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Adhesive & Sealants Market by Adhesives Formulating Technology (Water-Based, Solvent-Based, Hot-Melt, Reactive), Sealants Resin Type (Silicone, Polyurethane, Plastisol, Emulsion, Polysulfide, Butyl), Application, and Region - Global Forecast to 2028

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Abstracts

The global adhesives & sealants market size is projected to grow from USD 76.5 billion in 2023 to USD 95.0 billion by 2028, at a CAGR of 4.4%, between 2023 and 2028. Increased need for adhesives in the medical sector, growing demand for adhesives & sealants in the building & construction industry, and expansion in the appliances industry are the primary market drivers. Environmental laws in Europe and North America are stifling market development, however, rising demand for green adhesives and sealants provides potential for producers. Adherence to policies and standards implemented by various regulatory authorities such as the Control of Substances Hazardous to Health (COSHH), the European Union (EU), the Registration, Evaluation, Authorization, and Restriction of Chemicals (REACH), the Globally Harmonized System (GHS), and the Environmental Protection Agency (EPA) in Europe and North America is a challenge for the chemical industry. Manufacturers in Europe and North America are following laws for the manufacturing and use of adhesives and sealants for a variety of applications in order to limit VOC emissions.

The water-based segment is expected to register one of the highest market share during the forecast period

The most common adhesive formulation method is water-based. Almost all adhesives produced with this method are resin emulsions, especially Polyvinyl Acetate Emulsion

(PAE), a stable suspension of Polyvinyl Acetate (PVA) particles in water. These adhesives are often composed of water-soluble protective colloids, such as polyvinyl alcohol or 2-hydroxyethyl cellulose ether, and may also include plasticizers, fillers, solvents, defoamers, and preservatives. Water-based adhesives are made from rubber compounds (as the basis material) and different additives to boost strength, such as synthetic hydrocarbon resins or pine sap derivatives. The adhesive particles are suspended in water, lowering the viscosity of the adhesive and allowing it to be applied to a variety of substrates of differing thicknesses.

The medical segment in application is expected to register one of the highest CAGR during the forecast period

Medical adhesives are created from a variety of materials, including natural and synthetic rubber, as well as hydrocolloids, hydrogels, polyacrylates, polyurethanes, and silicone. Silicone is the mildest on the skin of the bunch. The material is noted for its great breathability, biocompatibility, and inertness. Silicone PSAs have traditionally been used in industrial applications because they provide a broad temperature performance window (both high and low temperature), quick adhesion (particularly useful for splicing), general good adhesion to low surface energy substrates, and low adhesion built over time/temperature.

Europe adhesives & sealants market is estimated to capture one of the highest share in terms of volume during the forecast period

In terms of volume, Europe held the bulk of the global adhesives and sealants market in 2022. Germany, France, Spain, Russia, Italy, Turkey, and the United Kingdom are the primary European adhesives and sealants markets. This area is home to some of the largest companies in the adhesives and sealants industry, including Henkel AG (Germany), Sika AG (Switzerland), and Arkema (Bostik SA) (France). As a result, the market is likely to be driven by the rise of end-use industries and the presence of these players over the forecast period. Environmental laws and shifting raw material prices have a significant impact on the European adhesives and sealants sector. Companies in this region work with those in the United States to create environmentally friendly goods.

The break-up of the profile of primary participants in the adhesives & sealants market:

By Company Type: Tier 1 – 46%, Tier 2 – 43%, and Tier 3 – 27%

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

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

The key companies profiled in this report are Henkel AG (Germany), H.B. Fuller (US), Sika AG (Switzerland), Arkema (Bostik SA) (France), 3M (US), Huntsman Corporation (US), Illinois Tool Works Inc. (US), Avery Dennison Corporation (US), Dow Inc. (US), Wacker Chemie AG (Germany), and others.

Research Coverage:

This research report categorizes the adhesives & sealants market by adhesives formulating technology (Water-based, Solvent-based, Hot-melt, Reactive & Others), sealants resin type (Silicone, Polyurethane, Plastisol, Emulsion, Polysulfide, Butyl, and Others), applications and region (North America, Europe, Asia Pacific, the Middle East & Africa, and South America). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the adhesives & sealants market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, and services; key strategies; Contracts, partnerships, and agreements. new product & service launches, mergers and acquisitions, and recent developments associated with the adhesives & sealants market. Competitive analysis of upcoming startups in the adhesives & sealants market ecosystem is covered in this report. Reasons to buy this report: The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall adhesives & sealants market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Growing demand for sustainable raw material building and construction), restraints (volatility in raw material prices), opportunities (expansion in untapped markets), and challenges (stringent regulatory policies).

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

Market Development: Comprehensive information about lucrative markets – the report analyses the adhesives & sealants market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the adhesives & sealants market

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Henkel AG (Germany), H.B. Fuller (US), Sika AG (Switzerland), Arkema (Bostik SA) (France), 3M (US), Huntsman Corporation (US), Illinois Tool Works Inc. (US), Avery Dennison Corporation (US), Dow Inc. (US), and Wacker Chemie AG (Germany). The report also helps stakeholders understand the pulse of the adhesives & sealants market and provides them information on key market drivers, restraints, challenges, and opportunities.

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*Details on Business overview, Products offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

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About

The Report “Adhesives & Sealants Market by Technology (Water, Solvent, Hot-Melt, Reactive & Others), by Chemistry (PAE, PVA, VAE, EVA, SBS, Synthetic Rubber, Polyamide, Polyurethane, Epoxy, Cyanoacrylate, & Others), & by Application - Global Forecast to 2020”, report analyzes the global adhesives & sealants market with respect to market drivers, restraints, opportunities, and challenges in different regions.

The global market value of the adhesives & sealants was estimated to be about $45.36 Billion in 2014 and is projected to reach $59.75 Billion by 2020, growing at a CAGR of 4.72% between 2015 and 2020.

Driven by the requirement of superior performance characteristics, the adhesives market is slowly shifting from the traditional solvent based adhesives towards the use of high-performance products such as reactive hot melts and pressure sensitive hot melt adhesives. This slow but certain shift in portfolio is fuelling the overall growth of hot melt adhesives.

The adhesives & sealants demand, in terms of value and volume, depicts the current and future projections according to the parallel economic and industrial outlook. This analysis covers important developments, investments & expansions, partnerships & agreements, and mergers & acquisitions of the leading global companies.

Technological advancements are fueling demand for sealants in the mature North American and European markets. Less cure time, increased performance benefits such as high-performing seals, better adhesion to a variety of substrates, resistance to chemicals and gas, coupled with a host of other innovations are reviving the market.

There has also been significant consolidation via merger and acquisition of participants at all levels of the value chain. With millions of surgical procedures taking place annually, the market for wound closure products and techniques is expected to grow significantly. It is driven by an increase in the aging world population, which creates increased demand for all types of surgical intervention, particularly cardiovascular, orthopedic, urological, and dermatological procedures. The emerging generation of wound closure products and technologies consists of green as well as synthetic sealants; energy-based wound closure methods are well-positioned to capitalize on this growth, owing to their ability to seal wounds quickly with little or no clinical follow-up.

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