

Roofing Chemicals Market By Material Type (Acrylic, Asphalt, Elastomer, Epoxy Resin, Styrene, Others), By Roofing Type (Membrane roofing, Elastomeric roofing, Bituminous roofing, Metal roofing, Plastic (PVC) roofing, Others), By Construction Type (New Construction, Re-Roofing), By End-Use (Residential, Non-Residential): Global Opportunity Analysis and Industry Forecast, 2023 - 2033

Market Report | 2024-04-01 | 300 pages | Allied Market Research

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Report description:

The global roofing chemicals market was valued at \$42.3 billion in 2023, and is projected to reach \$69.4 billion by 2033, growing at a CAGR of 5.1% from 2024 to 2033.

Introduction

Roofing chemicals form a diverse group of compounds crafted to safeguard, seal, bond, and amplify the efficiency of roofing structures. This category encompasses sealants, adhesives, coatings, primers, membranes, and waterproofing agents, among others. Each variant is engineered for distinct purposes such as waterproofing, UV protection, thermal insulation, or bonding, catering to the diverse needs of various roofing materials and environmental applications.

The utilization of roofing chemicals offers numerous benefits to both residential and commercial buildings. The roofing chemicals provide superior protection against harsh weather conditions, including rain, snow, UV radiation, and temperature fluctuations, thereby extending the lifespan of roofing materials. Additionally, roofing chemicals enhance energy efficiency by reducing heat transfer and air leakage, leading to lower heating and cooling costs. Moreover, roofing chemicals contribute to improved aesthetics, as they come in various colors and finishes to complement the overall design of the structure. Furthermore, they help in preventing leaks, mold growth, and structural damage, thus reducing maintenance requirements and associated costs over time.

One of the primary functions of roofing chemicals is waterproofing. Waterproofing compounds are designed to prevent water penetration into the roof structure, thereby protecting the building interior from moisture damage. In addition to waterproofing,

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roofing chemicals also play a crucial role in providing thermal insulation. Insulating materials such as foam sprays or reflective coatings are applied to the roof surface to reduce heat transfer between the interior and exterior of the building. This helps regulate indoor temperatures, improve energy efficiency, and lower heating and cooling costs. Insulation chemicals are particularly important in regions with extreme climates, where maintaining comfortable indoor conditions is essential.

Market Dynamics

The increase in demand of the roofing construction industry drives the growth of the roofing chemicals market. The growth in the construction of new residential, commercial, industrial, and infrastructure projects requires a significant amount of roofing materials. Roofing chemicals play a crucial role in ensuring the durability, weatherproofing, and energy efficiency of these newly constructed roofs. Advancements in roofing technology, such as the development of cool roofs, green roofs, and smart roofing systems, are driving the demand for specialized roofing chemicals that provide these advanced functionalities. This creates opportunities for manufacturers to innovate and introduce new products tailored to specific market needs.

In February 2024, Holcim acquired ZinCo, a leader in advanced green roofing systems based in Germany with operations across Europe, Asia, and the Americas. Holcim is advancing its goal of expanding its solutions & products business to 30% of group net sales by 2025, entering the most attractive segments of construction, from roofing systems to insulation and renovation.

However, health and safety concerns are expected to restrain the growth of the roofing chemicals market. Many roofing chemicals contain volatile organic compounds (VOCs), solvents, and other hazardous substances that can emit toxic fumes during manufacturing, handling, and application. Prolonged exposure to these fumes can lead to respiratory problems, eye irritation, headaches, and other health issues for workers and contractors. Additionally, certain roofing chemicals may contain carcinogenic or mutagenic substances, posing long-term health risks to individuals exposed to them. Skin contact with roofing chemicals, such as sealants, adhesives, and coatings, can cause irritation, allergic reactions, chemical burns, and dermatitis. Workers and contractors who handle these chemicals without proper protective equipment and precautions are at risk of developing skin-related health issues.

Segments Overview

The roofing chemicals market is segmented into material type, roofing type, construction type, application, and region. On the basis of material type, the market is classified into acrylic, asphalt, elastomer, epoxy resin, styrene, and others. On the basis of the roofing type, the market is divided into membrane roofing, elastomeric roofing, bituminous roofing, metal roofing, plastic (PVC) roofing, and others. On the basis of the construction type, the market is bifurcated into new construction, and re-roofing. On the basis of the application, the market is categorized into residential, and non-residential. Region-wise, the market is studied across North America, Europe, Asia-Pacific, and LAMEA.

On the basis of material type, the other segment including polyurethane, Polyvinyl Chloride (PVC), thermoplastic olefin (TPO) and others is the fastest growing segment in the roofing chemicals market representing the growth of 6.1% during the forecast period. Polyurethane roofing are key components in polyurethane formulations, providing the material with its structural integrity and strength.

On the basis of roofing type, the other segment including slate roofing, composite roofing and others is the fastest growing segment in the roofing chemicals market growing with the CAGR of 6.4% during the forecast period. Slate is a natural stone with inherent waterproof properties. However, sealants and waterproofing compounds are often applied to further enhance its resistance to moisture infiltration. These chemicals create a protective barrier against water, preventing leaks and water damage. Based on construction type re-roofing is the fastest growing segment growing with the CAGR of 5.6 from 2024 to 2033. Corrosion protection is particularly important for metal roofs, which are susceptible to rust and corrosion. Corrosion-resistant chemicals, such as zinc-based coatings, galvanized steel, and epoxy primers, are applied to metal surfaces to prevent oxidation and corrosion. These chemicals create a protective barrier that shields the metal from moisture, oxygen, and other corrosive elements, extending the lifespan of the roof and reducing maintenance requirements.

Region-wise, Asia-Pacific dominated the roofing chemicals, growing with a CAGR of 5.5% during the forecast period. China's roofing chemical market is driven by rapid urbanization and infrastructure development. Waterproofing solutions are in high demand, especially in coastal regions prone to typhoons and heavy rainfall. Polyurethane and acrylic-based waterproofing membranes are widely used for their durability and versatility. Reflective roof coatings are also gaining popularity in Chinese cities to mitigate the urban heat island effect and reduce energy consumption for cooling.

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Competitive Analysis

In addition, the report covers profiles of key industry participants such as BASF SE, Dow, SIKA CORPORATION, GAF, Inc, Owens Corning, Johns Manville, Saint-Gobain, DuPont, Akzo Nobel N.V., and PPG Industries.

Key Market Trends:

By material type, the asphalt is the most lucrative segment growing with the CAGR of 4.8% during the forecast period.

By roofing type others segment including slate roofing, composite roofing and others is the fastest growing segment representing 6.4% CAGR in the market during the forecast period.

By construction type new construction dominated the market accounting for more than half of the market share in the roofing chemicals market.

By end-use residential is the most lucrative segment accounting for more than half of the market share in the roofing chemicals market.

Region-wise Asia-Pacific is the fastest growing region growing with the CAGR of 5.5% during the forecast period.

Key Benefits For Stakeholders

This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the roofing chemicals market analysis from 2023 to 2033 to identify the prevailing roofing chemicals market opportunities.

The market research is offered along with information related to key drivers, restraints, and opportunities.

Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-buyer network.

In-depth analysis of the roofing chemicals market segmentation assists to determine the prevailing market opportunities.

Major countries in each region are mapped according to their revenue contribution to the global market.

Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

The report includes the analysis of the regional as well as global roofing chemicals market trends, key players, market segments, application areas, and market growth strategies.

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End user preferences and pain points

Product Benchmarking / Product specification and applications

Product Life Cycles

Upcoming/New Entrant by Regions

Technology Trend Analysis

Market share analysis of players by products/segments

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New Product Development/ Product Matrix of Key Players
Patient/epidemiology data at country, region, global level
Regulatory Guidelines
Additional company profiles with specific to client's interest
Additional country or region analysis- market size and forecast
Criss-cross segment analysis- market size and forecast
Expanded list for Company Profiles
Historic market data
Key player details (including location, contact details, supplier/vendor network etc. in excel format)
Market share analysis of players at global/region/country level
SWOT Analysis
Volume Market Size and Forecast

Key Market Segments By Material Type Epoxy Resin

Styrene
Others
Acrylic
Asphalt
Elastomer
By Roofing Type Membrane roofing
Elastomeric roofing
Bituminous roofing
Metal roofing
Plastic (PVC) roofing
Others
By Construction Type New Construction
Re-Roofing
By End-Use Residential
Non-Residential
By Region North America U.S.
Canada
Mexico
Europe Germany
France
UK
Spain
Italy
Rest of Europe
Asia-Pacific China
Japan
India
South Korea
Australia
Rest of Asia-Pacific
LAMEA Brazil
Saudi Arabia
South Africa

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Rest of LAMEA
Key Market Players
BASF SE
Dow
Sika Corporation
GAF, Inc
Owens Corning
Johns Manville
Saint-Gobain
DUPONT
Akzo Nobel N.V.
PPG Industries Inc

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**Roofing Chemicals Market By Material Type (Acrylic, Asphalt, Elastomer, Epoxy Resin, Styrene, Others), By Roofing Type (Membrane roofing, Elastomeric roofing, Bituminous roofing, Metal roofing, Plastic (PVC) roofing, Others), By Construction Type (New Construction, Re-Roofing), By End-Use (Residential, Non-Residential):
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