

# **Timber Laminating Adhesives Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Resin Type (Melamine (Urea) Formaldehyde Adhesives, Phenol Resorcinol Formaldehyde Adhesives, Polyurethane, Emulsion Polymer Isocyanate Adhesives, Others), By Application (Floor Beam, Roof Beam, Window & Door Header, Others), By End User Industry (Residential, Non-Residential), By Region and Competition**

<https://marketpublishers.com/r/T14282D8FB1DEN.html>

Date: October 2023

Pages: 177

Price: US\$ 4,900.00 (Single User License)

ID: T14282D8FB1DEN

## **Abstracts**

The Global Timber Laminating Adhesives Market achieved a valuation of USD 974.18 million in 2022, and it is poised for robust growth in the forecast period with a projected Compound Annual Growth Rate (CAGR) of 5.18% through 2028 and is expected to reach 1311.36 million by 2028. Timber laminating adhesives find extensive applications in the field of building and construction. These adhesives play a critical role in the production of glued laminated timber (glulam) and cross laminated timber (CLT), which are used to create a variety of structural components, including straight laminated beams, wall beams, curved laminated beams, and I-beams. The primary function of these adhesive laminations is to securely bond multiple layers of beams, resulting in structural elements that offer enhanced strength and reduced weight compared to solid wood of equivalent thickness.

### **Key Market Drivers**

1. Rising Demand for Timber Laminating Adhesives in the Residential Sector: The residential sector is a cornerstone of construction activity, shaping living spaces

globally. In recent years, there has been a significant increase in the demand for timber laminating adhesives in residential construction. This demand surge is driven by a combination of practical and environmental factors. Sustainability is a major driver, as there is a growing emphasis on eco-friendly building practices. Timber laminating adhesives enable the production of engineered wood products that provide a greener alternative to traditional construction materials. These adhesives are versatile and efficient, allowing the creation of strong, lightweight, and structurally sound floor beams, which are advantageous for various residential construction projects. Engineered wood components manufactured with timber laminating adhesives offer optimized structural performance and reduced construction weight, aligning with the needs of modern homeowners who seek durability, safety, and sustainability in their living spaces.

2. Increasing Demand for Timber Laminating Adhesives in the Non-residential Sector: In the realm of construction, the non-residential sector encompasses a wide range of structures, from skyscrapers and commercial complexes to educational institutions and industrial facilities. Recently, the demand for timber laminating adhesives in the non-residential sector has grown significantly, driven by factors such as sustainability, efficiency, and innovation in modern construction practices. Sustainability is a key driver, with construction professionals seeking materials and methods that align with eco-conscious values. Timber laminating adhesives enable the construction of strong and durable structures using renewable and sustainable resources, making them an appealing choice. Efficiency and speed are also crucial in non-residential construction, and timber laminating adhesives offer advantages by allowing for faster assembly on-site, reducing construction timelines, and minimizing disruptions in busy urban environments. Additionally, the adaptability and versatility of timber laminating adhesives enable the creation of complex architectural designs and innovative building forms, further driving demand in the non-residential sector.

3. Rising Demand for Timber Laminating Adhesives in Window & Door Header Applications: Timber laminating adhesives are increasingly in demand for window and door header applications due to their ability to provide structural integrity and load-bearing capacity. Window and door headers must withstand significant vertical and lateral loads, making it crucial to use materials that can endure these forces over time. Timber laminating adhesives offer the advantage of creating composite wood components with enhanced strength and load-bearing capabilities. They also offer design flexibility, allowing architects and designers to create custom-shaped headers that cater to unique architectural requirements. This flexibility in design enhances the overall aesthetic of windows and doors, contributing to the growing demand for timber laminating adhesives in this application.

## Key Market Challenges

1. **Environmental Sustainability and Compatibility with New Timber Materials:** A significant challenge in the timber laminating adhesives market is the demand for more environmentally sustainable solutions. As sustainability gains prominence, the timber sector is under pressure to reduce its carbon footprint and minimize its impact on natural resources. Adhesive manufacturers are being urged to develop adhesives with lower volatile organic compound (VOC) emissions, reduced toxicity, and eco-friendly formulations. Balancing adhesive performance with environmental impact requires extensive research and development to meet both regulatory requirements and consumer expectations. Additionally, as innovative timber materials like cross-laminated timber (CLT) and glued laminated timber (glulam) gain popularity, adhesive manufacturers must develop adhesives compatible with these new materials, ensuring structural integrity.

2. **Fire Resistance and Safety Standards and Durability in Challenging Environments:** Fire safety is a critical concern in construction, and timber structures have historically been considered less fire-resistant than traditional materials. Developing timber laminating adhesives that provide both strong bonding and effective fire resistance is a complex task. Timber structures are exposed to various environmental conditions, including moisture, temperature fluctuations, and UV radiation, which can lead to adhesive degradation over time. Developing adhesives that withstand these challenges while maintaining bonding properties is an ongoing technical challenge.

3. **Competition and Continuous Innovation:** The timber laminating adhesives market is relatively fragmented, with multiple players competing for market share. This competition can lead to challenges such as price pressures and the need for continuous innovation to differentiate products. Adhesive manufacturers must invest in research and development to offer adhesive solutions that meet evolving customer demands and industry trends.

## Key Market Trends

1. **Technological Advancements:** Advancements in adhesive technology are playing a crucial role in the timber laminating adhesives market. Manufacturers are investing in research and development to create adhesives that offer enhanced bonding performance, durability, and moisture resistance. These innovations enable architects, designers, and builders to enhance the aesthetic appeal of timber laminates while

maintaining structural integrity.

2. **Shift towards Bio-Based Adhesives:** There is a notable shift towards bio-based and renewable adhesive formulations in response to the demand for sustainable materials and products. Bio-based timber laminating adhesives, derived from natural sources such as soy, starch, and lignin, offer reduced environmental impact, aligning with sustainability goals and consumer preferences for eco-friendly products.

3. **Focus on Retrofitting and Renovation:** Retrofitting and renovation projects aimed at enhancing sustainability and energy efficiency are on the rise. Timber laminating adhesives play a critical role in these projects by allowing the integration of modern timber components into older structures. As heritage buildings and older structures undergo transformation, the market for adhesive solutions that ensure seamless integration and structural reinforcement is expanding.

## Regional Insights

1. **Asia Pacific:** Asia Pacific emerged as the dominant player in the global timber laminating adhesives market in 2022. The rapid urbanization, cultural preference for timber, focus on sustainability, and expanding middle-class segment in the region contribute to its robust growth. Timber laminating adhesives are well-suited to meet the needs of the growing construction sector in Asia Pacific.

2. **Europe:** Europe dominates the market due to widespread acceptance and increasing utilization of wood as a primary building material. The region has a substantial presence of homes constructed using laminated timber, further driving the demand for timber laminating adhesives.

In conclusion, the global Timber Laminating Adhesives market is experiencing significant growth driven by factors such as sustainability, efficiency, and innovation in construction practices. Timber laminating adhesives offer versatile solutions that align with eco-conscious values and address the demands of both residential and non-residential construction. However, challenges related to environmental sustainability, fire resistance, and competition require ongoing research and development efforts in the industry. Additionally, technological advancements, the shift towards bio-based adhesives, and a focus on retrofitting and renovation are shaping the market's trends and future direction.

## Key Market Players

Sika AG

H.B. Fuller Company

Dow Chemical Company

Henkel AG & Co.KGaA

Arkema S.A.

3M Company

Jowat SE

Akzo Noble N.V.

Illinois Tool Works Inc.

Pidilite Industries Limited

Report Scope:

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

Timber Laminating Adhesives Market, By Resin Type:

Melamine (Urea) Formaldehyde Adhesives

Phenol Resorcinol Formaldehyde Adhesives

Polyurethane

Emulsion Polymer Isocyanate Adhesives

Others

### Timber Laminating Adhesives Market, By Application:

Floor Beam

Roof Beam

Window & Door Header

Others

### Timber Laminating Adhesives Market, By End User Industry:

Residential

Non-Residential

### Timber Laminating Adhesives Market, By Region:

Asia-Pacific

China

India

Australia

Japan

South Korea

Europe

France

Germany

Spain

Italy

United Kingdom

North America

United States

Mexico

Canada

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Egypt

Competitive Landscape

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

Available Customizations:

Global Timber Laminating Adhesives Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following

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customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).



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