

Moisture Curing Adhesives Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Chemistry (Polyurethane, Silicone, Cyanoacrylate and Polyolefin), By Application (Construction, Automotive, Wood Working, Textile, and Others), By Region and competition

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Abstracts

Global Moisture Curing Adhesives Market has valued at USD 4.85 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.84% through 2028.

Moisture curing adhesives, also known as moisture-cured adhesives, represent a significant and dynamic segment within the adhesive industry. These adhesives are known for their ability to cure and bond materials in the presence of atmospheric moisture. As industries across the globe seek more efficient and sustainable bonding solutions, the global moisture curing adhesives market is experiencing substantial growth and transformation. In this article, we provide a comprehensive overview of this market, exploring key drivers, challenges, and emerging trends.

As environmental concerns intensify, industries are shifting towards adhesives that have lower volatile organic compound (VOC) emissions and reduced environmental impact. Moisture curing adhesives, which often meet these criteria, are in demand.

The automotive industry is one of the largest consumers of moisture curing adhesives, particularly for applications like glass bonding, structural bonding, and seam sealing. As global vehicle production continues to grow, the demand for these adhesives follows

suit.

In the construction sector, moisture curing adhesives are used for various applications, including bonding flooring, installing windows, and sealing joints. The construction industry's growth fuels demand for these versatile adhesives.

Moisture curing adhesives typically require specific humidity levels and time to cure properly. Variations in environmental conditions can affect curing times, which can be a challenge for manufacturers.

While these adhesives excel at bonding porous materials, they may have limitations when it comes to non-porous surfaces. Formulation improvements are ongoing to address this challenge.

Asia-Pacific remains a prominent region in the moisture curing adhesives market, driven by robust manufacturing activities, rapid urbanization, and construction projects. North America and Europe also witness significant demand, particularly in the automotive and construction sectors.

Increasing emphasis on sustainability is driving research and development efforts towards bio-based moisture curing adhesives, which have a lower environmental footprint. Manufacturers are constantly working on formulations that offer quicker curing times and better adhesion to a wider range of substrates. With growing customer demands for tailored solutions, companies are focusing on providing adhesives that cater to specific industry needs and applications.

The global moisture curing adhesives market continues to evolve as industries prioritize environmentally friendly, efficient, and reliable bonding solutions. While challenges like curing time and substrate compatibility persist, ongoing research and innovation are expected to address these issues. As industries like automotive, construction, and electronics expand, the demand for moisture curing adhesives is likely to remain robust, making it a lucrative and essential segment within the adhesive industry. Companies in this space should remain adaptive and innovative to harness the full potential of this growing market.

Key Market Drivers

Increasing Demand in Construction Activities is Major Factor for Moisture Curing Adhesives Market Growth

The global moisture curing adhesives market is experiencing a robust surge in growth, largely attributed to the burgeoning demand within the construction industry. This demand is a consequence of significant infrastructure developments taking place across the world, with particular emphasis on key regions such as the Asia-Pacific.

In recent years, the Asia-Pacific region has emerged as a dominant force in the global moisture curing adhesives market. This dominance is primarily due to the substantial increase in construction activities in countries like India and China. These nations have witnessed unprecedented urbanization and industrialization, fueling the need for reliable and advanced adhesive solutions. The construction sector, in particular, has been a major beneficiary of this trend.

China, one of the economic giants of the Asia-Pacific region, has been making substantial investments in infrastructure projects. The Chinese government, in an effort to bolster its economy and improve the quality of life for its citizens, approved a staggering 26 infrastructure projects in 2019, with an estimated investment of approximately USD 142 billion. These projects encompass a wide range of areas, including transportation, energy, and real estate, and are expected to be completed by 2023. Such massive investments have naturally led to an increased demand for moisture curing adhesives, as they play a pivotal role in various construction applications, ensuring durable and long-lasting bonds.

India, another major player in the Asia-Pacific region, has been following a similar trajectory. The Indian government has allocated a substantial budget of USD 63 billion for the infrastructure sector in the fiscal year 2019-20, with ambitious plans to spend a staggering USD 1.4 trillion over the next five years. Initiatives such as the development of smart cities and the 'housing for all' program have been instrumental in driving the construction industry forward. These initiatives, aimed at creating modern urban spaces and affordable housing, are creating a soaring demand for moisture curing adhesives. These adhesives are critical for ensuring the structural integrity of buildings and infrastructure, making them indispensable in the construction sector.

Moisture curing adhesives, known for their exceptional bond strength and extended working time, have found widespread application in solid wood plank and engineered wood projects within both the commercial and residential sectors. As the construction industry continues to expand, so does the demand for wooden flooring and furniture. This trend is particularly noticeable in India, where the furniture industry was projected to surpass USD 32 billion by 2019, and it is expected to maintain a growth rate of 20%

per annum in the coming years. Moisture curing adhesives have become an essential component in crafting durable and aesthetically pleasing wooden furniture and flooring, further propelling the growth of the global market.

Government support and policies have played a pivotal role in accelerating the demand for moisture curing adhesives in the Asia-Pacific region. The backing of massive infrastructure projects, coupled with initiatives aimed at improving the quality of living for citizens, has created a conducive environment for the adhesive market to thrive. This upward trajectory is expected to continue as construction activities in the region show no signs of slowing down.

In conclusion, the global moisture curing adhesives market is experiencing a remarkable surge in demand, driven by the construction boom in the Asia-Pacific region. The substantial investments in infrastructure, coupled with the growth of the furniture and wooden flooring industries, are propelling the market to new heights. With government support and favorable economic conditions, the future looks promising for moisture curing adhesives, as they continue to be a critical component in building the infrastructure of the future.

Rising Demand from the Automotive industries Drives the Demand for Moisture Curing Adhesives Market

The global moisture curing adhesives market has been experiencing a significant surge in growth, largely propelled by the rising demand from the automotive industry. This growing demand is reshaping the landscape of adhesive solutions and has become a pivotal driver of market expansion.

In recent years, the automotive sector has undergone a remarkable transformation. Consumer preferences have shifted towards lighter, more fuel-efficient vehicles, and manufacturers are increasingly turning to advanced materials and bonding technologies to meet these demands. Moisture curing adhesives have emerged as a preferred choice for automotive assembly due to their exceptional performance characteristics.

One of the key factors driving the adoption of moisture curing adhesives in the automotive industry is their ability to provide strong and durable bonds across a wide range of substrates, including metals, plastics, and composites. These adhesives offer high tensile and shear strength, making them ideal for critical applications such as structural bonding, panel bonding, and glass bonding. This strength not only enhances the structural integrity of vehicles but also contributes to improved safety, which is a

paramount concern in the automotive sector.

Furthermore, moisture curing adhesives are valued for their resistance to temperature extremes, chemicals, and environmental factors. In the automotive industry, where vehicles are subjected to various climatic conditions and exposure to corrosive substances, the durability of adhesive bonds is essential. Moisture curing adhesives excel in this regard, ensuring that bonded components remain securely attached throughout a vehicle's lifespan.

Weight reduction has become a central focus in the automotive industry, driven by stringent emissions regulations and the pursuit of greater fuel efficiency. Traditional mechanical fastening methods, such as welding and riveting, add unnecessary weight to vehicles. Moisture curing adhesives, on the other hand, are lightweight and contribute to a reduction in the overall weight of vehicles. This not only enhances fuel efficiency but also allows automakers to meet stringent emissions standards.

Another notable advantage of moisture curing adhesives in the automotive sector is their ability to dampen vibrations and reduce noise, vibration, and harshness (NVH) levels. This leads to a quieter and more comfortable driving experience, a key factor in enhancing customer satisfaction and brand loyalty.

The automotive industry is also witnessing a shift towards electric and hybrid vehicles. These vehicles demand innovative solutions to address unique challenges, including thermal management and battery assembly. Moisture curing adhesives have proven to be valuable in these applications, as they can provide efficient thermal conductivity and insulation while securely bonding sensitive electronic components.

Moreover, as automakers strive to streamline production processes and reduce assembly times, moisture curing adhesives offer significant advantages. These adhesives cure rapidly upon exposure to moisture in the environment, eliminating the need for time-consuming ovens or curing processes. This accelerates the manufacturing process, leading to cost savings and increased production efficiency.

The global automotive industry's recognition of these benefits has resulted in a growing preference for moisture curing adhesives across all segments, from passenger cars to commercial vehicles. As a result, adhesive manufacturers are investing in research and development to create tailored solutions that meet the specific needs of the automotive sector.

In conclusion, the rising demand for moisture curing adhesives from the automotive industry is playing a pivotal role in driving the growth of the global moisture curing adhesives market. These adhesives offer a versatile and reliable solution for automakers seeking to meet evolving consumer expectations, regulatory requirements, and sustainability goals. As the automotive industry continues to evolve, moisture curing adhesives are poised to remain a critical enabler of innovation and progress in vehicle design and manufacturing.

Growing Moisture Curing Adhesives for Packaging Purposes

The global moisture curing adhesives market is experiencing a significant boost in growth, primarily attributed to the expanding applications of these adhesives in the realm of packaging. Moisture curing adhesives have long been recognized for their versatility and robust bonding properties, making them an ideal choice for various industries. However, the packaging sector has emerged as a particularly potent driver of market expansion.

In recent years, the demand for efficient and eco-friendly packaging solutions has surged worldwide. This shift is driven by several factors, including increasing environmental awareness, regulatory changes promoting sustainable packaging, and evolving consumer preferences for packaging materials that are not only safe but also environmentally responsible. Moisture curing adhesives have risen to prominence in this context as a key enabler of sustainable and effective packaging solutions.

One of the key advantages of moisture curing adhesives in packaging applications is their ability to bond a wide range of substrates, including different types of plastics, metals, and even paper. This versatility allows manufacturers to create innovative and eco-friendly packaging designs that meet the demands of today's discerning consumers. Whether it's the bonding of plastic films for flexible packaging, sealing rigid containers, or affixing labels securely to packaging materials, moisture curing adhesives offer reliable adhesion that ensures the integrity of the package throughout its lifecycle.

Moreover, moisture curing adhesives excel in maintaining the freshness and quality of packaged goods. In the food and beverage industry, for instance, these adhesives are indispensable for creating airtight seals and closures on packaging, preventing spoilage, and preserving the flavor and safety of consumables. Similarly, in pharmaceuticals and cosmetics, moisture curing adhesives contribute to secure and tamper-evident packaging, assuring consumers of product authenticity and safety.

The global market for moisture curing adhesives has witnessed remarkable growth, owing to their increased adoption across various industries, including automotive, construction, and electronics. However, the packaging sector has emerged as a growth engine with its unique set of demands and requirements. The rise in e-commerce activities has further fueled this growth, as packaging plays a pivotal role in ensuring the safe and intact delivery of products to consumers' doorsteps.

Another notable factor driving the adoption of moisture curing adhesives in packaging is their eco-friendliness. As the world grapples with environmental challenges, there is a growing emphasis on sustainable packaging practices. Moisture curing adhesives align well with this trend, as they are solvent-free, emit low levels of volatile organic compounds (VOCs), and offer excellent durability. This makes them a preferred choice for manufacturers aiming to reduce their environmental footprint while delivering high-quality packaging solutions.

Furthermore, the global moisture curing adhesives market is witnessing innovations in formulation and application techniques to cater to the specific needs of the packaging industry. Manufacturers are developing adhesives with faster curing times, enhancing production efficiency, and enabling quicker turnaround times in packaging operations. These advancements are critical in meeting the demands of a dynamic and competitive packaging landscape.

In conclusion, the growing use of moisture curing adhesives for packaging purposes is a pivotal driver of the global moisture curing adhesives market. As the world increasingly values sustainable, efficient, and reliable packaging solutions, these adhesives have emerged as a key enabler. Their ability to bond various substrates, maintain product freshness, and contribute to eco-friendly packaging practices positions them as a vital component in the packaging industry's quest for innovation and sustainability. With ongoing research and development efforts aimed at addressing the evolving needs of the packaging sector, moisture curing adhesives are poised to continue propelling the growth of the global market in the coming years.

Key Market Challenges

Stringent Environmental Regulations

Stringent environmental regulations are posing significant obstacles to the growth of the global moisture curing adhesives market. While these regulations are undoubtedly necessary to protect our environment, they have imposed numerous challenges on

businesses in the adhesive industry. Moisture curing adhesives have been favored for their strong bonding capabilities and versatility, but their formulations often include volatile organic compounds (VOCs) and other hazardous substances that are now strictly regulated.

Compliance with these stringent environmental standards necessitates costly adjustments to adhesive formulations and production processes, leading to increased manufacturing expenses. Moreover, the lengthy approval processes for new environmentally friendly adhesive products can delay market entry and hinder innovation. As a result, businesses are finding it increasingly challenging to meet both regulatory requirements and consumer demands for high-performance adhesives.

In this competitive landscape, companies operating in the moisture curing adhesives market must adapt swiftly by investing in research and development to create eco-friendly alternatives and streamline their manufacturing processes. Collaboration with regulatory bodies to establish clearer guidelines and incentivize sustainable practices may also be pivotal in overcoming these obstacles and fostering market growth in an environmentally responsible manner.

High Level of Technical challenges

The global moisture curing adhesives market is facing substantial impediments due to technical challenges. These adhesives, known for their versatility and durability, are crucial in various industries. However, their formulation and application require precise technical expertise. One of the primary technical challenges lies in achieving the ideal curing conditions, as they depend on factors like humidity, temperature, and substrate compatibility. Variability in these conditions can result in inconsistent adhesive performance, making it difficult for manufacturers to guarantee product reliability.

Furthermore, moisture curing adhesives often require a thorough understanding of material compatibility, which is critical to prevent issues like adhesive failure or unwanted chemical reactions. Additionally, as industries evolve and demand specialized adhesive solutions, staying up-to-date with the latest technological advancements becomes essential.

To overcome these technical obstacles and stimulate market growth, companies in this sector must invest in ongoing research and development, collaborate with experts in material science, and continually innovate to create user-friendly, foolproof solutions that can thrive in diverse operating environments. This commitment to technical

excellence will be pivotal in sustaining and expanding the global moisture curing adhesives market.

Key Market Trends

Increasing Adoption of Sustainable Adhesives

The increasing adoption of sustainable adhesives stands as a pivotal trend driving the growth of the global moisture curing adhesives market. In an era characterized by heightened environmental consciousness, industries across the board are shifting their focus towards eco-friendly solutions, and adhesives are no exception. Sustainable adhesives offer a compelling value proposition by reducing the carbon footprint associated with traditional adhesive products. These adhesives are typically low in volatile organic compounds (VOCs), emit fewer harmful chemicals during application, and are derived from renewable resources or recycled materials. This aligns perfectly with the global sustainability agenda, appealing to both manufacturers and consumers alike.

As regulatory bodies tighten their grip on emissions and environmental standards, the demand for sustainable adhesives is expected to surge further. Industries such as construction, automotive, and packaging are increasingly recognizing the benefits of moisture curing adhesives in meeting their sustainability goals. This trend not only contributes to a greener planet but also offers lucrative growth opportunities for companies in the moisture curing adhesives market that are quick to embrace eco-conscious solutions.

Development of New and Improved Adhesives with Better Performance Properties

The development of new and improved adhesives with enhanced performance properties represents a crucial trend driving the growth of the global moisture curing adhesives market. In an ever-evolving landscape of industrial applications, there is a constant demand for adhesives that not only bond effectively but also offer superior attributes. Manufacturers are investing heavily in research and innovation to formulate moisture curing adhesives that excel in areas like strength, durability, flexibility, and resistance to environmental factors such as moisture, heat, and chemicals.

These advancements in adhesive technology are revolutionizing industries like automotive, aerospace, construction, and electronics, where the need for high-performance bonding solutions is paramount. As manufacturers seek to optimize their

production processes and reduce assembly times, the availability of moisture curing adhesives with improved performance properties becomes a game-changer. Consequently, this trend is poised to create substantial growth opportunities in the global moisture curing adhesives market, as it caters to the evolving needs of diverse industries, ultimately enhancing product quality and efficiency.

Segmental Insights

Chemistry Insights

Based on the chemistry, the polyurethane (PU) segment emerged as the dominant player in the global market for Moisture Curing Adhesives in 2022. Polyurethane is a versatile polymer known for its durability and flexibility. It is commonly used in industries such as construction, automotive, and furniture for applications like insulation, adhesives, and coatings.

Silicone is another well-regarded for its high-temperature resistance and biocompatibility. It's commonly used in the medical, electronics, and automotive industries, primarily for sealing, lubrication, and insulation.

Application Insights

The Construction segment is projected to experience rapid growth during the forecast period. The construction industry is often a significant driver of economic activity in many regions. It encompasses residential, commercial, and infrastructure projects. Construction may include contracts, project management, and materials procurement. Depending on the economic climate and infrastructure development in a particular region, the construction segment could dominate the market.

The automotive industry is a global giant, with extensive manufacturing, supply chain, and sales operations. Business English related to the automotive sector may involve manufacturing processes, marketing, sales, and supply chain management. The automotive industry is highly influential, and business communication within this sector is vital in many regions.

Regional Insights

The Asia-Pacific region is poised to be the dominant market for moisture curing adhesives in the foreseeable future, primarily due to the surge in demand driven by the

construction industry in countries like India and China.

The substantial investments in infrastructure projects from countries such as China and India are anticipated to be key drivers for this market. According to the National Development and Reform Commission, the Chinese government greenlit 26 infrastructure projects with an estimated investment of around USD 142 billion in 2019, with expected completion by 2023. Additionally, the Indian government allocated USD 63 billion to the infrastructure sector in 2019-20 and has ambitious plans to invest USD 1.4 trillion over the next five years. Initiatives like the development of smart cities and programs such as 'housing for all' are set to further boost the demand for moisture curing adhesives within the construction industry.

Moisture curing adhesives find extensive use in solid wood plank and engineered wood applications within both the commercial and residential sectors. They offer exceptional bond strength and extended working time, making them indispensable. The growing furniture industry and the increased demand for wooden flooring are expected to be significant drivers for this market. According to a World Bank report, the Indian furniture industry was projected to surpass USD 32 billion by 2019 and is estimated to maintain a growth rate of 20% per annum in the coming years.

These aforementioned factors, combined with government backing and support, are collectively contributing to the escalating demand for moisture curing adhesives in the Asia-Pacific region throughout the forecast period.

Key Market Players

3M Company

Advatac Ltd.

Apollo Chemicals Ltd.

Bostik SA

Daubert Chemical Co., Inc.

Delo Industrial Adhesives LLC

Dow, Inc.

DuPont de Nemours, Inc.

Dymax Corporation

Franklin International, Inc.

Report Scope:

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

Moisture Curing Adhesives Market, By Application:

Polyurethane

Silicone

Cyanoacrylate

Polyolefin

Moisture Curing Adhesives Market, By Application:

Construction

Automotive

Wood Working

Textile

Others

Moisture Curing 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 Moisture Curing Adhesives Market.

Available Customizations:

Global Moisture Curing 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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