

Marine Adhesive Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented by Resin Type (Epoxy, Silicon, Polyurethane, Acrylic, and Other), By Application (Deck Systems, Glazing, Panel Bonding, and Others), By Substrate (Plastic, Composite, Metals, and Others), By End Use (Cargo Ships, Passenger ships, Boat, and Other), By Region and competition

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Abstracts

Global Marine Adhesive Market has valued at USD 456.23 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 3.31% through 2028.

The global marine adhesive market is experiencing substantial growth, driven by the flourishing marine industry and the increasing demand for high-performance adhesive solutions. Marine adhesives play a crucial role in ensuring the structural integrity and longevity of vessels, offshore structures, and maritime components. Marine adhesives are specialized adhesive formulations designed to meet the demanding requirements of the maritime industry. These adhesives are used for bonding, sealing, and encapsulating various marine components, including boat hulls, decks, windows, and offshore platforms. As the marine industry continues to expand globally, the demand for high-performance marine adhesives is on the rise.

The global marine industry, including shipbuilding, repair, and offshore exploration, is witnessing significant growth. This expansion is a primary driver for the marine adhesive market, as adhesives are essential for constructing and maintaining marine vessels and

structures. The trend towards lightweight and corrosion-resistant materials in marine construction has led to a greater use of composites. Marine adhesives are crucial for bonding composite materials effectively, driving demand. Stringent environmental regulations are pushing the maritime industry to adopt eco-friendly adhesives with low volatile organic compounds (VOCs). Manufacturers are developing green adhesive solutions to comply with these regulations. Ongoing maintenance and repair work in the marine industry requires high-quality adhesives. The need for durable bonding solutions for retrofitting and repairs contributes to market growth.

Marine adhesives must withstand extreme conditions, including saltwater exposure, UV radiation, and temperature fluctuations. Developing adhesives that maintain their performance under these conditions is a technical challenge. Traditional mechanical fasteners, such as bolts and welds, still compete with adhesives in certain marine applications. Convincing the industry of the advantages of adhesive bonding can be a challenge.

Research and development efforts are focused on creating advanced adhesive formulations that offer improved bonding strength, durability, and resistance to environmental stressors, opening up opportunities for market growth. Expanding into emerging maritime markets, such as Asia-Pacific and Latin America, offers significant growth potential as these regions invest in shipbuilding and offshore infrastructure.

The development of nanotechnology in adhesive formulations is an emerging trend. Nano-adhesives offer enhanced bonding properties and better resistance to harsh marine environments. The market is witnessing a shift towards sustainable and bio-based adhesive options to align with environmental concerns and regulations. Adoption of digital tools and technologies for adhesive application and quality control is increasing, enhancing precision and efficiency in marine construction. Collaborations between adhesive manufacturers, shipbuilders, and naval architects are becoming common, fostering innovation and custom adhesive solutions.

The global marine adhesive market is on a growth trajectory, driven by the expanding marine industry, increased use of composites, and environmental regulations. Challenges related to environmental conditions and competition from traditional fasteners are being addressed through innovative adhesive formulations and industry partnerships. The emergence of trends such as nano-adhesives, sustainability, digitalization, and collaborative partnerships indicates a dynamic and evolving market landscape.

To capitalize on the opportunities presented by this market, adhesive manufacturers should continue investing in research and development to create advanced formulations, expand their global reach, and promote the benefits of adhesive bonding in the maritime sector. As the marine industry continues to evolve, marine adhesives will remain indispensable for ensuring the structural integrity and durability of marine vessels and offshore structures.

Key Market Drivers

Growing Demand from Marine or Construction Industry is Major Factor for Marine Adhesive Market Growth

The marine adhesive market is experiencing robust growth, primarily driven by the growing demand from the marine and construction industries. Marine adhesives have become indispensable in these sectors due to their exceptional properties and performance advantages, supporting a wide range of applications critical to both industries.

One of the key drivers behind the increasing demand for marine adhesives is their vital role in shipbuilding and repair within the marine industry. Modern vessels, including commercial ships, naval vessels, and pleasure crafts, rely heavily on advanced adhesive technologies for structural bonding, sealing, and insulation. Marine adhesives offer excellent adhesion to various substrates, including metals, composites, and plastics, making them ideal for bonding components like hulls, decks, cabins, and interior fittings. These adhesives enhance the overall structural integrity of vessels while contributing to weight reduction, fuel efficiency, and corrosion resistance.

Furthermore, marine adhesives play a crucial role in the construction and maintenance of offshore structures, such as oil rigs, platforms, and wind turbines. These structures operate in harsh marine environments, exposed to saltwater, extreme weather conditions, and corrosion. Marine adhesives provide reliable and long-lasting bonding and sealing solutions that can withstand these challenging conditions. They are used to bond and seal structural components, cables, pipelines, and equipment, ensuring the durability and safety of offshore installations.

Moreover, marine adhesives support the construction and repair of marinas, docks, piers, and bridges within the construction industry. These adhesives are employed in a wide range of applications, including attaching pilings, securing pontoons, bonding decking materials, and sealing joints. Their strong adhesion, resistance to water and

weathering, and durability make them essential for these critical infrastructure projects. Marine adhesives help extend the service life of marine and coastal structures while reducing maintenance costs.

The construction industry is also benefiting from the versatility of marine adhesives in underwater and wet conditions. These adhesives can be used for both above-water and underwater applications, making them suitable for construction projects involving pools, water features, and submerged structures. Their ability to bond and seal in wet environments without compromising performance is invaluable for such applications.

Furthermore, marine adhesives support the assembly and maintenance of boats and yachts in the recreational boating industry. Boat manufacturers and repair facilities rely on these adhesives for tasks such as bonding fiberglass hulls, securing deck fittings, and sealing joints. Marine adhesives contribute to the longevity, safety, and overall quality of recreational watercraft.

Additionally, the push for sustainability and environmental responsibility is driving the adoption of marine adhesives that are formulated to meet eco-friendly criteria. Many marine adhesive formulations are low in volatile organic compounds (VOCs) and have low odor, making them suitable for environmentally sensitive marine and construction projects. These adhesives align with industry and regulatory efforts to reduce the environmental impact of marine and coastal activities.

Technological advancements and innovations in marine adhesive formulations have played a significant role in market growth. Manufacturers continue to invest in research and development to improve the performance, durability, and environmental attributes of marine adhesives. These advancements have expanded the range of applications and industries where marine adhesives can be used, further driving their demand.

In conclusion, the growing demand from the marine and construction industries is a major factor in the marine adhesive market's growth. These industries rely on marine adhesives for their exceptional bonding, sealing, and durability properties, supporting critical applications in shipbuilding, offshore construction, marina and bridge construction, recreational boating, and more. As both industries continue to prioritize safety, performance, and sustainability, marine adhesives are expected to remain essential materials for a wide range of marine and coastal projects, contributing to innovation and progress in these sectors.

Increasing Use of Composites for Making Ships and Marine Construction Drives the

Demand for Marine Adhesive Market

The marine adhesive market is experiencing significant growth, primarily propelled by the increasing use of composites in the construction of ships and marine structures. Composites, which consist of reinforcing fibers and a resin matrix, offer superior strength-to-weight ratios, corrosion resistance, and durability compared to traditional materials like steel and wood. As the maritime industry embraces composites for their numerous advantages, marine adhesives have become essential in bonding and sealing composite components, driving demand for these specialized adhesive products.

One of the key drivers behind the growing demand for marine adhesives is the maritime industry's shift towards composites in shipbuilding and marine construction. Modern vessels, including naval ships, commercial ships, offshore platforms, and recreational boats, are increasingly constructed using composite materials for various components such as hulls, decks, superstructures, and interior fittings. Composites allow for the design of lightweight, high-performance marine structures that are resistant to corrosion and provide exceptional durability in harsh marine environments.

Marine adhesives are crucial in joining and sealing composite components in shipbuilding. They provide strong and reliable bonds between composite panels, facilitating the construction of complex, integrated structures. By replacing traditional welding or mechanical fastening methods with adhesive bonding, shipbuilders achieve significant weight reductions while maintaining structural integrity. This contributes to improved fuel efficiency, enhanced vessel performance, and reduced environmental impact—a key consideration in the maritime industry's quest for sustainability.

Furthermore, marine adhesives play a pivotal role in sealing joints, seams, and openings in composite marine structures. The ability to create watertight and airtight seals is essential for ensuring the safety and functionality of ships and marine installations. Marine adhesives not only protect against water ingress but also contribute to the overall stability and longevity of composite structures.

In addition to shipbuilding, marine adhesives are widely used in the construction of offshore platforms and marine installations, including oil and gas rigs, wind turbines, and floating docks. These structures operate in harsh marine environments, exposed to saltwater, waves, and corrosive elements. Marine adhesives provide exceptional corrosion resistance and adhesion properties, making them ideal for bonding and sealing critical components in offshore installations. They ensure the durability, safety,

and long-term performance of these structures.

Moreover, marine adhesives are employed in the recreational boating industry, where composites have gained popularity for their versatility and performance. Boat manufacturers and repair facilities use marine adhesives for a variety of applications, including bonding composite hulls, attaching deck fittings, sealing joints, and providing structural reinforcement. These adhesives enhance the overall quality, safety, and longevity of recreational boats and yachts while contributing to weight reduction and improved fuel efficiency.

The push for sustainability and environmental responsibility in the maritime industry is driving the adoption of marine adhesives formulated to meet eco-friendly criteria. Many marine adhesive formulations are low in volatile organic compounds (VOCs) and have low odor, aligning with industry and regulatory efforts to reduce the environmental impact of marine and coastal activities. These adhesives are sought after by shipbuilders, offshore platform constructors, and boat manufacturers committed to eco-conscious practices.

In conclusion, the increasing use of composites for making ships and marine construction is a major driver of the marine adhesive market. Composites offer numerous advantages in terms of weight reduction, corrosion resistance, and durability, making them a preferred choice for modern marine structures. Marine adhesives are essential in bonding and sealing composite components, ensuring structural integrity, safety, and environmental sustainability in shipbuilding, offshore construction, and the recreational boating industry. As the maritime industry continues to embrace composites for their benefits, the demand for marine adhesives is expected to remain strong, supporting innovation and progress in marine and coastal applications.

Rising Maintenance and Repair Work in the Marine Industry

The marine adhesive market is experiencing significant growth, largely driven by the rising demand for maintenance and repair work in the marine industry. Marine adhesives have become indispensable for the upkeep and rehabilitation of ships, vessels, offshore platforms, and other maritime structures. These adhesive solutions play a pivotal role in addressing various repair and maintenance challenges, contributing to the longevity, safety, and performance of marine assets.

One of the key drivers behind the growing demand for marine adhesives in the context of maintenance and repair is the aging global fleet of ships and vessels. As maritime

assets age, they require regular maintenance, refurbishment, and repair to ensure they remain seaworthy and meet safety standards. Marine adhesives offer an efficient and reliable solution for bonding, sealing, and reinforcing various components, enabling the restoration of aging vessels to their original or improved conditions.

Marine adhesives are used extensively in the repair of hulls and superstructures. They can address issues such as corrosion, cracks, and structural damage by providing strong and durable bonding solutions. By replacing damaged or deteriorated sections of a ship's hull or superstructure with composite materials and marine adhesives, ship operators can extend the life of their vessels while improving their overall structural integrity.

Furthermore, marine adhesives are essential for sealing joints, seams, and openings in vessels and offshore structures. Ensuring watertight and airtight seals is crucial for preventing water ingress, which can lead to corrosion, leaks, and reduced structural stability. Marine adhesives offer a reliable means of sealing various components, from windows and hatches to bulkheads and pipe penetrations, safeguarding the integrity of marine assets.

In addition to conventional vessel repair and maintenance, marine adhesives play a pivotal role in the retrofitting and upgrading of ships and offshore platforms. Retrofit projects often involve the installation of new equipment, components, and systems to enhance vessel performance, safety, and compliance with evolving regulations. Marine adhesives facilitate the bonding and integration of these new elements, allowing shipowners to modernize their fleets and meet industry standards effectively.

Moreover, the offshore industry relies heavily on maintenance and repair work to ensure the continued safe operation of offshore platforms, oil rigs, and wind turbines. These structures endure harsh marine conditions, including saltwater exposure, high winds, and corrosive environments. Marine adhesives are used for structural bonding, sealing, and corrosion protection in these applications. They help extend the service life of offshore installations, reduce maintenance costs, and improve safety.

Additionally, marine adhesives are used in the renovation and refurbishment of marinas, docks, piers, and coastal infrastructure. These structures require ongoing maintenance to withstand the effects of waves, tides, and weathering. Marine adhesives contribute to the repair and reinforcement of structural components, enhancing their durability and safety.

The growing emphasis on sustainability and environmental responsibility in the marine industry has also contributed to the adoption of eco-friendly marine adhesives for maintenance and repair work. Many marine adhesive formulations are designed to be low in volatile organic compounds (VOCs) and have low odor, aligning with industry and regulatory efforts to minimize the environmental impact of marine activities.

In conclusion, the rising demand for maintenance and repair work in the marine industry is a significant driver of the marine adhesive market. These adhesives play a vital role in addressing the repair and maintenance needs of aging vessels, offshore structures, and coastal infrastructure. By providing efficient and reliable solutions for bonding, sealing, and reinforcement, marine adhesives support the maritime industry in ensuring the safety, longevity, and performance of marine assets. As the need for maintenance and repair continues to grow in the marine sector, the demand for marine adhesives is expected to remain strong, contributing to the overall resilience and sustainability of maritime operations.

Key Market Challenges

Harsh Environmental Conditions

Harsh environmental conditions pose a significant obstruction to the growth of the marine adhesive market. Marine adhesives play a crucial role in the construction and maintenance of vessels, boats, and offshore structures, where they need to withstand extreme conditions such as saltwater exposure, temperature variations, and constant mechanical stresses. However, these challenging environments can accelerate adhesive degradation and compromise bond integrity over time.

Saltwater, in particular, can corrode adhesives and substrates, leading to weakened bonds and potential structural failures. Temperature fluctuations and UV radiation can further exacerbate the deterioration process. These factors not only compromise the safety and longevity of marine structures but also increase maintenance and repair costs.

To address this challenge, manufacturers in the marine adhesive market are continually developing specialized formulations that offer enhanced resistance to harsh marine environments. These adhesives may incorporate advanced polymer technologies, anti-corrosive additives, and improved curing mechanisms to ensure long-lasting performance.

Moreover, proper surface preparation and application techniques are crucial to achieving robust bonds in marine applications. As the marine industry seeks more durable and reliable adhesive solutions to withstand harsh conditions, ongoing research and innovation will be essential to drive market growth and ensure the safety and integrity of maritime structures and vessels.

Competition from Mechanical Fasteners

Competition from mechanical fasteners poses a notable obstacle to the growth of the marine adhesive market. While marine adhesives offer a range of advantages, including weight reduction, improved aesthetics, and enhanced structural integrity, they face strong competition from traditional mechanical fastening methods such as bolts, screws, and rivets in the marine industry.

Mechanical fasteners have been used for decades and are well-established, instilling confidence in their reliability. They are perceived as a tried-and-true solution for joining and securing marine components. Additionally, some shipbuilders and operators may be hesitant to transition to adhesive-based bonding due to concerns about adhesive performance under harsh marine conditions. Moreover, mechanical fasteners are often easier to inspect, repair, and replace, when necessary, which can be seen as an advantage in maintenance-intensive marine environments.

To overcome this competition, the marine adhesive industry must continually innovate and educate stakeholders about the benefits of adhesive bonding, such as reduced weight, improved resistance to corrosion, and enhanced aesthetics. Additionally, developing marine adhesives with specialized formulations designed to outperform mechanical fasteners in specific applications, while ensuring they meet stringent industry standards, can help foster greater adoption.

As the marine industry evolves and seeks more efficient and cost-effective solutions, the marine adhesive market has the potential for growth. Building trust in adhesive technologies and demonstrating their performance advantages under challenging marine conditions will be crucial in addressing the competition from mechanical fasteners.

Key Market Trends

Development of New Marine Adhesives with Improved Performance Characteristics

The development of new marine adhesives with improved performance characteristics is a key trend fueling the growth of the global marine adhesive market. In the highly demanding marine environment, where vessels and structures face extreme conditions like saltwater exposure, temperature fluctuations, and mechanical stresses, adhesive performance is of paramount importance.

To address these challenges, manufacturers are investing heavily in research and development to create advanced marine adhesives that offer enhanced properties. These improvements include superior adhesion strength, faster curing times, increased resistance to water and corrosion, and greater flexibility to withstand structural movements and vibrations.

One significant area of advancement is the development of adhesives capable of bonding dissimilar materials effectively. This is crucial in marine construction and repair, where various substrates need to be securely joined. Additionally, adhesives that can maintain their performance in both wet and submerged conditions are gaining importance in underwater applications, such as ship hull repairs and marine infrastructure projects.

Innovations also extend to adhesives for specialized marine applications, such as those designed for bonding composites, plastics, or metals. These tailored formulations provide solutions that meet the specific needs of different marine industries, from shipbuilding to offshore drilling.

As the global marine industry continues to evolve and demands higher-performing adhesive solutions, the development of new marine adhesives with improved performance characteristics not only addresses critical challenges but also fosters growth and innovation within the marine adhesive market. These advanced adhesives play a pivotal role in ensuring the safety, longevity, and efficiency of marine structures and vessels, positioning them as indispensable assets in the maritime sector.

Growing Focus on Sustainability

The global marine adhesive market is experiencing a significant growth trend driven by a growing focus on sustainability. As environmental awareness and regulations become more stringent, the marine industry is increasingly looking for eco-friendly solutions in its materials and practices. This shift toward sustainability has a profound impact on the selection of adhesives used in marine applications.

Marine adhesives play a vital role in bonding and sealing various components in vessels and structures, and their environmental impact is under scrutiny. Manufacturers are responding by developing sustainable marine adhesives with reduced VOC (volatile organic compound) content, lower emissions, and minimized use of hazardous materials. These adhesives align with stringent environmental standards and reduce the industry's carbon footprint.

Furthermore, there is a growing interest in bio-based and biodegradable marine adhesives. These formulations, derived from renewable sources, offer an eco-friendly alternative to traditional adhesives. They not only reduce reliance on fossil fuels but also contribute to reducing plastic waste in marine ecosystems.

The focus on sustainability extends beyond the adhesive formulations themselves. Manufacturers are also exploring sustainable packaging and distribution methods, as well as improving the recyclability of adhesive containers. In response to these sustainability trends, the global marine adhesive market is witnessing a shift in demand toward green and environmentally responsible solutions. As environmental concerns continue to drive regulatory changes and shape industry standards, marine adhesives that prioritize sustainability are likely to experience sustained growth and increased adoption across the marine sector.

Segmental Insights

Resin Type Insights

Based on the resin type, the epoxy segment emerged as the dominant player in the global market for Marine Adhesive. Epoxy adhesives are renowned for their exceptional bonding strength, which is vital in the marine industry where the integrity of bonded joints is critical for safety and structural stability. Epoxy adhesives offer versatility in terms of substrates they can bond, including metals, composites, plastics, and wood. This versatility makes them suitable for various marine applications, from boat construction to ship repairs.

Epoxy adhesives are known for their resilience in harsh marine environments, including exposure to saltwater, UV radiation, and temperature variations. They maintain their bond strength and structural integrity under these challenging conditions. Epoxy adhesives can cure and bond effectively even when applied underwater, making them invaluable for marine repairs and maintenance tasks below the waterline.

End Use Insights

The cargo segments are projected to experience rapid growth during the forecast period. Cargo vessels, including container ships and bulk carriers, require strong and durable adhesives to ensure the structural integrity of their cargo holds. Marine adhesives are used extensively for bonding and sealing cargo hold components, preventing water ingress, and withstanding the mechanical stresses associated with cargo loading and unloading.

The cargo holds of ships are exposed to harsh marine environments, making waterproofing a critical requirement. Marine adhesives play a pivotal role in creating watertight seals, ensuring that cargo remains dry and undamaged during transit. Cargo ships often carry a wide range of cargoes, including chemicals and bulk materials, some of which can be corrosive. Marine adhesives used in cargo holds are formulated to resist corrosion, protecting the ship's structural elements and cargo containment systems.

The cargo shipping industry is a cornerstone of global trade, with billions of tons of goods transported by sea each year. This high demand for cargo vessels drives the need for reliable marine adhesives that can withstand the rigors of maritime transport.

Regional Insights

The Asia-Pacific (APAC) region has emerged as the dominant player in the marine Adhesive Market, surpassing both Europe and North America. This growth can be attributed to the robust economic development and the simultaneous expansion of population in countries such as China and India. These factors are expected to drive increased spending on marine-related activities throughout Asia Pacific over the next seven years. Furthermore, according to projections from Oxford Economics, the volume of marine output is forecasted to experience an impressive 85.0% growth, reaching a total of USD 17.5 trillion by the year 2030. China and India are set to play a pivotal role in propelling the marine industry forward in this region.

Europe is another region that is experiencing growth during the projected period. This growth is primarily attributed to the significant presence of European ship owners who control approximately 40.0% of the world's shipping fleet. Europe boasts an extensive network of inland waterways, particularly in countries situated in Central Europe such as France, Germany, Russia, and Belgium. The ongoing development and increasing importance of these inland waterways for trade and passenger transportation are

expected to stimulate demand for marine adhesives within the European market.

Key Market Players

3M Company

Bostik SA

Gurit AG

H.B. Fuller Company

Henkel AG & Co. KGaA

Huntsman International LLC (Huntsman Corporation)

Illinois Tool Works

Parson Adhesives Inc.

Scott Bader Company Ltd.

Sika AG

Report Scope:

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

Marine Adhesive Market, By Resin Type:

Epoxy

Silicon

Polyurethane

Acrylic

Other

Marine Adhesive Market, By Application:

Deck Systems

Glazing

Panel Bonding

Others

Marine Adhesive Market, By Substrate:

Plastic

Composite

Metals

Others

Marine Adhesive Market, By End Use:

Cargo Ships

Passenger ships

Boat

Other

Marine Adhesive 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 Marine Adhesive Market.

Available Customizations:

Global Marine Adhesive 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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