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Spraying & Plastering Machine Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Spraying Machines, Plastering Machines), By Mechanism (Electric-Powered Machines, Diesel-Powered Machines, Pneumatic Machines, Hydraulic Machines), By Application (Residential Construction, Commercial Construction, Industrial Construction, Infrastructure), By Material Type (Cement-Based Plaster, Gypsum-Based Plaster, Lime Plaster, Stucco Plaster), By Region & Competition, 2021-2031F

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Abstracts

The Global Spraying & Plastering Machine Market is projected to expand from USD 3.97 Billion in 2025 to USD 5.68 Billion by 2031, registering a CAGR of 6.15%. This market comprises mechanized equipment engineered to automatically mix, pump, and apply materials such as mortar, stucco, or gypsum, serving as a highly efficient alternative to manual rendering techniques. Growth is primarily driven by a critical global shortage of skilled construction labor and the escalating demand for accelerated project timelines in rapidly urbanizing areas. By significantly reducing physical strain on workers while ensuring consistent finish quality, these machines align with the construction industry's enduring push for mechanization and operational efficiency.

However, market growth is frequently hindered by the substantial initial capital investment required for these advanced units and the sector's sensitivity to macroeconomic instability. Economic downturns often lead to reduced construction

outputs, which directly impacts equipment procurement. For instance, the Committee for European Construction Equipment (CECE) reported that the European market for concrete equipment, including mortar application machinery, experienced a 20% sales decline in 2024 due to weak building activity. This contraction highlights the challenge that economic volatility presents to the widespread adoption of automation technologies, despite their clear long-term operational benefits.

Market Driver

Escalating skilled labor shortages and rising workforce costs are fundamentally transforming the global spraying and plastering machine market by necessitating a shift toward automated application methods. Because manual plastering is physically demanding and experienced tradespeople are becoming scarcer, contractors are increasingly adopting automated mortar pumps and rendering machines to maintain productivity. This mechanization reduces reliance on large manual crews, enabling construction firms to execute projects efficiently despite widening workforce gaps. According to the '2024 Construction Workforce Shortage Survey' by the Associated General Contractors of America in August 2024, 94% of construction firms with open positions reported difficulty filling craft positions, a critical deficit that accelerates the procurement of labor-saving equipment to ensure project continuity.

Furthermore, increasing government investment in infrastructure and rapid urbanization are amplifying the demand for high-capacity equipment capable of covering vast surface areas with speed and uniformity. Large-scale residential and commercial projects require a level of consistency that manual application cannot sustain, making mechanized spraying indispensable for meeting tight delivery schedules. In the 'Interim Budget 2024-25', the Press Information Bureau noted in February 2024 that the Government of India increased capital expenditure for infrastructure by 11.1% to ?11,11,111 crore, signaling a robust pipeline of construction activity requiring advanced machinery. This trend is evident in manufacturer performance; for example, Zoomlion Heavy Industry Science and Technology Co., Ltd. reported a 43.7% year-on-year increase in overseas revenue during the first half of 2024, reflecting strong global demand.

Market Challenge

The expansion of the Global Spraying & Plastering Machine Market is significantly hampered by the sector's acute sensitivity to macroeconomic instability, which creates a volatile environment for equipment procurement. These machines represent a substantial capital expenditure, and their adoption relies heavily on the financial confidence of construction firms. During periods of economic uncertainty, high interest rates and inflated material costs frequently compel developers to pause or cancel residential and commercial projects. This reduction in active construction volume directly limits the cash flow available to contractors, causing them to defer investments in automated rendering technologies in favor of conserving liquidity or relying on traditional, lower-cost manual labor.

This correlation between diminished construction output and reduced equipment demand is evident in recent industry performance metrics. According to the European Construction Industry Federation (FIEC), the housebuilding segment across the European Union was projected to decline by 3.9% in 2025, following a significant contraction in the previous year. As the residential sector constitutes a primary end-user base for mortar spraying and plastering applications, such a sustained downturn in housing starts inevitably suppresses the market for these machines, preventing the wider adoption of automation despite its efficiency benefits.

Market Trends

The rise of Equipment-as-a-Service (EaaS) and rental models is becoming a dominant market force as construction companies seek to mitigate the financial risks associated with purchasing high-cost plastering machinery. Contractors are increasingly favoring rental agreements over capital expenditures to maintain liquidity during volatile economic periods, allowing them to access advanced spraying units without the burden of depreciation or maintenance costs. This structural shift is evident in the robust performance of the rental sector despite broader equipment sales contraction, as end-users prioritize operational flexibility over asset ownership. According to the American Rental Association's 'Updated Rental Revenue Forecast' in August 2024, construction and general tool rental revenue in the United States was projected to achieve an 8.9% increase in 2024, highlighting the growing preference for usership models over traditional procurement.

The adoption of autonomous robotic plastering systems is also accelerating as regulatory bodies and technology developers collaborate to standardize automated finishing for improved safety and consistency. Beyond solving labor deficits, these robotic units are being deployed to eliminate human exposure to hazardous dust and repetitive strain injuries, ensuring uniform quality that exceeds manual capabilities. This technological integration is moving from pilot phases to large-scale implementation in advanced construction markets where precision is paramount. As reported by The

Straits Times in October 2024, the Housing & Development Board announced that approximately 50% of new Build-To-Order construction projects in Singapore will progressively utilize robots for painting and plastering tasks starting in 2025.

Key Market Players

- Putzmeister Holding GmbH
- Sika AG
- Graco Inc.
- Knauf Gips KG
- Saint-Gobain S.A.
- IMER Group S.p.A.
- Wagner Group GmbH
- Utiform S.p.A.
- Mai International GmbH
- Turbosol Prodotti S.r.l.

Report Scope

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

- Spraying & Plastering Machine Market, By Type
  - Spraying Machines
  - Plastering Machines

Spraying & Plastering Machine Market, By Mechanism

- Electric-Powered Machines
- Diesel-Powered Machines
- Pneumatic Machines
- Hydraulic Machines

Spraying & Plastering Machine Market, By Application

- Residential Construction
- Commercial Construction
- Industrial Construction
- Infrastructure

Spraying & Plastering Machine Market, By Material Type

- Cement-Based Plaster
- Gypsum-Based Plaster
- Lime Plaster
- Stucco Plaster

Spraying & Plastering Machine Market, By Region

- North America
  - United States
  - Canada
  - Mexico

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- 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

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Spraying & Plastering Machine Market.

Available Customizations:

Global Spraying & Plastering Machine Market report with the given market data, TechSci 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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