

Industrial Adhesive Market - Global Outlook and Forecast 2020-2025

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Abstracts

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The industrial adhesive market is expected to grow at a CAGR of over 4% during the period 2019–2025.

Changing construction practices and the increasing use of innovative building materials are key factors, which are likely to increase the demand for epoxy adhesives and its related formulations. Epoxy resins are known for their durable adhesive nature. They resist extreme climate conditions or chemical spills, thereby making them ideal products with strong withstanding pressure. Epoxy resins are durable and can be used with various materials such as wood, metal, glass, or tiles. While epoxy adhesives are key raw materials for interior works in both household and commercial construction, the growth of the global furniture market, which hit around \$554 billion in 2019, is expected to boost the industrial adhesive market.

The following factors are likely to contribute to the growth of the industrial adhesive market during the forecast period:

Usage of Epoxy in the Construction Sector

Growth of Smart Vehicles

Consistent Demand from the Packaging Industry

The study considers the present scenario of the industrial adhesive market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

INDUSTRIAL ADHESIVE MARKET: SEGMENTATION

This research report includes a detailed segmentation by technology, product, end-users, and geography. APAC is leading the industrial water-based adhesives market, followed by North America and Europe. Their demand is increasing from automotive & transportation, building & construction, paper & packaging, labels, woodworking, and other application segments. The growing awareness of the “green economy” is likely to create more opportunities for water-based industrial products. Although the market is growing, the limited usage in high-end applications is inhibiting growth. While manufacturers make use of advanced packaging technology, an automatic water-based adhesive dispenser is such state-of-art technology, which increases the productivity and safety of packaging goods. The demand for high-quality flexible packaging and labeling machineries with inbuilt dispensers is the highest in Asia and Africa. Hence, the development in packaging technology is a major key driver for increasing the consumption of water-based adhesives across the globe, especially in APAC.

The acrylic segment is expected to have high demand across several industries. The cost-efficiency of acrylic adhesives and high growth in APAC is expected to drive the segment growth. Acrylic ones have replaced epoxy adhesives on account of their high strength and remarkable toughness. Factors such as cost-effectiveness and high resistance are the driving factor for their usage in the manufacturing and fabricating industry.

The application of PVA is growing in substrates such as cork, leather, paper, and cardboard. Packaging, paper, construction, and wood processing industries are dependent on water-based and hot melt adhesives, which extensively use PVA in various applications. The demand is expected for PVA is expected to be high in the APAC region, as many industries utilizing the adhesive are currently in the high growth mode.

PVA adhesives are environment friendly and are likely to replace formaldehyde adhesives in the wood industry on a large scale. However, the usage of petrochemical derivatives is expected to slow down during the forecast period on account of stringency

in emission regulations.

The growth of the PU market is growing on account of characteristics such as first-rate adhesion, abrasion resistance, low-temperature resistance, exceptional oil resistance. PU adhesives are highly sturdy and tough due to their cohesive potency and flexibility. The segment is likely to observe an incremental growth of over \$2.50 billion during the forecast period.

The increasing usage of structural adhesives is boosting the demand for epoxy across the world. Epoxy has a wide number of applications and acts as a major revenue generator in the industrial adhesive market. Epoxy is most commonly used in aerospace, automotive, building and construction, and semiconductor industries. China, South Korea, and Japan are the largest epoxy markets because of the growth of aerospace and semiconductor industries in the APAC region.

The increasing demand for industrial adhesives in the construction segment is directly proportional to the growth of the building and construction sector. They are used in several tasks in the construction market, including repair and installation of acoustic ceiling panels, floor tiles, and continuous flooring installation. The construction industry is estimated to grow by 4% by 2023, driven by APAC and Latin America. Hence, the increase in the value of construction is expected to provide opportunities for the adhesive industry.

Regulatory pressures on the automotive industry are increasing across the world. The growth of the automotive industry in APAC, Latin America, and MEA until the last decade was uninhabited due to the lack of strong policies and regulations on emissions and other environmental impacts. However, with globalization, several foreign players are scaling up their operations and expanding their footprint in several countries to benefit from favorable FDI and other corporate-friendly policies. Europe and North America are facing increased competition from APAC-based vehicle manufacturers. However, the decrease in the demand for new vehicles in the last few years has reduced the growth of epoxy industrial adhesives.

Furniture adhesives are used for waterproofing and improve the quality of doors and windows. The furniture industry is expected to grow by over 6% during the period 2018–2023. Rapid urbanization and an increase in disposable incomes are the factors that boost the furniture market in the APAC region. Adhesive technologies used in woodworking are generally EVA and PU hot-melts, and dispersions.

Market Segmentation by Technology

Waterborne

Solvent-based

Hotmelt

Others

Market Segmentation by Product

Acrylic

PVA

PU

Styrenic Block

Epoxy

EVA

Others

Market Segmentation by End-users

Packaging

Construction

Automotive

Woodwork

Others

INSIGHTS BY GEOGRAPHY

Several countries are witnessing a boom in the industrial adhesive market. The capital investment from lenders and private equity groups is abundantly fueling the growth of small and medium-sized players. In recent years, major end-users have been construction, automotive, packaging, and electronics.

The construction industry investor confidence has increased in the US, Australia, Japan, and Europe. The YOY growth has increased in more than a hundred countries with respect to the construction market. Over the years, emerging economies such as South Africa, Brazil, and China have provided a major impetus to the market. The markets in North America and Europe are rapidly evolving with the adoption of new building technology, including sustainability practices.

In the automotive sector, the geographical proximity of India with Europe and the Middle East automotive market has provided better opportunities to the manufacturing sector. While developed markets in Europe and North America are lagging behind the developing market, the automotive market of APAC is growing in consumption and purchase. Auto sales are expected to remain steady in 2020 and 2021, as macroeconomic conditions are positive and supportive of the auto industry.

North America and Europe hold major shares in the global packaging market. In 2018, the two regions accounted for a share of more than 55% on account of the growing consumer packaging market. The global market for packaging was offset by economic downturns witnessed in Latin America and political instability in a few MEA countries. Countries such as Australia, Japan, China, Germany, France, the US, and Canada are the major packaging markets with high spend on F&B and pharmaceutical segments.

Market Segmentation by Geography

Europe

Spain

Germany

Italy

France

UK

North America

US

Canada

APAC

South Korea

China

Japan

Australia

India

Latin America

Brazil

Mexico

Argentina

Colombia

MEA

Turkey

Saudi Arabia

South Africa

UAE

Egypt

INSIGHTS BY VENDORS

The global industrial adhesive market is highly competitive with the presence of global, regional, and local players. A majority of the market share is captured by global companies such as Arkema, Henkel, and HB Fuller. To maintain a competitive edge, the vendors are focusing on developing innovative products and increasing their product portfolio by making huge investments in R&D. The key competitive factors in the industrial adhesive market include:

Product Quality

Aftersales Services

Strong Supply Program

Technical Support

Competitive Pricing Structure

Key Vendors

Henkel

Sika

HB Fuller

Arkema

Other Vendors

Flamemaster

Permatex

Master Bond, Inc.

Solvay

Beacon Adhesives

Huntsman

Ashland

Lord Corp.

Franklin Adhesives and Polymers

Kleiberit Adhesives

3M

Dow Inc.

Jowat

KEY MARKET INSIGHTS

The analysis of the industrial adhesive market provides sizing and growth opportunities for the period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the

market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.

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