

Middle East & Africa Automotive Adhesives & Sealants Market - Size, Share, Covid-19 Impact & Forecasts Up To 2028

Market Report | 2023-01-23 | 190 pages | Mordor Intelligence

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Report description:

The Middle East & Africa Automotive Adhesives & Sealants Market is projected to register a CAGR of 6.88%

Key Highlights

Largest Segment by Technology - Reactive : In the Middle East & African automotive adhesives and sealants market, reactive technology registers the highest market share due to its wide applications in the automotive industry for assembling, repairing, and thread-locking, among others.

Largest Segment by Resin - Polyurethane : Polyurethane resins hold the largest market share owing to their wide-ranging applications as adhesives and sealants in the automotive industry, for both interior and exterior applications.

Largest Segment by Country - South Africa : South Africa dominates the market owing to a high number of manufacturing operations, including automotive assembly, original equipment manufacturers (OEMs), and MROs.

Fastest-growing Segment by Country - South Africa : Due to the increasing demand for hybrid trucks, military vehicles, and others, South Africa is expected to be the fastest-growing country in the market during the forecast period.

MEA Automotive Adhesives & Sealants Market Trends

Polyurethane is the largest segment by Resin.

The growth in the Middle East & African automotive industry has led to the growth of demand for automotive adhesives and sealants. There was an increase in automobile production in major countries of Africa, such as South Africa, which accounted for

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0.58% of global vehicle production in 2020 and is expected to grow significantly because of the introduction and demand for electric vehicles in the forecast period 2022-2028. This trend is expected to boost the demand for adhesives and sealants required for automobile manufacture over the forecast period 2022-2028.

The COVID-19 pandemic in 2020 severely affected the automotive industry in the Middle East because of economic slowdowns and value chain disruptions. However, government support in the form of policies such as a 15% reduction in import duties in Saudi Arabia and lower fuel prices in Middle East countries led to a rapid recovery in demand for automobiles, which increased the demand for automotive adhesives and sealants in 2021.

The majorly used resins in the automotive industry are epoxy-based, polyurethane-based, and acrylic-based because of their wide compatibility with different substrates such as ceramics, plastics, glass, metals, and composites, which comprise the overall structure of an automobile. Polyurethane resin is used as polyurethane reactive (PUR) adhesives in manufacturing automobiles. VAE/EVA adhesives are the fastest-growing technology in the Middle East & African automotive industry. It is expected that these adhesives will register a CAGR of 8.24% during the forecast period (2022-2028) due to the rising trend of hot-melt adhesives over solvent-borne adhesives.

South Africa is the largest segment by Country.

The major automotive companies in the Middle East & Africa, such as Hyundai, are working on making the vehicles light in weight so as to improve fuel efficiency and as cost-cutting measures. To achieve this, automotive adhesives and sealants are used to replace bulkier metallic frames and joinery components such as welding joints, screws, and bolts. This technology development will lead to an increase in demand for automotive adhesives and sealants in mentioned period of 2022-2028.

The abrupt reductions in revenue and demand for automotive adhesives and sealants in 2020 are due to the impact of the COVID-19 pandemic, which caused an overall economic slowdown and value chain disruptions. Passenger vehicle sales in Africa decreased from 850,000 vehicular units in 2019 to 650,000 vehicular units in 2020. This growth was recovered in 2021 because of government policies that were meant to support the automotive industry, as it covers the major portion of the GDP of a nation. The size of the market is determined by the per capita income and population of the region. So based on demographics, more than 75% is covered by countries in the sub-Sahara region, Northern Africa, and the rest of the Middle East countries, which is a larger number of vehicles in the region than that of the rest. The vehicle's count is directly proportional to the automotive adhesives and sealants required to manufacture the same.

South Africa contains nearly one-fifth of the market share as it is the largest manufacturer of automobiles in the region, which comprise 0.58% of global automobile production.

MEA Automotive Adhesives & Sealants Market Competitor Analysis

The Middle East & Africa Automotive Adhesives & Sealants Market is moderately consolidated, with the top five companies occupying 55.12%. The major players in this market are Dow, H.B. Fuller Company, Henkel AG & Co. KGaA, Huntsman International LLC and Sika AG (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format
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