

# **Adhesives & Sealants Market by Adhesive Technology (Water-based, Solvent-based, Hot-melt, Reactive), Sealant Resin Type (Silicone, Polyurethane, Plastisol, Emulsion, Polysulfide, Butyl), Application, & Region - Global Forecast to 2029**

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## **Abstracts**

The global adhesives & sealants market size was USD 76.1 billion in 2024 and is projected to reach USD 86.6 billion by 2029, at a CAGR of 2.6% between 2024 and 2029. Water-based technology accounted for the largest segment of adhesive technology & resins. The growth of the water-based adhesives sector is being driven by a steady rise in demand from building and construction projects in North America, as well as the initiation of new infrastructure ventures in India, Taiwan, and other developing countries worldwide. These adhesives exhibit superior adhesion characteristics across various substrates and are widely applied in packaging tasks such as bookbinding, paper bags, cartons, labels, foils, films, paperboard decals, wood assembly, automobile upholstery, and leather binding.

“Paper & packaging by adhesive application accounted for the largest segment of adhesives market.”

The global paper & packaging sector is experiencing significant growth, primarily driven by emerging markets where urbanization is leading to changes in consumer behavior and an increased demand for packaged products. The rise of e-commerce is also contributing to this growth. Economic development and demographic shifts play crucial roles in propelling the packaging industry forward. With anticipated increases in income, consumer spending on packaged goods is expected to rise. Furthermore, there is a notable surge in demand for pharmaceutical products, particularly in developed markets like Japan, driven by rising life expectancies.

“Silicone, by sealant resin type accounted for the largest segment of adhesives & sealants market.”

Leading the sealants market is silicone, closely followed by polyurethane. Silicone-modified polyether sealants, which initially originated in Japan, have now expanded their reach to encompass broader markets in North America and Europe. The surge in demand for silicone sealants stems from their versatile applications in various automobile bonding tasks, including sealing joints, gaps, and cracks, forming low-temperature gaskets, and replacing windscreens. Additionally, they are used for bonding headlamps, fog lamps, tail lamps, lamp covers, caps, and bulb mounting sockets, driving growth within this segment.

“Building & construction, by sealant application accounted for the largest segment of sealants market.”

The building and construction segment holds the largest portion of the sealants market share. Sealants also serve as adhesives in various applications. For example, in structural glazing for glass-walled buildings, sealants are not only used for sealing but also for bonding the glass to the building framework. While sealants may not possess the high tensile strength characteristic of adhesives, they offer superior durability and reliability when exposed to conditions such as high humidity, chemical exposure, or electrical stress. Particularly, silicones facilitate some movement between bonded parts, thereby mitigating shearing stresses resulting from differences in thermal expansion among dissimilar materials.

“Asia Pacific, by region is forecasted to be the fastest segment of adhesives & sealants market during the forecast period.”

Asia Pacific has emerged as a key player in both the production and consumption of adhesives and sealants, propelled by increasing domestic demand, rising income levels, and favorable resource accessibility. It stands as the primary region for automobile manufacturing, with the automotive and transportation sector representing a major consumer of adhesives and sealants. Economic growth across the Asia Pacific region, particularly in emerging markets such as India, Taiwan, Indonesia, Malaysia, Thailand, and Vietnam, is driving a rise in infrastructure projects, thereby spurring demand for adhesives and sealants in the building and construction domain.

The break-up of the profile of primary participants in the C4ISR market:

By Company Type: Tier 1 – 46%, Tier 2 – 36%, and Tier 3 – 18%

By Designation: C Level – 21%, D Level – 23%, and Others – 56%

By Region: North America – 37%, Asia Pacific – 26%, Europe – 23%, the Middle East & Africa – 10%, and South America- 4%

The key companies profiled in this report are Henkel AG & Co. KGaA (Germany), H.B. Fuller Company (US), Sika AG (Switzerland), Arkema (Bostik) (France), and 3M (US).

#### Research Coverage:

The adhesives & sealants market has been segmented based on Adhesives Technology (Water-based Adhesives, Solvent-based Adhesives, Hot-melt adhesives, and Reactive & Others), Adhesive Application (Paper & Packaging, building & construction, Woodworking, Automotive & Transportation, Consumer & DIY, Leather & Footwear, Assembly, Electronics, Medical, and Others), Sealant Resin Type (Silicone, Polyurethane, Platisol, Emulsion, Polysulfide, Butyl, and Others), Sealant Application (Building & Construction, Automotive & Transportation, Consumer, and Others), and by Region (Asia Pacific, Europe, North America, South America, and Middle East & Africa).

#### Reasons to Buy the Report

From an insight perspective, this research report focuses on various levels of analyses — industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together comprise and discuss the basic views on the competitive landscape; emerging and high-growth segments of the market; high growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

? Analysis of key drivers (Growth of building & construction industry), restraints (Stringent environmental regulations in North America & Europe), opportunities (Investments in emerging markets of Asia Pacific), challenges (Shifting rules and changing standards)

? Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the market

? Market Development: Comprehensive information about lucrative emerging markets – the report analyzes the market for adhesives & sealants across regions

? Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the market

? Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the market.

## Contents

### 1 INTRODUCTION

#### 1.1 STUDY OBJECTIVES

#### 1.2 MARKET DEFINITION

##### 1.2.1 INCLUSIONS AND EXCLUSIONS

##### 1.2.2 DEFINITION AND INCLUSIONS, BY ADHESIVE TECHNOLOGY

##### 1.2.3 DEFINITION AND INCLUSIONS, BY ADHESIVE APPLICATION

##### 1.2.4 DEFINITION AND INCLUSIONS, BY SEALANT RESIN TYPE

##### 1.2.5 DEFINITION AND INCLUSIONS, BY SEALANT APPLICATION

#### 1.3 MARKET SEGMENTATION

#### FIGURE 1 ADHESIVES & SEALANTS MARKET SEGMENTATION

##### 1.3.1 REGIONS COVERED

##### 1.3.2 YEARS CONSIDERED

#### 1.4 CURRENCY CONSIDERED

#### 1.5 UNITS CONSIDERED

#### 1.6 STAKEHOLDERS

#### 1.7 SUMMARY OF CHANGES

##### 1.7.1 IMPACT OF RECESSION

### 2 RESEARCH METHODOLOGY

#### 2.1 RESEARCH DATA

#### FIGURE 2 ADHESIVES & SEALANTS MARKET: RESEARCH DESIGN

##### 2.1.1 SECONDARY DATA

###### 2.1.1.1 Key data from secondary sources

##### 2.1.2 PRIMARY DATA

###### 2.1.2.1 Key data from primary sources

###### 2.1.2.2 Key industry insights

###### 2.1.2.3 Breakdown of primary interviews

###### 2.1.2.4 Primary data sources

#### 2.2 MARKET SIZE ESTIMATION

##### 2.2.1 BOTTOM-UP APPROACH

#### FIGURE 3 MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH

##### 2.2.2 TOP-DOWN APPROACH

#### FIGURE 4 MARKET SIZE ESTIMATION: TOP-DOWN APPROACH

#### FIGURE 5 ADHESIVES & SEALANTS MARKET SIZE ESTIMATION, BY REGION

#### FIGURE 6 ADHESIVES & SEALANTS MARKET, BY ADHESIVE TECHNOLOGY

## 2.3 MARKET GROWTH FORECAST

### 2.3.1 SUPPLY-SIDE FORECAST

FIGURE 7 ADHESIVES & SEALANTS MARKET: SUPPLY-SIDE FORECAST

FIGURE 8 METHODOLOGY FOR SUPPLY-SIDE SIZING OF ADHESIVES & SEALANTS MARKET

### 2.3.2 DEMAND-SIDE FORECAST

## 2.4 FACTOR ANALYSIS

FIGURE 9 MAJOR FACTORS RESPONSIBLE FOR GLOBAL RECESSION AND THEIR IMPACT ON ADHESIVES & SEALANTS MARKET

## 2.5 DATA TRIANGULATION

FIGURE 10 ADHESIVES & SEALANTS MARKET: DATA TRIANGULATION

## 2.6 ASSUMPTIONS

## 2.7 LIMITATIONS

## 2.8 GROWTH RATE ASSUMPTIONS/GROWTH FORECAST

## 2.9 RISK ASSESSMENT

TABLE 1 ADHESIVES & SEALANTS MARKET: RISK ASSESSMENT

## 2.10 IMPACT OF RECESSION

## 3 EXECUTIVE SUMMARY

TABLE 2 ADHESIVES & SEALANTS MARKET SNAPSHOT, 2024 VS. 2029

FIGURE 11 REACTIVE & OTHERS SEGMENT TO REGISTER HIGHEST CAGR IN ADHESIVES MARKET DURING FORECAST PERIOD

FIGURE 12 ELECTRONIC APPLICATION TO REGISTER HIGHEST CAGR IN ADHESIVES MARKET

FIGURE 13 SILICONE TO BE LEADING RESIN TYPE IN SEALANTS MARKET

FIGURE 14 BUILDING & CONSTRUCTION TO BE LARGEST APPLICATION OF SEALANTS

FIGURE 15 ASIA PACIFIC LED ADHESIVES & SEALANTS MARKET IN 2023

## 4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN ADHESIVES & SEALANTS MARKET

FIGURE 16 ADHESIVES & SEALANTS MARKET TO WITNESS MODERATE GROWTH DURING FORECAST PERIOD

4.2 ADHESIVES & SEALANTS MARKET, BY ADHESIVE TECHNOLOGY

FIGURE 17 REACTIVE & OTHERS SEGMENT TO REGISTER HIGHEST GROWTH BETWEEN 2024 AND 2029

#### 4.3 ADHESIVES & SEALANTS MARKET, BY SEALANT RESIN TYPE

FIGURE 18 POLYURETHANE TO BE FASTEST-GROWING SEGMENT BETWEEN 2024 AND 2029

#### 4.4 ADHESIVES MARKET, DEVELOPED VS. EMERGING ECONOMIES

FIGURE 19 EMERGING ECONOMIES TO WITNESS HIGHER GROWTH DURING FORECAST PERIOD

#### 4.5 SEALANTS MARKET, DEVELOPED VS. EMERGING ECONOMIES

FIGURE 20 EMERGING ECONOMIES TO REGISTER SIGNIFICANT GROWTH DURING FORECAST PERIOD

#### 4.6 ASIA PACIFIC ADHESIVES MARKET, BY ADHESIVE TECHNOLOGY AND COUNTRY

FIGURE 21 CHINA ACCOUNTED FOR LARGEST MARKET SHARE IN 2023

#### 4.7 ASIA PACIFIC SEALANTS MARKET, BY SEALANT RESIN TYPE AND COUNTRY

FIGURE 22 SILICONE SEGMENT ACCOUNTED FOR LARGEST MARKET SHARE IN 2023

#### 4.8 ADHESIVES MARKET, BY COUNTRY

FIGURE 23 INDIA TO EMERGE AS FASTEST-GROWING MARKET FOR ADHESIVES

#### 4.9 SEALANTS MARKET, BY COUNTRY

FIGURE 24 INDIA TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD

### 5 MARKET OVERVIEW

#### 5.1 INTRODUCTION

#### 5.2 MARKET DYNAMICS

FIGURE 25 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN ADHESIVES & SEALANTS MARKET

##### 5.2.1 DRIVERS

5.2.1.1 Growth of building & construction industry

5.2.1.2 Increased demand for adhesives in medical industry

5.2.1.3 Growth in appliances industry

##### 5.2.2 RESTRAINTS

5.2.2.1 Stringent environmental regulations in North America and Europe

5.2.2.2 Technological limitations in adhesives industry

##### 5.2.3 OPPORTUNITIES

5.2.3.1 Investments in emerging markets of Asia Pacific

5.2.3.2 Development of hybrid resins for manufacturing high-performance adhesives

##### 5.2.4 CHALLENGES

5.2.4.1 Regulatory compliance

#### 5.3 PORTER'S FIVE FORCES ANALYSIS



TABLE 3 ADHESIVES & SEALANTS MARKET: PORTER'S FIVE FORCES ANALYSIS  
FIGURE 26 PORTER'S FIVE FORCES ANALYSIS: ADHESIVES & SEALANTS  
MARKET

- 5.3.1 THREAT OF NEW ENTRANTS
- 5.3.2 THREAT OF SUBSTITUTES
- 5.3.3 BARGAINING POWER OF BUYERS
- 5.3.4 BARGAINING POWER OF SUPPLIERS
- 5.3.5 INTENSITY OF COMPETITIVE RIVALRY

5.4 MACROECONOMIC INDICATOR

- 5.4.1 INTRODUCTION
- 5.4.2 GDP TRENDS AND FORECAST

TABLE 4 GROWTH TRENDS AND FORECAST OF GDP, BY COUNTRY  
(PERCENTAGE CHANGE), 2018 2028

- 5.4.3 TRENDS AND FORECAST OF GLOBAL CONSTRUCTION INDUSTRY

FIGURE 27 GLOBAL SPENDING IN CONSTRUCTION INDUSTRY, 2014 2035

- 5.4.4 TRENDS IN GLOBAL AUTOMOTIVE INDUSTRY

TABLE 5 AUTOMOTIVE PRODUCTION (2021 2022)

- 5.4.5 TRENDS IN GLOBAL AEROSPACE INDUSTRY

## 6 INDUSTRY TRENDS

### 6.1 SUPPLY CHAIN ANALYSIS

FIGURE 28 ADHESIVES & SEALANTS MARKET: SUPPLY CHAIN ANALYSIS

### 6.2 ECOSYSTEM ANALYSIS/MARKET MAP

TABLE 6 ADHESIVES & SEALANTS MARKET: ROLE IN ECOSYSTEM

FIGURE 29 ADHESIVES & SEALANTS MARKET: ECOSYSTEM MAPPING

FIGURE 30 ADHESIVES & SEALANTS MARKET: STAKEHOLDERS IN ECOSYSTEM

### 6.3 INVESTMENT AND FUNDING SCENARIO

TABLE 7 INVESTMENT AND FUNDING SCENARIO

### 6.4 TRENDS AND DISRUPTIONS IMPACTING CUSTOMER BUSINESS

FIGURE 31 NEW REVENUE POCKETS IN ADHESIVES & SEALANTS MARKET

### 6.5 KEY STAKEHOLDERS & BUYING CRITERIA

- 6.5.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 32 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS

TABLE 8 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP 3  
APPLICATIONS (%)

- 6.5.2 BUYING CRITERIA

FIGURE 33 KEY BUYING CRITERIA FOR ADHESIVES & SEALANTS

TABLE 9 KEY BUYING CRITERIA FOR ADHESIVES & SEALANTS



## 6.6 PRICING ANALYSIS

### 6.6.1 AVERAGE SELLING PRICE TREND, BY REGION

FIGURE 34 AVERAGE SELLING PRICE TREND OF ADHESIVES, BY REGION

### 6.6.2 AVERAGE SELLING PRICE TREND, BY ADHESIVE TECHNOLOGY

FIGURE 35 AVERAGE SELLING PRICE TREND OF ADHESIVES, BY ADHESIVE TECHNOLOGY

### 6.6.3 AVERAGE SELLING PRICE TREND, BY ADHESIVE APPLICATION

FIGURE 36 AVERAGE SELLING PRICE TREND OF ADHESIVES, BY ADHESIVE APPLICATION

### 6.6.4 AVERAGE SELLING PRICE TREND, BY REGION

FIGURE 37 AVERAGE SELLING PRICE TREND OF SEALANTS, BY REGION

### 6.6.5 AVERAGE SELLING PRICE TREND, BY SEALANT RESIN TYPE

FIGURE 38 AVERAGE SELLING PRICE TREND OF SEALANTS, BY SEALANT RESIN TYPE

### 6.6.6 AVERAGE SELLING PRICE TREND, BY SEALANT APPLICATION

FIGURE 39 AVERAGE SELLING PRICE TREND OF SEALANTS, BY SEALANT APPLICATION

6.6.7 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY ADHESIVE APPLICATION

FIGURE 40 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY ADHESIVE APPLICATION, 2023

TABLE 10 AVERAGE SELLING PRICE OF KEY PLAYERS, BY TOP 3 ADHESIVE APPLICATIONS (USD/KG)

6.6.8 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY SEALANT APPLICATION

FIGURE 41 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY SEALANT APPLICATION

TABLE 11 AVERAGE SELLING PRICE OF KEY PLAYERS, BY TOP 3 SEALANT APPLICATIONS (USD/KG)

## 6.7 TRADE ANALYSIS

### 6.7.1 EXPORT SCENARIO OF ADHESIVES & SEALANTS

FIGURE 42 ADHESIVES EXPORT, BY KEY COUNTRIES, 2018?2022 (USD THOUSAND)

### 6.7.2 IMPORT SCENARIO OF ADHESIVES & SEALANTS

FIGURE 43 ADHESIVES IMPORT, BY KEY COUNTRIES, 2018?2022 (USD THOUSAND)

## 6.8 GLOBAL ECONOMIC SCENARIO AFFECTING MARKET GROWTH

### 6.8.1 RUSSIA UKRAINE WAR

### 6.8.2 CHINA

6.8.2.1 China's debt problem

6.8.2.2 Environmental commitments

## 6.9 REGULATORY LANDSCAPE

### 6.9.1 REGULATIONS AND STANDARDS

TABLE 12 LEEDS STANDARDS FOR ARCHITECTURAL APPLICATIONS

TABLE 13 LEEDS STANDARDS FOR SPECIALTY APPLICATIONS

TABLE 14 LEEDS STANDARDS FOR SUBSTRATE-SPECIFIC APPLICATIONS

6.9.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 15 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 16 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 17 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

## 6.10 PATENT ANALYSIS

FIGURE 44 LIST OF MAJOR PATENTS FOR ADHESIVES & SEALANTS

### 6.10.1 LIST OF MAJOR PATENTS

## 6.11 CASE STUDY ANALYSIS

## 6.12 TECHNOLOGY ANALYSIS

### 6.12.1 KEY TECHNOLOGIES

6.12.1.1 Water-based

6.12.1.2 Solvent-based

6.12.1.3 Hot-melt

6.12.1.4 Reactive & others

### 6.12.2 COMPLEMENTARY TECHNOLOGIES

6.12.2.1 Curing technology

6.12.2.2 Sustainability technology

6.12.2.3 Testing & quality control technologies

## 6.13 KEY CONFERENCES & EVENTS IN 2024 2025

TABLE 18 ADHESIVES & SEALANTS MARKET: DETAILED LIST OF CONFERENCES & EVENTS

## 7 ADHESIVES & SEALANTS MARKET, BY ADHESIVE TECHNOLOGY

### 7.1 INTRODUCTION

FIGURE 45 WATER-BASED ADHESIVE TECHNOLOGY TO LEAD OVERALL MARKET

TABLE 19 ADHESIVES & SEALANTS MARKET, BY ADHESIVE TECHNOLOGY, 2016

2022 (USD MILLION)

TABLE 20 ADHESIVES & SEALANTS MARKET, BY ADHESIVE TECHNOLOGY, 2023  
2029 (USD MILLION)

TABLE 21 ADHESIVES & SEALANTS MARKET, BY ADHESIVE TECHNOLOGY, 2016  
2022 (KILOTON)

TABLE 22 ADHESIVES & SEALANTS MARKET, BY ADHESIVE TECHNOLOGY, 2023  
2029 (KILOTON)

## 7.2 WATER-BASED ADHESIVES

7.2.1 ASIA PACIFIC TO BE FASTEST-GROWING MARKET FOR WATER-BASED  
ADHESIVES

TABLE 23 WATER-BASED: ADHESIVES MARKET, BY REGION, 2016 2022 (USD  
MILLION)

TABLE 24 WATER-BASED: ADHESIVES MARKET, BY REGION, 2023 2029 (USD  
MILLION)

TABLE 25 WATER-BASED: ADHESIVES MARKET, BY REGION, 2016 2022  
(KILOTON)

TABLE 26 WATER-BASED: ADHESIVES MARKET, BY REGION, 2023 2029  
(KILOTON)

TABLE 27 WATER-BASED: ADHESIVES MARKET, BY RESIN TYPE, 2016 2022  
(USD MILLION)

TABLE 28 WATER-BASED: ADHESIVES MARKET, BY RESIN TYPE, 2023 2029  
(USD MILLION)

TABLE 29 WATER-BASED: ADHESIVES MARKET, BY RESIN TYPE, 2016 2022  
(KILOTON)

TABLE 30 WATER-BASED: ADHESIVES MARKET, BY RESIN TYPE, 2023 2029  
(KILOTON)

### 7.2.2 PVA EMULSION ADHESIVES

TABLE 31 PVA EMULSION: ADHESIVES MARKET, BY REGION, 2016 2022 (USD  
MILLION)

TABLE 32 PVA EMULSION: ADHESIVES MARKET, BY REGION, 2023 2029 (USD  
MILLION)

TABLE 33 PVA EMULSION: ADHESIVES MARKET, BY REGION, 2016 2022  
(KILOTON)

TABLE 34 PVA EMULSION: ADHESIVES MARKET, BY REGION, 2023 2029  
(KILOTON)

### 7.2.3 ACRYLIC POLYMER EMULSION ADHESIVES

TABLE 35 ACRYLIC POLYMER EMULSION: ADHESIVES MARKET, BY REGION,  
2016 2022 (USD MILLION)

TABLE 36 ACRYLIC POLYMER EMULSION: ADHESIVES MARKET, BY REGION,

2023 2029 (USD MILLION)

TABLE 37 ACRYLIC POLYMER EMULSION: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 38 ACRYLIC POLYMER EMULSION: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

#### 7.2.4 VAE EMULSION ADHESIVES

TABLE 39 VAE EMULSION: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 40 VAE EMULSION: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 41 VAE EMULSION: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 42 VAE EMULSION: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

#### 7.2.5 SBC LATEX ADHESIVES

TABLE 43 SBC LATEX: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 44 SBC LATEX: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 45 SBC LATEX: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 46 SBC LATEX: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

#### 7.2.6 OTHER WATER-BASED RESIN TYPE

7.2.6.1 Polyurethane dispersion adhesives

7.2.6.2 Water-based rubber adhesives

TABLE 47 OTHER WATER-BASED RESIN TYPE: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 48 OTHER WATER-BASED RESIN TYPE: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 49 OTHER WATER-BASED RESIN TYPE: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 50 OTHER WATER-BASED RESIN TYPE: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

### 7.3 SOLVENT-BASED ADHESIVES

7.3.1 STRINGENT GOVERNMENT REGULATIONS TO RESTRICT USE OF SOLVENT-BASED ADHESIVES

TABLE 51 SOLVENT-BASED: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 52 SOLVENT-BASED: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 53 SOLVENT-BASED: ADHESIVES MARKET, BY REGION, 2016 2022  
(KILOTON)

TABLE 54 SOLVENT-BASED: ADHESIVES MARKET, BY REGION, 2023 2029  
(KILOTON)

TABLE 55 SOLVENT-BASED: ADHESIVES MARKET, BY RESIN TYPE, 2016 2022  
(USD MILLION)

TABLE 56 SOLVENT-BASED: ADHESIVES MARKET, BY RESIN TYPE, 2023 2029  
(USD MILLION)

TABLE 57 SOLVENT-BASED: ADHESIVES MARKET, BY RESIN TYPE, 2016 2022  
(KILOTON)

TABLE 58 SOLVENT-BASED: ADHESIVES MARKET, BY RESIN TYPE, 2023 2029  
(KILOTON)

#### 7.3.2 POLYURETHANE ADHESIVES

TABLE 59 POLYURETHANE SOLVENT-BASED: ADHESIVES MARKET, BY REGION,  
2016 2022 (USD MILLION)

TABLE 60 POLYURETHANE SOLVENT-BASED: ADHESIVES MARKET, BY REGION,  
2023 2029 (USD MILLION)

TABLE 61 POLYURETHANE SOLVENT-BASED: ADHESIVES MARKET, BY REGION,  
2016 2022 (KILOTON)

TABLE 62 POLYURETHANE SOLVENT-BASED: ADHESIVES MARKET, BY REGION,  
2023 2029 (KILOTON)

#### 7.3.3 ACRYLIC ADHESIVES

TABLE 63 ACRYLIC: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 64 ACRYLIC: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 65 ACRYLIC: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 66 ACRYLIC: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

#### 7.3.4 CHLOROPRENE RUBBER (CR) ADHESIVES

TABLE 67 CHLOROPRENE RUBBER: ADHESIVES MARKET, BY REGION, 2016  
2022 (USD MILLION)

TABLE 68 CHLOROPRENE RUBBER: ADHESIVES MARKET, BY REGION, 2023  
2029 (USD MILLION)

TABLE 69 CHLOROPRENE RUBBER: ADHESIVES MARKET, BY REGION, 2016  
2022 (KILOTON)

TABLE 70 CHLOROPRENE RUBBER: ADHESIVES MARKET, BY REGION, 2023  
2029 (KILOTON)

#### 7.3.5 POLYVINYL ACETATE (PVA) ADHESIVES

TABLE 71 POLYVINYL ACETATE: ADHESIVES MARKET, BY REGION, 2016 2022  
(USD MILLION)

TABLE 72 POLYVINYL ACETATE: ADHESIVES MARKET, BY REGION, 2023 2029

(USD MILLION)

TABLE 73 POLYVINYL ACETATE: ADHESIVES MARKET, BY REGION, 2016 2022  
(KILOTON)

TABLE 74 POLYVINYL ACETATE: ADHESIVES MARKET, BY REGION, 2023 2029  
(KILOTON)

#### 7.3.6 POLYAMIDE ADHESIVES

TABLE 75 POLYAMIDE: ADHESIVES MARKET, BY REGION, 2016 2022 (USD  
MILLION)

TABLE 76 POLYAMIDE: ADHESIVES MARKET, BY REGION, 2023 2029 (USD  
MILLION)

TABLE 77 POLYAMIDE: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 78 POLYAMIDE: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

#### 7.3.7 SYNTHESIZED RUBBER ADHESIVES

TABLE 79 SYNTHESIZED RUBBER: ADHESIVES MARKET, BY REGION, 2016 2022  
(USD MILLION)

TABLE 80 SYNTHESIZED RUBBER: ADHESIVES MARKET, BY REGION, 2023 2029  
(USD MILLION)

TABLE 81 SYNTHESIZED RUBBER: ADHESIVES MARKET, BY REGION, 2016 2022  
(KILOTON)

TABLE 82 SYNTHESIZED RUBBER: ADHESIVES MARKET, BY REGION, 2023 2029  
(KILOTON)

#### 7.3.8 OTHER SOLVENT-BASED RESIN TYPE

TABLE 83 OTHER SOLVENT-BASED RESIN TYPE: ADHESIVES MARKET, BY  
REGION, 2016 2022 (USD MILLION)

TABLE 84 OTHER SOLVENT-BASED RESIN TYPE: ADHESIVES MARKET, BY  
REGION, 2023 2029 (USD MILLION)

TABLE 85 OTHER SOLVENT-BASED RESIN TYPE: ADHESIVES MARKET, BY  
REGION, 2016 2022 (KILOTON)

TABLE 86 OTHER SOLVENT-BASED RESIN TYPE: ADHESIVES MARKET, BY  
REGION, 2023 2029 (KILOTON)

### 7.4 HOT-MELT ADHESIVES

7.4.1 FAST SETTING SPEED AND RELATIVELY LOWER COST DRIVING DEMAND  
FOR HOT-MELT ADHESIVES

TABLE 87 HOT-MELT: ADHESIVES MARKET, BY REGION, 2016 2022 (USD  
MILLION)

TABLE 88 HOT-MELT: ADHESIVES MARKET, BY REGION, 2023 2029 (USD  
MILLION)

TABLE 89 HOT-MELT: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 90 HOT-MELT: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)



TABLE 91 HOT-MELT: ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 92 HOT-MELT: ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 93 HOT-MELT: ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 94 HOT-MELT: ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

#### 7.4.2 ETHYLENE-VINYL ACETATE (EVA) ADHESIVES

TABLE 95 ETHYLENE-VINYL ACETATE: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 96 ETHYLENE-VINYL ACETATE: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 97 ETHYLENE-VINYL ACETATE: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 98 ETHYLENE-VINYL ACETATE: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

#### 7.4.3 STYRENIC BLOCK COPOLYMER (SBC) ADHESIVES

TABLE 99 STYRENIC BLOCK COPOLYMER: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 100 STYRENIC BLOCK COPOLYMER: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 101 STYRENIC BLOCK COPOLYMER: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 102 STYRENIC BLOCK COPOLYMER: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

#### 7.4.4 METALLOCENE POLYOLEFIN (MPO) ADHESIVES

TABLE 103 METALLOCENE POLYOLEFIN: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 104 METALLOCENE POLYOLEFIN: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 105 METALLOCENE POLYOLEFIN: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 106 METALLOCENE POLYOLEFIN: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

#### 7.4.5 POLYOLEFIN ADHESIVES

TABLE 107 POLYOLEFIN: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 108 POLYOLEFIN: ADHESIVES MARKET, BY REGION, 2023 2029 (USD



MILLION)

TABLE 109 POLYOLEFIN: ADHESIVES MARKET, BY REGION, 2016 2022  
(KILOTON)

TABLE 110 POLYOLEFIN: ADHESIVES MARKET, BY REGION, 2023 2029  
(KILOTON)

#### 7.4.6 AMORPHOUS POLY-ALPHAOLEFIN (APAO) ADHESIVES

##### 7.4.6.1 Properties

##### 7.4.6.2 Applications

TABLE 111 AMORPHOUS POLY-ALPHAOLEFIN: ADHESIVES MARKET, BY  
REGION, 2016 2022 (USD MILLION)

TABLE 112 AMORPHOUS POLY-ALPHAOLEFIN: ADHESIVES MARKET, BY  
REGION, 2023 2029 (USD MILLION)

TABLE 113 AMORPHOUS POLY-ALPHAOLEFIN: ADHESIVES MARKET, BY  
REGION, 2016 2022 (KILOTON)

TABLE 114 AMORPHOUS POLY-ALPHAOLEFIN: ADHESIVES MARKET, BY  
REGION, 2023 2029 (KILOTON)

#### 7.4.7 OTHER HOT-MELT RESIN TYPE

##### 7.4.7.1 Polyamides

##### 7.4.7.2 Polyurethane (PUR)

##### 7.4.7.3 Others

TABLE 115 OTHER HOT-MELT RESIN TYPE: ADHESIVES MARKET, BY REGION,  
2016 2022 (USD MILLION)

TABLE 116 OTHER HOT-MELT RESIN TYPE: ADHESIVES MARKET, BY REGION,  
2023 2029 (USD MILLION)

TABLE 117 OTHER HOT-MELT RESIN TYPE: ADHESIVES MARKET, BY REGION,  
2016 2022 (KILOTON)

TABLE 118 OTHER HOT-MELT RESIN TYPE: ADHESIVES MARKET, BY REGION,  
2023 2029 (KILOTON)

#### 7.5 REACTIVE & OTHERS

7.5.1 FASTEST-GROWING ADHESIVE TECHNOLOGY DURING FORECAST  
PERIOD

TABLE 119 REACTIVE & OTHERS: ADHESIVES MARKET, BY REGION, 2016 2022  
(USD MILLION)

TABLE 120 REACTIVE & OTHERS: ADHESIVES MARKET, BY REGION, 2023 2029  
(USD MILLION)

TABLE 121 REACTIVE & OTHERS: ADHESIVES MARKET, BY REGION, 2016 2022  
(KILOTON)

TABLE 122 REACTIVE & OTHERS: ADHESIVES MARKET, BY REGION, 2023 2029  
(KILOTON)

TABLE 123 REACTIVE & OTHERS: ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 124 REACTIVE & OTHERS: ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 125 REACTIVE & OTHERS: ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 126 REACTIVE & OTHERS: ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

#### 7.5.2 POLYURETHANE ADHESIVES

##### 7.5.2.1 Liquid

###### 7.5.2.1.1 One-component

###### 7.5.2.1.2 Two-component

TABLE 127 POLYURETHANE: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 128 POLYURETHANE: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 129 POLYURETHANE: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 130 POLYURETHANE: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

#### 7.5.3 EPOXY ADHESIVES

TABLE 131 EPOXY: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 132 EPOXY: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 133 EPOXY: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 134 EPOXY: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

#### 7.5.4 OTHERS

##### 7.5.4.1 Polysulfide adhesives

##### 7.5.4.2 Modified acrylate & methyl methacrylate (MMA) adhesives

##### 7.5.4.3 Cyanoacrylate adhesives

TABLE 135 APPLICATIONS OF CYANOACRYLATE ADHESIVES

##### 7.5.4.4 Anaerobic adhesives

TABLE 136 APPLICATIONS OF ANAEROBIC ADHESIVES

##### 7.5.4.5 Formaldehyde-based (reactive-based) adhesives

##### 7.5.4.6 Silicone

##### 7.5.4.7 Polyester

##### 7.5.4.8 Resorcinol

##### 7.5.4.9 Phenolic

TABLE 137 APPLICATIONS OF PHENOLIC RESINS IN VARIOUS ADHESIVE MIXES

##### 7.5.4.10 Natural and bio-based adhesives

TABLE 138 OTHERS: ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 139 OTHERS: ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 140 OTHERS: ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 141 OTHERS: ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

## **8 ADHESIVES & SEALANTS MARKET, BY ADHESIVE APPLICATION**

### **8.1 INTRODUCTION**

FIGURE 46 PAPER & PACKAGING SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

TABLE 142 ADHESIVES & SEALANTS MARKET, BY ADHESIVE APPLICATION, 2016 2022 (USD MILLION)

TABLE 143 ADHESIVES & SEALANTS MARKET, BY ADHESIVE APPLICATION, 2023 2029 (USD MILLION)

TABLE 144 ADHESIVES & SEALANTS MARKET, BY ADHESIVE APPLICATION, 2016 2022 (KILOTON)

TABLE 145 ADHESIVES & SEALANTS MARKET, BY ADHESIVE APPLICATION, 2023 2029 (KILOTON)

### **8.2 PAPER & PACKAGING**

#### **8.2.1 HIGH DEMAND FOR FLEXIBLE PACKAGING TO DRIVE MARKET**

TABLE 146 PAPER & PACKAGING: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 147 PAPER & PACKAGING: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 148 PAPER & PACKAGING: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 149 PAPER & PACKAGING: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

### **8.3 BUILDING & CONSTRUCTION**

8.3.1 DEVELOPMENT OF SMART CITIES AND MEGAPROJECTS TO DRIVE GROWTH

TABLE 150 BUILDING & CONSTRUCTION: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 151 BUILDING & CONSTRUCTION: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 152 BUILDING & CONSTRUCTION: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 153 BUILDING & CONSTRUCTION: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

#### 8.4 WOODWORKING

##### 8.4.1 GROWTH OF FURNITURE INDUSTRY TO DRIVE MARKET

TABLE 154 WOODWORKING: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 155 WOODWORKING: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 156 WOODWORKING: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 157 WOODWORKING: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

#### 8.5 AUTOMOTIVE & TRANSPORTATION

##### 8.5.1 ADVANCEMENTS IN ELECTRIC VEHICLES TO FUEL DEMAND FOR ADHESIVES

TABLE 158 AUTOMOTIVE & TRANSPORTATION: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 159 AUTOMOTIVE & TRANSPORTATION: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 160 AUTOMOTIVE & TRANSPORTATION: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 161 AUTOMOTIVE & TRANSPORTATION: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

#### 8.6 CONSUMER & DIY

##### 8.6.1 INCREASING DEMAND FOR LOW-STRENGTH AND DURABLE ADHESIVES TO DRIVE MARKET

TABLE 162 CONSUMER & DIY: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 163 CONSUMER & DIY: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 164 CONSUMER & DIY: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 165 CONSUMER & DIY: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

#### 8.7 LEATHER & FOOTWEAR

##### 8.7.1 RISING DEMAND FOR ATHLETIC FOOTWEAR TO DRIVE MARKET

TABLE 166 LEATHER & FOOTWEAR: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 167 LEATHER & FOOTWEAR: ADHESIVES & SEALANTS MARKET, BY

REGION, 2023 2029 (USD MILLION)

TABLE 168 LEATHER & FOOTWEAR: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 169 LEATHER & FOOTWEAR: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## 8.8 ASSEMBLY

8.8.1 WIDE USE OF ADHESIVES IN MANUFACTURING SECTOR TO BOOST MARKET

TABLE 170 ASSEMBLY: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 171 ASSEMBLY: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 172 ASSEMBLY: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 173 ASSEMBLY: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## 8.9 ELECTRONICS

8.9.1 NEW TRENDS AND TECHNOLOGICAL INNOVATIONS TO FUEL MARKET

TABLE 174 ELECTRONICS: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 175 ELECTRONICS: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 176 ELECTRONICS: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 177 ELECTRONICS: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## 8.10 MEDICAL

8.10.1 GROWING USE OF SILICONE ADHESIVES TO DRIVE MARKET

TABLE 178 MEDICAL: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 179 MEDICAL: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 180 MEDICAL: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 181 MEDICAL: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## 8.11 OTHER ADHESIVE APPLICATIONS

TABLE 182 OTHER ADHESIVE APPLICATIONS: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 183 OTHER ADHESIVE APPLICATIONS: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 184 OTHER ADHESIVE APPLICATIONS: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 185 OTHER ADHESIVE APPLICATIONS: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## **9 ADHESIVES & SEALANTS MARKET, BY SEALANT RESIN TYPE**

### **9.1 INTRODUCTION**

FIGURE 47 SILICONE TO LEAD SEALANTS MARKET DURING FORECAST PERIOD

TABLE 186 ADHESIVES & SEALANTS MARKET, BY SEALANT RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 187 ADHESIVES & SEALANTS MARKET, BY SEALANT RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 188 ADHESIVES & SEALANTS MARKET, BY SEALANT RESIN TYPE, 2016 2022 (KILOTON)

TABLE 189 ADHESIVES & SEALANTS MARKET, BY SEALANT RESIN TYPE, 2023 2029 (KILOTON)

### **9.2 SILICONE**

#### **9.2.1 BETTER FLEXIBILITY AND LONGER SHELF LIFE TO DRIVE DEMAND**

TABLE 190 SILICONE: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 191 SILICONE: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 192 SILICONE: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 193 SILICONE: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

### **9.3 POLYURETHANE**

#### **9.3.1 HIGH DEMAND IN AUTOMOTIVE APPLICATIONS TO DRIVE MARKET**

TABLE 194 POLYURETHANE: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 195 POLYURETHANE: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 196 POLYURETHANE: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 197 POLYURETHANE: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)



## 9.4 PLASTISOL

### 9.4.1 INCREASING DEMAND IN AUTOMOBILES TO DRIVE MARKET

TABLE 198 PLASTISOL: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 199 PLASTISOL: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 200 PLASTISOL: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 201 PLASTISOL: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## 9.5 EMULSION

### 9.5.1 GROWING USE IN CONSTRUCTION SECTOR TO DRIVE MARKET

TABLE 202 EMULSION: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 203 EMULSION: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 204 EMULSION: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 205 EMULSION: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## 9.6 POLYSULFIDE

9.6.1 INCREASING DEMAND FOR INSULATING GLASS SEALANTS TO DRIVE MARKET

TABLE 206 POLYSULFIDE: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 207 POLYSULFIDE: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 208 POLYSULFIDE: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 209 POLYSULFIDE: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## 9.7 BUTYL

### 9.7.1 HIGHER STABILITY AGAINST OXIDATION TO FUEL DEMAND

TABLE 210 BUTYL: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 211 BUTYL: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 212 BUTYL: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)



TABLE 213 BUTYL: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

9.8 OTHER SEALANT RESIN TYPES

TABLE 214 OTHER SEALANT RESIN TYPES: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 215 OTHER SEALANT RESIN TYPES: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 216 OTHER SEALANT RESIN TYPES: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 217 OTHER SEALANT RESIN TYPES: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## **10 ADHESIVES & SEALANTS MARKET, BY SEALANT APPLICATION**

10.1 INTRODUCTION

FIGURE 48 BUILDING & CONSTRUCTION SEGMENT TO LEAD SEALANTS MARKET DURING FORECAST PERIOD

TABLE 218 ADHESIVES & SEALANTS MARKET, BY SEALANT APPLICATION, 2016 2022 (USD MILLION)

TABLE 219 ADHESIVES & SEALANTS MARKET, BY SEALANT APPLICATION, 2023 2029 (USD MILLION)

TABLE 220 ADHESIVES & SEALANTS MARKET, BY SEALANT APPLICATION, 2016 2022 (KILOTON)

TABLE 221 ADHESIVES & SEALANTS MARKET, BY SEALANT APPLICATION, 2023 2029 (KILOTON)

10.2 BUILDING & CONSTRUCTION

10.2.1 INVESTMENTS IN NEW CONSTRUCTION AND INFRASTRUCTURE TO DRIVE MARKET

TABLE 222 BUILDING & CONSTRUCTION: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 223 BUILDING & CONSTRUCTION: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 224 BUILDING & CONSTRUCTION: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 225 BUILDING & CONSTRUCTION: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

10.3 AUTOMOTIVE & TRANSPORTATION

10.3.1 WIDE USE IN RADIATORS AND AUTOMOTIVE COMPONENTS TO DRIVE DEMAND FOR SEALANTS

TABLE 226 AUTOMOTIVE & TRANSPORTATION: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 227 AUTOMOTIVE & TRANSPORTATION: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 228 AUTOMOTIVE & TRANSPORTATION: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 229 AUTOMOTIVE & TRANSPORTATION: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

#### 10.4 CONSUMER

10.4.1 RISING DEMAND FOR SEALANTS FOR HOUSEHOLD USE TO DRIVE MARKET

TABLE 230 CONSUMER: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 231 CONSUMER: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 232 CONSUMER: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 233 CONSUMER: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

#### 10.5 OTHER SEALANT APPLICATIONS

TABLE 234 OTHER SEALANT APPLICATIONS: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 235 OTHER SEALANT APPLICATIONS: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 236 OTHER SEALANT APPLICATIONS: ADHESIVES & SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 237 OTHER SEALANT APPLICATIONS: ADHESIVES & SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## 11 ADHESIVES & SEALANTS MARKET, BY REGION

### 11.1 INTRODUCTION

FIGURE 49 ASIA PACIFIC TO REGISTER HIGHEST CAGR FOR ADHESIVES BETWEEN 2024 AND 2029

FIGURE 50 ASIA PACIFIC TO RECORD FASTEST GROWTH FOR SEALANTS BETWEEN 2024 AND 2029

TABLE 238 ADHESIVES & SEALANTS MARKET, BY TYPE, 2016 2022 (USD MILLION)

TABLE 239 ADHESIVES & SEALANTS MARKET, BY TYPE, 2023 2029 (USD

MILLION)

TABLE 240 ADHESIVES & SEALANTS MARKET, BY TYPE, 2016 2022 (KILOTON)

TABLE 241 ADHESIVES & SEALANTS MARKET, BY TYPE, 2023 2029 (KILOTON)

TABLE 242 ADHESIVES MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 243 ADHESIVES MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 244 ADHESIVES MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 245 ADHESIVES MARKET, BY REGION, 2023 2029 (KILOTON)

TABLE 246 SEALANTS MARKET, BY REGION, 2016 2022 (USD MILLION)

TABLE 247 SEALANTS MARKET, BY REGION, 2023 2029 (USD MILLION)

TABLE 248 SEALANTS MARKET, BY REGION, 2016 2022 (KILOTON)

TABLE 249 SEALANTS MARKET, BY REGION, 2023 2029 (KILOTON)

## 11.2 NORTH AMERICA

### 11.2.1 IMPACT OF RECESSION

FIGURE 51 NORTH AMERICA: ADHESIVES & SEALANTS MARKET SNAPSHOT

TABLE 250 NORTH AMERICA: ADHESIVES & SEALANTS MARKET, BY TYPE, 2016 2022 (USD MILLION)

TABLE 251 NORTH AMERICA: ADHESIVES & SEALANTS MARKET, BY TYPE, 2023 2029 (USD MILLION)

TABLE 252 NORTH AMERICA: ADHESIVES & SEALANTS MARKET, BY TYPE, 2016 2022 (KILOTON)

TABLE 253 NORTH AMERICA: ADHESIVES & SEALANTS MARKET, BY TYPE, 2023 2029 (KILOTON)

TABLE 254 NORTH AMERICA: ADHESIVES MARKET, BY COUNTRY, 2016 2022 (USD MILLION)

TABLE 255 NORTH AMERICA: ADHESIVES MARKET, BY COUNTRY, 2023 2029 (USD MILLION)

TABLE 256 NORTH AMERICA: ADHESIVES MARKET, BY COUNTRY, 2016 2022 (KILOTON)

TABLE 257 NORTH AMERICA: ADHESIVES MARKET, BY COUNTRY, 2023 2029 (KILOTON)

TABLE 258 NORTH AMERICA: SEALANTS MARKET, BY COUNTRY, 2016 2022 (USD MILLION)

TABLE 259 NORTH AMERICA: SEALANTS MARKET, BY COUNTRY, 2023 2029 (USD MILLION)

TABLE 260 NORTH AMERICA: SEALANTS MARKET, BY COUNTRY, 2016 2022 (KILOTON)

TABLE 261 NORTH AMERICA: SEALANTS MARKET, BY COUNTRY, 2023 2029 (KILOTON)

TABLE 262 NORTH AMERICA: ADHESIVES MARKET, BY TECHNOLOGY, 2016 2022

(USD MILLION)

TABLE 263 NORTH AMERICA: ADHESIVES MARKET, BY TECHNOLOGY, 2023 2029

(USD MILLION)

TABLE 264 NORTH AMERICA: ADHESIVES MARKET, BY TECHNOLOGY, 2016 2022

(KILOTON)

TABLE 265 NORTH AMERICA: ADHESIVES MARKET, BY TECHNOLOGY, 2023 2029

(KILOTON)

TABLE 266 NORTH AMERICA: WATER-BASED ADHESIVES MARKET, BY RESIN

TYPE, 2016 2022 (USD MILLION)

TABLE 267 NORTH AMERICA: WATER-BASED ADHESIVES MARKET, BY RESIN

TYPE, 2023 2029 (USD MILLION)

TABLE 268 NORTH AMERICA: WATER-BASED ADHESIVES MARKET, BY RESIN

TYPE, 2016 2022 (KILOTON)

TABLE 269 NORTH AMERICA: WATER-BASED ADHESIVES MARKET, BY RESIN

TYPE, 2023 2029 (KILOTON)

TABLE 270 NORTH AMERICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN

TYPE, 2016 2022 (USD MILLION)

TABLE 271 NORTH AMERICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN

TYPE, 2023 2029 (USD MILLION)

TABLE 272 NORTH AMERICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN

TYPE, 2016 2022 (KILOTON)

TABLE 273 NORTH AMERICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN

TYPE, 2023 2029 (KILOTON)

TABLE 274 NORTH AMERICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE,

2016 2022 (USD MILLION)

TABLE 275 NORTH AMERICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE,

2023 2024 (USD MILLION)

TABLE 276 NORTH AMERICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE,

2016 2022 (KILOTON)

TABLE 277 NORTH AMERICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE,

2023 2029 (KILOTON)

TABLE 278 NORTH AMERICA: REACTIVE & OTHERS ADHESIVES MARKET, BY

RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 279 NORTH AMERICA: REACTIVE & OTHERS ADHESIVES MARKET, BY

RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 280 NORTH AMERICA: REACTIVE & OTHERS ADHESIVES MARKET, BY

RESIN TYPE, 2016 2022 (KILOTON)

TABLE 281 NORTH AMERICA: REACTIVE & OTHERS ADHESIVES MARKET, BY

RESIN TYPE, 2023 2029 (KILOTON)

TABLE 282 NORTH AMERICA: ADHESIVES MARKET, BY APPLICATION, 2016 2022  
(USD MILLION)

TABLE 283 NORTH AMERICA: ADHESIVES MARKET, BY APPLICATION, 2023 2029  
(USD MILLION)

TABLE 284 NORTH AMERICA: ADHESIVES MARKET, BY APPLICATION, 2021 2028  
(KILOTON)

TABLE 285 NORTH AMERICA: ADHESIVES MARKET, BY APPLICATION, 2023 2029  
(KILOTON)

TABLE 286 NORTH AMERICA: SEALANTS MARKET, BY RESIN TYPE, 2016 2022  
(USD MILLION)

TABLE 287 NORTH AMERICA: SEALANTS MARKET, BY RESIN TYPE, 2023 2029  
(USD MILLION)

TABLE 288 NORTH AMERICA: SEALANTS MARKET, BY RESIN TYPE, 2016 2022  
(KILOTON)

TABLE 289 NORTH AMERICA: SEALANTS MARKET, BY RESIN TYPE, 2023 2029  
(KILOTON)

TABLE 290 NORTH AMERICA: SEALANTS MARKET, BY APPLICATION, 2016 2022  
(USD MILLION)

TABLE 291 NORTH AMERICA: SEALANTS MARKET, BY APPLICATION, 2023 2029  
(USD MILLION)

TABLE 292 NORTH AMERICA: SEALANTS MARKET, BY APPLICATION, 2016 2022  
(KILOTON)

TABLE 293 NORTH AMERICA: SEALANTS MARKET, BY APPLICATION, 2023 2029  
(KILOTON)

#### 11.2.2 US

11.2.2.1 Increasing private and residential construction to drive market

#### 11.2.3 CANADA

11.2.3.1 Surge in construction projects to foster market growth

#### 11.2.4 MEXICO

11.2.4.1 New constructions in residential segment to drive market

### 11.3 EUROPE

#### 11.3.1 IMPACT OF RECESSION

FIGURE 52 EUROPE: ADHESIVES & SEALANTS MARKET SNAPSHOT

TABLE 294 EUROPE: ADHESIVES & SEALANTS MARKET, BY TYPE, 2016 2022  
(USD MILLION)

TABLE 295 EUROPE: ADHESIVES & SEALANTS MARKET, BY TYPE, 2023 2029  
(USD MILLION)

TABLE 296 EUROPE: ADHESIVES & SEALANTS MARKET, BY TYPE, 2016 2022  
(KILOTON)

TABLE 297 EUROPE: ADHESIVES & SEALANTS MARKET, BY TYPE, 2023 2029 (KILOTON)

TABLE 298 EUROPE: ADHESIVES MARKET, BY COUNTRY, 2016 2022 (USD MILLION)

TABLE 299 EUROPE: ADHESIVES MARKET, BY COUNTRY, 2023 2029 (USD MILLION)

TABLE 300 EUROPE: ADHESIVES MARKET, BY COUNTRY, 2016 2022 (KILOTON)

TABLE 301 EUROPE: ADHESIVES MARKET, BY COUNTRY, 2023 2029 (KILOTON)

TABLE 302 EUROPE: SEALANTS MARKET, BY COUNTRY, 2016 2022 (USD MILLION)

TABLE 303 EUROPE: SEALANTS MARKET, BY COUNTRY, 2023 2029 (USD MILLION)

TABLE 304 EUROPE: SEALANTS MARKET, BY COUNTRY, 2016 2022 (KILOTON)

TABLE 305 EUROPE: SEALANTS MARKET, BY COUNTRY, 2023 2029 (KILOTON)

TABLE 306 EUROPE: ADHESIVES MARKET, BY TECHNOLOGY, 2016 2022 (USD MILLION)

TABLE 307 EUROPE: ADHESIVES MARKET, BY TECHNOLOGY, 2023 2029 (USD MILLION)

TABLE 308 EUROPE: ADHESIVES MARKET, BY TECHNOLOGY, 2016 2022 (KILOTON)

TABLE 309 EUROPE: ADHESIVES MARKET, BY TECHNOLOGY, 2023 2029 (KILOTON)

TABLE 310 EUROPE: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 311 EUROPE: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 312 EUROPE: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 313 EUROPE: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 314 EUROPE: SOLVENT-BASED ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 315 EUROPE: SOLVENT-BASED ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 316 EUROPE: SOLVENT-BASED ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 317 EUROPE: SOLVENT-BASED ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 318 EUROPE: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2016



2022 (USD MILLION)

TABLE 319 EUROPE: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2023

2024 (USD MILLION)

TABLE 320 EUROPE: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2016

2022 (KILOTON)

TABLE 321 EUROPE: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2023

2029 (KILOTON)

TABLE 322 EUROPE: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN  
TYPE, 2016 2022 (USD MILLION)

TABLE 323 EUROPE: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN  
TYPE, 2023 2029 (USD MILLION)

TABLE 324 EUROPE: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN  
TYPE, 2016 2022 (KILOTON)

TABLE 325 EUROPE: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN  
TYPE, 2023 2029 (KILOTON)

TABLE 326 EUROPE: ADHESIVES MARKET, BY APPLICATION, 2016 2022 (USD  
MILLION)

TABLE 327 EUROPE: ADHESIVES MARKET, BY APPLICATION, 2023 2029 (USD  
MILLION)

TABLE 328 EUROPE: ADHESIVES MARKET, BY APPLICATION, 2021 2028  
(KILOTON)

TABLE 329 EUROPE: ADHESIVES MARKET, BY APPLICATION, 2023 2029  
(KILOTON)

TABLE 330 EUROPE: SEALANTS MARKET, BY RESIN TYPE, 2016 2022 (USD  
MILLION)

TABLE 331 EUROPE: SEALANTS MARKET, BY RESIN TYPE, 2023 2029 (USD  
MILLION)

TABLE 332 EUROPE: SEALANTS MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 333 EUROPE: SEALANTS MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 334 EUROPE: SEALANTS MARKET, BY APPLICATION, 2016 2022 (USD  
MILLION)

TABLE 335 EUROPE: SEALANTS MARKET, BY APPLICATION, 2023 2029 (USD  
MILLION)

TABLE 336 EUROPE: SEALANTS MARKET, BY APPLICATION, 2016 2022  
(KILOTON)

TABLE 337 EUROPE: SEALANTS MARKET, BY APPLICATION, 2023 2029  
(KILOTON)

### 11.3.2 GERMANY

#### 11.3.2.1 Electric mobility revolution to increase demand for adhesives & sealants in



automotive industry

11.3.3 UK

11.3.3.1 Growth of construction sector to drive market

11.3.4 FRANCE

11.3.4.1 Development of affordable houses and renewable energy infrastructure to foster market growth

11.3.5 ITALY

11.3.5.1 Developments in medical industry to support market growth

11.3.6 SPAIN

11.3.6.1 Recovery of construction and automotive industries to drive market

11.3.7 TURKEY

11.3.7.1 Rapid urbanization and increasing purchasing power to boost market

11.3.8 REST OF EUROPE

11.4 ASIA PACIFIC

11.4.1 IMPACT OF RECESSION

FIGURE 53 ASIA PACIFIC: ADHESIVES & SEALANTS MARKET SNAPSHOT

TABLE 338 ASIA PACIFIC: ADHESIVES & SEALANTS MARKET, BY TYPE, 2016 2022 (USD MILLION)

TABLE 339 ASIA PACIFIC: ADHESIVES & SEALANTS MARKET, BY TYPE, 2023 2029 (USD MILLION)

TABLE 340 ASIA PACIFIC: ADHESIVES & SEALANTS MARKET, BY TYPE, 2016 2022 (KILOTON)

TABLE 341 ASIA PACIFIC: ADHESIVES & SEALANTS MARKET, BY TYPE, 2023 2029 (KILOTON)

TABLE 342 ASIA PACIFIC: ADHESIVES MARKET, BY COUNTRY, 2016 2022 (USD MILLION)

TABLE 343 ASIA PACIFIC: ADHESIVES MARKET, BY COUNTRY, 2023 2029 (USD MILLION)

TABLE 344 ASIA PACIFIC: ADHESIVES MARKET, BY COUNTRY, 2016 2022 (KILOTON)

TABLE 345 ASIA PACIFIC: ADHESIVES MARKET, BY COUNTRY, 2023 2029 (KILOTON)

TABLE 346 ASIA PACIFIC: SEALANTS MARKET, BY COUNTRY, 2016 2022 (USD MILLION)

TABLE 347 ASIA PACIFIC: SEALANTS MARKET, BY COUNTRY, 2023 2029 (USD MILLION)

TABLE 348 ASIA PACIFIC: SEALANTS MARKET, BY COUNTRY, 2016 2022 (KILOTON)

TABLE 349 ASIA PACIFIC: SEALANTS MARKET, BY COUNTRY, 2023 2029

(KILOTON)

TABLE 350 ASIA PACIFIC: ADHESIVES MARKET, BY TECHNOLOGY, 2016 2022  
(USD MILLION)

TABLE 351 ASIA PACIFIC: ADHESIVES MARKET, BY TECHNOLOGY, 2023 2029  
(USD MILLION)

TABLE 352 ASIA PACIFIC: ADHESIVES MARKET, BY TECHNOLOGY, 2016 2022  
(KILOTON)

TABLE 353 ASIA PACIFIC: ADHESIVES MARKET, BY TECHNOLOGY, 2023 2029  
(KILOTON)

TABLE 354 ASIA PACIFIC: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE,  
2016 2022 (USD MILLION)

TABLE 355 ASIA PACIFIC: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE,  
2023 2029 (USD MILLION)

TABLE 356 ASIA PACIFIC: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE,  
2016 2022 (KILOTON)

TABLE 357 ASIA PACIFIC: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE,  
2023 2029 (KILOTON)

TABLE 358 ASIA PACIFIC: SOLVENT-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2016 2022 (USD MILLION)

TABLE 359 ASIA PACIFIC: SOLVENT-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2023 2029 (USD MILLION)

TABLE 360 ASIA PACIFIC: SOLVENT-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2016 2022 (KILOTON)

TABLE 361 ASIA PACIFIC: SOLVENT-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2023 2029 (KILOTON)

TABLE 362 ASIA PACIFIC: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2016  
2022 (USD MILLION)

TABLE 363 ASIA PACIFIC: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2023  
2024 (USD MILLION)

TABLE 364 ASIA PACIFIC: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2016  
2022 (KILOTON)

TABLE 365 ASIA PACIFIC: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2023  
2029 (KILOTON)

TABLE 366 ASIA PACIFIC: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN  
TYPE, 2016 2022 (USD MILLION)

TABLE 367 ASIA PACIFIC: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN  
TYPE, 2023 2029 (USD MILLION)

TABLE 368 ASIA PACIFIC: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN  
TYPE, 2016 2022 (KILOTON)

TABLE 369 ASIA PACIFIC: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 370 ASIA PACIFIC: ADHESIVES MARKET, BY APPLICATION, 2016 2022 (USD MILLION)

TABLE 371 ASIA PACIFIC: ADHESIVES MARKET, BY APPLICATION, 2023 2029 (USD MILLION)

TABLE 372 ASIA PACIFIC: ADHESIVES MARKET, BY APPLICATION, 2021 2028 (KILOTON)

TABLE 373 ASIA PACIFIC: ADHESIVES MARKET, BY APPLICATION, 2023 2029 (KILOTON)

TABLE 374 ASIA PACIFIC: SEALANTS MARKET, BY RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 375 ASIA PACIFIC: SEALANTS MARKET, BY RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 376 ASIA PACIFIC: SEALANTS MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 377 ASIA PACIFIC: SEALANTS MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 378 ASIA PACIFIC: SEALANTS MARKET, BY APPLICATION, 2016 2022 (USD MILLION)

TABLE 379 ASIA PACIFIC: SEALANTS MARKET, BY APPLICATION, 2023 2029 (USD MILLION)

TABLE 380 ASIA PACIFIC: SEALANTS MARKET, BY APPLICATION, 2016 2022 (KILOTON)

TABLE 381 ASIA PACIFIC: SEALANTS MARKET, BY APPLICATION, 2023 2029 (KILOTON)

#### 11.4.2 CHINA

11.4.2.1 Foreign investments to drive market

#### 11.4.3 INDIA

11.4.3.1 Government initiatives for economic growth to boost market

#### 11.4.4 JAPAN

11.4.4.1 Growth of tourism sector to boost market

#### 11.4.5 SOUTH KOREA

11.4.5.1 Growth in automotive and building construction industries to fuel demand

#### 11.4.6 THAILAND

11.4.6.1 Economic stability and rising establishment of end-use industries to fuel market

#### 11.4.7 INDONESIA

11.4.7.1 Rise in automobile manufacturers to drive market

#### 11.4.8 REST OF ASIA PACIFIC

### 11.5 MIDDLE EAST & AFRICA

#### 11.5.1 IMPACT OF RECESSION

#### FIGURE 54 MIDDLE EAST & AFRICA: ADHESIVES & SEALANTS MARKET SNAPSHOT

TABLE 382 MIDDLE EAST & AFRICA: ADHESIVES & SEALANTS MARKET, BY  
TYPE, 2016 2022 (USD MILLION)

TABLE 383 MIDDLE EAST & AFRICA: ADHESIVES & SEALANTS MARKET, BY  
TYPE, 2023 2029 (USD MILLION)

TABLE 384 MIDDLE EAST & AFRICA: ADHESIVES & SEALANTS MARKET, BY  
TYPE, 2016 2022 (KILOTON)

TABLE 385 MIDDLE EAST & AFRICA: ADHESIVES & SEALANTS MARKET, BY  
TYPE, 2023 2029 (KILOTON)

TABLE 386 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY COUNTRY, 2016  
2022 (USD MILLION)

TABLE 387 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY COUNTRY, 2023  
2029 (USD MILLION)

TABLE 388 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY COUNTRY, 2016  
2022 (KILOTON)

TABLE 389 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY COUNTRY, 2023  
2029 (KILOTON)

TABLE 390 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY COUNTRY, 2016  
2022 (USD MILLION)

TABLE 391 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY COUNTRY, 2023  
2029 (USD MILLION)

TABLE 392 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY COUNTRY, 2016  
2022 (KILOTON)

TABLE 393 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY COUNTRY, 2023  
2029 (KILOTON)

TABLE 394 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY TECHNOLOGY,  
2016 2022 (USD MILLION)

TABLE 395 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY TECHNOLOGY,  
2023 2029 (USD MILLION)

TABLE 396 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY TECHNOLOGY,  
2016 2022 (KILOTON)

TABLE 397 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY TECHNOLOGY,  
2023 2029 (KILOTON)

TABLE 398 MIDDLE EAST & AFRICA: WATER-BASED ADHESIVES MARKET, BY  
RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 399 MIDDLE EAST & AFRICA: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 400 MIDDLE EAST & AFRICA: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 401 MIDDLE EAST & AFRICA: WATER-BASED ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 402 MIDDLE EAST & AFRICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 403 MIDDLE EAST & AFRICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 404 MIDDLE EAST & AFRICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 405 MIDDLE EAST & AFRICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 406 MIDDLE EAST & AFRICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 407 MIDDLE EAST & AFRICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2023 2024 (USD MILLION)

TABLE 408 MIDDLE EAST & AFRICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 409 MIDDLE EAST & AFRICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 410 MIDDLE EAST & AFRICA: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 411 MIDDLE EAST & AFRICA: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 412 MIDDLE EAST & AFRICA: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 413 MIDDLE EAST & AFRICA: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 414 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY APPLICATION, 2016 2022 (USD MILLION)

TABLE 415 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY APPLICATION, 2023 2029 (USD MILLION)

TABLE 416 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY APPLICATION, 2021 2028 (KILOTON)

TABLE 417 MIDDLE EAST & AFRICA: ADHESIVES MARKET, BY APPLICATION, 2023 2029 (KILOTON)

TABLE 418 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY RESIN TYPE, 2016

2022 (USD MILLION)

TABLE 419 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY RESIN TYPE, 2023

2029 (USD MILLION)

TABLE 420 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY RESIN TYPE, 2016

2022 (KILOTON)

TABLE 421 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY RESIN TYPE, 2023

2029 (KILOTON)

TABLE 422 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY APPLICATION, 2016

2022 (USD MILLION)

TABLE 423 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY APPLICATION, 2023

2029 (USD MILLION)

TABLE 424 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY APPLICATION, 2016

2022 (KILOTON)

TABLE 425 MIDDLE EAST & AFRICA: SEALANTS MARKET, BY APPLICATION, 2023

2029 (KILOTON)

#### 11.5.2 GCC COUNTRIES

##### 11.5.2.1 Saudi Arabia

11.5.2.1.1 Mega housing projects to increase demand for adhesives

##### 11.5.2.2 UAE

11.5.2.2.1 Growing industrial activity to impact market growth

##### 11.5.2.3 Rest of GCC Countries

#### 11.5.3 REST OF MIDDLE EAST & AFRICA

#### 11.6 SOUTH AMERICA

##### 11.6.1 IMPACT OF RECESSION

FIGURE 55 SOUTH AMERICA: ADHESIVES & SEALANTS MARKET SNAPSHOT

TABLE 426 SOUTH AMERICA: ADHESIVES & SEALANTS MARKET, BY TYPE, 2016

2022 (USD MILLION)

TABLE 427 SOUTH AMERICA: ADHESIVES & SEALANTS MARKET, BY TYPE, 2023

2029 (USD MILLION)

TABLE 428 SOUTH AMERICA: ADHESIVES & SEALANTS MARKET, BY TYPE, 2016

2022 (KILOTON)

TABLE 429 SOUTH AMERICA: ADHESIVES & SEALANTS MARKET, BY TYPE, 2023

2029 (KILOTON)

TABLE 430 SOUTH AMERICA: ADHESIVES MARKET, BY COUNTRY, 2016 2022  
(USD MILLION)

TABLE 431 SOUTH AMERICA: ADHESIVES MARKET, BY COUNTRY, 2023 2029  
(USD MILLION)

TABLE 432 SOUTH AMERICA: ADHESIVES MARKET, BY COUNTRY, 2016 2022  
(KILOTON)



TABLE 433 SOUTH AMERICA: ADHESIVES MARKET, BY COUNTRY, 2023 2029  
(KILOTON)

TABLE 434 SOUTH AMERICA: SEALANTS MARKET, BY COUNTRY, 2016 2022  
(USD MILLION)

TABLE 435 SOUTH AMERICA: SEALANTS MARKET, BY COUNTRY, 2023 2029  
(USD MILLION)

TABLE 436 SOUTH AMERICA: SEALANTS MARKET, BY COUNTRY, 2016 2022  
(KILOTON)

TABLE 437 SOUTH AMERICA: SEALANTS MARKET, BY COUNTRY, 2023 2029  
(KILOTON)

TABLE 438 SOUTH AMERICA: ADHESIVES MARKET, BY TECHNOLOGY, 2016 2022  
(USD MILLION)

TABLE 439 SOUTH AMERICA: ADHESIVES MARKET, BY TECHNOLOGY, 2023 2029  
(USD MILLION)

TABLE 440 SOUTH AMERICA: ADHESIVES MARKET, BY TECHNOLOGY, 2016 2022  
(KILOTON)

TABLE 441 SOUTH AMERICA: ADHESIVES MARKET, BY TECHNOLOGY, 2023 2029  
(KILOTON)

TABLE 442 SOUTH AMERICA: WATER-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2016 2022 (USD MILLION)

TABLE 443 SOUTH AMERICA: WATER-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2023 2029 (USD MILLION)

TABLE 444 SOUTH AMERICA: WATER-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2016 2022 (KILOTON)

TABLE 445 SOUTH AMERICA: WATER-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2023 2029 (KILOTON)

TABLE 446 SOUTH AMERICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2016 2022 (USD MILLION)

TABLE 447 SOUTH AMERICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2023 2029 (USD MILLION)

TABLE 448 SOUTH AMERICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2016 2022 (KILOTON)

TABLE 449 SOUTH AMERICA: SOLVENT-BASED ADHESIVES MARKET, BY RESIN  
TYPE, 2023 2029 (KILOTON)

TABLE 450 SOUTH AMERICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE,  
2016 2022 (USD MILLION)

TABLE 451 SOUTH AMERICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE,  
2023 2024 (USD MILLION)

TABLE 452 SOUTH AMERICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE,



2016 2022 (KILOTON)

TABLE 453 SOUTH AMERICA: HOT-MELT ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 454 SOUTH AMERICA: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 455 SOUTH AMERICA: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 456 SOUTH AMERICA: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 457 SOUTH AMERICA: REACTIVE & OTHERS ADHESIVES MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 458 SOUTH AMERICA: ADHESIVES MARKET, BY APPLICATION, 2016 2022 (USD MILLION)

TABLE 459 SOUTH AMERICA: ADHESIVES MARKET, BY APPLICATION, 2023 2029 (USD MILLION)

TABLE 460 SOUTH AMERICA: ADHESIVES MARKET, BY APPLICATION, 2021 2028 (KILOTON)

TABLE 461 SOUTH AMERICA: ADHESIVES MARKET, BY APPLICATION, 2023 2029 (KILOTON)

TABLE 462 SOUTH AMERICA: SEALANTS MARKET, BY RESIN TYPE, 2016 2022 (USD MILLION)

TABLE 463 SOUTH AMERICA: SEALANTS MARKET, BY RESIN TYPE, 2023 2029 (USD MILLION)

TABLE 464 SOUTH AMERICA: SEALANTS MARKET, BY RESIN TYPE, 2016 2022 (KILOTON)

TABLE 465 SOUTH AMERICA: SEALANTS MARKET, BY RESIN TYPE, 2023 2029 (KILOTON)

TABLE 466 SOUTH AMERICA: SEALANTS MARKET, BY APPLICATION, 2016 2022 (USD MILLION)

TABLE 467 SOUTH AMERICA: SEALANTS MARKET, BY APPLICATION, 2023 2029 (USD MILLION)

TABLE 468 SOUTH AMERICA: SEALANTS MARKET, BY APPLICATION, 2016 2022 (KILOTON)

TABLE 469 SOUTH AMERICA: SEALANTS MARKET, BY APPLICATION, 2023 2029 (KILOTON)

## 11.6.2 BRAZIL

11.6.2.1 Rising investment from the government to drive market

## 11.6.3 ARGENTINA

11.6.3.1 Increase in population and improved economic conditions to drive demand

#### 11.6.4 REST OF SOUTH AMERICA

### 12 COMPETITIVE LANDSCAPE

#### 12.1 INTRODUCTION

#### 12.2 KEY STRATEGIES

12.2.1 OVERVIEW OF STRATEGIES ADOPTED BY KEY MARKET PLAYERS (2020 2023)

#### 12.3 MARKET SHARE ANALYSIS

FIGURE 56 MARKET SHARE ANALYSIS, 2023

TABLE 470 ADHESIVES & SEALANTS MARKET: DEGREE OF COMPETITION

12.3.1 HENKEL KG & CO. KGAA

12.3.2 H.B. FULLER COMPANY

12.3.3 ARKEMA (BOSTIK)

12.3.4 SIKA AG

12.3.5 3M

#### 12.4 REVENUE ANALYSIS

FIGURE 57 REVENUE ANALYSIS OF TOP 5 PLAYERS (2019 2023)

#### 12.5 COMPANY VALUATION AND FINANCIAL METRICS, 2023

12.5.1 COMPANY VALUATION

FIGURE 58 ADHESIVES & SEALANTS MARKET: COMPANY VALUATION

12.5.2 FINANCIAL METRICS

FIGURE 59 ADHESIVES & SEALANTS MARKET: FINANCIAL METRICS

#### 12.6 BRAND/PRODUCT COMPARATIVE ANALYSIS

12.6.1 BRAND/PRODUCT COMPARATIVE ANALYSIS

TABLE 471 ADHESIVES & SEALANTS MARKET: BRAND/PRODUCT COMPARATIVE ANALYSIS

#### 12.7 MARKET RANKING ANALYSIS

FIGURE 60 MARKET RANKING ANALYSIS, 2023

#### 12.8 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

12.8.1 STARS

12.8.2 EMERGING LEADERS

12.8.3 PERVASIVE PLAYERS

12.8.4 PARTICIPANTS

FIGURE 61 ADHESIVES & SEALANTS MARKET: COMPANY EVALUATION MATRIX (KEY PLAYERS), 2023

12.8.5 COMPANY FOOTPRINT

FIGURE 62 ADHESIVES & SEALANTS MARKET: COMPANY FOOTPRINT (27 COMPANIES)

TABLE 472 ADHESIVES & SEALANTS MARKET: APPLICATION FOOTPRINT (27 COMPANIES)

TABLE 473 ADHESIVES & SEALANTS MARKET: REGION FOOTPRINT (27 COMPANIES)

TABLE 474 ADHESIVES & SEALANTS MARKET: COMPANY FOOTPRINT (27 COMPANIES)

12.9 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023

12.9.1 PROGRESSIVE COMPANIES

12.9.2 RESPONSIVE COMPANIES

12.9.3 DYNAMIC COMPANIES

12.9.4 STARTING BLOCKS

FIGURE 63 ADHESIVES & SEALANTS MARKET: COMPANY EVALUATION MATRIX (STARTUPS/SMES), 2023

12.9.5 COMPETITIVE BENCHMARKING

TABLE 475 ADHESIVES & SEALANTS MARKET: KEY STARTUPS/SMES (11 COMPANIES)

TABLE 476 ADHESIVES & SEALANTS MARKET: COMPETITIVE BENCHMARKING OF STARTUPS/SMES (11 COMPANIES)

12.10 COMPETITIVE SCENARIO & TRENDS

12.10.1 PRODUCT LAUNCHES

TABLE 477 ADHESIVES & SEALANTS MARKET: PRODUCT LAUNCHES, JANUARY 2020 DECEMBER 2023

12.10.2 DEALS

TABLE 478 ADHESIVES & SEALANTS MARKET: DEALS, JANUARY 2020 DECEMBER 2023

12.10.3 EXPANSIONS

TABLE 479 ADHESIVES & SEALANTS MARKET: EXPANSIONS, JANUARY 2020 DECEMBER 2023

## **13 COMPANY PROFILES**

(Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats)\*

13.1 MAJOR PLAYERS

13.1.1 HENKEL AG & CO. KGAA

TABLE 480 HENKEL AG & CO. KGAA: COMPANY OVERVIEW

FIGURE 64 HENKEL AG & CO. KGAA: COMPANY SNAPSHOT

TABLE 481 HENKEL AG & CO. KGAA: PRODUCTS/SERVICES/SOLUTIONS

**OFFERED**

TABLE 482 HENKEL AG & CO. KGAA: PRODUCT LAUNCHES, JANUARY 2020  
DECEMBER 2023

TABLE 483 HENKEL AG & CO. KGAA: DEALS, JANUARY 2020 DECEMBER 2023

TABLE 484 HENKEL AG & CO. KGAA: EXPANSIONS, JANUARY 2020 DECEMBER  
2023

**13.1.2 H.B. FULLER COMPANY**

TABLE 485 H.B. FULLER COMPANY: BUSINESS OVERVIEW

FIGURE 65 H.B. FULLER COMPANY: COMPANY SNAPSHOT

TABLE 486 H.B. FULLER COMPANY: PRODUCTS/SERVICES/SOLUTIONS

**OFFERED**

TABLE 487 H.B. FULLER COMPANY: PRODUCT LAUNCHES, JANUARY 2020  
DECEMBER 2023

TABLE 488 H.B. FULLER COMPANY: DEALS, JANUARY 2020 DECEMBER 2023

TABLE 489 H.B. FULLER COMPANY: EXPANSIONS, JANUARY 2020 DECEMBER  
2023

**13.1.3 SIKA AG**

TABLE 490 SIKA AG: BUSINESS OVERVIEW

FIGURE 66 SIKA AG: COMPANY SNAPSHOT

TABLE 491 SIKA AG: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 492 SIKA AG: DEALS, JANUARY 2020 DECEMBER 2023

TABLE 493 SIKA AG: EXPANSIONS, JANUARY 2020 DECEMBER 2023

**13.1.4 ARKEMA (BOSTIK)**

TABLE 494 ARKEMA (BOSTIK): COMPANY OVERVIEW

FIGURE 67 ARKEMA (BOSTIK): COMPANY SNAPSHOT

TABLE 495 ARKEMA (BOSTIK): PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 496 ARKEMA (BOSTIK): PRODUCT LAUNCHES, JANUARY 2020  
DECEMBER 2023

TABLE 497 ARKEMA (BOSTIK): DEALS, JANUARY 2020 DECEMBER 2023

TABLE 498 ARKEMA (BOSTIK): EXPANSIONS, JANUARY 2020 DECEMBER 2023

**13.1.5 3M**

TABLE 499 3M: COMPANY OVERVIEW

FIGURE 68 3M: COMPANY SNAPSHOT

TABLE 500 3M: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 501 3M: PRODUCT LAUNCHES, JANUARY 2020 DECEMBER 2023

**13.1.6 HUNTSMAN CORPORATION**

TABLE 502 HUNTSMAN CORPORATION: COMPANY OVERVIEW

FIGURE 69 HUNTSMAN CORPORATION: COMPANY SNAPSHOT

TABLE 503 HUNTSMAN CORPORATION: PRODUCTS/SERVICES/SOLUTIONS

## OFFERED

TABLE 504 HUNTSMAN CORPORATION: PRODUCT LAUNCHES, JANUARY 2020  
DECEMBER 2023

TABLE 505 HUNTSMAN CORPORATION: DEALS, JANUARY 2020 DECEMBER 2023

TABLE 506 HUNTSMAN CORPORATION: EXPANSIONS, JANUARY 2020  
DECEMBER 2023

### 13.1.7 ILLINOIS TOOL WORKS INC.

TABLE 507 ILLINOIS TOOL WORKS INC.: COMPANY OVERVIEW

FIGURE 70 ILLINOIS TOOL WORKS INC.: COMPANY SNAPSHOT

TABLE 508 ILLINOIS TOOL WORKS INC.: PRODUCTS/SERVICES/SOLUTIONS  
OFFERED

TABLE 509 ILLINOIS TOOL WORKS INC.: PRODUCT LAUNCHES, JANUARY 2020  
DECEMBER 2023

TABLE 510 ILLINOIS TOOL WORKS INC.: DEALS, JANUARY 2020 DECEMBER 2023

### 13.1.8 AVERY DENNISON CORPORATION

TABLE 511 AVERY DENNISON CORPORATION: COMPANY OVERVIEW

FIGURE 71 AVERY DENNISON CORPORATION: COMPANY SNAPSHOT

TABLE 512 AVERY DENNISON CORPORATION:  
PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 513 AVERY DENNISON CORPORATION: PRODUCT LAUNCHES, JANUARY  
2020 DECEMBER 2023

TABLE 514 AVERY DENNISON CORPORATION: EXPANSIONS, JANUARY 2020  
DECEMBER 2023

### 13.1.9 DOW

TABLE 515 DOW INC: COMPANY OVERVIEW

FIGURE 72 DOW: COMPANY SNAPSHOT

TABLE 516 DOW: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 517 DOW: PRODUCT LAUNCHES, JANUARY 2020 DECEMBER 2023

TABLE 518 DOW: EXPANSIONS, JANUARY 2020 DECEMBER 2023

### 13.1.10 WACKER CHEMIE AG

TABLE 519 WACKER CHEMIE AG: COMPANY OVERVIEW

FIGURE 73 WACKER CHEMIE AG: COMPANY SNAPSHOT

TABLE 520 WACKER CHEMIE AG: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 521 WACKER CHEMIE AG: PRODUCT LAUNCHES, JANUARY 2020  
DECEMBER 2023

TABLE 522 WACKER CHEMIE AG: EXPANSIONS, JANUARY 2020 DECEMBER 2023

## 13.2 OTHER PLAYERS

### 13.2.1 RPM INTERNATIONAL, INC

TABLE 523 RPM INTERNATIONAL, INC: COMPANY OVERVIEW

**TABLE 524 RPM INTERNATIONAL, INC: PRODUCTS/SERVICES/SOLUTIONS OFFERED****13.2.2 AKZO NOBEL N.V.****TABLE 525 AKZO NOBEL N.V.: COMPANY OVERVIEW****TABLE 526 AKZO NOBEL N.V.: PRODUCTS/SERVICES/SOLUTIONS OFFERED****13.2.3 PPG INDUSTRIES, INC****TABLE 527 PPG INDUSTRIES, INC: COMPANY OVERVIEW****TABLE 528 PPG INDUSTRIES, INC: PRODUCTS/SERVICES/SOLUTIONS OFFERED****13.2.4 PARKER HANNIFIN CORP (PARKER LORD)****TABLE 529 PARKER HANNIFIN CORP (PARKER LORD): COMPANY OVERVIEW****TABLE 530 PARKER HANNIFIN CORP (PARKER LORD):  
PRODUCTS/SERVICES/SOLUTIONS OFFERED****13.2.5 ADHESIVES RESEARCH INC.****TABLE 531 ADHESIVES RESEARCH INC.: COMPANY OVERVIEW****TABLE 532 ADHESIVES RESEARCH INC.: PRODUCTS/SERVICES/SOLUTIONS  
OFFERED****13.2.6 DELO INDUSTRIE KLEBSTOFFE GMBH & CO. KGAA****TABLE 533 DELO INDUSTRIE KLEBSTOFFE GMBH & CO. KGAA: COMPANY  
OVERVIEW****TABLE 534 DELO INDUSTRIE KLEBSTOFFE GMBH & CO. KGAA.:  
PRODUCTS/SERVICES/SOLUTIONS OFFERED****TABLE 535 DELO INDUSTRIE KLEBSTOFFE GMBH & CO. KGAA: PRODUCT  
LAUNCHES, JANUARY 2020 DECEMBER 2023****13.2.7 DYMAX CORPORATION****TABLE 536 DYMAX CORPORATION: COMPANY OVERVIEW****TABLE 537 DYMAX CORPORATION: PRODUCTS/SERVICES/SOLUTIONS  
OFFERED****TABLE 538 DYMAX CORPORATION: EXPANSIONS, JANUARY 2020 DECEMBER  
2023****13.2.8 MAPEI CORPORATION****TABLE 539 MAPEI CORPORATION: COMPANY OVERVIEW****TABLE 540 MAPEI CORPORATION: PRODUCTS/SERVICES/SOLUTIONS OFFERED****13.2.9 MERIDIAN ADHESIVES GROUP****TABLE 541 MERIDIAN ADHESIVES GROUP: COMPANY OVERVIEW****TABLE 542 MERIDIAN ADHESIVES GROUP: PRODUCTS/SERVICES/SOLUTIONS  
OFFERED****TABLE 543 MERIDIAN ADHESIVES GROUP: PRODUCT LAUNCHES, JANUARY  
2020 DECEMBER 2023****TABLE 544 MERIDIAN ADHESIVES GROUP: DEALS, JANUARY 2020 DECEMBER**



2023

TABLE 545 MERIDIAN ADHESIVES GROUP: EXPANSIONS, JANUARY 2020  
DECEMBER 2023

13.2.10 MASTER BOND INC.

TABLE 546 MASTER BOND INC.: COMPANY OVERVIEW

TABLE 547 MASTER BOND INC.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

13.2.11 SOUDAL GROUP

TABLE 548 SOUDAL GROUP: COMPANY OVERVIEW

TABLE 549 SOUDAL GROUP: PRODUCTS/SERVICES/SOLUTIONS OFFERED

13.2.12 PIDILITE INDUSTRIES

TABLE 550 PIDILITE INDUSTRIES: COMPANY OVERVIEW

TABLE 551 PIDILITE INDUSTRIES: PRODUCTS/SERVICES/SOLUTIONS OFFERED

13.2.13 JOWAT SE

TABLE 552 JOWAT SE: COMPANY OVERVIEW

TABLE 553 JOWAT SE: PRODUCTS/SERVICES/SOLUTIONS OFFERED

13.2.14 FRANKLIN INTERNATIONAL

TABLE 554 FRANKLIN INTERNATIONAL: COMPANY OVERVIEW

TABLE 555 FRANKLIN INTERNATIONAL: PRODUCTS/SERVICES/SOLUTIONS  
OFFERED

13.2.15 ASTRAL ADHESIVES

TABLE 556 ASTRAL ADHESIVES: COMPANY OVERVIEW

TABLE 557 ASTRAL ADHESIVES: PRODUCTS/SERVICES/SOLUTIONS OFFERED

13.2.16 DIC CORPORATION

TABLE 558 DIC CORPORATION: COMPANY OVERVIEW

TABLE 559 DIC CORPORATION: PRODUCTS/SERVICES/SOLUTIONS OFFERED

13.2.17 MOMENTIVE

TABLE 560 MOMENTIVE: COMPANY OVERVIEW

TABLE 561 MOMENTIVE: PRODUCTS/SERVICES/SOLUTIONS OFFERED

\*Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats)\* might not be captured in case of unlisted companies.

## **14 ADJACENT & RELATED MARKETS**

14.1 LIMITATIONS

14.2 CONSTRUCTION SEALANTS MARKET

14.2.1 MARKET DEFINITION

14.3 MARKET OVERVIEW

14.4 CONSTRUCTION SEALANTS MARKET, BY RESIN TYPE



TABLE 562 CONSTRUCTION SEALANTS MARKET, BY RESIN TYPE, 2020 2022  
(USD MILLION)

TABLE 563 CONSTRUCTION SEALANTS MARKET, BY RESIN TYPE, 2023 2028  
(USD MILLION)

TABLE 564 CONSTRUCTION SEALANTS MARKET, BY RESIN TYPE, 2020 2022  
(KILOTON)

TABLE 565 CONSTRUCTION SEALANTS MARKET, BY RESIN TYPE, 2023 2028  
(KILOTON)

14.4.1 SILICONE

14.4.2 POLYURETHANE

14.4.3 POLYSULFIDE

14.4.4 OTHERS

14.5 CONSTRUCTION SEALANTS MARKET, BY APPLICATION

TABLE 566 CONSTRUCTION SEALANTS MARKET, BY APPLICATION, 2020 2022  
(USD MILLION)

TABLE 567 CONSTRUCTION SEALANTS MARKET, BY APPLICATION, 2023 2028  
(USD MILLION)

TABLE 568 CONSTRUCTION SEALANTS MARKET, BY APPLICATION, 2020 2022  
(KILOTON)

TABLE 569 CONSTRUCTION SEALANTS MARKET, BY APPLICATION, 2023 2028  
(KILOTON)

14.5.1 GLAZING

14.5.2 FLOORING & JOINING

14.5.3 SANITARY & KITCHEN

14.5.4 OTHER APPLICATIONS

14.6 CONSTRUCTION SEALANTS MARKET, BY END-USE INDUSTRY

TABLE 570 CONSTRUCTION SEALANTS MARKET, BY END-USE INDUSTRY, 2020  
2022 (USD MILLION)

TABLE 571 CONSTRUCTION SEALANTS MARKET, BY END-USE INDUSTRY, 2023  
2028 (USD MILLION)

TABLE 572 CONSTRUCTION SEALANTS MARKET, BY END-USE INDUSTRY, 2020  
2022 (KILOTON)

TABLE 573 CONSTRUCTION SEALANTS MARKET, BY END-USE INDUSTRY, 2023  
2028 (KILOTON)

14.6.1 RESIDENTIAL

14.6.2 NONRESIDENTIAL

14.6.3 COMMERCIAL & INFRASTRUCTURE

14.7 CONSTRUCTION SEALANTS MARKET, BY REGION

TABLE 574 CONSTRUCTION SEALANTS MARKET, BY REGION, 2020 2022 (USD

MILLION)

TABLE 575 CONSTRUCTION SEALANTS MARKET, BY REGION, 2023 2028 (USD MILLION)

TABLE 576 CONSTRUCTION SEALANTS MARKET, BY REGION, 2020 2022 (KILOTON)

TABLE 577 CONSTRUCTION SEALANTS MARKET, BY REGION, 2023 2028 (KILOTON)

14.7.1 ASIA PACIFIC

14.7.2 NORTH AMERICA

14.7.3 EUROPE

14.7.4 SOUTH AMERICA

14.7.5 MIDDLE EAST & AFRICA

## **15 APPENDIX**

15.1 DISCUSSION GUIDE

15.2 KNOWLEDGESTORE: MARKETSANDMARKETS SUBSCRIPTION PORTAL

15.3 CUSTOMIZATION OPTIONS

15.4 RELATED REPORTS

15.5 AUTHOR DETAILS

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