

Global Body-in-White Structural Adhesives Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Body-in-White Structural Adhesives market size was valued at US\$ 1671 million in 2025 and is forecast to a readjusted size of US\$ 1989 million by 2032 with a CAGR of 2.5% during review period.

Body-in-white structural adhesives are advanced bonding agents used in the automotive manufacturing process, specifically during the assembly of a vehicle's body structure before it is painted. These adhesives are designed to bond various materials, such as steel, aluminum, and composites, enhancing the overall strength and stiffness of the vehicle. By providing a lightweight alternative to traditional welding, these adhesives help improve fuel efficiency and reduce manufacturing costs. They also contribute to better sound dampening and resistance to corrosion. Body-in-white structural adhesives play a crucial role in ensuring vehicle safety, performance, and longevity by enhancing the integrity of the vehicle's framework.

The Body-in-White (BIW) structural adhesives market plays a critical role in the modern automotive manufacturing landscape, especially as automakers shift toward lighter, safer, and more energy-efficient vehicles. These adhesives are used to bond various substrates such as aluminum, high-strength steel, and composite materials within the car's structural frame. A major driver of this market is the increasing use of mixed-material body structures, which require bonding solutions that provide high mechanical strength, corrosion resistance, and energy absorption in crash events. Additionally, the push for electric vehicles (EVs) globally has further increased the reliance on structural adhesives to reduce vehicle weight and improve rigidity without adding welding complexity.

However, there are several challenges that restrain the broader application of BIW adhesives. Long curing times and the need for precise process control add complexity to production lines. Compatibility issues with different coatings, surface treatments, and assembly conditions can limit the flexibility of structural adhesives across vehicle platforms. Moreover, the automotive industry's reliance on traditional joining methods like spot welding and riveting still presents an adoption barrier, especially among manufacturers with conservative design philosophies or legacy production systems.

Regionally, Europe leads the adoption of structural adhesives due to its emphasis on EV development, stringent crash safety regulations, and the popularity of lightweight car designs. North America follows, especially in the context of trucks and SUVs that benefit from improved structural performance. The Asia-Pacific region, particularly China, shows significant growth potential, supported by strong government policies for electric vehicles and investments in advanced manufacturing technologies. Japan and South Korea, home to technologically advanced automakers, are key innovators in high-performance adhesives that meet demanding strength and durability criteria.

This report is a detailed and comprehensive analysis for global Body-in-White Structural Adhesives market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Body-in-White Structural Adhesives market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Body-in-White Structural Adhesives market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Body-in-White Structural Adhesives market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Body-in-White Structural Adhesives market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Body-in-White Structural Adhesives

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Body-in-White Structural Adhesives market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Henkel, Sika, DuPont, H.B.Fuller, Sunstar, Arkema Group, 3M, Unitech, Huntsman, L&L Products, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Body-in-White Structural Adhesives market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Epoxy

Urethane

Others

Market segment by Application

Passenger Car

Commercial Vehicle

Major players covered

Henkel

Sika

DuPont

H.B.Fuller

Sunstar

Arkema Group

3M

Unitech

Huntsman

L&L Products

Parker

PPG

Hubei Huitian New Materials

ThreeBond

Comens New Materials

Uniseal

Market segment by region, regional analysis covers
North America (United States, Canada, and Mexico)
Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)
Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)
South America (Brazil, Argentina, Colombia, and Rest of South America)
Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Body-in-White Structural Adhesives product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Body-in-White Structural Adhesives, with price, sales quantity, revenue, and global market share of Body-in-White Structural Adhesives from 2021 to 2026.

Chapter 3, the Body-in-White Structural Adhesives competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Body-in-White Structural Adhesives breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Body-in-White Structural Adhesives market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Body-in-White Structural Adhesives.

Chapter 14 and 15, to describe Body-in-White Structural Adhesives sales channel, distributors, customers, research findings and conclusion.

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