

Electric Vehicle Adhesives Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Resin (Epoxy, Silicon, Polyurethane, Acrylic, and Other), By Vehicle Type (Electric Trucks, Electric Buses, Electric Bikes, and Electric Cars), By Application (Exterior, Interior, Powertrain), By Substrate (Plastic, Composite, Metals, and Others), By End Use (Pack & Module Bonding, Thermal Interface Bonding, Battery Cell Encapsulation, and Other), By Region and competition

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Abstracts

Global Electric Vehicle Adhesives Market has valued at USD 1.56 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 9.55% through 2028.

The automotive industry is undergoing a transformation, with electric vehicles (EVs) at the forefront of this revolution. As the world shifts towards cleaner and more sustainable transportation solutions, the demand for electric vehicles is on the rise. Within the EV manufacturing process, adhesive technology plays a pivotal role in ensuring the structural integrity, safety, and performance of these advanced vehicles. In this article, we provide a comprehensive overview of the global electric vehicle adhesives market, exploring key drivers, challenges, and emerging trends.

The global transition towards electric vehicles is accelerating, driven by environmental

concerns, government incentives, and improvements in battery technology. EVs require advanced adhesives for various applications, including battery assembly, structural bonding, and thermal management.

To enhance the energy efficiency and range of electric vehicles, automakers are increasingly focusing on reducing vehicle weight. Adhesives play a vital role in joining lightweight materials like aluminum and carbon fiber composites.

Stringent safety standards and regulations necessitate the use of high-performance adhesives in EV manufacturing to ensure crashworthiness, fire resistance, and overall safety.

Electric vehicles often employ unique materials like lithium-ion batteries and lightweight composites. Adhesive compatibility with these materials can pose challenges in terms of adhesion and durability. EVs generate significant heat, especially during fast charging. Adhesives used in battery assembly and thermal management must withstand high temperatures and thermal cycling.

As environmental concerns remain paramount, the demand for sustainable and eco-friendly adhesives is expected to grow. Bio-based adhesives and those with reduced VOC emissions are gaining attention. Adhesives with enhanced thermal conductivity will be crucial as EV manufacturers strive to manage heat efficiently in battery packs and power electronics. EV manufacturers are seeking tailor-made adhesive solutions to meet the specific requirements of their vehicle designs. This trend is likely to lead to increased customization and innovation in the adhesive industry.

The global electric vehicle adhesives market is poised for substantial growth as the electric vehicle industry continues to expand. Adhesives are fundamental in ensuring the safety, performance, and sustainability of electric vehicles. As automakers worldwide invest in electric mobility and governments implement policies to reduce emissions, the role of adhesives in EV manufacturing becomes increasingly critical. To thrive in this evolving market, adhesive manufacturers should remain adaptive and innovative, developing solutions that address the unique challenges posed by electric vehicles. As electric vehicles become the norm on our roads, the electric vehicle adhesives market will undoubtedly play a central role in shaping the future of automotive manufacturing and sustainable transportation.

Key Market Drivers

Growing Demand for Light Weight Vehicles is Major Factor for Electric Vehicle Adhesives Market Growth

The global electric vehicle (EV) adhesives market is experiencing significant growth, and a major driving force behind this expansion is the increasing demand for lightweight vehicles, particularly electric ones. The automotive industry is currently undergoing a transformation, with electric vehicles at the forefront of this revolution. EVs are gaining popularity due to their eco-friendly nature, reduced emissions, and their potential to reshape the future of transportation.

Lightweighting is a critical strategy in EV development. Reducing the weight of EVs enhances their energy efficiency and extends their driving range, two factors crucial to EV adoption. Lighter vehicles require less energy to operate, leading to improved performance and reduced reliance on large, heavy batteries.

Adhesives are essential components in lightweight vehicle construction. They enable the bonding of dissimilar materials, such as metals, composites, and plastics, creating strong and durable joints without adding excessive weight. This enables manufacturers to replace traditional mechanical fasteners, such as bolts and rivets, with adhesives to achieve weight reduction.

Batteries are one of the heaviest components in an EV. As the demand for greater driving range and improved energy efficiency grows, EV manufacturers are striving to make batteries more energy-dense and lightweight. Adhesives are used in battery assembly to reduce weight and improve thermal management.

EVs often feature unique body and chassis designs to accommodate battery placement and optimize weight distribution. Adhesives play a critical role in securing these specialized components, helping to create lightweight yet structurally sound vehicle frames.

Efficient thermal management is vital for the performance and safety of EVs, particularly during fast charging and high demand driving. Adhesives are used to bond heat sinks and other thermal management components, ensuring that heat is effectively dissipated without adding significant weight.

The growing demand for lightweight vehicles, especially electric ones, is driving the adoption of adhesives in the automotive industry. Adhesive manufacturers are developing specialized formulations to meet the specific lightweighting needs of EV

manufacturers.

Ongoing research and development efforts in the EV adhesives market have led to the creation of advanced formulations that offer exceptional bonding strength, durability, and resistance to extreme temperatures, vibrations, and environmental factors.

As the EV market continues to expand, driven by advances in battery technology and environmental concerns, the demand for lightweight construction and the corresponding use of adhesives is expected to increase. The future of electric mobility hinges on lightweight and efficient vehicles.

The global electric vehicle adhesives market is experiencing robust growth, primarily fueled by the automotive industry's emphasis on lightweight construction in the context of electric vehicles. Lightweighting is essential for improving EV efficiency and driving range, and adhesives are integral to achieving this goal. As the EV market evolves and continues to grow, manufacturers and suppliers in the EV adhesives market must remain at the forefront of technology and innovation to meet the evolving demands of electric vehicle manufacturers, ensuring sustained growth and a more sustainable and efficient future for transportation.

Rising Adoption of Electric Vehicle Drives the Demand for Electric Vehicle Adhesives Market

The global electric vehicle (EV) adhesives market is experiencing remarkable growth, primarily driven by the rising adoption of electric vehicles worldwide. The automotive industry is undergoing a revolutionary transformation with the rapid adoption of electric vehicles. EVs have gained traction due to their environmental benefits, reduced emissions, and potential to reshape the future of transportation.

One of the key strategies in EV development is lightweighting, aimed at reducing vehicle weight to enhance energy efficiency and extend driving range. Lightweight construction materials and innovative design approaches are pivotal in achieving these goals.

Adhesives play a vital role in the construction and assembly of electric vehicles. They are employed in various aspects of EV manufacturing, from bonding lightweight materials to securing critical components and improving overall vehicle performance.

EVs often feature complex and diverse material compositions, including metals,

composites, plastics, and more. Adhesives are essential for securely bonding these dissimilar materials, creating strong and durable joints that reduce weight and enhance structural integrity.

EVs rely on advanced battery technology for power storage. Adhesives are crucial in the assembly of battery packs, ensuring that individual cells are securely held in place. They also play a role in thermal management, as they are used to bond heat-resistant components that dissipate heat generated during charging and driving.

Adhesives contribute to the construction of EV body structures and chassis components. They enable manufacturers to design lightweight but robust vehicle frames, enhancing both energy efficiency and safety.

Adhesives are used to dampen noise, reduce vibrations, and enhance overall ride comfort in electric vehicles. This is especially important as EVs are known for their quiet operation, which can amplify other sources of noise and vibration.

The widespread adoption of electric vehicles is driving the demand for specialized adhesives designed to meet the unique requirements of EV manufacturers. Adhesive manufacturers are developing formulations tailored to the needs of the EV industry.

Ongoing research and development efforts in the EV adhesives market have led to the creation of advanced adhesive formulations with improved bonding strength, durability, and resistance to extreme temperatures, vibrations, and environmental factors.

As electric mobility continues to grow and evolve, driven by advances in battery technology, environmental concerns, and regulatory support, the demand for adhesives will likely increase. Adhesives are essential enablers of lightweight, efficient, and sustainable electric vehicles.

The global electric vehicle adhesives market is experiencing robust growth, primarily fueled by the increasing adoption of electric vehicles worldwide. Adhesives play a critical role in the assembly and performance of EVs, contributing to lightweighting, safety, energy efficiency, and overall vehicle quality. As electric vehicles become more mainstream and the industry continues to innovate, manufacturers and suppliers in the EV adhesives market must remain at the forefront of technology and sustainability to meet the evolving demands of electric vehicle manufacturers. This ensures sustained growth and a brighter, more sustainable future for the world of transportation.

Increasing Investment in Electric Vehicle segment and Associated Industry

The global electric vehicle (EV) adhesives market is experiencing substantial growth, largely attributed to the increasing investment in the electric vehicle segment and its associated industries. Electric vehicles have garnered significant attention from governments, automakers, and investors due to their potential to transform the automotive industry and reduce greenhouse gas emissions. As a result, there has been a substantial increase in investments in the electric vehicle segment.

The electric vehicle ecosystem encompasses not only the manufacturing of electric cars but also the development of infrastructure, charging networks, battery technology, and related industries. These investments support the growth and expansion of the entire EV ecosystem.

Adhesives are integral to the construction, performance, and safety of electric vehicles. They play a critical role in bonding various materials used in EV components, battery assembly, structural integrity, noise reduction, thermal management, and more.

A significant portion of investment in the electric vehicle segment is directed towards battery technology. Improved energy density, faster charging, and longer-lasting batteries are essential for the widespread adoption of EVs. Adhesives are used in the assembly of advanced battery packs and thermal management systems, contributing to battery performance.

Investments drive research and development in lightweight materials and innovative design approaches. Adhesives facilitate the use of lightweight materials, such as composites and aluminum, in EV construction, contributing to energy efficiency and range extension.

The growing investments in electric vehicles have prompted advancements in adhesive technology. Manufacturers are developing specialized adhesive formulations tailored to meet the unique requirements of EV manufacturers, ensuring strong bonds, durability, and resistance to extreme conditions.

Governments worldwide are offering incentives and subsidies to promote the adoption of electric vehicles, which further stimulates investments in the EV industry. These incentives often come with requirements for vehicle efficiency and sustainability, driving the demand for high-performance adhesives.

As investments continue to flow into the electric vehicle ecosystem, the demand for adhesives used in EV manufacturing is expanding. Adhesive manufacturers are poised to benefit from the growth of this ecosystem by supplying critical components.

The future of electric mobility is promising, with investments in research, development, infrastructure, and production set to accelerate the global transition to electric vehicles. Adhesives will remain a vital part of this transformation, supporting the creation of efficient, reliable, and sustainable electric vehicles.

The global electric vehicle adhesives market is experiencing robust growth, primarily driven by the increasing investment in the electric vehicle segment and its associated industries. Adhesives are essential enablers of lightweight, efficient, and sustainable electric vehicles, contributing to vehicle performance, safety, and energy efficiency. As investments in electric vehicles and their ecosystem continue to grow, manufacturers and suppliers in the EV adhesives market must remain at the forefront of technology and sustainability to meet the evolving demands of electric vehicle manufacturers. This ensures sustained growth and a brighter, more sustainable future for the world of transportation.

Key Market Challenges

Adhesive Compatibility with lithium-ion batteries and lightweight Composites

Environmental concerns are serving as a substantial roadblock to the growth of the global Electric Vehicle Adhesives market. Electric Vehicle 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 Electric Vehicle 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 Electric Vehicle 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 Electric Vehicle 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.

Thermal Management or Withstand High Temperatures and Thermal Cycling

Thermal management and the ability to withstand high temperatures and thermal cycling are formidable obstacles to the growth of the global Electric Vehicle (EV) Adhesives market. As electric vehicles become increasingly prevalent, the demand for adhesives that can maintain their structural integrity and bonding strength under extreme thermal conditions has surged.

EV components, particularly batteries and power electronics, generate substantial heat during operation. Adhesives used in these applications must effectively dissipate heat, ensuring that sensitive components remain within their optimal temperature range to prevent performance degradation or even catastrophic failures. Additionally, EVs often undergo rapid thermal cycling as they charge and discharge, subjecting adhesives to significant temperature fluctuations.

Developing adhesives that can consistently endure these demanding conditions while maintaining their adhesive properties is a complex technical challenge. Manufacturers must invest in advanced material science and adhesive formulations to strike the right balance between robust thermal management and strong bonding capabilities. Meeting these requirements is crucial for fostering the growth of the global EV Adhesives market, as it directly impacts the reliability and safety of electric vehicles.

Key Market Trends

Advanced Thermal Management

Advanced thermal management is a crucial trend propelling the growth of the global EV (Electric Vehicle) Adhesives market. With the rapid expansion of the electric vehicle industry, efficient thermal management has become imperative. EVs rely on complex battery systems and power electronics that generate significant heat during operation. To ensure optimal performance, safety, and longevity of these components, thermal management solutions are essential.

Adhesives play a vital role in this context by securing and thermally conducting critical components such as battery cells, power electronics, and cooling systems. Advanced EV adhesives are formulated to offer strong adhesion, electrical insulation, and superior thermal conductivity, helping dissipate heat efficiently and maintain the ideal operating temperature.

As the electric vehicle market continues to grow, driven by environmental concerns and advancements in battery technology, the demand for specialized EV adhesives is on the rise. Companies that innovate and provide advanced thermal management adhesive solutions are well-positioned to capitalize on this trend, contributing to the development of more efficient and reliable electric vehicles.

Customization and Innovation

Customization and innovation are pivotal trends driving the growth of the global Electric Vehicle (EV) Adhesives market. As the EV industry continues to evolve, manufacturers are seeking adhesive solutions that can be customized to meet the unique and ever-changing requirements of electric vehicles. Customization is crucial to ensure adhesives can effectively bond and protect various components, from battery packs and power electronics to charging connectors and motors.

In addition to customization, innovation in adhesive formulations and application methods is essential to address the specific challenges posed by EVs, such as high-temperature environments and exposure to harsh chemicals. EV adhesives need to offer strong bonding capabilities, excellent thermal management properties, and electrical insulation while remaining lightweight and environmentally friendly.

As the demand for electric vehicles grows due to environmental concerns and advancements in EV technology, the global EV Adhesives market is expanding. Companies that invest in research and development to create innovative, customizable adhesive solutions tailored to the dynamic needs of the EV industry are well-positioned to capture significant market share and contribute to the ongoing electrification of transportation.

Segmental Insights

Vehicle Type Insights

Based on the vehicle type, the epoxy segment emerged as the dominant player in the

global market for automotive vehicle adhesives. This is largely attributed to the rapid expansion of BEV production, particularly in the passenger light-duty vehicle segment, as forecasted by the International Energy Agency (IEA). The IEA predicts a substantial increase in the stock of BEVs by 2030, with a significant focus on passenger vehicles.

This growth trend is exemplified by substantial investments in BEV manufacturing. For instance, in May 2019, a joint venture between Volkswagen and Anhui Jianghuai Automobile (known as JAC) received approval to commence construction of their BEV production facility. Volkswagen's ambitious plans for this joint venture involve the production of a staggering 22 million electric vehicles within the next decade, with 50% of this production expected to take place in China.

The substantial consumption of adhesives within the BEV segment, combined with the anticipated surge in BEV production, presents a highly promising outlook for the global adhesive market throughout the forecast period. As the automotive industry undergoes a profound transformation towards electric mobility, the role of adhesives, particularly within the BEV category, is poised to be instrumental in shaping the market's growth trajectory.

End User Insights

The Pack & Module Bonding segments are projected to experience rapid growth during the forecast period. This segment is vital in the production of battery packs for electric powertrains, where adhesives offer a range of benefits. These advantages include enhancing the crashworthiness and structural integrity of the battery pack, reducing weight, enabling bonding of various substrates, and facilitating the bonding of uncoated metal surfaces.

Following closely, the thermal interface bonding segment emerged as the second-largest application segment in 2019. As batteries become smaller and more powerful, they generate increased heat that necessitates effective heat dissipation. To address this challenge, proper thermal interface materials are required, which must combine low viscosity with high thermal conductivity, all while providing insulation. This scenario underscores the importance of adhesives capable of delivering mechanical rigidity, thermal conductivity, and design flexibility, eliminating the need for traditional fasteners. In April 2019, Henkel, for instance, introduced silicone-free liquid gap fillers specifically designed for electric vehicles. These products boasted a thermal conductivity of 3.0 W/m-K. The continuous innovation and research efforts driving the development of new adhesive types tailored for electric vehicles are expected to contribute significantly to

market growth.

Furthermore, battery cell encapsulation is anticipated to witness the most rapid growth throughout the forecast period. Battery cells represent the smallest packaged form of a battery, and adhesives play a crucial role in ensuring their structural integrity. Adhesives are used for aligning cells correctly and securely, preventing any movement, particularly during vibrations, acceleration, or deceleration.

Regional Insights

Asia Pacific region emerged as the dominant player in the Global Electric Vehicle Adhesives Market in 2022, holding the largest market share in terms of both value and volume. The region under discussion, particularly China, stands as a significant consumer of electric vehicles (EVs), given its status as the world's largest manufacturer of such vehicles. However, the advent of the Covid-19 pandemic, which was initially reported in China, had a notable impact on the market's growth trajectory in 2020 and 2021. The pandemic disrupted global supply chains, including the production of electric vehicles. As of March 2020, challenges such as labor shortages and the unavailability of essential raw materials adversely affected the manufacturing of EVs, subsequently influencing the demand for adhesives in this sector.

On the other side of the globe, North America is poised to emerge as the fastest-growing regional market for electric vehicles and, consequently, electric vehicle adhesives. The region is witnessing a surge in investments directed towards the manufacturing of electric vehicles. Notably, in July 2019, LG Chem made a significant announcement regarding the establishment of a second manufacturing facility in the United States, dedicated to producing EV batteries.

LG Chem, a leading player in the battery manufacturing industry, supplies its products to prominent automotive companies like General Motors and Volkswagen. The new factory, scheduled to commence production in 2022, represents a substantial investment in battery production. As the production of batteries and electric vehicles gains momentum in North America, it is expected to drive the demand for adhesives, creating a conducive environment for market growth.

This strategic move aligns with the broader trend of increasing investments in electric vehicle manufacturing in North America. As the automotive industry in the region pivots towards electric mobility solutions, the demand for adhesives, vital in ensuring the structural integrity and performance of EVs, is set to experience rapid growth. These

developments underscore the pivotal role that North America is poised to play in the global electric vehicle market and, by extension, in the electric vehicle adhesives market.

Key Market Players

3M Company

Henkel AG & Co. KGaA

H.B. Fuller Company

Sika AG

Ashland, Inc.

PPG Industries, Inc.

Permabond Engineering Adhesives Ltd.

Wacker Chemie AG

Bostik SA – An Arkema company

L&L Products, Inc.

Report Scope:

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

Electric Vehicle Adhesives Market, By Resin:

Epoxy

Silicon

Polyurethane

Acrylic

Other

Electric Vehicle Adhesives Market, By Vehicle Type:

Electric Trucks

Electric Buses

Electric Bikes

Electric Cars

Electric Vehicle Adhesives Market, By Application:

Exterior

Interior

Powertrain

Electric Vehicle Adhesives Market, By Substrate:

Plastic

Composite

Metals

Others

Electric Vehicle Adhesives Market, By End Use:

Pack & Module Bonding

Thermal Interface Bonding

Battery Cell Encapsulation

Other

Electric Vehicle 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 Electric Vehicle Adhesives Market.

Available Customizations:

Global Electric Vehicle 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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