russia, Turkey and Brazil.

North America, estimated to account for 39% in 2024, is the leading global region for Glass Wool consumption and likely to maintain a 2024-2030 CAGR of 2.4% and reach 2.4 million metric tons by 2030. Asia-Pacific, on the other hand, is expected to be the fastest growing region for Fiberglass/Glass Wool insulation, with a projected CAGR of 4.6%, enabling the region to reach close to 2 million metric tons by 2030, attributed to rising construction activity, especially in commercial and civil engineering sectors, and growth in industrial, HVAC and appliances sectors. Particularly, China and India are projected to record the fastest growths in glass wool insulation demand. Recovery in residential and commercial construction activity and stringent energy efficiency standards and codes will boost glass wool insulation demand in developed regions such as North America and Europe.

Fiberglass (Glass Wool) Insulation Market Analysis by Product Form

The global Fiberglass (Glass Wool) Insulation market further segmented by product form into Batts & Rolls (Blankets), Blow-in/Loose-fill Glass Wool, Boards, Other Forms. Accounting for an estimated volume share of 62.6% in 2024, Batts & Rolls segment dominates the global Glass Wool Insulation market and expected to register the slowest growth over 2024-2030. Other Forms of Glass Wool, such as duct wraps, pipe insulation etc., are projected to maintain the fastest CAGR of 4.6% over the 2024-2030 analysis period, driven by increasing demand for these products in industrial & HVAC applications across the globe.

Fiberglass (Glass Wool) Insulation Market Analysis by End-use Application

The global market for Glass Wool/Fiberglass Insulation is analyzed in this report with respect to end-use applications including Residential Construction, Commercial & Industrial Construction, Industrial & HVAC Applications, and Appliances & Other. Residential Construction forms the largest end use application for Glass Wool Insulation, accounting for an estimated 46% valued at US\$4.7 billion in terms of value in 2024 and expected to grow at a modest 2024-2030 CAGR of 3.1%. Driven by expanding industrial and manufacturing sectors in developing regions, Industrial & HVAC applications are expected to record the fastest growth, forecast at a CAGR of 4.1% during the 2024-2030 period, followed by Appliances and Transportation applications.

Fiberglass (Glass Wool) Insulation Market Report Scope

The report reviews, analyzes and projects the global Glass Wool/Fiberglass Insulation market (both thermal and acoustic insulation) for the period 2021-2030 in terms of volumes in metric tons and market value in US\$, and the compound annual growth rates (CAGRs) projected from 2024 through to 2030. Global, regional and country markets are analyzed by end-use application and product form in terms of both volume and value. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of fiberglass (glass wool) insulation industry.

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Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Volume consumption in Metric Tons (Tonnes) and Value market in US\$

Companies Mentioned: 30+

Fiberglass (Glass Wool) Insulation Market by Geographic Region

- North America (The United States and Canada)
- Europe (France, Germany, Italy, Spain, The United Kingdom and Rest of Europe)
- Asia-Pacific (China, India, Japan, South Korea and Rest of Asia-Pacific)
- Rest of World (Brazil, Russia, Turkiye and Other ROW)

Fiberglass (Glass Wool) Insulation Market by Application

- Residential Construction
- Commercial & Industrial Construction
- Industrial & HVAC Applications
- Appliances & Other

Fiberglass (Glass Wool) Insulation by Product Form

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- Competing Insulation Materials

2. KEY GLOBAL PLAYERS

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- CSR Bradford Insulation
- Huamei Group
- Johns Manville Corporation
- KCC Corporation
- Knauf Insulation S.P.R.L.
- Owens Corning
- Saint Gobain S.A.
- URSA Insulation, S.A.

3. KEY BUSINESS & PRODUCT TRENDS

Superwall Cavity Batts by Superglass become one of the First Insulation Products to be CCPI-verified

Isover Launches First Hybrid Glass Furnace in Etten-Leur site, Netherlands

Izocam Completes the Acquisition of His Yalitim

Insul-SHIELD Black, a New Addition to John Manville's Product Portfolio

Izocam Honored with EPD Certificate and RAL Certificate, Owing to the Company's High Standards of Eco-friendly Production More..

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- o□Owens Corning (United States)
- o□Quietflex Manufacturing Company L.P. (United States)
- o□Superior Fibers, LLC (United States)
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