

Construction Chemicals Market Report - UK 2017-2021 Analysis

Published: 31/05/2017 / Number of Pages: 85 / Price: £895.00

Introduction and Overview

The 6th edition of the '**Construction Chemicals Market Report - UK 2017-2021 Analysis**' incorporates original research and provides a comprehensive and up-to-date review of the market, defined in this report as covering the following applications; buildings, civils structures and home improvement / housing RMI. The market is expected to progress positively, driven in particular by growth in the infrastructure sector which will in turn drive growth in admixtures, sealants, protective coatings etc.



Key issues covered in the report:

- Concrete & mortar admixtures.
- Adhesives - DIY, trade and structural.
- Sealants and caulks - DIY, trade and structural.
- Fillers - decorators, wood and foam.
- Protective coatings - e.g. structural waterproofing.
- Resin flooring systems.

Areas of particular interest include:

- Market sizes and forecasts by value for key product groups, through to 2021.
- Product mixes within key product categories where relevant.
- End-user and distribution mixes for key product groups.
- Reviews of suppliers for key product groups. Extensive section on company profiles including - RPM International, Arkema Group, Henkel, Sika Group, Saint Gobain Weber, Artex Group, Instarmac, Mapei and many more.
- Detailed market data and insight on the construction chemicals market by AMA Research, a leading UK provider of construction market intelligence.

Some of the companies included:

3M Scotchkote, Adsheed Ratcliffe, Akzo Nobel, Apollo Chemicals, Ardex Ltd, Arkema SA, Bartoline, BASF Construction

Chemicals UK, Bostik, Building Adhesives Ltd, Chemence, Chemfix Products, Chemique Adhesives & Sealants, Conren, F Ball and Co, Flowcrete, Fosroc, Gorilla Glue Europe Kommerling, Grace Construction Products Ltd, Henkel Ltd, Hodgson Sealants, Instarmac Group PLC, John L Lord, Kilwaughter Chemical Company, Larsen (Manufacturing), Mapei (UK), Normet UK, Norcross Adhesives, Oscrete, Palace Chemicals, Parex, Power Adhesives, Ronacrete, RPM International Inc, Rust Oleum, Saint Gobain Weber UK, Seal It Services, Sherwin Williams Diversified Brands, Sika Ltd, Siroflex, Soudal UK, Sovereign Chemicals, Stirling Lloyd Polychem, Sto, Tor Coatings, Tremco Illbruck, Watco UK, Wetherby Building Systems, Uzin

Overview of Market for Construction Chemicals

- Total market size at manufacturers' sales prices 2012-2016 and forecasts 2017-2021.
- Key drivers e.g. housebuilding and commercial new build, home improvement activity, infrastructure, non-residential RMI etc.
- Mix of construction chemicals by type by value.

Adhesives / Mastic Sealants, Putties and Caulks

- Market size at MSP 2012-2016 & forecasts 2017-2021, with key drivers.
- Market mix by product type by value e.g. tiling, structural, roofing etc.
- Market mix by broad end-use mix by value i.e. housebuilding, contract, DIY/'GSI'.
- Supply & distribution overview e.g. DIY stores, builders' merchants, specialists etc.

Fillers / Concrete and Mortar Admixtures

- Market size at MSP 2012-2016 & forecasts 2017-2021, with key drivers.
- Market mix by product type by value. Fillers - decorators, wood, expanding foam. Concrete and mortar admixtures - plasticizers, water repellents etc.
- Market mix by broad end-use mix by value & volume. Fillers - trade, DIY. Concrete and mortar admixtures - ready mix concrete manufacturers.
- Supply & distribution overview. Fillers - DIY stores, builders' merchants, specialists etc. Concrete and mortar admixtures - direct sales, chemicals distributors.

Protective Coatings / Resin Flooring Systems

- Market size at MSP 2012-2016 & forecasts 2017-2021, with key drivers.
- Protective coatings - market mix by broad end-use by value. Supply and distribution overview - direct sales, chemicals distributors.
- Resin flooring systems - market mix by product type e.g. epoxy resin, polyurethane etc.
- Overview of major suppliers - Alto Flooring, Flowcrete, John L Lord etc.

Supplier Review

- Estimated market shares.
- Overview of leading manufacturers and suppliers - latest UK turnovers, products supplied etc - RPM International, Akzo

Report Summary

This report focuses on liquid, spray, foam, mastic and powdered chemical products used by tradesmen, sub-contractors and homeowners. Also included are concrete and mortar additives that are used in both factory production and in the on-site production of concrete products and mortars. Product sectors covered in this report include; adhesives; sealants, caulks & putties; fillers; concrete & mortar admixtures; protective coatings and resin flooring systems. Adhesives constitute the largest product group.

Annual growth rates vary between some of the product sub-sectors, due to differing trends within key end user markets, but overall growth has been slow and steady in this market over the past five years or so. Despite the outcome of the vote to leave the EU, there have been steadily growing levels of home improvement and housebuilding output, leading to greater usage of sealants and adhesives, with bright prospects also in the infrastructure sector.

The key manufacturers and suppliers are mainly subsidiaries or divisions of trans-national chemical product manufacturers. These typically have extensive product ranges for applications other than construction, that will often include manufacturing, offshore and transport.

Medium term growth prospects for the overall market appear steady but modest, particularly for products mostly supplied to the home improvement and trade sectors for use on residential RMI and refurbishment. There is likely to be a period of significant uncertainty over the next 2-3 years as the formal EU departure looms closer and the UK has to renegotiate trade deals. Risks also include changes to legislation affecting the construction chemicals market.

List of Report Contents

Content Listing

- 1. INTRODUCTION 7
 - 1.1 BACKGROUND 7
 - 1.2 SOURCES OF INFORMATION 7
- 2. SUMMARY 9
 - 2.1 MARKET SITUATION 9
 - 2.2 MARKET PROSPECTS 10
- 3. ECONOMIC ENVIRONMENT 12
 - 3.1 GDP 12
 - 3.2 INFLATION & INTEREST RATES 14
 - 3.3 UNEMPLOYMENT 15
 - 3.4 HOUSEHOLD CONSUMPTION 16
 - 3.5 HOUSING & CONSTRUCTION 16

3.6	STERLING	17
3.7	POPULATION PROFILE	18
3.8	CONCLUSIONS	18
4.	UK CONSTRUCTION CHEMICALS MARKET OVERVIEW	20
4.1	DEFINITIONS	20
4.2	OVERVIEW OF MARKET SIZE AND TRENDS	20
4.3	KEY MARKET DRIVERS	23
4.3.1	Home Improvement	23
4.3.2	Non Residential RMI	25
4.3.3	Housebuilding	27
4.3.4	Non-Residential New Construction	29
5.	ADHESIVES	36
5.1	DEFINITION	36
5.2	MARKET SIZE FOR TRADE & DIY AND CONSTRUCTION ADHESIVES	36
5.3	MARKET MIX FOR ADHESIVES	38
5.3.1	Overview	38
5.3.2	Floor & Wall Tile Adhesives & Grouts	38
5.3.3	Market Shares	41
5.3.4	Structural Adhesives	42
5.3.5	Floorcovering Adhesives	42
5.3.6	Roofing Adhesives	45
5.3.7	Wallcovering Adhesives	46
5.4	DISTRIBUTION OF CONSTRUCTION ADHESIVES	47
5.5	MAJOR SUPPLIERS	48
6.	SEALANTS, CAULKS AND PUTTIES	50
6.1	DEFINITION	50

6.2 MARKET SIZE AND TRENDS FOR SEALANTS, CAULKS AND PUTTIES	51
6.3 MARKET MIX FOR SEALANTS, CAULKS AND PUTTIES	52
6.3.1 Product Mix for Specialist /Structural Sealants	52
6.3.2 Market for DIY & Trade Sealants, Caulks & Putties	53
6.4 SUPPLY CHAIN AND DISTRIBUTION FOR SEALANTS, CAULKS AND PUTTIES	53
6.5 MAJOR SUPPLIERS OF SEALANTS, CAULKS & PUTTIES	55
7. FILLERS	57
7.1 DEFINITION	57
7.2 MARKET SIZE AND TRENDS FOR FILLERS	57
7.3 MARKET MIX FOR FILLERS	58
7.4 DISTRIBUTION FOR FILLERS	59
8. CONCRETE, MORTARS AND CEMENT ADMIXTURES	62
8.1 DEFINITION	62
8.2 MARKET SIZE, TRENDS FOR CONCRETE, CEMENT AND MORTARS ADMIXTURES	63
8.3 MARKET MIX FOR CONCRETE, CEMENT AND MORTARS ADMIXTURES	65
8.4 DISTRIBUTION FOR CONCRETE, CEMENT AND MORTARS ADMIXTURES	66
9. PROTECTIVE COATINGS	67
9.1 DEFINITION	67
9.2 MARKET OVERVIEW PROTECTIVE COATINGS	67
9.3 WATERPROOFING CHEMICALS	68
9.4 FIRE PROTECTION CHEMICALS	69
9.5 DISTRIBUTION AND SUPPLY FOR PROTECTIVE COATINGS	69
10. RESIN FLOORING SYSTEMS	72
10.1 DEFINITION	72
10.2 MARKET SIZE AND TRENDS FOR RESIN FLOORING SYSTEMS	72
10.3 MARKET MIXES FOR RESIN FLOORING SYSTEMS	73

10.4 SUPPLY FOR INDUSTRIAL RESIN FLOORING 74

11. SUPPLIERS 76

11.1 MARKET SHARES 76

11.2 COMPANY PROFILES 76

Appendix 84

Tables & Charts

CHART 1: UK CONSTRUCTION & HOME IMPROVEMENT MARKET FOR CHEMICAL PRODUCTS 2012-2021 9

TABLE 2: GDP DATA - 2013-2017 - KEY CONSTITUENT ELEMENTS 13

CHART 3: INTEREST RATES AND INFLATION (CPI) FROM 2000-2021 15

CHART 4: PDI & SAVINGS RATIO AT CURRENT PRICES 2000-2021 16

TABLE 5: EXCHANGE RATE FLUCTUATIONS 2012-2019 - STERLING TO THE DOLLAR, AND THE EURO, SPOT RATES 18

CHART 6: UK CONSTRUCTION & HOME IMPROVEMENT MARKET SIZE FOR CHEMICAL PRODUCTS £M MSP 2011 -2021 21

CHART 7: APPROXIMATE MIX OF CONSTRUCTION & HOME IMPROVEMENT CHEMICALS PRODUCTS (ADHESIVES, FILLERS, SEALANTS, ADMIXTURES, COATINGS, RESIN ETC) 2016 22

TABLE 8: UK RESIDENTIAL PROPERTY TRANSACTIONS VALUED AT £40K OR ABOVE 2012-2021 23

TABLE 9: HOUSEHOLD SPENDING ON DIY GOODS & TRADE SERVICES £BN (AT 2014 PRICES) 2010 -2016 24

TABLE 10: NON-HOUSING RMI CONTRACTORS OUTPUT £ BILLION 2011-2021 25

TABLE 11: UK CONSTRUCTION RMI CONTRACTORS OUTPUT BY BROAD END USE SECTOR (INFRASTRUCTURE, COMMERCIAL & INDUSTRIAL, PUBLIC SECTOR NON-HOUSING) 2016 26

CHART 12: UK CONSTRUCTION RMI CONTRACTORS OUTPUT BY KEY ACTIVITY (ELECTRICAL, PLUMBING, GLAZING, ROAD REPAIRS ETC) 2016 27

TABLE 13: HOUSEBUILDING STARTS & COMPLETIONS ('000 DWELLINGS) 2012- 2021 28

CHART 14: NON-RESIDENTIAL CONSTRUCTION SECTOR - NEW WORK AND RMI OUTPUT AND NEW ORDERS 2006 TO 2016 - BY VALUE (£ BILLION AT CURRENT PRICES) 30

CHART 15: VALUE OF NON-HOUSING NEW WORK OUTPUT BY SECTOR % MIX BY VALUE 2015 AND 2016 31

TABLE 16: UK ADHESIVES IN THE CONSTRUCTION & HOME IMPROVEMENT MARKET (£M MSP) 2012 -2021 37

CHART 17: ESTIMATED BROAD PRODUCT MIX BY VALUE FOR ADHESIVES (TILING, STRUCTURAL, ROOFING, FLOORING, WALLPAPER) 38

TABLE 18: UK MARKET SIZE AND FORECASTS FOR WALL & FLOOR TILE ADHESIVES & GROUTS BY VALUE (£M MSP) 2012 - 2021 39

CHART 19: UK MARKET FOR WALL & FLOOR TILES BY VOLUME ('000 M2) 2012-2021 40

CHART 20: TILE ADHESIVES & GROUTS MANUFACTURERS, BRANDS AND ESTIMATED MARKET SHARES 41

CHART 21: UK MARKET FOR FLOORCOVERINGS BY VOLUME (MILLION M2) 2011-2016 43

CHART 22: UK FLOORCOVERINGS MARKET (CARPET, WOOD, VINYL & OTHERS) % MIX BY VOLUME 2016 44

CHART 23: UK MARKET FOR VINYL FLOORCOVERINGS BY VOLUME (MILLION M2) 2011-2016 44

CHART 24: UK MARKET FOR FLAT ROOFING SYSTEMS BY AREA OF WATERPROOFING MEMBRANES INSTALLED (MILLION M2) 2012-18 45

CHART 25: UK WALLPAPER MARKET END USER MIX (DIY, TRADE DOMESTIC, TRADE COMMERCIAL) % BY VALUE 47

CHART 26: DISTRIBUTION MIX FOR CONSTRUCTION, TRADE & DIY ADHESIVES BY VALUE 48

TABLE 27: UK CONSTRUCTION & HOME IMPROVEMENT MARKET FOR SEALANTS, CAULKS & PUTTIES BY VALUE (£M MSP) 2012-2021 51

CHART 28: UK MARKET FOR SPECIALIST SEALANTS BY POLYMER TYPE BY VOLUME 53

CHART 29: DISTRIBUTION MIX FOR SPECIALIST SEALANTS USED FOR STRUCTURES, UTILITIES & OTHER CIVILS APPLICATIONS BY VALUE 54

CHART 30: DISTRIBUTION MIX FOR TRADE & DIY SEALANTS BY VALUE 54

TABLE 31: UK MARKET FOR FILLERS BY VALUE (£M MSP) 2012-2021 58

CHART 32: UK DEMAND FOR FILLERS BY TYPE (DECORATORS FILLERS, EXPANDING FOAMS, WOOD FILLERS) BY VALUE 59

TABLE 33: KEY CHANNELS OF DISTRIBUTION FOR FILLERS - ESTIMATED % SHARES BY VALUE 60

CHART 34: FILLERS - BROAD MARKET SHARES BY BRAND BY VALUE (POLYCELL, MERCHANTS OWN LABEL ETC) 60

CHART 35: ESTIMATED MARKET MIX FOR CONCRETE, CEMENT AND MORTARS ADMIXTURES - BY KEY APPLICATIONS (RMC, CONCRETE BLOCKS ETC) BY VOLUME (TONNES) 63

TABLE 36: UK MARKET FOR CONCRETE, CEMENT & MORTARS ADMIXTURES BY VALUE (£M MSP) 2012-2021 64

CHART 37: UK MARKET TRENDS FOR KEY PRODUCT APPLICATIONS FOR ADMIXTURES (RMC, CONCRETE BLOCKS, PORTLAND CEMENT ETC) 2011 - 2016 65

CHART 38: UK MARKET FOR CONCRETE, CEMENT AND MORTARS ADMIXTURES - APPROXIMATE PRODUCT MIX BY TYPE (E.G. PLASTICIZERS ETC) BY VOLUME 66

TABLE 39: UK CONSTRUCTION MARKET FOR FIREPROOFING, WATERPROOFING & OTHER PROTECTION CHEMICALS (£M MSP) 2012-2021 67

CHART 40: UK MARKET FOR RESIN FLOORING SYSTEMS 2012 -2021 72

CHART 41: UK MARKET FOR RESIN FLOORING SYSTEMS BY TYPE OF COATING BY VALUE (£M MSP) 73

CHART 42: UK CONSTRUCTION & HOME IMPROVEMENTS CHEMICALS MARKET SUPPLIERS SHARES 2015/16 76

The '**Construction Chemicals Market Report - UK 2017-2021 Analysis**' costs £895+VAT (if applicable) for a PDF version.

Other formats are available - [click here](#) for a information about available report formats. All AMA reports are sold with a single user licence as standard. For more information about AMA licences [click here](#).

About AMA Research

Established in 1989, AMA Research is widely recognised as the leading specialist provider of market research to the UK building and construction industries. AMA's research and analysis goes beyond the more commonly available range of statistical and company information to provide expert, informed commentary and in-depth market analysis, making the reports a valuable and relevant resource for understanding the UK's construction and associated markets.

We offer the following:

- **Consultancy and bespoke research projects**
- **Published research reports** - 150+ high quality, detailed research reviews covering a wide range of environmental, building and construction products.

Our extensive experience and in-house research database enables us to offer specialised and flexible bespoke research services, as well as giving excellent value for money. Our experienced in-house team of researchers are experts in their fields and adept in conducting original and relevant research for reports or bespoke projects, and key decision makers across the building and construction industries, both in the UK and abroad, frequently use our high-quality reports as their primary source of market data.

To find out more about AMA Research, visit: www.amaresearch.co.uk or call us on +44 1242 235724