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Spray Adhesives Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Chemistry (Epoxy, Polyurethane, Synthetic Rubber, Vinyl Acetate Ethylene, Others), By Type (Solvent-Based, Water Based and Hot Melt), By End User (Transportation, Construction, Furniture, Packaging, Textile, Others), By Region and Competition

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Abstracts

Global Spray Adhesives Market has valued at USD3.45 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5% through 2028. Spray adhesives are widely used in various industries such as transportation, construction, and furniture. In the transportation industry, these adhesives find applications in interiors and upholstery for vehicles, aircraft, and ships. In construction, they are extensively utilized for flooring and roofing applications. Moreover, spray adhesives are also commonly employed in packaging, arts and crafts, and textiles. One of the key advantages of using spray adhesives is their ability to wet the base of joining surfaces, resulting in better and stronger bonds by consistently transferring loads between the blended surfaces. It is worth mentioning that some spray adhesives may contain volatile organic compounds (VOCs) that are emitted during their application.

In recent years, the demand for hygienic food packaging has been increasing, which is expected to further drive the growth of the Spray Adhesives Market. Additionally, the use of spray adhesives in bonding laminates, decorative cushions, fabrics, and foams to furniture will contribute to the growth of the industry. These versatile adhesives are also commonly used for gluing drywalls, plasters, fiberglass, and suspended ceilings.

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Moreover, they find applications in the construction industry for bonding EPS foams, pipe insulation, roofing membranes, and carpet tile installation.

Spray adhesives have emerged as excellent alternatives to tape glues, white glues, and hot glues due to their superior properties such as strong bonding, resistance to heat and moisture, and more. Furthermore, the increasing economic growth in countries like Indonesia, Malaysia, the Philippines, and Thailand is anticipated to drive the growth of the Spray Adhesives Market, fueled by the growing investments in the infrastructure sector.

The favorable socio-economic and demographic factors, including urbanization, population growth, disposable incomes, and improved living standards, are expected to positively impact the global spray adhesives market. However, there are certain challenges and restraints that need to be addressed. For instance, the high VOC emissions associated with solvent-based adhesives pose hurdles to market growth. Additionally, epoxy resin-based adhesives, which are commonly used in the industry, are subject to price fluctuations as they are derived from petroleum. Nevertheless, the increasing demand for low-VOC and eco-friendly adhesives, along with ongoing innovations in the field of hot melts and low-VOC formulations, are expected to create lucrative growth opportunities in the market.

Overall, the Spray Adhesives Market is poised for growth, driven by its wide range of applications and the need for efficient bonding solutions in various industries.

Key Market Drivers

Growing Demand of Spray Adhesives in Construction Industry

The global spray adhesives market has been on a consistent upward trajectory, driven by a multitude of factors. One of the key drivers of this growth is the ever-increasing demand for spray adhesives in the construction industry. The construction sector, being one of the pillars of economic development, relies heavily on efficient and reliable materials, and spray adhesives have emerged as a go-to solution for many applications in this field.

Spray adhesives, which are specialty glues packaged in convenient aerosol cans or cylinders, offer a myriad of benefits that make them highly sought after in construction projects. Their ability to provide an even distribution of adhesive ensures strong bonding, while their fast-drying time saves valuable time during construction.

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Furthermore, spray adhesives exhibit remarkable resistance to heat and moisture, making them ideal for various challenging environments.

In the construction sector, spray adhesives find widespread use due to their versatility, efficiency, and durability. They have proven to be indispensable in applications such as insulation attachment, drywall lamination, carpet tile installation, and ceiling tile adhesion, among others. The quick and efficient method of securing materials together that spray adhesives offer significantly reduces both the time and labor required for construction projects, enhancing overall productivity.

Another noteworthy aspect of spray adhesives is their compatibility with a wide range of materials. Whether it's wood, metal, concrete, foam, fabric, or more, spray adhesives exhibit excellent adhesion properties, making them a reliable choice for diverse construction needs. This versatility further adds to their appeal and utility in the industry.

The construction industry is experiencing substantial growth worldwide, fueled by factors such as increasing urbanization, population growth, and infrastructure development projects. As the industry expands and evolves, the demand for efficient and reliable materials like spray adhesives continues to surge. Moreover, the growing trend towards green building and sustainable construction practices has emphasized the need for products that are low in volatile organic compounds (VOCs) and contribute to improved indoor air quality. Spray adhesives, with their low VOC content, align perfectly with these requirements, further driving their adoption in construction projects.

In conclusion, the increasing demand for spray adhesives in the construction industry serves as a significant driver for the global spray adhesives market. As the construction industry continues to thrive and evolve, the demand for effective and environmentally friendly products like spray adhesives is anticipated to witness a further surge, propelling the market's growth to new heights.

Growing Demand of Spray Adhesives in Packaging Industry

Spray adhesives, which are typically packaged in aerosol cans or cylinders, are a specialized type of glue that is specifically designed for easy and quick application. These adhesives are known for their exceptional bonding strength, fast-drying time, and resistance to both heat and moisture. One of their key advantages is the ability to provide an even distribution of adhesive, making them a preferred choice for a wide range of applications, particularly in the packaging industry.

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In the packaging industry, spray adhesives play a crucial role and are extensively utilized due to their exceptional versatility and efficiency. They offer a fast, durable, and robust bond that is ideal for securing various types of packaging materials, including cardboard, plastic, and foam. The flexibility of spray adhesives also allows for both temporary and permanent bonding, depending on the specific requirements of the packaging. This adaptability makes them suitable for a wide range of packaging applications, ranging from food and beverage packaging to electronics and consumer goods packaging.

The packaging industry is experiencing robust growth globally, fueled by factors such as increasing consumerism, the booming e-commerce sector, and the expanding food and beverage industry. As this industry continues to grow, the demand for efficient and reliable materials like spray adhesives is also on the rise.

Furthermore, there is a growing emphasis on sustainable packaging solutions, which has led to an increased demand for spray adhesives that are low in volatile organic compounds (VOCs) and comply with environmental regulations. This shift towards eco-friendly practices has further propelled the demand for spray adhesives in the packaging industry.

In conclusion, the increasing demand for spray adhesives in the packaging industry is a significant driving force behind the growth of the global spray adhesives market. As the packaging industry continues to evolve towards more sustainable practices, the demand for efficient and environmentally friendly products like spray adhesives is anticipated to rise, further boosting the growth of the global spray adhesives market. The continuous development and innovation in spray adhesive technology are expected to cater to the evolving needs of the packaging industry, ensuring its vital role in the market for years to come.

Key Market Challenges

Volatility in Prices of Raw Materials

Spray adhesives, known for their convenience in aerosol cans or cylinders, are specialized glues formulated with a range of raw materials including resins, solvents, and propellants. However, the cost of these raw materials is subject to fluctuations influenced by various factors such as changes in crude oil prices, supply chain disruptions, trade policies, and geopolitical events. These price volatilities can significantly impact the overall cost of production, subsequently affecting the profitability

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and pricing of spray adhesives in the global market.

The volatility in raw material prices not only affects production costs but also creates challenges for manufacturers in predicting and managing costs, potentially resulting in reduced profit margins. Moreover, these price fluctuations can disrupt the competitive landscape, as smaller companies may struggle to absorb the increased costs, leading to a potential consolidation of the market in favor of larger players who have better capabilities to manage these challenges.

Additionally, the impact of volatile raw material prices extends beyond production costs. It can also result in increased logistics costs, further straining the resources of market participants and adding complexity to their operations.

Key Market Trends

Surge in Technological Advancements

Technological advancements in the field of spray adhesives are driven by the constant pursuit of improving product efficiency, reducing environmental impact, and expanding application areas. In this quest for innovation, researchers and engineers are continuously developing new formulations that offer superior bonding strength, faster drying time, and compatibility with an even wider range of materials.

One notable development in recent years is the introduction of water-based spray adhesives. These environmentally friendly alternatives have gained significant attention and are projected to capture a substantial market share. Their low volatile organic compound (VOC) emissions and compliance with stringent environmental regulations make them an ideal choice for industries that prioritize sustainability.

As a result of these technological advancements, the global spray adhesives market has witnessed a significant transformation. New and improved product formulations, coupled with enhanced application techniques, have expanded the use of spray adhesives across various industries. In the transportation sector, for example, the adoption of spray adhesives has surged for interior and upholstery applications. Technological innovations have provided superior bonding strength and durability, meeting the demanding requirements of this industry.

Furthermore, advancements in technology have enabled the development of spray adhesives that can withstand extreme temperatures and harsh environmental

conditions. This has opened up new possibilities for applications in industries such as aerospace and automotive, where adhesives need to perform reliably under challenging circumstances.

As the demand for efficient and environmentally friendly adhesives continues to grow, the role of technological advancements becomes even more critical. Companies operating in the spray adhesives market must continually invest in research and development to stay ahead of evolving industry trends and consumer demands. The shift towards green and sustainable practices is expected to drive further advancements in the formulation of spray adhesives, particularly in the development of bio-based or recyclable adhesives.

By pushing the boundaries of technology, the spray adhesives industry is poised to revolutionize the way materials are bonded and revolutionize various sectors, including transportation, packaging, and construction.

Segmental Insights

Chemistry Insights

Based on the category of chemistry, the epoxy resins segment emerged as the dominant player in the global market for Spray Adhesives in 2022. The excellent resistance offered by Epoxy Resins towards heat and chemical applications is greatly boosting its demand among various end-use industries. The outstanding durability of epoxy resin makes it an ideal choice for use with a wide range of materials including fabric, wood, metal, and glass. Its low shrinkage, remarkable mechanical strength, and strong fatigue properties contribute to the projected revenue growth of this segment. Additionally, epoxy adhesives offer numerous advantages such as strong adhesive and cohesive strength, material versatility, accelerated cure time, and exceptional environmental resistance. These remarkable features make epoxy resins a preferred choice for a variety of applications in different industries.

Type Insights

The water-based segment is projected to experience rapid growth during the forecast period. The water-based segment is projected to hold a significant revenue share in the global spray adhesives market. This is primarily attributed to the presence of stringent regulations governing the emissions of volatile organic compounds (VOCs). As awareness grows regarding the negative effects of VOCs on human health, the demand

for water-based adhesives is increasing in comparison to solvent-based adhesives. One of the key advantages of water-based adhesives is their absence of VOCs, making them a more environmentally friendly option.

Moreover, water-based adhesives offer various benefits such as consistency, bond stability, versatility, and cost-effectiveness. These factors are driving the revenue growth of the water-based segment. Additionally, water-based adhesives can be successfully utilized on a wide range of substrates, including synthetic and natural textiles, paper, cardboard, and plastics. Their advanced bonding capabilities make them suitable for meeting demanding applications in various end-use markets.

Furthermore, the use of water-based spray adhesives contributes to the improvement of quality, efficiency, and sustainability in the furniture and building components industry. With the increasing construction of green buildings, the demand for water-based spray adhesives is expected to witness significant growth in the construction sector. This is mainly because water-based adhesives are non-hazardous and eco-friendly, aligning with the sustainability goals of green buildings.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Spray Adhesives Market in 2022, holding the largest market share in terms of value. Rapid urbanization, industrial development, and expansion in the transportation and construction sectors in developing countries of the region are projected to drive the growth of the spray adhesives market during the forecast period. This growth is fueled by the rising investment of governments in several countries, including India, China, Indonesia, Philippines, Malaysia, and Thailand, for the development of the infrastructure sector. As the living standards of consumers continue to rise, there is a growing demand for high-quality and customized furniture, further boosting the demand for spray adhesives.

Moreover, the growth in the automotive sector of the region, driven by the increasing demand for fuel efficiency and emission reduction, is also contributing to the growing demand for eco-friendly products, including spray adhesives. China, being the largest manufacturer of automobiles in the world, is expected to play a significant role in boosting the growth of the spray adhesives market in the country.

Additionally, the increasing production of commercial aircraft in the region is further contributing to the demand for spray adhesives in the aerospace industry. As the aerospace industry continues to expand, the need for reliable and high-performance

adhesives becomes crucial, making spray adhesives an essential component in aircraft manufacturing processes.

Overall, the combination of infrastructure development, growing demand for customized furniture, and the expansion of the automotive and aerospace sectors in the region is driving the demand for spray adhesives, positioning the market for significant growth in the coming years.

Key Market Players

Henkel AG & Co KGaA

3M Co.

HB Fuller Co

Avery Dennison Corp

Bostik SA

ND Industries Inc.

Sika AG

Illinois Tool Works Inc

Kissel+Wolf GmbH

Quin GmbH

Report Scope:

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

Spray Adhesives Market, By Chemistry:

Epoxy

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Polyurethane

Synthetic Rubber

Vinyl Acetate Ethylene

Others

Spray Adhesives Market, By Type:

Solvent-Based

Water Based

Hot Melt

Spray Adhesives Market, By End User:

Transportation

Construction

Furniture

Packaging

Textile

Others

Spray Adhesives Market, By Region:

North America

United States

Canada

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- Mexico

Europe

- France
- United Kingdom
- Italy
- Germany
- Spain

Asia-Pacific

- China
- India
- Japan
- Australia
- South Korea

South America

- Brazil
- Argentina
- Colombia

Middle East & Africa

- South Africa
- Saudi Arabia

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UAE

Kuwait

Turkey

Egypt

Competitive Landscape

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

Available Customizations:

Global Spray 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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