

# **Stone and Tile Adhesives and Sealants Market Forecasts to 2030 – Global Analysis By Product Type (Adhesives and Sealants), Substrate Type (Ceramic Tiles, Porcelain Tiles, Natural Stone, Glass Tiles and Other Substrate Types), Distribution Channel, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Stone and Tile Adhesives and Sealants Market is growing at a CAGR of 9.3% during the forecast period. Stone and tile adhesives and sealants are specialized materials used to bond and protect stone, ceramic, and porcelain tiles. Adhesives provide strong, durable bonding between tiles and surfaces, ensuring stability. Sealants are applied to protect the grout lines and tile surfaces from moisture, stains, and wear. These products are essential in flooring, wall installations, and exterior applications, offering longevity and aesthetic enhancement to stone and tile surfaces.

According to the U.S. Census Bureau, the value of construction in 2022 was \$1,792.9 billion, 10.2 percent ( $\pm 0.8$  percent) above the \$1,626.4 billion spent in 2021.

Market Dynamics:

Driver:

Growing construction industry

The expanding construction industry is a primary driver for the stone and tile adhesives and sealants market. Increasing residential, commercial, and industrial construction

projects globally have boosted demand for durable and aesthetically appealing materials. Adhesives and sealants are crucial for ensuring strong bonding and longevity of tiles, making them indispensable in modern construction. Additionally, the rise in renovation activities further supports market growth, as these products are essential for repair and refurbishment projects.

#### Restraint:

##### Fluctuating raw material prices

Fluctuating prices of raw materials, such as polymers and additives, act as a significant restraint. These materials are derived from petrochemicals, whose prices are volatile due to geopolitical tensions and supply-demand imbalances. Rising costs directly impact the profitability of manufacturers and may lead to higher product prices, reducing affordability for end-users. This challenge is particularly pronounced in price-sensitive markets, where cost competitiveness is crucial.

#### Opportunity:

##### Rapid urbanization and infrastructure development

Rapid urbanization and infrastructure development present lucrative opportunities for the market. Emerging economies in Asia-Pacific, Latin America, and Africa are witnessing significant investments in housing and public infrastructure. The demand for advanced adhesives and sealants is increasing as builders prioritize durability and energy efficiency in new projects. Moreover, innovations in eco-friendly products with low VOC emissions align with global sustainability goals, further driving adoption.

#### Threat:

##### Rising use of pre-fabricated panels

The growing popularity of pre-fabricated panels poses a threat to the market. These panels often come pre-finished, reducing the need for on-site adhesives and sealants. Additionally, pre-fabricated solutions offer faster installation times and cost savings, which appeal to contractors and developers. This trend could limit the growth potential of traditional adhesives and sealants in specific applications.

#### Covid-19 Impact:

The COVID-19 pandemic disrupted the stone and tile adhesives and sealants market due to halted construction activities, supply chain interruptions, and labor shortages. Demand declined sharply during lockdowns as large-scale projects were delayed or canceled. However, a surge in DIY home improvement projects partially offset losses in residential segments. As economies recover and construction resumes, the market are expected to rebound strongly.

The residential buildings segment is expected to be the largest during the forecast period

The residential buildings segment is expected to account for the largest market share during the forecast period. Increasing investments in housing development and renovation projects are driving demand for adhesives and sealants that ensure durability, waterproofing, and aesthetic enhancement. Rising disposable incomes and changing consumer preferences for modern living spaces are further bolstering this segment's growth, making it a significant contributor to the market.

The porcelain tiles segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the porcelain tiles segment is expected to witness the highest CAGR. This growth is attributed to the superior properties of porcelain tiles, including durability, stain resistance, and aesthetic versatility. Growing adoption in residential and commercial spaces, coupled with advancements in adhesive formulations specifically designed for porcelain tiles, is driving this segment's expansion.

Region with largest share:

The North America region is anticipated to account for the largest market share during the forecast period. Extensive remodeling activities and a preference for high-quality construction materials are driving demand for adhesives and sealants. Government initiatives promoting sustainable construction practices and the presence of leading market players further strengthen North America's position as the largest regional market.

Region with highest CAGR:

The Asia Pacific region is anticipated to register the highest growth rate over the

forecast period. Rapid urbanization and infrastructure expansion in countries like China and India fuel demand for adhesives in this region. Growing populations, increasing disposable incomes, and government initiatives promoting affordable housing further drive the adoption of these products. The shift toward modern construction practices accelerates growth, making Asia Pacific a key market for future opportunities.

### Key players in the market

Some of the key players in Stone and Tile Adhesives and Sealants Market include Henkel AG & Co. KGaA, H.B. Fuller Company, Arkema Group (Bostik), BASF SE, 3M, AKEMI, Fosroc International, Ardex Group, LATICRETE International, DowDuPont, Sika AG, Saint-Gobain Weber, Mapei S.p.A, Terraco Group, Pidilite Industries and MYK LATICRETE.

### Key Developments:

In December 2023, Arkema acquires Arc Building Products in Ireland, specialized in construction adhesives and sealants. With the planned acquisition of Arc Building Products, Arkema will strengthen its position in Ireland's growing construction adhesives market with a broader range of solutions and a local manufacturing footprint.

In September 2023, Henkel has launched an innovative adhesive solution under its 'No More Nails' category. Pattex No More Nails Stick & Peel is the first removable construction adhesive on the market that holds a weight of up to 6 kilograms on different surfaces such as tile, glass or PVC and can be easily peeled off without any damage. The revolutionary product offers high initial tack for easy, quick, and removable decoration at home – thanks to its water-resistance even in wet areas such as bathrooms or kitchens.

### Product Types Covered:

Adhesives

Sealants

### Substrate Types Covered:

Ceramic Tiles

Porcelain Tiles

Natural Stone

Glass Tiles

Other Substrate Types

Distribution Channels Covered:

Direct Sales

Retailers and Wholesalers

E-commerce

End Users Covered:

Residential Buildings

Commercial Buildings

Institutional Buildings

Infrastructure Projects

Regions Covered:

North America

US

Canada

Mexico

## Europe

Germany

UK

Italy

France

Spain

Rest of Europe

## Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

## South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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