

Construction Adhesives & Sealants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2028

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Report description:

The Construction Adhesives & Sealants Market size is estimated at USD 17.22 billion in 2024, and is expected to reach USD 21.73 billion by 2028, growing at a CAGR of 5.99% during the forecast period (2024-2028).

Infrastructure projects to support the growth of construction adhesives and sealants

- Globally, the most prominent are adhesives and sealants based on polyurethane, acrylic, silicone, and polysulphide resins. Global demand for these products witnessed slow growth during 2017-2019 due to a decline in construction activities in the Asia-Pacific and European regions. The demand from these two regions recorded CAGRs of -1.82% and 0.73%, respectively, in this period. The demand for construction adhesives and sealants declined in 2020 from all regions due to a shortage of raw materials, workers, and other factors due to the COVID-19 pandemic. Among all resins, the demand for adhesives based on cyanoacrylate resins took the worst hit and declined by 6.19% compared to 2019.

- In 2021, as restrictions eased, the demand for construction adhesives and sealants quickly rebounded to the pre-pandemic levels. Support schemes like the Homebuilder program in Australia played a crucial role in the demand growth. This growth trend is expected to continue throughout the forecast period, and the demand for construction adhesives and sealants is expected to record a CAGR of 4.13% during the forecast period 2022-2028.

- Construction adhesives and sealants based on acrylic resin occupied the largest share of the demand among all resins because of their strong bonds. The demand share for acrylic resins is expected to remain the highest during the forecast period. The demand growth for silicone resin-based construction adhesives and sealants is expected to outpace the demand growth for acrylic resin-based construction adhesives and sealants over the forecast period.

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Inflating demand from Asia-Pacific's construction sector likely to drive the global sales of adhesive and sealants

- Asia-Pacific accounted for the largest share of the demand for construction adhesives and sealants throughout the study period because of the large number of construction activities in China, Japan, South Korea, India, Australia, and other countries in the region. China has the largest construction market globally and generates up to 71% of the demand from Asia-Pacific due to the country's large population and increasing urbanization.
- In 2017-2019, the demand for construction adhesives and sealants was sluggish due to a decline in construction activities in a few countries in Europe and South America because of the increased volatility of financial markets and increased interest rates by central banks of countries like Argentina.
- In 2020, the demand for construction adhesives and sealants declined by up to 27% in a few countries, but the global impact was not severe as construction activities were deemed essential in a few countries like South Africa and Brazil, among others. In a few countries, like Russia, construction sites were the first to reopen after the pandemic. These factors cushioned the COVID-19 pandemic's impact on the global market, restricting the decline to 7.6%.
- In 2021, due to relief packages and support schemes in countries like the United States, Australia, and EU countries, construction activities quickly reached their pre-pandemic levels, thus boosting the demand for construction adhesives and sealants. Infrastructure construction adhesives and sealants are expected to witness the largest growth among other construction adhesives and sealants types during the forecast period because of increased investments and budget allotments in European, South American, and Asia-Pacific countries.

Global Construction Adhesives & Sealants Market Trends

Growing residential and infrastructural development to thrive the construction sector

- The building and construction industry witnessed steady growth, with a CAGR of 2.6% from 2017 to 2019. This growth was driven by the upswing in global economic activity and increasing demand for single-family homes. In 2020, the COVID-19 pandemic had a major impact on the global building and construction industry. Constraints in labor supply, disruptions in construction finances and the supply chain, and economic uncertainty negatively impacted the global building and construction industry.
- Though the industry showed positive growth in 2021, the pandemic's effect on supply chains, which resulted in a hike in raw material prices, is still plaguing the industry. However, as the construction industry heavily influences a nation's economy, countries in Europe, North America, and Asia-Pacific have used the construction industry to restart their economic cycles by offering support schemes. Some support schemes include the Homebuilder Programme in Australia and the economic recovery plan of EU countries.
- The Asia-Pacific region experiences the highest volume of construction activities, and it is expected to remain the largest construction market till 2028 due to its huge population, increasing urbanization, and increasing investments in infrastructural development in countries like China, India, Japan, Indonesia, and South Korea.
- Increasing emphasis on green buildings and efforts to reduce emissions from global construction activities are expected to result in more sustainable operational procedures during the forecast period. For example, France has sanctioned EUR 7.5 billion for the construction industry to transform itself into a low-carbon energy economy.

Construction Adhesives & Sealants Industry Overview

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The Construction Adhesives & Sealants Market is fragmented, with the top five companies occupying 32.69%. The major players in this market are Arkema Group, Henkel AG & Co. KGaA, MAPEI S.p.A., Sika AG and Soudal Holding N.V. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 End User Trends

4.1.1 Building and Construction

4.2 Regulatory Framework

4.2.1 Argentina

4.2.2 Australia

4.2.3 Brazil

4.2.4 Canada

4.2.5 China

4.2.6 EU

4.2.7 India

4.2.8 Indonesia

4.2.9 Japan

4.2.10 Malaysia

4.2.11 Mexico

4.2.12 Russia

4.2.13 Saudi Arabia

4.2.14 Singapore

4.2.15 South Africa

4.2.16 South Korea

4.2.17 Thailand

4.2.18 United States

4.3 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2028 and analysis of growth prospects)

5.1 Resin

5.1.1 Acrylic

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- 5.1.2 Cyanoacrylate
- 5.1.3 Epoxy
- 5.1.4 Polyurethane
- 5.1.5 Silicone
- 5.1.6 VAE/EVA
- 5.1.7 Other Resins
- 5.2 Technology
 - 5.2.1 Hot Melt
 - 5.2.2 Reactive
 - 5.2.3 Sealants
 - 5.2.4 Solvent-borne
 - 5.2.5 Water-borne
- 5.3 Region
 - 5.3.1 Asia-Pacific
 - 5.3.1.1 Australia
 - 5.3.1.2 China
 - 5.3.1.3 India
 - 5.3.1.4 Indonesia
 - 5.3.1.5 Japan
 - 5.3.1.6 Malaysia
 - 5.3.1.7 Singapore
 - 5.3.1.8 South Korea
 - 5.3.1.9 Thailand
 - 5.3.1.10 Rest of Asia-Pacific
 - 5.3.2 Europe
 - 5.3.2.1 France
 - 5.3.2.2 Germany
 - 5.3.2.3 Italy
 - 5.3.2.4 Russia
 - 5.3.2.5 Spain
 - 5.3.2.6 United Kingdom
 - 5.3.2.7 Rest of Europe
 - 5.3.3 Middle East & Africa
 - 5.3.3.1 Saudi Arabia
 - 5.3.3.2 South Africa
 - 5.3.3.3 Rest of Middle East & Africa
 - 5.3.4 North America
 - 5.3.4.1 Canada
 - 5.3.4.2 Mexico
 - 5.3.4.3 United States
 - 5.3.4.4 Rest of North America
 - 5.3.5 South America
 - 5.3.5.1 Argentina
 - 5.3.5.2 Brazil
 - 5.3.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

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- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
 - 6.4.1 3M
 - 6.4.2 Aica Kogyo Co., Ltd.
 - 6.4.3 Arkema Group
 - 6.4.4 Dow
 - 6.4.5 H.B. Fuller Company
 - 6.4.6 Henkel AG & Co. KGaA
 - 6.4.7 Huntsman International LLC
 - 6.4.8 Illinois Tool Works Inc.
 - 6.4.9 MAPEI S.p.A.
 - 6.4.10 Momenite
 - 6.4.11 RPM International Inc.
 - 6.4.12 Shin-Etsu Chemical Co., Ltd.
 - 6.4.13 Sika AG
 - 6.4.14 Soudal Holding N.V.
 - 6.4.15 Wacker Chemie AG

7 KEY STRATEGIC QUESTIONS FOR ADHESIVES AND SEALANTS CEOS

8 APPENDIX

- 8.1 Global Adhesives and Sealants Industry Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework (Industry Attractiveness Analysis)
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Drivers, Restraints, and Opportunities
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

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