

# Commercial Insulation 2022

The building materials and construction industry's trusted partner for market intelligence

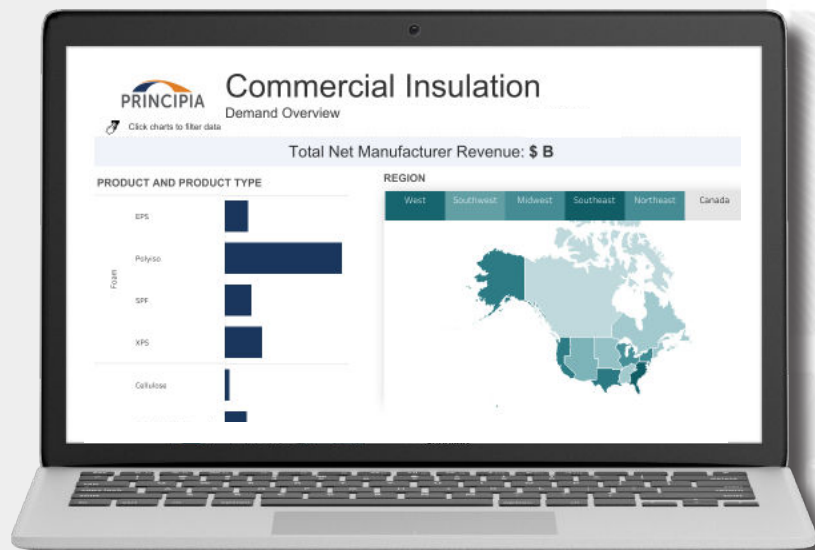
## Commercial Insulation 2022

Commercial Insulation 2022 provides a vital benchmark analysis for forecasting and business planning. Using 2021 as a baseline, this data analyzes demand by material, construction type, distribution channel, supplier, and region, and provides a year-over-year forecast through 2024.

This online data product delivers interactive data and key insights summarized in three sections: Demand, Supply, and Forecast.

### Summary Brief

A summary brief provide an overview on current market size, trends and developments, and keys for future success and outlook. In addition, the brief will provide views on demand, supply, and growth. Details include perspective of the overall commercial building market, material share and share shift, application by building type, channel share and shift, pricing analysis, key suppliers, impact of code changes and impact of consolidation in both the supplier and channel base. The brief will be approximately 25-30 pages in a PDF format.



### Interactive Data Dashboards

Market demand and supply data will be presented through our proprietary online delivery platform. Subscribers can interact with the data real time to view preset dashboards or download and manipulate the data for strategic and tactical planning needs, internal management reporting and customer conversations.



Contact Principia for More Information

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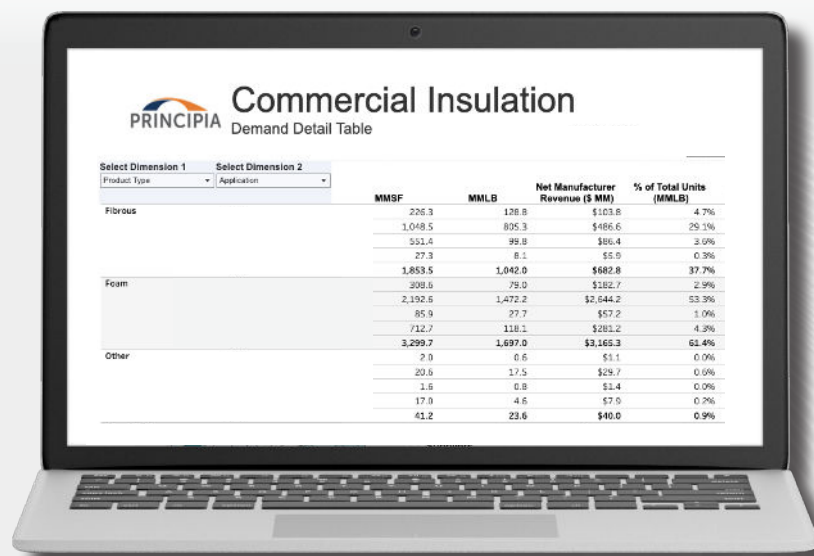
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## Current Market Demand

Demand can be depicted in volume, factory gate value, and further segmented by key dimensions (material, region, construction type, building type, and application) through crosstab analysis. Data is also available for visual analysis depicted as maps, bar charts and tables to create your own customized views.

An insights-driven analysis of North American commercial insulation demand will include a range of views including:

- Share shifts for products and applications
- Regional analysis to detect trends and changes
- Insights related to code compliance
- Trends by type of building and construction market
- Update on structural shifts and industry consolidation
- Implications of price changes and inventory levels



Select Dimension 1		Select Dimension 2					
Product Type	Application	MMSF	MMLB	Net Manufacturer Revenue (\$ MM)	% of Total Units (MMLB)		
Fibrous		226.3	128.8	\$103.8	4.7%		
		1,048.5	805.3	\$486.6	29.1%		
		351.4	99.8	\$86.4	3.6%		
		27.3	8.1	\$5.9	0.3%		
		1,853.5	1,042.0	\$682.8	37.7%		
Foam		398.6	79.0	\$182.7	2.9%		
		2,192.5	1,472.2	\$2,844.2	53.3%		
		85.9	27.7	\$57.2	1.0%		
		712.7	118.1	\$281.2	4.3%		
		3,299.7	1,697.0	\$3,165.3	61.4%		
Other		2.0	0.6	\$1.1	0.0%		
		20.6	17.5	\$29.7	0.6%		
		1.6	0.8	\$1.4	0.0%		
		17.0	4.6	\$7.0	0.2%		
		41.2	23.6	\$40.0	0.9%		

## In Focus

### Material

- Foams
  - Expanded polystyrene (EPS)
  - Extruded polystyrene (XPS)
  - Polyisocyanurate (PIR)
  - Spray polyurethane foam (SPF)
    - Open cell
    - Closed cell
    - Roofing
- Fiberglass
  - Batts and rolls
- Loose fill
- Stone wool
- Cellulose

### Application

- Wall - above and below grade
  - Continuous insulation
  - Cavity insulation
- Roof
  - Above deck
  - Ceiling
  - Attic
- Slab/foundation
- Floor assembly
  - Mass
  - Joist/framing

### Construction Type

- New construction
- Repair, remodel & replacement



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# Commercial Insulation 2022

## Supply and Distribution

Visualizations provide a user-friendly, flexible analysis of commercial insulation manufacturers, revenues and market share for products offered, and their distribution strategies employed.

- Supply overview showing a snapshot of the market including top manufacturers
- Market share by manufacturer by product
- Product flow by channel
- Manufacturers rank by product

Market developments in supply and distribution are highlighted including detailed analysis and insights regarding product trends, supplier activities and evolving channel dynamics.

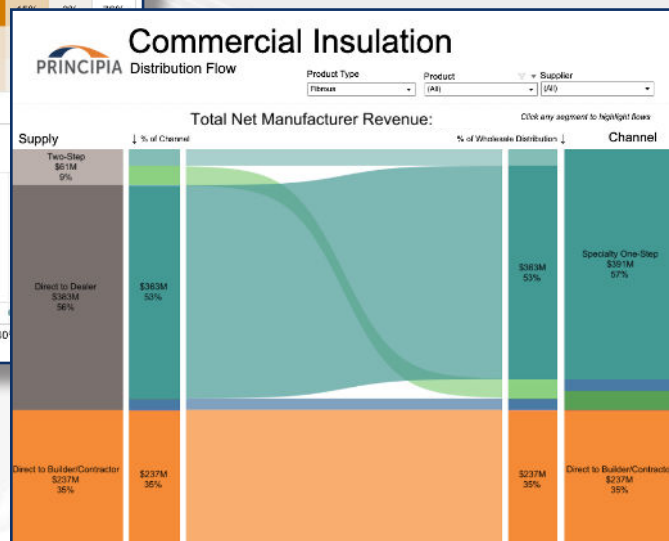
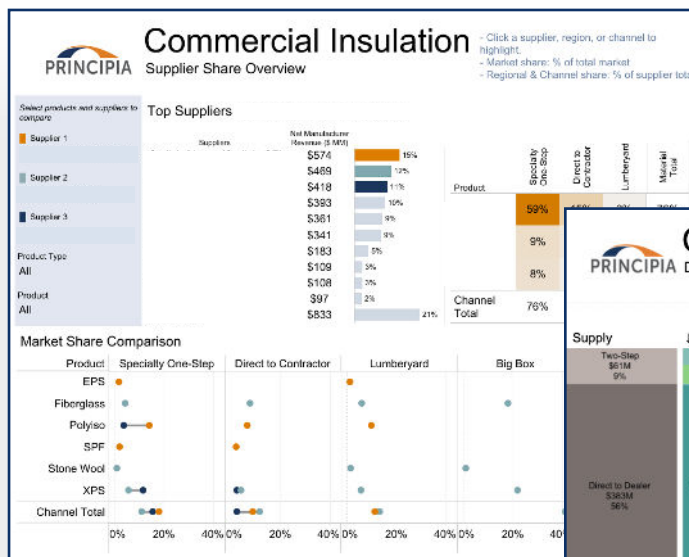
## In Focus

### Market

- Government
- Housing & lodging
- Industrial
- Medical
- Office
- Retail
- Warehouse
- Other

### Geography:

- U.S. Census Bureau divisions
- Canada (East and West)



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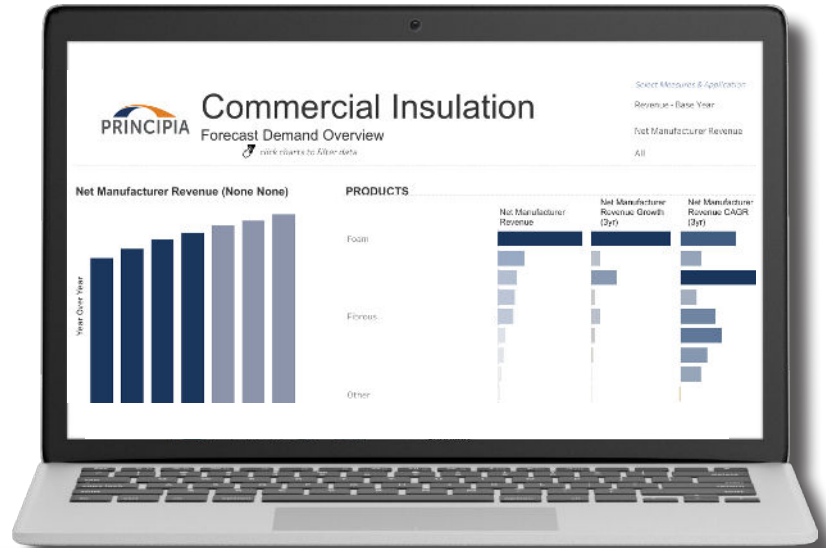
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# Commercial Insulation 2022

## Forecast Demand

Dashboards provide a planning tool to understand how commercial insulation demand evolves over the three-year period. With the same filtering capabilities as demand and supply dashboards, virtually any combination of dimensions (product, region, construction type, etc.) provides the data you need to support your strategic growth planning.

- Year-over-year forecast of insulation demand to 2024
- Projected changes in demand by product and region
- Forecast details with trend lines for 2021-2024
- Historical demand levels to 2018
- Custom detail tables for easy selection of data to download



Commercial Insulation Forecast Demand CAGR Table				
Select Dimension 1 Application	Select Dimension 2 Construction Type	Net Manufacturer Revenue Change 2015-2018	Net Manufacturer Revenue Change 2018-2021	CAGR 2018-21
Floor	New	▲\$31.9 MM	▲\$10.1 MM	2.12%
	RSR	▲\$13.3 MM	▲\$14.9 MM	3.64%
Roof	New	▲\$203.2 MM	▲\$74.1 MM	2.62%
	RSR	▲\$285.9 MM	▲\$272.9 MM	3.90%
Wall (Cavity)	New	▲\$55.4 MM	▲\$1.5 MM	0.03%
	RSR			
Wall (Continuous)	New			
	RSR			



Our analysis is drawn from insights shared by market participants around expectations and outlook for commercial insulation to provide an understanding of why expected growth will occur.

- Overview of demand forecast variables and influence on growth projections
- Changes and trendlines for growth by product to understand product substitution
- Supplier perspectives on expected growth
- Contractor, dealer, and specifier expectations regarding relative growth among products
- Implication of trends in the commercial building stock
- Technical and regulatory trends affecting potential demand



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## Methodology

Principia maintains a building materials and construction industry database that serves as the starting point for Commercial Insulation 2022. This includes previous research on the commercial insulation industry dating back to 2010. Primary research with over 500 industry participants will be conducted to develop market insights. Surveys with architects/consultants and builders/ contractors provide fresh industry perspectives driving shifts in material and supplier share. In-depth phone interviews with manufacturers and distributors/ dealers will inform and refine our estimates of supply and demand.

## Product Integration

For an integrated view of the overall insulation industry, you can combine Commercial Insulation 2022 with a subscription to Principia's residential BuilderSeries® Insulation data products.

## Subscription Information

### Scope

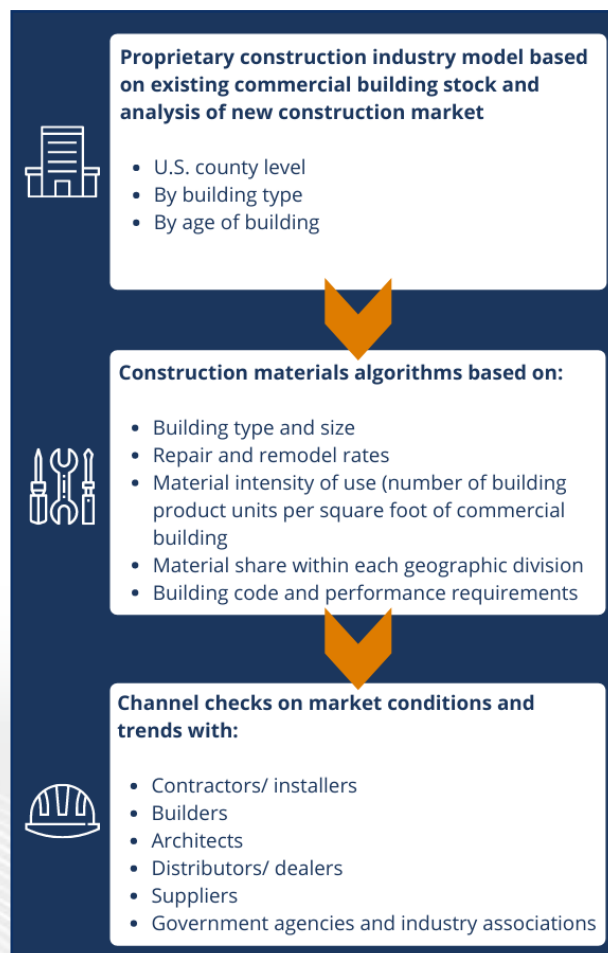
Commercial Insulation 2022 focuses on the commercial insulation market in North America. Demand data will be available down to the U.S. Census Bureau division level for the United States and segmented by east and west for Canada.

### Timing

Commercial Insulation 2022 is scheduled for completion in the first quarter of 2022.

### Subscription

All subscribers are offered a virtual onboarding session after the product is released to equip your team with the skills and insights to get the most out of the product throughout the one-year subscription period. To subscribe, call us at 610.363.7815 or email at [info@principiaconsulting.com](mailto:info@principiaconsulting.com).



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