

Composite Adhesives Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented by Product (Epoxy, Polyurethane, Acrylic, Cyanoacrylate and Other), By End User (Automotive & Transportation, Aerospace & Defense, Electrical & Electronics, Construction, and Others), By Region and competition

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Abstracts

Global Composite Adhesives Market has valued at USD 3.13 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.07% through 2028.

Composite adhesives are at the forefront of technological advancements in bonding solutions, proving essential in today's fast-evolving industrial landscape. Characterized by their ability to bind diverse composites, these adhesives have solidified their place in various sectors. This article provides a comprehensive overview of the Global Composite Adhesives Market, spotlighting its current status, growth drivers, challenges, and prevailing trends.

The Global Composite Adhesives Market has witnessed sustained growth over recent years. The mounting demand across diverse industries, such as aerospace, automotive, marine, and construction, has propelled the market to its current stature. Given the multifaceted benefits these adhesives offer, including superior strength, heat resistance, and durability, their popularity in various applications is unsurprising.

The aerospace sector is increasingly turning to composite materials for aircraft components due to their lightweight yet durable properties. Composite adhesives play

an integral role in binding these materials, aiding in weight reduction without compromising on strength.

In the quest for fuel efficiency, the automotive industry emphasizes lightweight vehicles. Composite adhesives, pivotal in binding lightweight composites, cater to this need effectively. Wind energy, which relies on large turbine blades made of composite materials, necessitates robust composite adhesives for optimal performance and durability. Modern architectural designs and infrastructural projects often involve composite materials for enhanced strength and aesthetics. Composite adhesives ensure these materials remain firmly bound, guaranteeing structural integrity.

Composite adhesives, primarily solvent-based, can release VOCs (Volatile Organic Compounds), raising environmental and health concerns. Regulatory bodies worldwide are imposing stringent guidelines, pushing manufacturers towards eco-friendly alternatives. The diverse nature of composite materials can pose bonding challenges, necessitating continuous R&D to develop versatile and effective adhesive solutions.

In line with global sustainability movements, there's a palpable shift towards green or eco-friendly composite adhesives. These environmentally benign alternatives, typically water-based, promise reduced VOC emissions. The rise of smart adhesives, equipped with self-healing and adaptive bonding properties, underscores the market's innovative spirit.

Asia-Pacific, driven by rapid industrialization and infrastructural developments, especially in nations like China and India, is expected to dominate the market. Meanwhile, Europe and North America continue to thrive, propelled by technological advancements in the aerospace and automotive sectors.

The Global Composite Adhesives Market, reflecting the broader narrative of industrial evolution, remains a hub of innovation and growth. As industries evolve, demanding lightweight yet strong materials, composite adhesives emerge as the binding force ensuring durability, safety, and efficiency. The market's future, while promising, hinges on its adaptability to environmental concerns and its capacity to continually innovate in the face of evolving industrial requirements.

Key Market Drivers

Growing Advancement in Aerospace Industry is Major Factor for Composite Adhesives Market Growth

The global composite adhesives market is experiencing significant growth, largely driven by the advancements in the aerospace industry. The aerospace industry is at the forefront of technological innovation, constantly pushing the boundaries of engineering and materials science. Recent advancements in aerospace technology have led to the development and adoption of lightweight composite materials in aircraft construction. These materials offer superior strength-to-weight ratios, fuel efficiency, and durability compared to traditional metals, driving a shift towards their widespread use in modern aircraft.

Composite adhesives play a pivotal role in the aerospace industry's adoption of composite materials. They are used extensively for bonding and joining composite components in aircraft structures, such as fuselages, wings, tail sections, and interiors. Composite adhesives facilitate strong and durable bonds that ensure the structural integrity of composite parts, contributing to enhanced aircraft performance and safety.

One of the primary drivers behind the aerospace industry's transition to composite materials is the pursuit of weight reduction and fuel efficiency. Lighter aircraft require less fuel for propulsion, resulting in reduced operating costs and lower carbon emissions. Composite adhesives, known for their ability to provide robust bonds without adding significant weight, are instrumental in achieving these goals.

Composite adhesives have evolved to meet the aerospace industry's stringent requirements. They are now formulated to offer high shear and tensile strength, excellent resistance to temperature extremes, and resistance to chemicals and environmental factors. These advanced adhesive solutions are tailored to address the specific needs of aircraft manufacturers, ensuring the longevity and reliability of composite structures.

The aerospace industry also relies on composite adhesives for repair and maintenance purposes. They are essential for fixing composite components that may sustain damage during the aircraft's operational life. These adhesives enable efficient repairs, reducing downtime and minimizing the need for costly part replacements.

The commercial aviation sector is witnessing substantial growth, with increasing air travel demand and the introduction of new aircraft models. This has led to a surge in the demand for composite materials and, consequently, composite adhesives. Major aircraft manufacturers are incorporating composites into their designs, further boosting the market for these adhesives.

Ongoing technological innovation in the aerospace industry continues to drive the development of new composite materials and bonding techniques. As aircraft designs become more complex and advanced, the need for specialized composite adhesives that can accommodate these innovations grows. Manufacturers in the composite adhesives market must remain at the forefront of adhesive technology to meet these evolving demands.

The global composite adhesives market is witnessing robust growth due to the aerospace industry's advancements and evolving needs. The aerospace sector's transition to lightweight composite materials for aircraft construction and repair has significantly increased the demand for specialized composite adhesives. As the aerospace industry continues to push the boundaries of technology and efficiency, the market for composite adhesives is expected to thrive. Manufacturers and suppliers in this market must stay agile and innovative to cater to the aerospace industry's evolving requirements, ensuring continued growth and relevance in this dynamic sector.

Rising demand from Renewable Energy Sector Drives the Demand for Composite Adhesives Market

The global composite adhesives market is experiencing substantial growth, and one of the primary drivers behind this expansion is the rising demand from the renewable energy sector. The renewable energy sector, encompassing wind, solar, hydropower, and other clean energy sources, has witnessed significant growth and investment in recent years. Governments and organizations worldwide are increasingly turning to renewable energy as a sustainable and environmentally friendly alternative to traditional fossil fuels.

Composite materials, such as fiberglass and carbon fiber-reinforced composites, have become fundamental in renewable energy applications. These materials offer exceptional strength, durability, and resistance to harsh environmental conditions, making them ideal for use in renewable energy infrastructure.

In the wind energy sector, composite materials are extensively used in the manufacturing of wind turbine blades. Wind turbine blades need to be lightweight yet robust to capture and convert wind energy efficiently. Composite materials, along with composite adhesives, facilitate the construction of longer and more efficient blades, contributing to increased energy production.

Solar energy systems, including photovoltaic panels, require durable and weather-resistant materials. Composite adhesives play a crucial role in bonding and sealing various components of solar panels, ensuring their longevity and efficiency in converting sunlight into electricity.

Hydropower and tidal energy generation involve the use of composite materials for underwater turbines and structures. Composite adhesives are essential for securely joining and sealing these components to withstand the challenges of submersion and turbulent water conditions.

Composite adhesives offer several advantages that align with the renewable energy sector's needs. They are known for their ability to create strong and lightweight bonds, making them instrumental in the construction of large wind turbine blades, solar panels, and other renewable energy infrastructure components.

Renewable energy installations often operate in harsh outdoor environments, exposed to UV radiation, extreme temperatures, and moisture. Composite adhesives are engineered to provide excellent resistance to these environmental factors, ensuring the longevity and reliability of renewable energy systems.

As the world transitions toward cleaner and more sustainable energy sources, the demand for renewable energy infrastructure continues to grow. This transition includes a heightened focus on technological advancements and the use of advanced materials, further driving the market for composite adhesives.

Governments and private sector entities are making substantial investments in renewable energy projects, both onshore and offshore. These investments drive the demand for composite materials and, consequently, composite adhesives required for the construction, maintenance, and repair of renewable energy infrastructure.

The global composite adhesives market is experiencing robust growth due to the increasing demand from the renewable energy sector. Composite materials and adhesives have become integral components of renewable energy infrastructure, enabling the development of more efficient and durable systems. As the world continues its shift towards clean and sustainable energy sources, the market for composite adhesives is expected to play a pivotal role in supporting the expansion and success of the renewable energy industry. Manufacturers and suppliers in this market must continue to innovate and adapt to meet the evolving requirements of the renewable energy sector, ensuring continued growth and relevance in this dynamic and crucial

industry.

Growing Adoption to Solve Construction Complexities

The global composite adhesives market is experiencing remarkable growth, driven significantly by the growing adoption of these specialized adhesives to address and solve the complexities in the construction industry. The construction industry has undergone significant transformations in recent years. Modern construction projects are characterized by their increasing complexity, with designs that demand innovative solutions to address a wide range of challenges.

Composite adhesives have emerged as indispensable tools for construction professionals dealing with complex structural and architectural requirements. These adhesives offer unique properties that make them invaluable in addressing the complexities of modern construction projects.

In construction, structural bonding is crucial for creating durable and stable connections between various building components. Composite adhesives are used to bond materials like concrete, steel, and glass, providing a strong and reliable connection that enhances the structural integrity of buildings.

Modern construction practices increasingly prioritize lightweight materials and structures for improved energy efficiency and sustainability. Composite adhesives are instrumental in bonding lightweight materials, such as composites, fiberglass, and carbon fiber, which contribute to the construction of lighter and more energy-efficient buildings.

Sustainability is a central theme in contemporary construction, with a focus on reducing environmental impact and energy consumption. Composite adhesives align with these sustainability goals, often being formulated as low-VOC (volatile organic compound) adhesives that minimize emissions and contribute to eco-friendly building practices.

Complex construction projects often require flexible and adaptable bonding solutions. Composite adhesives are engineered to offer versatility, accommodating various construction materials, substrates, and design changes that may arise during the course of a project.

The construction industry's evolving complexities demand high-performance solutions. Composite adhesives are designed to meet stringent requirements, providing excellent tensile and shear strength, as well as resistance to temperature variations, moisture,

and environmental factors.

In addition to new construction, composite adhesives are widely used in structural repairs and retrofitting projects. These adhesives enable the reinforcement and rehabilitation of existing structures, extending their service life and ensuring safety and reliability.

Global urbanization trends have led to an increasing number of large-scale construction projects in urban areas. The development of infrastructure, commercial buildings, and residential complexes has driven the demand for composite adhesives as construction professionals seek reliable and efficient solutions for complex urban projects.

The global composite adhesives market is witnessing robust growth, primarily driven by the construction industry's need to address the complexities of modern construction projects. Composite adhesives play a pivotal role in enhancing structural integrity, enabling lightweight construction, and facilitating sustainable and high-performance building practices. As the construction sector continues to evolve and embrace innovative solutions, the market for composite adhesives is expected to thrive. Manufacturers and suppliers in this market must continue to innovate and adapt to meet the ever-changing demands of the construction industry, ensuring continued growth and relevance in this dynamic and essential sector.

Key Market Challenges

Environmental Concerns

Environmental concerns are serving as a substantial roadblock to the growth of the global composite adhesives market. Composite adhesives play a vital role in various industries, particularly in aerospace, automotive, and construction, where lightweight, high-strength materials are in demand. However, the formulations of many traditional composite adhesives often contain volatile organic compounds (VOCs) and hazardous chemicals, which raise red flags in an era of heightened environmental consciousness.

Strict regulations and sustainability goals have driven industries to seek greener alternatives, putting pressure on adhesive manufacturers to reformulate their products. Transitioning to eco-friendly composite adhesives requires extensive research and development, which can be time-consuming and costly. Additionally, the approval processes for new environmentally responsible adhesive solutions can delay market entry.

To navigate this challenge and promote market growth, companies must prioritize the development of low-VOC or VOC-free composite adhesives, embrace sustainable manufacturing practices, and actively engage with regulatory bodies to ensure compliance. This commitment to environmental responsibility will not only address current concerns but also position businesses favorably in a market increasingly driven by eco-friendly innovations.

Technical Limitations

Technical limitations are a significant impediment to the growth of the global composite adhesives market. Composite adhesives are essential in industries such as aerospace, automotive, and construction for their ability to bond lightweight materials, enhancing structural integrity and reducing weight. However, these adhesives face challenges related to their technical performance, particularly in extreme conditions.

Composite adhesives must exhibit high temperature resistance, exceptional strength, and durability to meet industry standards. Meeting these technical requirements can be complex and costly, often requiring extensive research and development efforts. Additionally, adhesives must maintain their performance over time, which can be challenging in harsh environments or under constant stress.

To overcome these technical limitations and stimulate market growth, adhesive manufacturers must invest in cutting-edge materials science and engineering. Collaborations with end-users and research institutions can help address specific technical challenges and refine composite adhesive formulations. By continually innovating to improve performance, manufacturers can meet the evolving demands of industries and expand the global market for composite adhesives.

Key Market Trends

The adoption of green composite adhesives stands as a pivotal trend driving the growth of the global composite adhesives market. In an era marked by heightened environmental awareness and a commitment to sustainable practices, industries across the spectrum are increasingly turning to eco-friendly solutions. Green composite adhesives, also known as environmentally friendly or sustainable adhesives, are gaining traction due to their reduced environmental impact.

These adhesives are formulated with a focus on minimizing volatile organic compounds

(VOCs), using renewable or recycled materials, and lowering energy consumption during production. As regulations become stricter and consumer preferences shift toward more sustainable products, green composite adhesives offer a compelling value proposition.

The market for composite adhesives is witnessing growth as industries like automotive, aerospace, construction, and renewable energy emphasize lightweight, high-strength materials with minimal environmental impact. Manufacturers are actively seeking adhesives that align with their sustainability goals, making green composite adhesives a key driver in the global composite adhesives market's expansion. Companies that invest in and provide eco-conscious adhesive solutions are poised to benefit significantly from this transformative trend.

Smart Adhesives

The emergence of smart adhesives is a pivotal trend propelling the growth of the global composite adhesives market. Smart adhesives, often integrated with advanced technologies like sensors and responsive materials, are designed to provide not just structural bonding but also intelligent functionalities. These functionalities may include monitoring structural health, temperature sensing, or even self-healing capabilities.

Industries such as aerospace, automotive, and construction are increasingly adopting smart adhesives to enhance the performance and longevity of composite materials. For instance, in aerospace, smart adhesives can monitor the structural integrity of aircraft components, providing real-time data for maintenance and safety. In the automotive sector, these adhesives can contribute to lightweighting and fuel efficiency through self-healing properties.

As industries demand more advanced and multifunctional materials, the global composite adhesives market is witnessing substantial growth opportunities. Companies that invest in the development and deployment of smart adhesives, tailored to the unique needs of various sectors, are well-positioned to lead this transformative trend and drive innovation in composite materials across a range of industries.

Segmental Insights

Product Insights

Based on the Product, the epoxy segment emerged as the dominant player in the global

market for Composite Epoxy adhesives are widely used because they are low-cost, strong, durable, and resistant to mechanical shock, high temperatures, low shrinkage, and cryogenic temperatures.

Acrylic adhesives are expected to grow faster as they are used to bond rigid and semi-rigid materials in the automotive and medical industries. They provide strong bonds to composites and have high peel strength. They are also fast-curing and resistant to acids and solvents.

End User Insights

The automotive and transportation segments are projected to experience rapid growth during the forecast period. The use of composite adhesives in aircraft manufacturing increases assembly productivity, reduces weight, and helps to control costs. This is because most of the major parts of an aircraft use composite materials. For example, in 2021, Saab AB opened an aerospace facility in West Lafayette, Indiana, to produce the aft airframe section for the T-7A Red Hawk trainer aircraft. This plant will manufacture various composite parts using composite adhesives.

The automotive industry is expected to be the second-largest application segment of the adhesives market in terms of revenue in 2022. The use of adhesives in the automotive industry is increasing significantly due to the growing trend of lightweight vehicles. To achieve this, automotive companies are increasingly using composites. For example, in 2021, SFHL partnered with Mind S.r.l., marking SFHL's entry into the composites industry to reduce the weight of vehicles.

Regional Insights

Asia Pacific region emerged as the dominant player in the global composite adhesives market in 2022, holding the largest market share in terms of both value and volume. The growing demand for adhesives from the automotive and electronics industries has led to major players investing in the Asia Pacific region. For example, in May 2021, Henkel AG & Co. KGaA invested CNY 500 million USD 77.58 million to set up a dedicated adhesive Asia Pacific innovation center in Shanghai, China. The center will develop high-quality adhesives for consumers in the Asia Pacific region.

North America is expected to register the fastest revenue growth in the adhesives market over the forecast period. This is due to the increasing focus on the production of electric vehicles (EVs), aircraft, and electronics in the region. For example, in November

2021, Tesla Inc. announced plans to establish a new factory to produce battery manufacturing equipment in Canada. EV battery packs use a wide variety of adhesives in their production.

Europe accounted for the second-largest revenue share of the global adhesives market in 2021. The emphasis on using lightweight composite materials in aircraft is expected to benefit market growth over the forecast period. For example, in February 2022, the Netherlands-based Venturi Aviation partnered with Airborne, a company that offers solutions for advanced composites, to use lightweight structures for an all-electric commuter aircraft.

Overall, the adhesives market is expected to grow significantly in the coming years, driven by the automotive, electronics, and aerospace industries. The Asia Pacific region is expected to witness the fastest growth, followed by North America and Europe.

Key Market Players

1. 3M Company
2. Ashland Inc.
3. Bostik SA
4. Delo Industrial Adhesives, LLC
5. Dymax Corporation
6. Engineered Bonding Solutions, LLC
7. H.B. Fuller
8. Henkel AG & Co. KGaA
9. Herson Manufacturing, Inc.
10. Hexcel Corporation
11. Huntsman Corporation

Report Scope:

In this report, the Global Composite Adhesives Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Composite Adhesives Market, By Product:

Epoxy

Polyurethane

Acrylic

Cyanoacrylate

Other

Composite Adhesives Market, By End User:

Automotive & Transportation

Aerospace & Defense

Electrical & Electronics

Construction

Others

Composite Adhesives Market, By Region:

Asia-Pacific

China

India

Japan

Australia

South Korea

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Composite Adhesives Market.

Available Customizations:

Global Composite Adhesives market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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19. STRATEGIC RECOMMENDATIONS

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