

North America Construction Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

North America Construction Chemicals Market Analysis

The North America Construction Chemicals Market was valued at USD 19.20 billion in 2025 and estimated to grow from USD 20.3 billion in 2026 to reach USD 26.79 billion by 2031, at a CAGR of 5.71% during the forecast period (2026-2031). Infrastructure modernization programs, buy-clean procurement rules, and the rise of AI-enabled mix-design platforms are simultaneously expanding product demand and redefining specification pathways. Highway, bridge, and water-infrastructure upgrades funded by the Infrastructure Investment and Jobs Act (IIJA) fuel a steady pipeline of large-volume concrete applications that require high-efficiency admixtures capable of extending service life while offsetting raw material inflation. State-level embodied-carbon mandates are steering buyers toward low-GWP waterproofing membranes and supplementary-cementitious-material-compatible admixtures, creating premium pricing niches for verified sustainable chemistries. Data-center and semiconductor megaprojects drive the rapid adoption of fire-resistant coatings, precision sealants, and quick-turn curing compounds, while energy-efficiency codes increase demand for high-performance adhesives within advanced envelope systems. Petro-derived resin price swings and skilled-labor shortages remain cost headwinds; however, suppliers with vertically integrated feedstock positions and simplified application technologies are mitigating margin risk.

North America Construction Chemicals Market Trends and Insights

Substantial investments in infrastructure projects

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Many transportation improvements and bridge repairs, financed by the IIJA, are translating into consistent, high-volume demand for protective coatings, repair mortars, and water treatment chemicals. Cost inflation-characterized by growth in highway-construction indices during 2022-has eroded purchasing power, prompting agencies to shift toward performance-based specifications that emphasize lifecycle durability. Canadian federal and provincial programs mirror the U.S. momentum, particularly for waterproofing systems engineered to withstand freeze-thaw cycles. Suppliers that can document extended asset life under accelerated-aging protocols are winning multi-year framework contracts. Vertical integration in raw material sourcing is emerging as a hedge against bid volatility, allowing producers to honor fixed-price commitments despite fluctuations in feedstock prices.

Stringent energy-efficiency codes spurring high-performance admixtures

Convergence of Title 24, IECC, and provincial energy codes has elevated the minimum thermal performance required of walls and roofs, driving adoption of advanced sealants and adhesive systems that support continuous-insulation assemblies. The same projects must now also demonstrate lower embodied carbon, creating dual pressure for admixtures that reduce cement content without compromising strength. Concrete producers increasingly specify superplasticizers that allow higher fly-ash or slag substitution ratios, and some are integrating nano-silica blends to meet stringent modulus targets. Chemical suppliers offering cradle-to-gate EPDs and technical modeling support are displacing commodity providers in public-sector bids. In commercial buildings, energy modeling tools are linking thermal and structural simulations, further tightening tolerances on chemical performance at thinner slab profiles.

Volatility in petro-derived resin prices

Epoxy resin spot prices spiked after USITC launched an antidumping inquiry, squeezing margins in specialty coatings that rely on high-purity bisphenol-A feedstock. Manufacturers with Gulf-Coast plants enjoy freight advantages but remain vulnerable to hurricane-related outages. Hedging strategies include dual-sourcing from Asia and building on-site tank storage to smooth supply shocks. End-users are trialing hybrid systems that replace petro content with bio-based epoxies, but these blends still command price premiums and face limited code approvals. Dynamic pricing clauses have become standard in multi-year supply contracts to pass through feedstock price fluctuations.

Other drivers and restraints analyzed in the detailed report include:

Rapid adoption of ready-mix and precast methods
Circular economy mandates favoring low-carbon construction materials
Labor shortages slowing new project starts

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Waterproofing Solutions accounted for 32.62% of the North America construction chemicals market in 2025 and is projected to grow at a 6.09% CAGR through 2031, reflecting heightened focus on building-envelope integrity under stricter moisture-management codes. The segment outpaces overall market expansion as liquid-applied membranes replace sheet systems to cut labor hours and accommodate complex geometries. Manufacturers are blending polymer-modified asphalt with reactive silanes to achieve elongation while maintaining vapor permeability, meeting dual performance targets in energy-efficient assemblies. Hybrid systems that reinforce fluid membranes with geo-textile fabrics command premiums over standard products. Surface-treatment chemicals and curing compounds follow the same trend as precast producers, who emphasize release cleanliness and hydration control to accelerate plant throughput. Meanwhile, concrete-admixture suppliers are incorporating shrinkage-reducing additives into integrated waterproofing packages, enabling contractors to source multi-functional solutions

under a single warranty.

Concrete Admixtures remain a significant product group, driven by superplasticizers that deliver 25 MPa strength at 50% replacement levels of portland cement-a critical capability for low-carbon bids. Repair and rehabilitation chemicals, including fiber-wrapping epoxies and ultra-rapid-setting mortars, benefit from the aging bridge stock, with many federal projects already specifying these systems for deck overlays. Adhesives, sealants, and flooring resins maintain steady demand tied to commercial facade upgrades and high-traffic retail refurbishments. VOC restrictions and NFPA 285 compliance continue to push formulators toward low-solvent or water-borne chemistries, reshaping raw-material portfolios and margin profiles.

The North America Construction Chemicals Market Report is Segmented by Product (Adhesives, Anchors and Grouts, Concrete Admixtures, Concrete Protective Coatings, Flooring Resins, Repair and Rehabilitation Chemicals, and More), End-User Sector (Commercial, Industrial and Institutional, Infrastructure, and Residential), and Geography (United States, Canada, and Mexico). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

3M ARDEX Americas Arkema (Bostik) Ashland Dow Henkel AG & Co. KGaA Holcim Group Kingspan Group LATICRETE International, Inc MAPEI S.p.A. RPM International Inc. Saint-Gobain Sika AG Xypex USA

Additional Benefits:

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

Table of Contents:

1 Introduction

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Substantial investments in infrastructure projects

4.2.2 Stringent energy-efficiency codes spurring high-performance admixtures

4.2.3 Rapid adoption of ready-mix and precast methods

4.2.4 Circular economy mandates favouring low-carbon construction materials

4.2.5 AI-enabled mix-design platforms boosting chemical dosage accuracy

4.3 Market Restraints

4.3.1 Volatility in petro-derived resin prices

4.3.2 Labor shortages slowing new project starts

4.3.3 Fire-safety rule changes curbing solvent-borne chemistries

4.4 Value Chain Analysis

4.5 Regulatory Landscape

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4.6 Porter's Five Forces

4.6.1 Threat of New Entrants

4.6.2 Bargaining Power of Suppliers

4.6.3 Bargaining Power of Buyers

4.6.4 Threat of Substitutes

4.6.5 Industry Rivalry

5 Market Size and Growth Forecasts (Value)

5.1 By Product

5.1.1 Adhesives

5.1.1.1 Hot-Melt

5.1.1.2 Reactive

5.1.1.3 Solvent-borne

5.1.1.4 Water-borne

5.1.2 Anchors and Grouts

5.1.2.1 Cementitious Fixing

5.1.2.2 Resin Fixing

5.1.3 Concrete Admixtures

5.1.3.1 Accelerator

5.1.3.2 Air-Entraining

5.1.3.3 Super-plasticizer

5.1.3.4 Retarder

5.1.3.5 Shrinkage-Reducer

5.1.3.6 Viscosity-Modifier

5.1.3.7 Plasticizer

5.1.3.8 Other Types

5.1.4 Concrete Protective Coatings

5.1.4.1 Acrylic

5.1.4.2 Alkyd

5.1.4.3 Epoxy

5.1.4.4 Polyurethane

5.1.4.5 Other Resins

5.1.5 Flooring Resins

5.1.5.1 Acrylic

5.1.5.2 Epoxy

5.1.5.3 Polyaspartic

5.1.5.4 Polyurethane

5.1.5.5 Other Resins

5.1.6 Repair and Rehabilitation Chemicals

5.1.6.1 Fiber-Wrapping Systems

5.1.6.2 Injection Grouting

5.1.6.3 Micro-concrete Mortars

5.1.6.4 Modified Mortars

5.1.6.5 Rebar Protectors

5.1.7 Sealants

5.1.7.1 Acrylic

5.1.7.2 Epoxy

- 5.1.7.3 Polyurethane
- 5.1.7.4 Silicone
- 5.1.7.5 Other Resins
- 5.1.8 Surface-Treatment Chemicals
 - 5.1.8.1 Curing Compounds
 - 5.1.8.2 Mold-Release Agents
 - 5.1.8.3 Other Types
- 5.1.9 Waterproofing Solutions
 - 5.1.9.1 Chemicals
 - 5.1.9.2 Membranes
- 5.2 By End-User Sector
 - 5.2.1 Commercial
 - 5.2.2 Industrial and Institutional
 - 5.2.3 Infrastructure
 - 5.2.4 Residential

5.3 By Geography

- 5.3.1 United States

- 5.3.2 Canada

- 5.3.3 Mexico

6 Competitive Landscape

- 6.1 Market Concentration

- 6.2 Strategic Moves

- 6.3 Market Share(%)/Ranking Analysis

- 6.4 Company Profiles {(includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)}

- 6.4.1 3M

- 6.4.2 ARDEX Americas

- 6.4.3 Arkema (Bostik)

- 6.4.4 Ashland

- 6.4.5 Dow

- 6.4.6 Henkel AG & Co. KGaA

- 6.4.7 Holcim Group

- 6.4.8 Kingspan Group

- 6.4.9 LATICRETE International, Inc

- 6.4.10 MAPEI S.p.A.

- 6.4.11 RPM International Inc.

- 6.4.12 Saint-Gobain

- 6.4.13 Sika AG

- 6.4.14 Xypex USA

7 Market Opportunities and Future Outlook

- 7.1 White-Space and Unmet-Need Assessment

8 Key Strategic Questions for CEOs

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