

Adhesives and Sealants Market Report by Adhesive Type (Acrylic, PVA, Polyurethanes, Styrenic Block Copolymers, Epoxy, EVA, and Others), Sealant Type (Acrylic, Silicone, Polyurethane, Butyl, and Others), Technology (Water-Based, Solvent-Based, Hot Melt, Reactive, and Others), Application (Paperboard and Packaging, Building and Construction, Transportation, Leather and Footwear, Furniture, and Others), and Region 2024-2032

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Abstracts

The global adhesives and sealants market size reached US\$ 66.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 99.5 Billion by 2032, exhibiting a growth rate (CAGR) of 4.5% during 2024-2032. The market is experiencing steady growth driven by the increasing demand for adhesives and sealants across various industries, growing environmental awareness, surging demand for eco-friendly formulations, ongoing research and development (R&D) activities, and evolving consumer preferences for convenience and aesthetics.

Adhesives and Sealants Market Analysis:

Market Growth and Size: The global adhesives and sealants market is experiencing steady growth, driven by increasing demand from various industries, such as automotive, construction, and electronics.

Major Market Drivers: The rising demand for lightweight and fuel-efficient vehicles has been a major driver, propelling the automotive industry's adoption

of advanced adhesives and sealants.

Technological Advancements: Ongoing technological advancements have led to the development of high-performance and eco-friendly adhesives and sealants, meeting industry-specific requirements.

Industry Applications: Adhesives and sealants find widespread applications in construction, automotive manufacturing, aerospace assembly, electronics, healthcare, and packaging industries owing to their ability to reduce weight without compromising structural integrity.

Key Market Trends: Market trends include the shift towards eco-friendly formulations, increased emphasis on miniaturization in electronics, and the expansion of the market in emerging economies, particularly in Asia-Pacific.

Geographical Trends: Asia-Pacific is witnessing substantial growth due to urbanization and industrialization, while North America and Europe continue to be key markets with a focus on innovation.

Competitive Landscape: The market is highly competitive, with several major players competing for market share. Companies are investing in research and development (R&D) to stay competitive.

Challenges and Opportunities: Challenges include regulatory compliance and meeting industry standards. Opportunities lie in addressing environmental concerns and creating innovative solutions for evolving industries like electronics and renewable energy.

Adhesives and Sealants Market Trends:

Construction industry's impact on the global adhesives and sealants market

The expansion of the construction industry is one of the primary drivers influencing the global adhesives and sealants market. The escalating use of adhesives and sealants in various construction applications, from bonding materials like concrete, wood, and ceramics to sealing joints is another growth-inducing factor. The growth in infrastructure and building projects across the globe directly correlates with the demand for adhesives and sealants. As urbanization continues, the construction sector remains a steadfast

driver, necessitating the development of high-performance adhesives and sealants that meet the industry's stringent requirements. Additionally, environmental considerations in construction have prompted the formulation of eco-friendly adhesives and sealants, marking a significant trend in this sector's growth.

Automotive sector's influence on adhesives and sealants

The automotive industry is a key driver in the global adhesives and sealants market. The continual advancement of automotive technology and design has led to increased utilization of these materials in vehicle manufacturing. Adhesives and sealants play a vital role in enhancing safety by bonding critical components and reducing weight to improve fuel efficiency. With automakers striving for lightweighting and fuel economy, the demand for specialized adhesives and sealants is on the rise. Moreover, these materials contribute to noise and vibration reduction, making vehicles quieter and more comfortable for passengers. The automotive sector's dynamic nature and commitment to innovation ensure that adhesives and sealants continue to be pivotal components in the industry's ongoing evolution.

Aerospace industry's strive for high-performance adhesives and sealants

The aerospace industry is a driving force behind the development and utilization of high-performance adhesives and sealants. With stringent regulations and safety standards, aerospace applications demand exceptional bonding and sealing capabilities. Adhesives and sealants are used extensively in aircraft assembly, maintenance, and repair to ensure structural integrity, reduce weight, and enhance fuel efficiency. They also contribute to the aerospace sector's ability to withstand extreme environmental conditions, such as temperature variations and high-altitude exposure. As the aerospace industry continues to expand, especially with the growth of commercial aviation and space exploration, the demand for advanced adhesives and sealants is poised to increase, cementing this sector's influence on the market.

Electronics industry's surging use of adhesives and sealants for miniaturization

The electronics industry has embraced adhesives and sealants for their crucial role in achieving miniaturization and product assembly. With consumer electronics becoming smaller and more complex, precise bonding and sealing are essential. Adhesives play a pivotal role in securing delicate components on circuit boards, while sealants ensure protection against moisture and dust. Furthermore, these materials enable heat dissipation, which is vital for electronic device longevity and performance. As consumer

demand for compact and high-performing electronics continues to grow, the electronics industry's reliance on adhesives and sealants becomes increasingly pronounced. Innovations in this sector often revolve around adhesives and sealants designed to meet the unique challenges of electronic device manufacturing.

Adhesives and Sealants Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on adhesive type, sealant type, technology, and application.

Breakup by Adhesive Type:

Acrylic

PVA

Polyurethanes

Styrenic Block Copolymers

Epoxy

EVA

Others

Acrylic accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the adhesive type. This includes acrylic, PVA, polyurethanes, styrenic block copolymers, epoxy, EVA, and others. According to the report, acrylic represented the largest segment.

The acrylic segment is driven by the increasing demand in the construction and automotive industries, owing to its versatility, adhesion properties, and resistance to weathering. Acrylic adhesives and sealants are favored for their durability and ability to

bond various substrates, making them essential for structural applications and automotive assembly.

The polyvinyl acetate (PVA) segment is driven by its widespread use in woodworking, paper packaging, and school glue applications. PVA adhesives are known for their ease of use, non-toxicity, and excellent bonding capabilities on porous materials, making them a staple in woodworking and paper-related industries.

The polyurethanes segment is driven by their high-performance characteristics, making them a choice for industries like aerospace, automotive, and construction. Their flexibility, durability, and resistance to extreme conditions contribute to their growth, enabling their use in critical applications within these sectors.

The styrenic block copolymers segment, on the other hand, are driven by their use in the packaging, automotive, and healthcare industries due to their exceptional adhesion, impact resistance, and compatibility with various substrates.

Epoxy adhesives and sealants segment is driven by their strong bonding capabilities and resistance to chemicals and temperature fluctuations, making them indispensable in the aerospace, automotive, and electronics sectors.

The ethylene vinyl acetate (EVA) segment is driven by its use in flexible packaging, footwear, and solar panel applications due to its flexibility, low-temperature performance, and excellent adhesion properties. It plays a significant role in industries where flexibility and adhesion are critical factors.

The others segment encompasses various specialty adhesives and sealants catering to specific industries like electronics, medical, and renewable energy.

Breakup by Sealant Type:

Acrylic

Silicone

Polyurethane

Butyl

Others

Silicones holds the largest share in the industry

A detailed breakup and analysis of the market based on the sealant type have also been provided in the report. This includes acrylic, silicone, polyurethane, butyl, and others. According to the report, silicones accounted for the largest market share.

The silicone segment is primarily driven by their exceptional flexibility, heat resistance, and electrical insulation properties. These characteristics make them essential in the electronics, automotive, and aerospace sectors.

The acrylic segment is driven by the increasing demand for versatile and durable adhesives and sealants in a wide range of applications. Acrylic-based products offer excellent adhesion properties, weather resistance, and versatility, making them a preferred choice in construction, automotive, and general industries.

The polyurethane segment benefits from its outstanding bonding strength, chemical resistance, and versatility, which cater to applications in construction, automotive, and aerospace industries.

The butyl segment finds traction due to its exceptional air and water sealing capabilities, making it a top choice for the construction and automotive sectors.

In the others segment, various specialized formulations cater to specific industry needs, such as medical-grade adhesives or adhesives for renewable energy applications, driven by niche requirements and technological advancements.

Breakup by Technology:

Water-Based

Solvent-Based

Hot Melt

Reactive

Others

Water-based check represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the technology. This includes water-based, solvent-based, hot melt, reactive, and others. According to the report, water-based represented the largest segment.

The water-based segment is driven by the increasing demand for environmentally friendly adhesives and sealants. Stringent regulations and growing environmental awareness have led industries to shift towards water-based formulations due to their low volatile organic compounds (VOC) emissions, making them an eco-conscious choice for various applications.

Moreover, the solvent segment is primarily driven by its fast drying and excellent adhesion properties. Industries requiring rapid bonding and curing, such as automotive and construction, favor solvent-based adhesives and sealants for their efficiency and durability.

The hot melt segment experiences momentum due to its versatility and high bond strength. These adhesives solidify upon cooling, making them ideal for applications that require quick bonding, like packaging and woodworking.

The reactive segment is propelled by its ability to form strong chemical bonds, offering exceptional durability and resistance properties. Industries like aerospace, where safety and performance are paramount, prefer reactive adhesives and sealants for their exceptional bonding capabilities under extreme conditions.

Moreover, the others segment encompasses a variety of specialty adhesives and sealants tailored to unique applications.

Breakup by Application:

Paperboard and Packaging

Building and Construction

Transportation

Leather and Footwear

Furniture

Others

Building and construction represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the application. This includes paperboard and packaging, building and construction, transportation, leather and footwear, furniture, and others. According to the report, building and construction represented the largest segment.

The building and construction segment is driven by the increasing need for energy-efficient and durable construction materials. Sustainability and energy conservation have become paramount, leading to the adoption of advanced adhesives and sealants that enhance building insulation and structural integrity.

The paperboard and packaging segment is driven by the increasing demand for sustainable and eco-friendly packaging solutions. With growing environmental awareness and stringent regulations, there is a shift towards recyclable and biodegradable packaging materials, propelling innovation in this sector.

The transportation segment is driven by the increasing focus on lightweight materials and fuel efficiency. Adhesives and sealants play a crucial role in bonding and sealing components, reducing vehicle weight, and improving fuel economy, making them integral to the automotive and aerospace industries.

The leather and footwear segment is driven by the increasing demand for high-quality and stylish products. Adhesives and sealants ensure the durable assembly of leather goods and footwear, meeting consumer expectations for both aesthetics and functionality.

The furniture segment is driven by the increasing demand for modern and aesthetically pleasing designs. Adhesives and sealants are essential for bonding and securing furniture components, allowing manufacturers to create innovative and visually appealing products.

In the others segment, various industries benefit from adhesives and sealants for specific applications. This segment's growth is driven by niche requirements, such as in the healthcare sector for medical devices and in renewable energy for wind turbine assembly.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

APAC leads the market, accounting for the largest adhesives and sealants market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, APAC accounted for the largest market share.

In Asia Pacific, the adhesives and sealants market is witnessing substantial growth due to rapid urbanization and industrialization, particularly in emerging economies. The construction industry is a major driver, as it requires these materials for various applications, including infrastructure development and building projects. Additionally, technological advancements in the electronics sector contribute significantly to market expansion, as miniaturization trends demand precision bonding and sealing solutions. The region's vast consumer base and manufacturing capabilities make it a hub for adhesives and sealants, attracting both domestic and international manufacturers.

The North American adhesives and sealants market is driven by the increasing demand in the construction and automotive industries, where these materials are crucial for

bonding and sealing applications.

In Europe, the market is primarily influenced by the thriving automotive and aerospace sectors, emphasizing high-performance adhesives and sealants. Additionally, the region's commitment to green technologies and eco-conscious consumers fuels the development of environmentally friendly products.

Latin America sees growth in construction and packaging industries, along with a rising focus on sustainability.

The Middle East and Africa region experiences demand primarily from the construction sector due to ongoing infrastructure development, while the energy sector's expansion also contributes to market growth.

Leading Key Players in the Adhesives and Sealants Industry:

The key players in the adhesives and sealants market are actively engaged in several strategic initiatives to maintain their competitive edge and cater to evolving industry demands. These initiatives include significant investments in R&D, aimed at developing innovative formulations that meet specific industry requirements and regulatory standards. Additionally, companies are increasingly focusing on sustainability by introducing eco-friendly products to align with growing environmental concerns and consumer preferences for green solutions. Market leaders are also expanding their global footprint through mergers, acquisitions, and partnerships to tap into emerging markets and strengthen their distribution networks.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

3M Company

Arkema S.A

Ashland Global Specialty Chemicals Inc.

Avery Dennison Corporation

Beardow & Adams (Adhesives) Limited

Eastman Chemical Company

H.B. Fuller Company

Henkel AG & Co. KGaA

Sika AG

Wacker Chemie AG

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Latest News:

In September 2021: 3M launched the 3M™ VHBT™ GPH Series, a family of double-sided tapes designed for bonding high surface energy substrates.

In October 2021: Arkema announced the acquisition of Lambson Limited, a leader in photoinitiator technology for UV-curable coatings and inks. This acquisition was in line with Arkema's strategy to expand its presence in the sustainable and high-performance materials market.

In May 2021: Ashland introduced 'Ashland 1™', a new brand identity that reflected the company's commitment to innovation and customer-focused solutions in various markets, including adhesives and sealants.

Key Questions Answered in This Report

1. What was the size of the global adhesives and sealants market in 2023?
2. What is the expected growth rate of the global adhesives and sealants market during 2024-2032?
3. What are the key factors driving the global adhesives and sealants market?

4. What has been the impact of COVID-19 on the global adhesives and sealants market?
5. What is the breakup of the global adhesives and sealants market based on the adhesive type?
6. What is the breakup of the global adhesives and sealants market based on the sealant type?
7. What is the breakup of the global adhesives and sealants market based on the technology?
8. What is the breakup of the global adhesives and sealants market based on the application?
9. What are the key regions in the global adhesives and sealants market?
10. Who are the key players/companies in the global adhesives and sealants market?

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