

Engineering Adhesives Market Size Analysis - Market Share, Forecast Trends and Outlook Report (2025-2034)

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Report description:

The global engineering adhesives market value reached around USD 26.63 Billion in 2024 due to the increasing demand for lightweight and durable materials in industries such as automotive, aerospace, and construction. The automotive sector increasingly uses engineering adhesives for bonding components, which improves fuel efficiency and safety. As a result, the industry is expected to grow at a CAGR of 7.20% during the forecast period of 2025-2034 to attain a value of USD 53.37 Billion by 2034. Innovations in adhesive technologies, such as the development of high-strength, temperature-resistant formulations, further support market growth by meeting the evolving needs of sectors like electronics and medical devices.

Engineering Adhesives Market Growth

Engineering adhesives enable design freedom, allowing unique design concepts to be adopted and giving designers a more extensive range of materials to work with. One of the key factors driving the market growth is the increasing use of engineering adhesives in multiple sectors ranging from automotive and electronics to renewable energy and advanced engineering applications. Developing fermentation and microbial processes has led to the advancement of polyurethane adhesive products, driving the growth of the engineering adhesives industry. Also, the rise in the adoption of engineering adhesives in the transportation industry to produce various automobiles will likely drive the growth of the engineering adhesives market. However, increasing challenges in the application process of engineering adhesives are expected to pose barriers to the market's growth throughout the forecast period.

Adhesives are used as potting and masking agents in the consumer electronics sector for electrically conductive items. These adhesives also improve the quality and dependability of equipment and machinery, achieve dynamic and static strength, and reduce the possibility of corrosion during assembly, thereby propelling market growth. Moreover, governments worldwide are making investments in the power generation sector, which, in turn, has led to the escalating demand for engineering adhesives.

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Key Trends and Developments

Growing demand from manufacturing sector, burgeoning popularity of water-based adhesives, and development of self-healing adhesives are the key trends propelling the market growth.

August 2024

Researchers at Berkeley announced the development of stabilised ?LA polymer adhesives aimed at various applications, including medical, industrial, and consumer sectors. This innovation highlights the growing trend towards advanced adhesive formulations that offer enhanced performance and versatility, catering to diverse industry needs.

May 2024

Engineers at MIT unveiled a new cost-effective adhesive hydrogel designed to prevent fibrosis in patients with pacemakers and other medical devices. This development underscores the increasing focus on biocompatible adhesives in the healthcare sector, addressing critical challenges faced by patients relying on implanted devices.

May 2024

Shiva Engineering Services (SES) announced that it received an EPCm contract from a leading ink manufacturing company in India for their ink and adhesive expansion project in Dahej, Gujarat. This contract reflects the growing demand for adhesives in manufacturing processes and signifies SES's role in supporting industry expansion.

May 2024

H.B. Fuller announced its acquisition of ND Industries, a specialty adhesives provider. This strategic move aims to enhance H.B. Fuller's capabilities in functional coatings, adhesives, and sealants sectors, further solidifying its position in the engineering adhesives market.

Growing Demand from Manufacturing Sector

In 2023, the manufacturing sector accounted for 17% of India's GDP and the government aims to enhance their GDP share to 25% of the country's economy by 2025. This is expected to create lucrative new opportunities for the use of engineering adhesives. The shift towards lightweight materials such as composites and plastics in the automotive sector is significantly boosting the demand for high-performance adhesives and enhancing engineering adhesives market value. These adhesives are replacing traditional fasteners, contributing to a decrease in vehicle weight while enhancing both performance and safety.

The construction sector is witnessing a rising demand for engineering adhesives used in hybrid constructions, insulation panels, and sealing materials, among others. This increase is fuelled by the expansion of infrastructure projects, especially in Asia-Pacific countries like China and India. For instance, the gross output value of the construction sector in China witnessed a growth rate of 78.8% between 2014 and 2023.

Burgeoning Popularity of Water-Based Adhesives

The adoption of water-based engineering adhesives is rapidly growing across various industrial sectors due to their environmental benefits and improved performance features. These adhesives offer a sustainable alternative to traditional solvent-based options, which are known for releasing VOCs. These adhesives do not emit harmful VOCs and are made from renewable resources, aligning

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with the global push for more eco-friendly industrial practices and contributing to the engineering adhesives market revenue. As per a 2024 study, around 36.4 to 39.7% of the world's population is exposed to harmful VOC levels which is further driving the demand for sustainable and water-based adhesives.

Additionally, these adhesives offer strong bonding capabilities for both porous and non-porous surfaces, making them ideal for use in packaging, specifically for carton sealing and flexible packaging, construction, and the automotive sector, among others. Packaging is the world's third-largest end-use sector, due to its widespread usage in several industries, creating a positive landscape for the demand for adhesives.

Growing Demand from Automotive Sector

The automotive sector is experiencing a significant surge in the engineering adhesives demand, primarily due to their ability to bond lightweight materials effectively. In 2024, it is anticipated that approximately 70% of new vehicles will use advanced adhesive technologies to enhance fuel efficiency and structural integrity. Engineering adhesives provide high-temperature resistance and exceptional bonding strength, making them ideal for various automotive applications, including the assembly of electric vehicles (EVs). For example, companies like 3M and Henkel are innovating with polyurethane and epoxy adhesives that can withstand the rigors of automotive environments while contributing to weight reduction. Also, the automotive industry is projected to manufacture around 90 million vehicles globally in 2024, which correlates with the rising adoption of engineering adhesives, as manufacturers seek to leverage these materials to create lighter, more efficient vehicles.

Rising Use of Product in Aerospace Industries

The aerospace industry is also witnessing a notable increase in the use of engineering adhesives. With the rise in air travel and expanding airline fleets, the demand for adhesives in aircraft construction and maintenance is expected to grow significantly, driven by the need for lightweight and high-strength bonding solutions. Engineering adhesives are essential for both interior applications-such as retaining compounds and thread-lockers-and exterior applications like wing spars and fuselage panels. Companies like H.B. Fuller are developing new products that meet rigorous industry standards, including resistance to jet fuel and environmental factors. The aerospace sector anticipates producing about 40,000 commercial aircraft in the next decade, further fuelling the demand for advanced adhesive solutions. The increasing use of composite materials in aircraft design propels this trend, as these materials require innovative adhesive solutions for effective bonding.

Engineering Adhesives Market Trends

The development of self-healing adhesives is a crucial trend of engineering adhesives market as well as material science. This innovative technology is inspired by biological systems such as human skin, which can heal itself after injury. Researchers have been investing in the development of polymer adhesives that can self-repair through dynamic chemical bonds, including hydrogen bonds and metal-ligand coordination. In 2023, a team from the University of Illinois revealed a polymer that can repair minor fractures at room temperature, paving the way for new applications in electronic devices susceptible to micro-cracks.

There is also a growing demand for bio-based self-healing adhesives that are inspired by natural processes. For instance, adhesives that replicate the adhesion properties of mussels have been designed to repair underwater structures. For instance, in 2023 researchers at Purdue University developed a underwater bio-based adhesive that displays enhanced strength when in contact with water.

Engineering Adhesives Market Restraints

The costs of raw materials used in adhesive production such as resins and solvents, are subject to significant fluctuations and this

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volatility affects both production costs and the final prices for consumers, consequently affecting the engineering adhesives demand forecast. The price of engineering adhesives made from petrochemical sources can be greatly affected by changes in oil prices, which have been unpredictable due to geopolitical factors and supply chain disruptions. For instance, the producer price index for petrochemical manufacturing (PCU325110325110) was 151.569 in June 2024, up from 149.888 in May 2024.

Another major challenge in the market is the high cost of engineering adhesives, especially high-performance types like epoxies and polyurethanes. The complex formulations needed for these adhesives lead to increased production expenses, which may be difficult to afford by small and medium-sized enterprises (SMEs), due to their budgetary constraints.

Market Dynamics

Several government bodies across the world especially have implemented rigorous regulations concerning the emissions of volatile organic compounds (VOCs). These regulations promote the adoption of low-VOC or zero-VOC adhesives such as water-based or bio-based options, aimed at reducing air pollution and associated health issues. For instance, the EU's REACH (Registration, Evaluation, Authorisation, and Restriction of Chemicals) framework and the standards established by California's Air Resources Board (CARB) in the USA impose strict requirements on adhesives in industrial settings. There is also increased investment in research related to advanced adhesive technologies. For example, the U.S. Department of Energy has allocated grants for the development of innovative adhesive materials that enhance energy efficiency in manufacturing and product assembly processes.

Furthermore, some regions are offering incentives and grants to businesses that invest in sustainable technologies, which is expected to contribute to the growth of the engineering adhesives industry. For instance, the European Green Deal offers financial assistance to end-use sectors that implement sustainable practices, including the development of eco-friendly adhesive solutions.

Engineering Adhesives Industry Segmentation

?Global Engineering Adhesives Market Report and Forecast 2025-2034? offers a detailed analysis of the market based on the following segments:

Based on product, the market is divided into:

- ? Epoxies
- ? Polyurethanes
- ? Methacrylates
- ? Cyanoacrylates
- ? Others

The significant applications of the market are:

- ? Transportation
- ? Aviation
- ? Electrical and Electronics
- ? Energy
- ? MRO
- ? Others

The regional markets for engineering adhesives can be divided into:

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- ? North America
- ? Europe
- ? Asia Pacific
- ? Latin America
- ? Middle East and Africa

Engineering Adhesives Market Share

Market Insights by Product

Epoxies account for a significant engineering adhesives market share due to their superior bonding strength, durability, and resistance to harsh environmental conditions. They are used across multiple end-use sectors such as automotive, aerospace, and construction. Epoxies are primarily used for metal bonding and high-performance coatings, providing robust adhesive solutions for these industries.

Polyurethane adhesives are also expected to gain prominence in the market due to their flexibility, impact resistance, and ability to bond various materials. These properties boost their demand in applications like insulation panels, construction joints, and automotive components.

Market Insights by Applications

The transportation sector, which includes automotive, rail, and marine, among others, accounts for the largest share of the market and contributes greatly to the engineering adhesives industry revenue. The adoption of adhesives is increasing due to their benefits over traditional mechanical fasteners, especially in lowering vehicle weight and improving fuel efficiency. Engineering adhesives are also widely used to bond different materials such as metals, plastics, and composites, particularly in vehicle assembly, with a strong emphasis on EVs and lightweight designs.

The demand for engineering adhesives is also growing in the aviation sector. Adhesives are crucial for reducing aircraft weight and ensuring strong bonds in key components such as wings, fuselages, and interior structures.

Engineering Adhesives Market Regional Analysis

North America Engineering Adhesives Market Trends

The North American region accounts for a significant market share due to the rising demand from sectors such as automotive, aerospace, electronics, and construction. Technological advancements in manufacturing processes and the growing popularity of durable, high-performance adhesives in industrial applications are also boosting the demand of engineering adhesives market. Market players such as 3M, Henkel AG & Co., and H.B. Fuller are readily investing in innovation and launching new products and sustainable adhesive solutions to meet the evolving requirements of various industries. For example, 3M's launched an acrylic adhesive series in 2021 which grew popular due to its low odour and high flexibility.

Asia Pacific Engineering Adhesives Market Drivers

Asia Pacific is expected to be a significant regional market during the forecast period. The growth can be attributed to manufacturers transferring their production facilities to developing countries like China, Taiwan, India, the Philippines, and Indonesia. The highly developed automotive and electronics industry, along with the continuous investments in the region, are

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driving the engineering adhesives demand. Also, the growing renewable energy sector in China, India, Singapore, and Korea due to the advancements in the power generation industry and government reinforcement is increasing the demand for engineering adhesives. Further, China is emerging as one of the biggest markets in terms of the consumption and production of electronics.

Moreover, wind energy is one of the fastest-growing industries in China and globally. Wind turbine blade manufacturing necessitates extensive use of adhesive products, and China leads the world in both land and sea wind power capacity.

Europe Engineering Adhesives Market Analysis

The market growth in the region is driven by the rising demand for engineering adhesives across end-use sectors such as automotive, construction, and electronics, among others. In 2022, polymer dispersions and emulsions were two of the most popular adhesive types in Europe, comprising more than 45% of the overall volume. As per the engineering adhesives market dynamics and trends, under the European Union's Green Deal, which aims to promote circular economy initiatives and lower CO2 emissions, the demand for eco-friendly adhesives and sealants has grown.

Latin America Engineering Adhesives Market Growth

The LATAM market is also expected to witness steady growth in the coming years due to increasing demand from the automotive, construction, and electronics sectors. Major end-use sectors such as packaging and consumer electronics, are also boosting the need for high-performance adhesives, especially in Brazil and Mexico, and contributing to the engineering adhesives demand growth. The construction sector, on the other hand, is fuelling the shift towards bio-based and hybrid adhesive technologies as sustainability becomes a priority. Major global players such as 3M, Henkel, BASF, and Dow Chemical, in the region, are focusing on innovations to meet the rising industrial demands in the region.

Middle East and Africa Engineering Adhesives Market Dynamics

The market in the Middle East and Africa (MEA) is experiencing steady growth due to the rising construction activities, the automotive sector, and expansion of the packaging sector. Saudi Arabia contributes to the engineering adhesives market opportunities, especially with its large-scale Neom mega-city project. This project is estimated to be USD 500 billion and consists of the development of a 26,500 square kilometre area that stretches across northwest Saudi Arabia into Jordan and Egypt. Additionally, the packaging sector, particularly in food and cosmetics, continues to be a major consumer of adhesives.

Innovative Engineering Adhesives Startups

Startups are focused on integrating technology into engineering adhesives. For example, many companies are developing advanced adhesives designed for smart manufacturing environments, which enhance automation and precision. Some other startups are focused on producing adhesives using innovative techniques such as UV curing or hot melts, improving their efficiency and reducing production times. As per the engineering adhesives industry analysis, startups are committed to developing tailored adhesive solutions for emerging markets such as India, Africa, and the Middle East, where the construction and automotive sectors are witnessing substantial growth.

XlynX Materials

XlynX Materials, a startup located in Canada, specialises in the development of adhesives and coatings that establish exceptionally strong molecular connections. Their technology is dedicated to producing highly resilient adhesives tailored for demanding sectors such as aerospace and automotive, where performance under pressure is essential. The company's commitment to high-performance adhesives that minimise energy consumption and processing times has made it a popular

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choice among manufacturers in demand of dependable bonding solutions.

Chemence

Based in the UK, the company is recognised for its proficiency in UV-curable adhesives, which find extensive application in the electronics, medical device, and automotive end-use sectors. The company has gained prominence for its innovative adhesives that facilitate rapid and efficient bonding of materials using ultraviolet light.

Competitive Landscape

The report gives a detailed analysis of the following key players in the global engineering adhesives market, covering their competitive landscape, capacity, and latest developments like mergers, acquisitions, and investments, expansions of capacity, and plant turnarounds. Companies are investing heavily in research and development to develop environmentally friendly adhesives. They are focusing on bio-based and VOC-free formulations to meet stricter environmental regulations and the growing consumer demand for sustainable products. These companies have also introduced adhesives with lower carbon footprints and are emphasising sustainable manufacturing practices. Furthermore, they are working on adhesives designed for lightweight materials, especially in the automotive and aerospace sectors.

Sika AG

Sika AG is a leading global player in the speciality chemicals sector, focusing on products and systems for bonding, sealing, damping, reinforcing, and protecting applications in the construction and automotive sectors, which can boost the engineering adhesives market expansion.

H.B. Fuller Company

H.B. Fuller, founded in 1887 and based in St. Paul, Minnesota, is a prominent global leader in adhesives. The company offers innovative adhesive and sealant solutions across multiple end-use sectors such as construction, packaging, electronics, automotive, and healthcare, among others.

The Dow Chemical Company

The company offers a wide range of products such as adhesives, sealants, mortars, and waterproofing solutions. Sika is especially known for its advanced adhesives and sealants used in the construction and automotive sectors, significantly contributing to sustainable initiatives like energy-efficient buildings and lightweight automotive components.

Other major players in the market are 3M Company, Henkel AG & Co. KGaA, Permabond LLC, Shanghai Huitian New Material Co Ltd, and Huntsman Corporation, among others.

The comprehensive EMR report provides an in-depth assessment of the engineering adhesives market based on the Porter's five forces model along with giving a SWOT analysis.

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