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

Market Report | 2022-11-07 | 182 pages | Mordor Intelligence

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Report description:

The Middle East & Africa Construction Adhesives & Sealants Market size is estimated at USD 1.16 billion in 2024, and is expected to reach USD 1.39 billion by 2028, growing at a CAGR of 4.63% during the forecast period (2024-2028).

Saudi Arabia's growing consumption of adhesives & sealants to maintain its position at the top in terms of consumption even for the next few years

- Polyurethane and acrylic resin-based adhesives and sealants were the most used among other resin types in 2017-2021. They are expected to be the most used resin types during the forecast period (2022-2028) because of their strong bonds and their applicability as structural adhesives. In the Middle East and Africa, 67% of acrylic-based construction adhesives are manufactured in water-borne technology, and polyurethane-based products are manufactured majorly in sealant technology.
- In the Middle East & Africa region, the decrease in overall demand for construction adhesives and sealants in 2020 can be attributed to the overall economic slowdown in the region caused due to COVID-19 pandemic, which led to nationwide lockdowns, supply chain disruption, mandatory social distancing regulations, etc. Thus, the construction adhesives and sealants contracted by 7.04%% in 2020. It was restored by 5.22% in 2021.
- In the Middle East and Africa, during the historic period (2017-2021), demand for construction adhesives and sealants increased by a CAGR of 4% during the forecast period (2022-2028). The demand is expected to increase at a rate of 6%. Among all the resin types, silicone resin-based adhesives and sealants are expected to register the largest CAGR of around 6% during the forecast period (2022-2028).
- Saudi Arabia occupied the largest share of the global demand for construction adhesives and sealants. In 2021, the demand generated from Saudi Arabia was 81.6 million kilograms. In 2028, the demand is expected to reach 100.6 million kilograms with a

CAGR of 6.9%. Polyurethane, acrylic, and silicon resin-based adhesives and sealants products are expected to occupy more than 50% of the total demand generated by the Saudi Arabian construction industry in 2022.

A major boost to the growth forecasted to be contributed by the rising green building construction activities in the region

- In 2020, the decline in construction output by 4.4% was due to the COVID-19 pandemic, which led to nationwide lockdowns, supply chain disruption, mandatory social distancing regulations, etc. These factors led to declining demand for adhesives and sealants required for construction in 2020. The decline was the highest in South Africa because of the country's construction market decline.
- The demand for construction adhesives and sealants grew in 2021 because of the rising construction activities in Middle East & Africa. Saudi Arabia has implemented various construction projects, including a USD 500 billion futuristic mega-city 'Neom' project, the Red Sea Project - Phase 1, which is due to be completed in 2022, and luxury and hyper-luxury hotels that may comprise 3,000 rooms across five islands, and two inland resorts, Qiddiya Entertainment City, and Amaala - the uber-luxury wellness tourism destination. Such projects are likely to drive the demand for construction adhesives and sealants over the forecast period.
- The Middle East & Africa region is also set to be critical for the growth of green buildings globally over the next few years. Green Building Councils in the MENA Regional Network are responding to challenges and opportunities on the ground, ensuring that the region's buildings provide a high quality of life for people, minimize negative impacts on the environment, and maximize economic benefits. Thus, due to rising green building construction activities, the Middle East & African adhesives and sealants market is projected to record a CAGR of 3.4% by volume and 5.01% by value during the forecast period 2022-2028.

Middle East & Africa Construction Adhesives & Sealants Market Trends

Robust population and favorable government policies to boost the construction industry

- The construction industry is becoming a key driver for African economies, accounting for 10-15% of GDP. Development in the region is attracting investment from all over the world, which is further creating opportunities and boosting the workforce in the construction of residential, commercial, institutional, and industrial buildings.
- The construction industry registered a growth rate of 2.38% and 2.32% in 2018 and 2019, respectively. However, in 2020, the construction market contracted by 6.81% compared to the same period in 2019, as the COVID-19 pandemic negatively affected the construction market by restricting construction activities in countries like Saudi Arabia and the United Arab Emirates. In 2021, the construction market regained growth rate as the Middle East and African nations have done well in controlling the COVID-19 outbreak. As a result, key construction sectors recorded moderate growth, unlike other comparable markets which have witnessed low to negative growth.
- The Middle East and North Africa (MENA) is currently home to over 350 million people, and its population growth has been characterized by rapid urbanization. This is projected to continue, with the urban population expected to double from 2010 to 2050, from 200 million to nearly 400 million. This means a large demand for buildings, complicated by the challenges of conflict-induced displacement of people. Thus, the Middle East & Africa Construction industry is expected to increase at a CAGR of 2.7% during the forecast period (2022-2028).

Middle East & Africa Construction Adhesives & Sealants Industry Overview

The Middle East & Africa Construction Adhesives & Sealants Market is fragmented, with the top five companies occupying 20.95%. 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

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