

Global Low VOC Adhesives Market Size Study & Forecast, by Technology and Chemistry, and Regional Forecasts 2025-2035

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Abstracts

The Global Low VOC Adhesives Market is valued at approximately USD 57.3 billion in 2024 and is poised to exhibit a steady compound annual growth rate (CAGR) of 5.00% during the forecast period from 2025 to 2035. As regulatory mandates around volatile organic compound (VOC) emissions tighten worldwide and consumers increasingly demand sustainable, non-toxic solutions, low VOC adhesives have stepped into the spotlight as an indispensable innovation across industrial sectors. From automotive manufacturing lines to food packaging solutions and home furnishings, these eco-conscious bonding agents are revolutionizing how industries adhere to environmental standards without compromising product performance.

As nations escalate environmental accountability and corporations race to reduce carbon footprints, industries are pivoting toward water-based and hot-melt adhesive formulations. Water-based adhesives, owing to their excellent performance and minimal environmental impact, have found strong footing in packaging, construction, and woodworking industries. Meanwhile, the growing penetration of polyurethane and epoxy chemistries in electronics, automotive, and textile applications is unlocking new arenas for low VOC adhesives. This transition is not only compliance-driven but also inspired by the growing awareness among consumers who are actively influencing purchasing decisions based on green certifications and eco-labeling.

Regionally, North America continues to dominate the low VOC adhesives landscape, backed by stringent EPA regulations, widespread corporate sustainability initiatives, and a mature consumer base sensitive to indoor air quality. Europe follows closely, led by REACH-compliant innovations and proactive product development in Germany, France, and the Nordic countries. However, Asia Pacific is projected to witness the fastest

growth, driven by rapid urbanization, infrastructure development, and swelling demand for sustainable manufacturing practices in key economies like China, India, and South Korea. Moreover, the booming e-commerce sector and a resilient packaging industry in Asia are adding substantial impetus to the adoption of low VOC adhesives across the board.

Major market player included in this report are:

BASF SE

3M Company

Henkel AG & Co. KGaA

H.B. Fuller Company

Dow Inc.

Sika AG

Ashland Global Holdings Inc.

Avery Dennison Corporation

Arkema Group

Illinois Tool Works Inc.

Pidilite Industries Limited

Huntsman Corporation

Franklin International

Bostik (Arkema)

Lord Corporation

Global Low VOC Adhesives Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players.

The detailed segments and sub-segments of the market are explained below:

By Technology:

Water-Based

Hot-Melt

Reactive

By Chemistry:

Acrylic Polymer Emulsion

Polyvinyl Acetate (PVA) Emulsion

Vinyl Acetate Ethylene (VAE) Emulsion

Ethylene Vinyl Acetate (EVA) Emulsion

Styrene-Butadiene Copolymer (SBC)

Polyurethane

Epoxy

By End-Use Industry:

Building & Construction

Packaging

Automotive

Woodworking

Consumer & DIY

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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