Opportunity Analysis –
Thermoacoustic Insulation
Materials in BEVs

Case Study



Opportunity for Thermoacoustic Insulation Materials in BEVs

Client	Global chemicals manufacturer and provider of materials, industrial solutions, surface technologies, and nutrition & care as well as agricultural solutions
Industry	Insulation
Products	Thermoacoustic insulation material (melamine foam)

Context

 The client wanted to understand the market potential of thermoacoustic insulation materials used in fullyelectric passenger cars.

Key Business Questions

- Which applications within Battery Electric Vehicles (BEVs) may require thermoacoustic insulation materials (till 2030)?
- What are the major incumbent and future (till 2030) thermoacoustic insulation materials for noise management in BEVs? Who are their promoters?
- What is the addressable current market for thermoacoustic insulation materials?

Engagement Scope

Acoustic Need Assessment

- Assessment and comparison of noise management in BEVs & ICEs
- Assessment of applications within BEVs that may require thermoacoustic insulation materials
- Comparison of noise management rules for BEVs in different regions

2 Competitive **Material Assessment**

- Assessment of the current and future thermoacoustic insulation materials for noise management in BEVs
- Comparison among different thermoacoustic insulation materials based on their technical properties
- Assessment of the most critical product performance requirements (acoustic absorption, low weight, fire resistance, etc.) for noise management in BEVs

3 Market Landscape

- Indication of the addressable current market for thermoacoustic insulation materials by volume and value
- Qualitative assessment of major drivers and inhibitors
- Assessment of price points of key thermoacoustic insulation materials for noise management in BEVs

Key Findings and Conclusions

- Mapping thermal and sound emitting sources inside BEVs
- Assessing application areas of thermoacoustic insulation in BEVs
- Understanding different thermoacoustic materials that can be used in BEVs



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Research Methodology

Secondary/Desk Research

- Scanned paid & public databases such as Factiva, Bloomberg, ICIS, Chemical Weekly, etc.
- Referred to analyst reports, technical data-sheets, company annual reports, company presentations, company press releases, analyst presentations, white papers, importexport databases, etc.

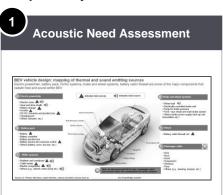
Primary Research

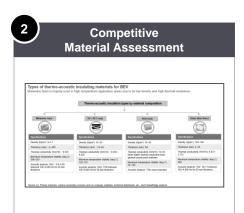
 Structured interviews conducted with industry participants, such as competitors, major direct and indirect end-users, researchers, thought leaders, independent consultants, and analysts to gather market insights

Benefits to Client

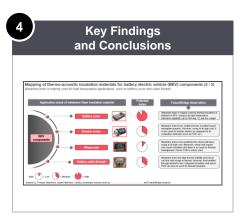
- Understanding and analyzing different heat emitting & sound emitting sources in BEVs
- Mapping of thermoacoustic insulation materials for BEV components
- Estimating the size of the addressable melamine foam market

Sample Analysis









Thank you

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