

Saudi Arabia Adhesives Market Assessment, By Type [Synthetic, Natural], By Technology [Water-Based, Solvent-Based, Hot melt, Reactive, Silicone, UV cured, Others], By Form [Paste, Liquid, Film, Others], By Application[Paper Packaging, Footwear, Door and window Assembly, Bonding structural parts, Lamination, Others], By End-user [Automotive (Passenger Cars, Light Commercial Vehicles, Heavy Commercial Vehicle, Others), Construction (Residential, Commercial, Industrial), Woodworking, Electrical and Electronics, Healthcare, Oil and Gas, Others, By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

Saudi Arabia Adhesives Market is experiencing robust growth, having reached a valuation of USD 326.92 million in 2022, and is projected to reach USD 601.08 million by 2030, exhibiting a steady CAGR of 7.91% for the forecast period between 2023 to 2030. The growing manufacturing sector is one of the major drivers of adhesives as Saudi Arabia attempts to diversify its economy. To support the product assembly, packaging, bonding structural parts and other applications, adhesives are widely used in sectors such as automotive, electronics, packaging, furniture, and textiles.

The demand for adhesives in the automotive industry across Saudi Arabia is growing due to the construction of regional auto assembly plants along with the adoption of

electric vehicles. The demand for adhesives in automotive assembly, bonding various components like interior trim, body panels, and glass, is growing due to the development of the automotive industry in Saudi Arabia, including local vehicle manufacturing and assembly. Additionally, the energy and oil & gas sector in Saudi Arabia significantly drives the adhesive market due to its application in pipeline coating, insulation, sealing, bonding, and others.

Moreover, Saudi Arabia has witnessed significant investments in construction projects. The distinct requirements and specifications of the ambitious projects of its Vision 2030 initiative program is expected to create demand for the adhesives sector in the region.

Higher Demand for Adhesives in Construction Sector

In recent years, Saudi Arabia has seen significant infrastructure and construction growth. Adhesives play an important role in various construction applications, such as the bonding of building materials, tiles, flooring, insulation, and others. The country's demand for adhesives is fuelled by the increase in construction projects. As part of its Vision 2030 program, Saudi Arabia has been carrying out several sizable infrastructure projects, including NEOM, the Red Sea Project, Qiddiya, King Salman Energy Park, Jeddah Tower, and Riyadh Metro.

Adhesives are used extensively in these large-scale projects for a variety of purposes, including building, decorating, and specialty coatings. Thus, owing to these distinctive requirements and specifications across construction projects is expected to drive the demand for adhesives in coming years.

Strong Petrochemical Sector

Saudi Arabia has a thriving energy and oil & gas industry due to its oil wealth. In this industry, adhesives are widely used for applications such as coating, bonding, sealing, and insulation of pipelines.

Saudi Aramco and Petrochemical Company TotalEnergies collaborate for a construction of an Ethylene plant in Al-Jubail which will have a capacity of 1.50 million tons with a cost of USD 2.7 billion and the commercial operation is targeted to start by 2027. The plant will supply petrochemical and specialty businesses in the industrial city of Jubail with feedstock. Thus, the construction of new capacities and distribution channels is expected to create demand for fitting tools and pipeline installation that is in turn expected to create opportunity for the adhesives market.

Shift Toward Renewable Energy

In the development of solar and wind energy, Saudi Arabia has made notable progress. Adhesives are required during the installation of solar panels, wind turbine blades, and other components.

In Sakaka City, Al Jouf Province, Saudi Arabia, there is a 300MW photovoltaic (PV) solar project called Sakaka opened in April 2021. More than 75,000 Saudi Arabian households will receive enough clean energy from the power plant, which is connected to the country's electricity grid, preventing the production of more than 430,000t of carbon dioxide (CO₂) annually.

For producers of adhesives, the growth of the renewable energy sector opens new opportunities.

Increasing Demand for Bio-based Adhesives

Similarly, to other countries across the globe, Saudi Arabia is witnessing a growing emphasis on sustainability and environmentally friendly products. There is an increasing demand for eco-friendly adhesives that have a minimal environmental impact, are free from hazardous chemicals, and offer recyclability. Demand for low-VOC adhesives is expected to drive the market in Saudi Arabia in the coming years.

Additionally, products made of plastic (including adhesives) must comply with new regulations implemented by SASO, the Saudi organization in charge of standards, measurement, and quality. As a result, the packaging industry is anticipated to see an increase in demand for biodegradable plastics that are friendly to the environment. This would strengthen the demand for bio-based adhesives in the Saudi Arabia market.

Impact of COVID-19

The COVID-19 pandemic caused numerous infrastructure and construction projects to be delayed or abandoned. This directly affected the demand for adhesives used in construction applications like securing flooring, tiles, and other building materials. Further, Global supply chains were disrupted as a result of the pandemic, including issues with transportation and raw material availability. Raw material sourcing issues for adhesive manufacturers could have caused production and delivery delays. On the demand side, due to lockdowns and restrictions, industries like automotive and

manufacturing industries experienced delays or brief suspensions, which reduced the demand for adhesives. However, due to the rise in demand for medical supplies and online shopping, adhesive demand increased in industries like healthcare, packaging, and e-commerce and countered the pandemic's negative effects to an extent.

Impact of Russia-Ukraine War

The war between Russia and Ukraine had little to no direct effect on the Saudi Arabia Adhesive market. However, there were a few unintended consequences of the geopolitical unrest on the US PU pads market. Since imports of crude oil from Russia were banned by a number of European nations, most of those countries turned to Saudi Arabia for its crude oil supply. Additionally, the manufacturing situation in Saudi Arabia market became less constrained due to rise in the export of feedstock crude oil to Europe. However, as Saudi Arabia started buying Russian Crude for domestic needs, the war had conditioned for the domestic manufacturers.

Key Players Landscape and Outlook

The Saudi Arabian adhesives market has a positive outlook. The nation's emphasis on economic diversification, growing manufacturing industries, and infrastructure development is anticipated to increase demand for adhesives. Additionally, there will probably be more demand for eco-friendly adhesive solutions as sustainability and environmental issues come to the fore. Technological developments, research and development initiatives, and partnerships between national and international players will result in novel adhesive products and solutions. Government programs encouraging localization and spending on research and development might also help the market expand.

Bostik and DGE have a distribution agreement for use in Europe, the Middle East, and Africa, valid since January 2022. The agreement covers Born2Bond™ engineering adhesives created for 'by-the-dot' bonding applications in particular industries, including automotive, electronics, luxury packaging, medical devices, and MRO.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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