

South East Asia Polyurethane (PU) Adhesives Market Analysis By Application (Footwear, Automotive, Construction, Packaging) And Segment Forecasts To 2020

<https://marketpublishers.com/r/SF1DFE3EFC6EN.html>

Date: January 2015

Pages: 82

Price: US\$ 5,950.00 (Single User License)

ID: SF1DFE3EFC6EN

Abstracts

South East Asia PU adhesives market is expected to reach USD 262.5 million by 2020. Emergence of South East Asia as a major automobile manufacturing hub on account of proximity to demand centers and low manufacturing cost is expected to drive the regional PU adhesives demand. Increasing construction spending on account of growing urbanization rates across major countries has also contributed to the market growth. Government support for strong inflow of FDI in Indonesia and Vietnam is expected to have positive influence on the overall market. Volatile raw material prices may emerge as a major challenge over the next six years.

Footwear emerged as the leading application segment and accounted for 25.5% of total market volume in 2013. Emergence of Vietnam as a major footwear manufacturing hub is expected to remain a key driving factor for this segment. Vietnam is the second largest footwear manufacturing nation in the world. Automotive is expected to witness the highest growth rate over the forecast period. The segment is expected to grow at an estimated CAGR of 7.0% from 2014 to 2020. Positive outlook on Thailand's automotive industry is expected to remain a key driving factor for this segment.

Further key findings from the study suggest:

South East Asia PU adhesives demand was 46.6 kilo tons in 2013 and is expected to reach 70.7 kilo tons by 2020, growing at an estimated CAGR of 6.2% from 2014 to 2020.

Indonesia emerged as the leading regional market and accounted for 33.1% of total market volume in 2013. Increasing construction spending coupled with growth of automotive industry is expected to remain a key driving factor for Indonesian market.

Shift of footwear industry from China to Vietnam on account of low manufacturing cost in the nation is anticipated to have direct positive impact on the regional market growth. PU adhesives demand in Thailand is expected to reach 17.4 kilo tons by 2020. Thailand's automotive industry has been growing at a tremendous pace is pronounced to be "Detroit of the East" on account of its growing popularity as a major automobile hub.

South East Asia PU adhesives market is moderately concentrated with top four companies, Henkel, 3M, HB Fuller, Avery Dennison dominating the regional market. Other PU adhesives manufacturers include Ashland Inc., Beardow & Adams (Adhesives) Ltd., BASF AG, Bostik SA, Eastman Chemical Company, The Dow Chemical Company, Ellsworth Adhesives, ND Industries, Momentive Performance Materials Inc., Uniseal Inc. and Sika AG.

For the purpose of this study, Grand View Research has segmented the South East Asia Polyurethane (PU) adhesives market on the basis of application and region:

South East Asia Polyurethane (PU) Adhesives Application Outlook (Volume, Kilo Tons; Revenue, USD Million, 2012 - 2020)

Footwear

Automotive

Construction

Packaging

Others

South East Asia Polyurethane (PU) Adhesives Regional Outlook (Volume, Kilo Tons; Revenue, USD Million, 2012 - 2020)

Indonesia

Thailand

Malaysia

Rest of South East Asia

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