

Epoxy Resins Market - Global Outlook & Forecast 2024-2029

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Report description:

The global epoxy resin market is expected to grow at a CAGR of 5.10% from 2023 to 2029.

MARKET TRENDS & DRIVERS

Evolving Market of Bio-based Epoxy Resins

With growing concerns about environmental impact and sustainability, many businesses seek alternatives to traditional epoxy resins derived from fossil fuels with a high carbon footprint. New resin formulations are being created using renewable resources, such as plant-based oils and bio-based materials. These sustainable resins offer similar performance characteristics to traditional epoxy resins but with a significantly reduced environmental impact. They have lower VOC emissions, reduced energy consumption during production, and can be easily recycled or disposed of in an environmentally friendly manner. Furthermore, adopting sustainable resin solutions can also help businesses comply with regulations and standards related to environmental sustainability. Many industries, such as construction, automotive, and electronics, are implementing stricter environmental regulations, and using sustainable resins can ensure compliance and avoid potential penalties or reputational damage.

Technological Advancements

Technological advancements have produced epoxy resins with improved properties necessary for the demanding and changing industrial environments. These innovations not only enhance the properties of epoxy resin but also open new possibilities for its application in various industries. For example, the development of nanotechnology has led to the creation of epoxy resins with improved strength, durability, and resistance to chemicals and temperature extremes. In addition, curing agents and additives advancements have allowed for faster curing times and enhanced adhesion properties. By staying updated on the latest technological innovations in the epoxy resin market, businesses can gain a competitive edge and capitalize on new opportunities for growth and expansion.

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SEGMENTATION INSIGHTS

INSIGHTS BY RAW MATERIAL

The DGBEA raw material segment holds the most significant share of the global epoxy resin market, accounting for over 36% of the global share by value in 2023. DGBEA is synthesized by reacting epichlorohydrin with Bisphenol-A, producing a viscous liquid serving epoxy resins as a precursor. The epoxy made from DGBEA is widely used in coatings, adhesives, composites, and encapsulation applications, with its demand rising in sectors like construction, automotive, aerospace, electronics, and marine due to increasing industrialization and modernization efforts. As global infrastructure development intensifies, particularly in emerging markets, the demand for high-performance materials like DGBEA epoxy escalates. Additionally, the automotive industry utilizes DGBEA to produce lightweight, durable components for electric vehicles (EVs) and high-performance automobiles.

Segmentation by Raw Material

- DGBEA
- DGBEF
- Novolac
- Aliphatic
- Glycidyl Amine
- Other Materials

INSIGHTS BY FORMULATION

The global epoxy resin market by formulation is segmented into liquid, solid, and powder. The liquid segment holds the largest segmental market share in 2023. Due to its superior properties, the demand for liquid epoxy resins is rising significantly across numerous industries. In the automotive sector, liquid epoxies are used in coatings that provide high durability, chemical resistance, and a glossy finish, contributing to the vehicle's aesthetic and longevity. Furthermore, the aerospace industry utilizes liquid epoxy resins for composite materials in aircraft components, benefiting from their lightweight and high-strength characteristics.

Segmentation by Formulation

- Liquid
- Solid
- Powder

INSIGHTS BY BONDING

The global epoxy resin market by bonding is segmented into two-part, one-part, and three-part. In 2023, the two-part segment dominated the market because it offers superior mechanical strength, thermal stability, and chemical resistance. Different ratios and formulations of the resin and hardener can be adjusted to meet specific application needs, such as varying curing times, flexibility, or environmental resistance. However, the one-part is growing at a high CAGR rate, owing to its simplified application process, reduced labor time, and minimized risk, making it user-friendly for industrial and consumer applications.

Segmentation by Bonding

- Two-part
- One-part
- Three-part

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INSIGHTS BY CURING METHOD

The cold cure segment dominated the global epoxy resin market under the curing segment and is projected to grow at a CAGR of 5.32% during the forecast period. Cold cure epoxy resin, also known as room-temperature cure epoxy, refers to a type of epoxy formulation that cures or hardens at ambient temperatures without needing external heat. Due to their versatility and user-friendly nature, cold-cure epoxy resins are used in multiple industries. These resins are widely used for repairs, bonding, and coatings in the construction industry. The electrical and electronics industries also benefit from cold cure epoxies for encapsulating and protecting sensitive electronic components. Curing at room temperature allows for efficient production processes, especially when rapid turnaround times are essential.

Segmentation by Curing Method

- Cold Cure
- Thermal Cure
- UV-Curing
- Moisture Curing
- Other Methods

INSIGHTS BY APPLICATION

The global epoxy resin market by application is segmented into paints & coatings, adhesives & sealants, composites, encapsulation, and other applications. Based on application, the paints and coating segment dominates the market and is estimated to lead the market through the forecast period. Epoxy coatings are highly durable, offer higher corrosion protection mechanical strength, and are easy to apply & maintain. Thus, these resins are widely used in metal, floor, white goods, marine & automotive part coatings, and other protective coating applications. The application of epoxy resins in paints and coatings is most prevalent in sectors like construction, automotive, marine, and oil and gas. Additionally, the composite segment is the fastest growth in this market, growing at a CAGR rate of 5.68% (by value) because of the rapid adoption and increasing investment in wind energy projects worldwide.

Segmentation by Application

- Paint & Coatings
- Adhesives & Sealants
- Composites
- Encapsulation
- Other Applications

INSIGHTS BY END-USERS

The global epoxy resin market by end-users is segmented into construction, automotive, electrical & electronics, manufacturing, power & energy, aerospace, and other end-users. Based on end-users, the construction sector dominates the market share because of the significant usage of epoxy resins in construction activities. Epoxy resin is a critical material in the construction industry due to its exceptional mechanical properties, adhesive strength, and chemical resistance. Also, epoxy resin is frequently used as a bonding agent in concrete repairs and structural strengthening. It is used to bond different construction materials, such as metal, wood, and concrete, ensuring structural integrity. However, the power & energy segment is the fastest-growing end-user segment due to rising renewable energy plants and investments in developing countries.

Segmentation by End-Users

- Construction

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- Automotive
- Electrical & Electronics
- Manufacturing
- Power & Energy
- Aerospace
- Other End-users

GEOGRAPHICAL ANALYSIS

In 2023, the APAC region accounted for the largest global epoxy resin market share of around 41% (by value). With favorable growth of end-use industries in China, India, Japan, and other countries, the region is expected to lead this market even during the forecast period. Moreover, the continuously expanding composites market, construction & automotive industries are further boosting the demand for durable & sustainable epoxies. India is projected to show prominent growth soon due to rapid industrialization. Also, owing to the well-established epoxy supply chains & manufacturers, countries such as South Korea & Japan hold a significant portion of the regional market.

North America holds a significant share of the global epoxy resin market due to the high penetration of both commercial and residential sectors and the substantial disposable income of consumers. Moreover, in North America, increasing digitization is fueling demand for electrical & electronic systems, and epoxy-based, long-lasting & reliable components are used in these systems to reduce costs and improve performance. In addition, in Europe, automotive, wind energy, and composites drive the growth of low & high cured epoxy resins. Germany is the leading contributor to Europe's epoxy resin industry growth. However, Latin America, the Middle East & Africa holds a smaller share; these regions are anticipated to indicate faster growth in the global market. Technological innovations, rapid industrial development, changing government policies, and rising disposable income in these regions are aiding the growth of epoxy-based end-use industries.

Segmentation by Geography

- APAC
 - o□China
 - o□Japan
 - o□India
 - o□Australia
 - o□South Korea
- North America
 - o□The U.S.
 - o□Canada
- Europe
 - o□Germany
 - o□The U.K.
 - o□France
 - o□Italy
 - o□Spain
 - o□Sweden
 - o□Netherlands
- Latin America
 - o□Brazil
 - o□Mexico
 - o□Argentina
 - o□Chile

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- Middle East & Africa
 - o South Africa
 - o Saudi Arabia
 - o UAE
 - o Turkey

VENDORS LANDSCAPE

The global epoxy resin market is characterized by a dynamic and competitive environment, featuring a blend of major international corporations and agile regional players striving for market dominance. Key players in the global epoxy resin market include industry giants such as 3M, Dow Inc., Huntsman Corporation, Sika AG, and Ashland Global Holdings Inc. These leading companies drive competition through continuous innovation, substantial investment in research and development, and strategic global expansions. The competition is further intensified by the need to meet evolving customer demands and regulatory standards, particularly in sustainability and performance.

With the growing competition in the epoxy resin industry, the key players, such as Kukdo, Huntsman, Hexion, and others, are focusing on catering to the maximum production capacities to better serve the existing consumers. Leading companies are actively investing in the fastest-growing regional epoxy market, such as the Middle East & Africa and APAC. For instance, in 2022, Aditya Birla Chemicals announced that it would double its epoxy manufacturing capacity and expand overseas operations, enhancing its position in the global market.

Key Company Profiles

- Hexion Inc.
- Olin Corporation
- Huntsman International LLC

Other Prominent Vendors

- 3M
- BASF SE
- Dow Inc.
- Atul Ltd
- KUKDO CHEMICAL CO., LTD
- Sika Group
- NAN YA Plastics Industrial Co., Ltd.
- DIC Corporation
- Sanmu Group
- Chang Chun Group
- Sinopec (China Petroleum & Chemical Corporation)
- Kolon Industries, Inc
- Nagase & Co., Ltd
- Grasim Industries Ltd (Aditya Birla Group)
- Covestro AG
- SABIC
- Henkel
- Gougeon Brothers Inc
- GreenPoxy (Epoxy.com)
- EPOKE
- Magnifico

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KEY QUESTIONS ANSWERED:

- 1.[] How big is the global epoxy resin market?
- 2.[] What is the growth rate of the global epoxy resin market?
- 3.[] Which region dominates the global epoxy resin market share?
- 4.[] What are the significant trends in the epoxy resin industry?
- 5.[] Who are the key players in the global epoxy resin market?

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