

Mineral Wool Board Insulation Market Assessment, By Type [Glass Wool, Rock Wool, Slag Wool], By Application [Building Insulation, Industrial Insulation, Fire Protection, Soundproofing, Others], By End-user Industry [Residential, Commercial, Industrial, Others] By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global mineral wool board insulation market is projected to witness a CAGR of 4.96% during the forecast period 2025-2032, growing from USD 10.05 billion in 2024 to USD 14.80 billion in 2032. The market is projected to see massive growth in the forthcoming years, driven by growing awareness about using energy-efficient building materials, enhanced fire safety regulations, and rising concerns toward sustainability.

Mineral wool boards are manufactured from natural minerals like basalt or industrial by-products such as slag. These raw materials are melted, spun into fibers, and compressed into insulation boards that exhibit exceptional thermal, acoustic, and fire-resistant properties. Due to their durability, versatility, and environmental safety, mineral wool boards are widely used in residential, commercial, industrial, and infrastructure applications.

Growing interest in sustainable construction practices across North America, coupled with government incentives for energy efficiency, is driving demand for mineral wool insulation. In Europe, significant investments in residential building renovation and retrofitting are expected to serve as a key driver for achieving the European Union climate targets. Meanwhile, rapid industrialization and urbanization in the Asia-Pacific, particularly in countries such as China and India, where large-scale construction projects are gaining momentum, are likely to strengthen the market's foothold in this area. These regions are projected to exhibit robust growth in the mineral wool insulation board market, fueled by global sustainability initiatives and the prioritization of energy-efficient solutions.

Leading companies in the mineral wool insulation market are expanding their global presence through strategic partnerships and acquisitions. For example, in October 2024, the Knauf Group announced an agreement to acquire a low-carbon rock mineral wool insulation business from Uzbekistan's Texnopark. The acquisition includes a new state-of-the-art manufacturing facility in

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Tashkent, which utilizes advanced electric melting technology to produce mineral wool with significantly reduced CO2 emissions. This move aligns with Knauf's commitment to sustainability and strengthens its footprint in Central Asia and the Commonwealth of Independent States (CIS), supporting its long-term strategy to meet the growing global demand for energy-efficient insulation solutions.

Increasingly Global Focus on Energy Efficiency and Sustainable Construction Practices Driving Market Growth

The primary driver of the mineral wool board insulation market is the growing demand for energy-efficient building materials. Rising awareness of climate change has prompted governments, corporations, and individuals to adopt initiatives aimed at reducing energy consumption, thereby lowering carbon footprints. The construction sector has become a critical focus area in these efforts. Mineral wool insulation boards play a pivotal role in this transition by offering superior thermal insulation. These boards regulate indoor temperatures effectively, minimizing reliance on heating and cooling systems and significantly reducing energy use.

In Europe, the EU's Energy Performance of Buildings Directive (EPBD) aims to significantly improve the energy efficiency of buildings across Europe, targeting a zero-emission building stock by 2050. The revised directive, EU/2024/1275, which entered into force on May 28, 2024, focuses on increasing renovation rates, especially for the worst-performing buildings. Key measures include minimum energy performance standards, a binding target to increase the average energy performance of the national residential building stock by 16% by 2030 in comparison to 2020, and by 20-22% by 2035, based on national trajectories. The EPBD also promotes the use of renewable energy, the digitalization of energy systems, and the rollout of infrastructure for sustainable mobility while allowing countries flexibility in implementation based on their specific context. The directive contributes to the objective of reducing GHG emissions by at least 60% in the building sector by 2030 compared to 2015. Overall, these measures are designed to drive significant improvements in energy efficiency and sustainability across the European building sector.

Enhanced Global Fire Safety Regulations and Growing Awareness of Building Safety Fueling the Mineral Wool Board Insulation Market

Mineral wool board insulation is highly valued not only for its thermal insulation properties but also for its exceptional fire-resistant capabilities. As urban populations grow and high-rise buildings proliferate globally, fire safety has become a paramount concern for governments and building developers. Mineral wool boards, being non-combustible and capable of withstanding extreme temperatures, are ideally suited for passive fire protection systems. These boards not only inhibit the spread of fire but also provide crucial insulation, ensuring structural integrity during a fire incident.

The demand for mineral wool insulation is further amplified by increasingly stringent fire safety regulations enforced worldwide. In the United States, standards such as the International Building Code (IBC) and the National Fire Protection Association (NFPA) mandate the use of fire-resistant materials in residential construction. Similarly, Europe's Construction Products Regulation (CPR) imposes rigorous performance requirements on insulation materials, particularly for fire safety. These regulations are especially strict for high-risk structures like hospitals, schools, and large commercial complexes, where fire resistance is critical to occupant safety.

As of December 2023, the United States construction industry experienced a 14% increase compared to last year, December 2022, demonstrating strong market performance in the commercial, and residential segments. Home improvements increased by 2%, multifamily construction increased by 12%, and single-family homebuilding increased by 10%. This expansion is in line with worldwide trends that prioritize construction efficiency and fire safety. Because of new regulations and increased awareness of building safety, there is an increasing demand for mineral wool boards, which offer greater fire protection and thermal insulation. An increase is also aiding the growth of mineral wool board insulation in the United States in residential and commercial construction projects. In general, these materials contribute to sustainability and help ensure compliance with fire safety regulations.

An expansion in construction projects for the residential and commercial sectors is further contributing to the growth of mineral wool board insulation in the United States. Generally, these materials help meet fire safety codes, while fulfilling the goal of sustainability. This makes them indispensable in modern construction. The momentum of the United States market is significant; it points toward the increasing integration of innovation with safety aspects in the country.

Residential is the Dominating Sector in the Market

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Mineral wool board insulation is increasingly adopted in the building and construction sector, particularly in residential buildings, driven by the growing demand for energy-efficient and sustainable buildings amid rapid urbanization. Homeowners and builders prioritize energy savings and occupant comfort, and mineral wool insulation serves as a highly cost-effective solution to meet these goals. These boards provide superior thermal insulation, minimizing reliance on heating and cooling systems while significantly lowering energy costs. Additionally, their excellent acoustic insulation properties enhance comfort and livability, especially in densely populated urban areas where noise pollution is a major contributor to discomfort.

Furthermore, there is growing demand for mineral wool insulation in the residential sector with green building certifications, such as the Leadership in Energy and Environmental Design (LEED) certificate and Building Research Establishment Environmental Assessment Method (BREEAM) certificate, among other sustainability labels. Such certificates prompt the use of high-performance insulation materials that enhance energy efficiency, improve the quality of indoor air, and reduce the environmental burden. LEED certification has become a global icon of success toward sustainable measures and is supported by an entire industry of dedicated organizations and individuals paving the way for market transformation.

To address the growing demand, companies are expanding their footprint and investing in new facilities to cater to the increasing demand for wool insulation boards. For example, in August 2024, the Rockwool Group announced to invest around USD 64 million in the Cheyyar facility, Tamil Nadu, as an expansion of its regional presence in South Asia. The facility, slated to begin production in 2026, will produce 50,000 tonnes of non-combustible stone wool insulation annually. This material provides energy-efficient, fire-safe, and sound-absorbing insulation solutions, which are increasingly critical for sustainable construction and green building projects.

The new plant will bolster Rockwool's capacity to meet growing demand in South India, complementing its existing manufacturing unit in Dahej, Gujarat. This expansion underscores the company's commitment to strengthening its footprint in India's rapidly evolving construction sector, where fire safety regulations and energy efficiency standards drive demand for advanced insulation materials.

Europe is the Largest Market for Mineral Wool Insulation Boards

Europe's mineral wool insulation market is growing steadily, driven by tightening energy efficiency regulations and the rising demand for sustainable construction materials. Mineral wool's superior thermal, acoustic, and fire-resistant properties make it a versatile solution for residential, commercial, and industrial applications. Countries like Germany, the United Kingdom, and France are leading this trend, enforcing stricter building codes that mandate high-performance insulation to meet sustainability targets. These regulations, combined with increasing awareness of fire safety and energy conservation, drive widespread adoption of mineral wool across the region.

The European Union is moving towards energy efficiency and sustainability, along with its stringent building and fire safety standards, making for a very conducive market environment for mineral wool board insulation. This will be part of a more comprehensive strategy aimed at reaching climate neutrality in 2050, which also includes increasing the energy efficiency of buildings in line with the EU's Energy Performance of Buildings Directive (EPBD), Energy Efficiency Directive, and the European Green Deal.

In April 2024, Owens Corning, an American firm that designs and manufactures insulation, roofing, and fiberglass composites and related materials announced its new investment project toward sustainability at the Paroc Hallekis plant. The plant has a new facility, 7,500 square meters of two buildings; one contains the new electrified furnace, and the other, the raw materials handling and filtration process. The Hallekis plant manufactures stone wool insulation products for both construction and technical insulation markets. Furthermore, upon completion, the investment will decrease the embodied carbon in the Hallekis products.

Future Market Scenario (2025 – 2032F)

□□ Technological advances in insulation, variations in compliance with regulatory requirements, and increasing environmental awareness are expected to spur market growth for mineral wool board insulation.

□□ Increasing demand for energy-efficient buildings and climate-neutral construction processes will further boost demand for mineral wool insulation in more sustainable buildings.

□□ Government policies promoting energy efficiency and fire safety standards in both developing and developed markets benefit mineral wool insulation producers.

□□ Asia-Pacific, where China, India, and Japan are expected to drive growth at relatively high rates, will continue to experience a

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boom in construction sectors and infrastructure development.

Key Players Landscape and Outlook

The global mineral wool board insulation market features a diverse competitive landscape, with key players adopting strategies such as investments in eco-friendly insulation solutions to comply with stringent regulatory demands for energy efficiency and sustainability. Regional manufacturers also play a significant role by catering to local market needs, while new entrants and their product development activities amplify the market's dynamism. This growth is further fueled by the adoption of advanced manufacturing technologies and rising demand for high-performance insulation materials.

In May 2024, Knauf Insulation Sprl. stated that it would invest over USD 223 million to build a new rock mineral wool production facility in the United Kingdom. By 2026, the facility will produce over 100,000 tons of rock mineral wool annually. This new facility is regarded as one of the advancements of the Knauf Group's growth initiatives for the mineral wool markets in northern Europe and the United Kingdom.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

17. Strategic Recommendations

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