

Construction Adhesives Market Assessment, By Resin Type [Acrylic, Polyurethanes, Polyvinyl Acetate, Epoxy, Rubber, Others], By Technology [Water-based, Solvent-based, Reactive, Others], By Application [Flooring, Roofing, Walls, Windows and Doors, Ventilation and Draughts, HVAC and Insulation, Others], By End-use Industry [Residential, Non-Residential], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global construction adhesives market is projected to witness a CAGR of 5.36% during the forecast period 2024-2031, growing from USD 11.22 billion in 2023 to USD 17.04 billion in 2031. Factors contributing to this growth include increased construction activities, advancements in adhesive technologies, new commercial projects, and a rising demand for durable and high-performance materials.

Various reasons for the growth in construction adhesives are attributed to the soaring construction activity in most parts of the world. Rapid urbanization and interest in rural to urban and semi-urban lifestyles, infrastructure development, and a strong growth rate in residential and commercial building projects have increased manifold, which in turn has raised the demand for construction adhesives. The adhesives are used crucially for holding the structure for a long period and, hence, have become vital in the modern methods of construction.

Due to innovation in adhesive formulations, products have come forward showing improved bonding strength, flexibility, and resistance to environmental factors. It, in turn, makes adhesives more versatile and suitable for wider application, further stimulating their adoption in construction projects. Increased demand for sustainable and green solutions is another key factor driving market growth.

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There is an increasing interest in adhesives that have low levels of volatile organic compounds and can contribute to the energy efficiency of buildings. The shift toward greener products for broader environmental and regulatory trends will continue to push manufacturers toward more sustainable adhesive options. The construction adhesives market is closely linked to the construction industry, especially in major economies such as India, China, and the United States. According to the Invest India report, India's construction sector is expected to reach USD 1.4 trillion by 2025, driving the demand for construction adhesives. Factors such as urbanization and infrastructure projects boost this growth.

Technological Advancements Driving Market Growth Through Adhesive Performance and Versatility

Key factors for the growth of the construction adhesives market come from new adhesive formulations developed owing to technological improvements. These are related to performance improvement, versatility enhancement, and application of adhesives for making effective and a wide range of construction needs. Recent developments have resulted in adhesives with higher bonding strength and better durability in the long run, providing better longevity.

For instance, the introduction of polyurethane-based adhesives brings unmatched strength and resistance to extreme weather and is, hence, ideal for critical applications in construction projects. Long-lasting bonds provided by adhesives resist mechanical stresses and environmental challenges to maintain structural integrity.

Modern adhesive technologies are designed to be flexible and adapt to a variety of materials and surfaces. Hybrid polymer adhesives combine the positive attributes of polyurethane and silicones into products that can bond to a range of substrates, including metals, plastics, and glass. Such flexibility allows the use of adhesives in diverse construction applications, ranging from panel securing to joint sealing, thus extending their utility throughout various jobs.

For instance, in 2022, Sika AG, a key supplier of innovative sealing, bonding, reinforcement, and protection solutions, participated as an exhibitor at the adhesives and bonding expo in North America to boost product demand and new innovations.

Increase in Construction Activities to Drive Market Demand

Urbanization, infrastructure development, and growing real estate markets are expected to drive the demand for high-value adhesives in different applications worldwide. Key drivers include rapid urbanization and expansion of infrastructure development. Adhesives have a critical role to play in projects belonging to end-user industries, from providing structural bonding to finishes. As the scale and complexity of building projects mount to cater to a fast-growing economy that requires more homes, office space, retail outlets, and industrial establishments, the uses of adhesives are expected to increase, from the installation of windowpanes to door fittings and floor and wall covering to prefabricated panels. An instance could be curtaining wall systems for high-rise buildings, whereby adhesive technologies must bond strongly and durably, playing a significant role from structural and aesthetic standpoints for the facade.

According to Invest India, India construction market is expected to boom after 2024. Nearly 600 million people in the residential construction segment are estimated to live in urban centers by 2030, creating a demand for 25 million additional mid-end and affordable units associated with the construction adhesives market.

Residential Sector to Lead the Market Share

Adhesives are used for various applications in new home construction and other renovation activities, including structural integrity and finishing. They are used during flooring installation, whether hardwood, laminate, or tile, due to their strong bonds, which ensure durability over a long period. They are crucial in drywall and paneling installation, including that of ceilings, for smooth, seamless finishes with strong performances. With increasingly varied flooring and wall materials, including rapidly advancing adhesive technology, continuous innovation in adhesive formulation drives meeting specific requirements.

The residential sector is on the frontline of adopting advanced adhesive technologies, lending functionality and beauty to the living spaces. Adhesives with special properties, such as high moisture resistance or high flexibility, respond to specific challenges of modern interior residential settings for bathroom and kitchen spaces plagued by high humidity and other rainy weather problems.

For instance, in September 2024, Henkel AG & Co. KGaA introduced a glue under the No More Nails brand. The market's first removable construction adhesive, Pattex No More Nails Stick & Peel, can hold up to 6 kg of weight on a variety of surfaces, including tile, glass, and PVC. It peels off effortlessly and without causing harm. This revolutionary solution for non-permanent wall fixing elevates the consumer experience and enhances decoration projects at home.

Asia-Pacific to Dominate the Construction Adhesives Market Share

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The real estate sector in Asia-Pacific is thriving, with significant investments in residential and commercial properties. This expansion creates a substantial market for construction adhesives used in various applications. The rapid development of residential communities and commercial spaces requires adhesives for tasks ranging from flooring and tiling to paneling and insulation. Innovations in adhesive technologies, such as those providing improved durability and ease of application, are catering to the needs of the growing real estate sector, facilitating the construction of modern and high-quality buildings.

Government initiatives are coupled with increasing infrastructure development and urban planning, thereby creating a better scope for the growth of the construction adhesives market. Policies and investments in housing projects, smart cities, metro construction, renovation activity in rainy weather, and sustainable building practices drive the demand for adhesives that are regulatory compliant and offer energy efficiency. Initiatives towards building energy-efficient green buildings and sustainable urban infrastructure boost the demand for eco-friendly and high-performance adhesives.

In March 2024, Jowat SE, a key supplier in the industrial adhesives market, opened a new adhesive center in Asia-Pacific, marking its second manufacturing location in the region. The move strengthens the company's position in the Asia-Pacific market.

Future Market Scenario (2024 - 2031F)

- Construction in the residential sector is expected to continue to be a key driver of market growth from 2024 to 2031. The ongoing expansion of housing projects, driven by new construction and renovation, will increase the demand for construction adhesive types.

- Asia-Pacific is poised to lead the construction adhesives market due to its rapid urbanization, robust economic growth, extensive construction, and infrastructure projects. Countries such as China, India, and various Southeast Asian nations are experiencing significant development in urban and rural areas.

- Advancements in adhesive technologies will continue to be a major growth driver for the market. Innovations such as the development of high-strength, rapid-curing, and versatile adhesive types are expected to be available in the market.

- Polymers are derived from petrochemicals, hence, their prices are sensitive to fluctuations in oil prices. An increase in oil prices can raise the cost of raw materials, impacting adhesive production costs.

Key Players Landscape and Outlook

New technologies being introduced by market players improve adhesive formulations, which include modern performance products boasting greater strength, durability, and environmental resistance. Besides, the growing interest of market players in sustainability pushes the demand toward eco-friendly and low-VOC (volatile organic compounds) products that align with general environmental objectives.

In February 2022, APL Apollo Tubes Limited, an independent company in the United Kingdom for liquid adhesives, coatings, and primers for the roofing, industrial, and construction markets, was acquired by Harvey Benjamin Fuller Company. Through the acquisition, Harvey Benjamin Fuller Company has benefitted from increased market share in building markets in Europe and the United Kingdom.

In 2023, Harvey Benjamin Fuller Company announced that it had acquired XCHEM International LLC, an adhesives manufacturer in UAE. XCHEM International LLC provides a wide range of specialty adhesives and coatings for industrial and infrastructure applications in the rapidly expanding Middle East and Northern Africa construction markets.

In September 2024, BOSTIK S.A (Arkema Group) introduced the Fast Glue Ultra+ product in the adhesive product range, which is developed with 60% bio-based materials. This innovation marks a significant advancement in the adhesives market.

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