

Engineering Adhesives Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Epoxies, Polyurethanes, Cyanoacrylates, Methacrylates, and Other), By Application (Transportation, Construction, Electrical & Electronics, Energy, and Others), By Region and competition

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Abstracts

Global Engineering Adhesives Market has valued at USD 19.56 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.23% through 2028.

Engineering adhesives play a critical role in various industries, from automotive and aerospace to electronics and construction. These adhesives are designed to provide strong bonding capabilities, exceptional durability, and resistance to environmental factors. The global engineering adhesives market has witnessed significant growth in recent years, driven by the increasing demand for lightweight materials, advancements in adhesive technologies, and a growing emphasis on sustainability.

Industries such as automotive and aerospace have been shifting towards lightweight materials to enhance fuel efficiency and reduce emissions. Engineering adhesives have become essential in bonding lightweight materials like composites, aluminum, and plastics, driving their demand.

Advancements in adhesive technology have led to the development of high-performance engineering adhesives with superior bonding properties. These adhesives offer improved strength, flexibility, and resistance to extreme temperatures and harsh

chemicals. There is a growing emphasis on environmentally friendly adhesives that are free from volatile organic compounds (VOCs) and other harmful chemicals. This has driven the development of eco-friendly engineering adhesives, aligning with sustainability goals in various industries.

The use of engineering adhesives is expanding into new applications, including medical devices, renewable energy systems, and consumer electronics. As industries diversify, so does the demand for specialized adhesives. These adhesives are known for their exceptional strength and resistance to chemicals, making them suitable for demanding applications in aerospace and automotive sectors. Polyurethane Adhesives offer a balance between flexibility and strength, making them versatile for various applications, including construction and electronics. Whereas Acrylic adhesives provide excellent UV resistance and are commonly used in automotive assembly and signage.

The global engineering adhesives market is not evenly distributed. Key regions include North America, Europe, Asia-Pacific, and Latin America. Asia-Pacific, with its booming manufacturing sector, has emerged as a significant market player.

Adhesive manufacturers must navigate a complex web of regulations related to safety, health, and environmental impact. Complying with these regulations while developing innovative products is a constant challenge. The market is highly competitive, with numerous global and regional players. Staying ahead in terms of technology, product quality, and pricing is crucial for sustained success.

The demand for sustainable and environmentally friendly adhesives is on the rise. Manufacturers have the opportunity to develop eco-friendly alternatives and tap into this growing market segment. Economic fluctuations and uncertainties can impact the demand for engineering adhesives, especially in industries like automotive and construction, which are sensitive to economic conditions.

The global engineering adhesives market is expected to continue its growth trajectory in the coming years. Advancements in adhesive technologies, coupled with the expansion of end-user industries, will be the primary drivers of this growth. Additionally, the market will witness increased investment in research and development to create adhesives that are more sustainable, versatile, and tailored to specific applications.

Therefore, the global engineering adhesives market is dynamic and full of opportunities. As industries evolve, the demand for high-performance adhesives will persist. Adhesive manufacturers that can innovate, adapt to changing regulations, and provide solutions

to meet industry needs will thrive in this competitive landscape. This market's future is bright, and it will play a crucial role in the advancement of various industries across the globe.

Key Market Drivers

Rising Demand from End-Use Industries is Major Factor for Engineering Adhesives Market Growth

In the realm of the global engineering adhesives market, a compelling force is at play - the relentless surge in demand from a diverse array of end-use industries. This surging demand has, in recent years, been a dynamic driver propelling the market's growth to unprecedented heights.

One of the most prominent factors contributing to this surge in demand is the automotive sector. In the pursuit of enhanced fuel efficiency and reduced emissions, the automotive industry has undergone a seismic shift towards lightweight materials, such as aluminum and advanced composites. These lightweight materials, while offering significant benefits, pose unique challenges in terms of assembly and bonding. This is where engineering adhesives step in as the unsung heroes, providing the crucial bonding solutions that enable the construction of lightweight, yet structurally robust vehicles. With the global automotive industry continuing to expand, the demand for these adhesives is set to soar even higher, driving substantial market growth.

Another sector experiencing exponential growth in demand for engineering adhesives is the aerospace industry. Aerospace applications are notorious for their extreme operating conditions, including high temperatures, pressure fluctuations, and exposure to harsh chemicals. Traditional fastening methods often fall short in such environments, making high-performance adhesives a necessity. These adhesives are essential in the assembly of critical aerospace components, ensuring that aircraft remain safe and reliable throughout their operational life. As the aerospace industry continues to advance technologically and expand globally, the demand for engineering adhesives shows no signs of abating.

The electronics industry is yet another major contributor to the surging demand for engineering adhesives. With the constant evolution of consumer electronics, miniaturization and durability are key considerations. Adhesives play a pivotal role in securing and protecting delicate electronic components, ensuring long-term reliability and functionality. Moreover, the rise of electric vehicles (EVs) has created a new frontier

for engineering adhesives in the electronics sector. As EVs become more prevalent, the demand for adhesives to bond battery cells, control units, and other critical components is poised to grow substantially, bolstering the market further.

Beyond these industries, engineering adhesives find applications in the construction sector, where they are used for bonding structural elements and sealing joints and seams in buildings. As the global population continues to urbanize, the construction industry remains a steady source of demand for these adhesives. Whether in skyscrapers or residential buildings, engineering adhesives contribute to the structural integrity and longevity of construction projects.

The relentless drive for innovation and sustainability across all industries further fuels the demand for specialized engineering adhesives. Manufacturers are constantly seeking adhesives that not only provide robust bonding but also align with environmental goals. This has led to the development of eco-friendly adhesives that are free from volatile organic compounds (VOCs) and other harmful chemicals, meeting the sustainability demands of modern industries.

Therefore, the rising demand from end-use industries is undeniably a powerful force propelling the global engineering adhesives market's growth. The automotive, aerospace, electronics, and construction sectors, along with the broader trends of innovation and sustainability, collectively create a landscape where engineering adhesives are indispensable. As these industries continue to evolve and expand, the market for engineering adhesives is poised for sustained and substantial growth, making it a crucial player in the global industrial adhesive landscape.

Increasing Demand for Lightweight and Strong Materials Drives the Demand for Engineering Adhesives Market

In the dynamic landscape of the global engineering adhesives market, one of the most compelling drivers of growth is the increasing demand for lightweight and strong materials across a wide spectrum of industries. This demand has emerged as a pivotal force propelling the market to unprecedented heights, reshaping the way products are designed and constructed.

The automotive industry, for instance, has undergone a revolutionary transformation driven by the pursuit of improved fuel efficiency and reduced emissions. As a result, there has been a substantial shift towards the adoption of lightweight materials such as aluminum, advanced composites, and high-strength steel. These materials offer

significant advantages in terms of reducing the overall weight of vehicles, enhancing performance, and achieving stringent environmental regulations. However, the challenge lies in effectively joining and bonding these diverse materials to maintain structural integrity. This is where engineering adhesives come to the forefront, providing the essential bonding solutions that enable the construction of lightweight yet incredibly robust vehicles. As the global automotive industry continues to expand and innovate, the demand for engineering adhesives is projected to soar, driving substantial market growth.

Similarly, the aerospace sector has experienced a parallel shift towards lightweight materials, primarily driven by the quest for fuel efficiency and the reduction of operational costs. Aircraft manufacturers are increasingly incorporating advanced composites and lightweight alloys in the construction of aircraft components. These materials, while offering remarkable advantages, present unique challenges in terms of assembly and bonding. Engineering adhesives have emerged as the linchpin solution, facilitating the secure and efficient bonding of lightweight materials in the extreme operating conditions characteristic of aerospace applications. With the aerospace industry continuously advancing technologically and expanding globally, the demand for engineering adhesives is expected to experience substantial and sustained growth.

The electronics industry represents yet another significant contributor to the escalating demand for engineering adhesives. In an era characterized by rapid technological advancements, electronic devices are becoming increasingly miniaturized while simultaneously needing to be more durable and resilient. Adhesives play a pivotal role in securing and protecting delicate electronic components, ensuring their long-term reliability and functionality. Furthermore, the burgeoning electric vehicle (EV) sector presents a new frontier for engineering adhesives within the electronics industry. As the adoption of EVs accelerates, there is a burgeoning need for adhesives to bond battery cells, control units, and other vital components, further bolstering market growth.

Outside of these industries, the construction sector, characterized by the global trend of urbanization, presents a steady source of demand for engineering adhesives. These adhesives are used to bond structural elements and seal joints and seams in buildings, enhancing their structural integrity and longevity. As urban populations continue to grow, the construction industry remains a significant driver of demand for engineering adhesives.

In tandem with the demand for lightweight materials, there is an ever-increasing emphasis on sustainability and environmental consciousness across industries. This

has spurred the development of eco-friendly engineering adhesives that are free from volatile organic compounds (VOCs) and other harmful chemicals. Manufacturers are keen on providing adhesives that align with modern industry's sustainability goals, further driving market growth.

Hence, the rising demand for lightweight and strong materials stands as a formidable catalyst driving the global engineering adhesives market's growth. Across sectors such as automotive, aerospace, electronics, and construction, the adoption of advanced materials has become synonymous with innovation and sustainability. In this evolving landscape, engineering adhesives have emerged as a linchpin solution, facilitating the effective assembly and bonding of these materials. As industries continue to embrace lightweight and strong materials as the future of product design and construction, the market for engineering adhesives is poised for sustained and substantial growth, solidifying its pivotal role in the global industrial adhesive landscape.

Growing Need for Sustainable Adhesives

In the dynamic landscape of the global engineering adhesives market, one of the most compelling catalysts for growth is the burgeoning need for sustainable adhesives. This increasing demand for environmentally friendly and ecologically responsible adhesive solutions has emerged as a pivotal force propelling the market to unprecedented heights, reshaping the way industries approach bonding and assembly.

Sustainability has become a dominant theme across industries worldwide, with businesses and consumers alike seeking products and technologies that have a reduced environmental footprint. Engineering adhesives, which play a crucial role in the manufacturing and construction processes, are no exception to this trend. Manufacturers are under increasing pressure to develop adhesives that not only provide robust bonding properties but also align with the principles of sustainability.

One of the key drivers of this demand for sustainable adhesives is the stringent regulatory landscape governing environmental impact. Governments and international organizations have imposed strict regulations on the use of volatile organic compounds (VOCs) and other harmful chemicals in adhesives, driven by concerns over air quality and the health of both workers and consumers. To comply with these regulations, adhesive manufacturers have been compelled to innovate and create formulations that are low in VOCs, thereby reducing their environmental impact.

Furthermore, the sustainability trend has extended into the materials used in

engineering adhesives themselves. Bio-based and renewable materials have gained prominence as alternatives to traditional petrochemical-derived components. These materials not only reduce reliance on fossil fuels but also have a lower carbon footprint. In response to this growing demand for sustainable materials, manufacturers have been investing heavily in research and development to create adhesives that incorporate these environmentally friendly components.

Another aspect of sustainability driving market growth is the focus on recyclability and reusability. Adhesives that can be easily separated from substrates during recycling processes are gaining traction, particularly in industries such as automotive and electronics. The ability to disassemble components without causing damage or contamination is increasingly seen as a critical feature of sustainable engineering adhesives.

The construction industry, a major consumer of engineering adhesives, has also embraced the sustainability trend. Builders are seeking adhesives that not only provide structural integrity but also contribute to energy efficiency and environmental sustainability. Adhesives used for insulation and sealing applications, for instance, are expected to meet stringent environmental standards while offering robust performance.

The aerospace industry, known for its exacting requirements, is not far behind in its pursuit of sustainable adhesives. The use of adhesives in aerospace applications, while critical for weight reduction and structural integrity, must adhere to strict safety and environmental standards. Manufacturers in this sector are increasingly opting for adhesives that are not only high-performing but also environmentally responsible.

Therefore, the growing need for sustainable adhesives is a formidable force propelling the global engineering adhesives market's growth. Sustainability considerations encompass regulatory compliance, the use of bio-based materials, recyclability, and broader industry trends toward environmental responsibility. As industries across the spectrum continue to prioritize sustainability in their operations, engineering adhesives that offer both robust bonding capabilities and eco-friendliness are poised for substantial and sustained growth. This positions sustainable adhesives as a key driver in reshaping the future of the global industrial adhesive landscape.

Key Market Challenges

Technical Challenges

The global engineering adhesives market faces substantial growth obstacles stemming from technical challenges. One of the primary challenges lies in meeting the stringent performance requirements of various industries. For instance, in aerospace and automotive applications, engineering adhesives must withstand extreme temperatures, pressures, and chemical exposures, demanding advanced formulations that can maintain their integrity under such conditions.

Another hurdle is achieving compatibility with a diverse range of substrates. Different materials, such as composites, metals, and plastics, require tailored adhesive solutions, complicating the development process. Adhesion to low-energy surfaces like polyethylene and polypropylene remains a persistent challenge.

Moreover, the need for faster curing times and reduced processing cycles places pressure on adhesive manufacturers to innovate. Balancing quick cure times with adequate bond strength is a complex technical problem. At the end, ensuring long-term durability and reliability of adhesive bonds in applications where safety is paramount, such as in aerospace, remains a formidable technical challenge.

Overcoming these technical barriers will be crucial for the sustained growth and innovation within the global engineering adhesives market. Manufacturers must invest in research and development to address these challenges effectively and remain competitive in a rapidly evolving landscape.

Competition from Other Joining Technologies

Competition from other joining technologies presents a significant impediment to the growth of the global engineering adhesives market. Traditional joining methods like welding, riveting, and mechanical fastening continue to be preferred choices in various industries, posing a challenge for adhesive adoption. These conventional methods offer advantages such as high bonding strength, established processes, and familiarity among engineers and manufacturers.

Moreover, in certain applications, particularly those requiring high-temperature resistance or where joints undergo extreme mechanical stresses, other joining technologies may outperform adhesives. Welding, for instance, remains the primary choice for heavy-duty and high-stress applications, where it excels in terms of strength and durability.

The perception of adhesives as less robust than traditional methods in certain situations

can deter their adoption, even when they may offer benefits like weight reduction, improved corrosion resistance, and enhanced aesthetics.

To overcome these challenges, adhesive manufacturers must continuously innovate, develop specialized formulations, and emphasize the unique advantages of adhesives, such as their ability to distribute stress evenly, join dissimilar materials, and provide vibration damping. Additionally, educating industries about the benefits and advancements in engineering adhesives is essential to gain a competitive edge and drive market growth.

Key Market Trends

Rising demand for Adhesives for Additive Manufacturing (AM)

A significant trend propelling the growth of the global engineering adhesives market is the rising demand for adhesives used in Additive Manufacturing (AM) processes. As the adoption of 3D printing and other AM techniques continues to expand across industries such as aerospace, automotive, healthcare, and consumer goods, the need for specialized adhesives tailored to the unique requirements of AM becomes increasingly apparent.

AM processes often involve bonding and joining of intricate, complex parts layer by layer. Engineering adhesives play a vital role in ensuring the integrity and strength of these bonds, especially in applications requiring precision, durability, and resilience. These adhesives must also address the challenges posed by a wide range of materials used in 3D printing, including metals, plastics, ceramics, and composites.

Manufacturers are thus focusing on developing adhesives that exhibit excellent adhesion properties, curing capabilities compatible with AM processes, and resistance to thermal and mechanical stresses. As the AM industry continues to flourish and diversify, the demand for purpose-built engineering adhesives is expected to experience robust growth, positioning it as a key driver in the global adhesives market.

Growing Popularity of Digitalization and Industry 4.0

The growing popularity of digitalization and Industry 4.0 is a pivotal trend driving the growth of the global engineering adhesives market. As industries undergo digital transformations, the adhesive sector is no exception. The integration of digital technologies and automation into the adhesive manufacturing process is enhancing

efficiency, quality control, and supply chain management.

Through data analytics and IoT (Internet of Things) devices, manufacturers can optimize production processes, ensuring consistent product quality. Real-time monitoring of adhesive application and performance allows for quick adjustments, reducing wastage and enhancing product reliability. Additionally, Industry 4.0 principles enable predictive maintenance, minimizing downtime and production interruptions.

Furthermore, digitalization facilitates closer collaboration between adhesive suppliers and end-users, enabling customized solutions tailored to specific industry needs. Overall, the adoption of digitalization and Industry 4.0 practices not only streamlines operations but also positions the engineering adhesives market for continued growth and innovation in an increasingly connected and data-driven world.

Segmental Insights

Product Insights

Based on the Product, the epoxies segment emerged as the dominant player in the global market for Engineering Adhesives in 2022. Epoxies are renowned for their exceptional strength and durability, making them a top choice for demanding applications in industries such as aerospace and automotive. Their versatility and ability to bond a wide range of materials give them a competitive edge and provide a high degree of freedom and are an ideal choice where structural linkage is required.

Polyurethane-based adhesives are another important segment of the engineering adhesives market. These adhesives are known for their high strength, flexibility, and resistance to impact. Polyurethane-based adhesives are used in a variety of applications, including automotive, construction, and packaging.

Cyanoacrylate-based adhesives, also known as instant adhesives, are a popular choice for bonding a variety of materials, including metal, plastic, and glass. These adhesives are known for their fast-curing times and high bond.

Application Insights

The transportation segment is projected to experience rapid growth during the forecast period. This is due to the increasing demand for lightweight and strong materials in the automotive and aerospace industries. Engineering adhesives are used to bond these

materials together, which helps to reduce the weight of vehicles and aircraft and improve their fuel efficiency.

The construction segment is another important segment of the engineering adhesives market. Engineering adhesives are used in a variety of construction applications, such as bonding concrete, metal, and glass. These adhesives also help to improve the durability and weather resistance of buildings and other structures.

The electrical and electronics segment is also a growing segment of the engineering adhesives market. Engineering adhesives are used to bond electronic components together and to protect them from environmental hazards. These adhesives are also used in the production of printed circuit boards and other electronic devices.

Regional Insights

The Asia-Pacific region is poised to assert its dominance in the global market, primarily due to its well-established automotive and electronics sectors. Over the years, significant investments have consistently been made in the region to propel advancements in both the industrial and renewable energy sectors.

China, in particular, has emerged as a major player in terms of both electronics' consumption and production. This surge in China's electronics industry has led to a notable uptick in demand for engineering adhesives across the Asia-Pacific region in recent times.

Despite a recent downturn in automotive manufacturing, Asia-Pacific remains the largest global consumer of automobiles. According to the Organisation Internationale des Constructeurs d'Automobiles (International Organization of Motor Vehicle Manufacturers), the Asia-Pacific region has been at the forefront of global automobile production in recent years. China, with its multitude of automobile manufacturing facilities, accounts for a substantial portion of the demand for engineering adhesives.

The burgeoning renewable energy industry in countries like China, India, Singapore, and Korea, spurred by government support and advancements in power generation, is also a significant driver of the growing demand for engineering adhesives in the region.

Key Market Players

3M Co.

Anabond

Arkema S. A

Ashland Global Specialty Chemicals Inc

Beijing Comens

Dow Corning Corporation

Dow, Inc.

DuPont de Nemours, Inc.

Duratek

Dymax Corporation

Report Scope:

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

Engineering Adhesives Market, By Product:

Epoxies

Polyurethanes

Cyanoacrylates

Methacrylates

Other

Engineering Adhesives Market, By Application:

Transportation

Construction

Electrical & Electronics

Energy

Others

Engineering 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 Engineering Adhesives Market.

Available Customizations:

Global Engineering 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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