

Non-Woven Adhesives Market by Technology (Hot-melt), Type (SBC, APAO, EVA), Application (Baby Care, Feminine Hygiene, Adult Incontinence, Medical), and Region - Global Forecast to 2025

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Abstracts

The non-woven adhesives market size is projected to grow from USD 2.3 billion in 2020 to USD 3.5 billion, by 2025. The market is witnessing high growth due to rising demand from emerging applications such as baby care, feminine hygiene, and adult incontinence. The APAC market exhibits strong growth potential between 2020 and 2025. The region accounted for the largest market share, in terms of value, of the overall non-woven adhesives market in 2019. Furthermore, this market is projected to witness the highest CAGR due to the growing demand from end users.

Stagnant growth is observed in the baby diaper market in developed regions due to declining birth rates and very high diaper penetration rate in matured markets such as the US, Japan, and in the Western European countries. The adhesive industry is affected by high transport costs induced by fluctuating fuel prices and higher manufacturing costs resulting from increasing energy costs. Adhesive manufacturers have responded by passing on such price rise to end users, thereby, resulting in decreased demand for adhesives, as certain end-use segments, such as low-end adhesive products and general users are price sensitive.

“The hot-melt segment is expected to lead the non-woven adhesives market, in terms of volume, during the forecast period.”

The hot-melt segment is expected to lead the non-woven adhesives market, in terms of volume, between 2020 and 2025. Hot-melt non-woven adhesives are used in assembly & construction of disposable hygiene products, including baby diapers, feminine

hygiene products, and adult incontinence products. They have excellent cohesive strength and strong adhesion to non-woven, absorbent pads and backing materials used in the construction of diapers and other disposable non-woven products.

Hygiene products manufacturers offer a range of adhesive solutions to meet consumer requirements. Innovative disposable hygiene products combine high adhesion with skin-friendliness. The players in this market focus on extensive R&D to manufacture innovative products and differentiate their product offerings from their competitors.

“The APAO segment is projected to account for the largest share of the overall non-woven adhesives market, in terms of volume, during the forecast period.”

APAO is projected to be the fastest-growing segment of the market, in terms of both volume and value, between 2020 and 2025. APAO is an important type of polyolefin used in non-woven adhesives. Such polyolefin has better thermal stability than products based purely on polyethylene (PE) and can be used at lower temperature ranges than pure polypropylene. It is produced by copolymerization of alpha-olefins, including propylene or 1-butene. The copolymers have an amorphous structure that makes them useful for producing hot-melt adhesives. APAO non-woven adhesives offer good resistance to acid and solvents, with better cost-effectiveness than other adhesives.

“APAC is projected to be the fastest-growing market for non-woven adhesives during the forecast period, in terms of value and volume.”

The non-woven adhesives market is projected to register the highest CAGR in APAC in the next five years, mainly due to the rise in population and increasing number of working women as well as higher growth prospects in the baby care and feminine hygiene applications. The markets in APAC countries are in the growth phase, where manufacturers compete with very similar offerings. The non-woven adhesives market in APAC is profitable than in the other regions. The market is becoming more organized, with companies entering into strategic acquisitions and joint ventures to increase their market shares.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the non-woven adhesives market, and information was gathered from secondary research to determine and verify the market size of several segments and subsegments.

By Company Type: Tier 1 - 60%, Tier 2 - 30%, and Tier 3 - 10%.

By Designation: C-Level - 50%, Director Level - 40%, and Others - 10%.

By Region: North America- 35%, Europe - 30%, APAC – 16% South America – 12% and Middle East & Africa - 7%

Key players profiled in the report include Henkel AG (Germany), H.B. Fuller (US), Arkema (France), Moresco Corporation (Japan), Beardow Adams (Adhesives) Ltd. (UK), Lohmann- Koester GmbH & Co.KG (Germany), ADTEK Malaysia Sdn Bhd (Malaysia), Colquimica Adhesives (Portugal), Savare Specialty Adhesives (Italy), and Palmetto Adhesives Company, Inc. (US).

Research Coverage

This report segments the non-woven adhesives market on the basis of technology, type, application, and region, and provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and agreements associated with the non-woven adhesives market.

Reasons to Buy this Report

From an insight perspective, this research report has focused on various levels of analyses—industry analysis (industry trends), key players in the non-woven adhesives market, and company profiles. These insights together comprise and discuss basic views on competitive landscape; emerging and high-growth segments of the non-woven adhesives market; high-growth regions; and market drivers, restraints, and opportunities.

The report provides insights on the following pointers:

Market penetration: Comprehensive information on non-woven adhesives offered by top players in the non-woven adhesives market

Product development/innovations: Detailed insights on upcoming technologies, research & development activities, and new product launches in the non-woven

adhesives market

Market development: Comprehensive information about lucrative emerging markets—the report analyzes the market of non-woven adhesives across various regions

Market diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the non-woven adhesives market

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*Details on Business Overview, Products Offered, Recent Developments, SWOT Analysis, MnM View might not be captured in case of unlisted companies.

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12.3.5 ADHESIVES & SEALANTS MARKET, BY REGION

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TABLE 268 ADHESIVES MARKET SIZE, BY REGION, 2020–2025 (USD MILLION)

TABLE 269 ADHESIVES MARKET SIZE, BY REGION, 2016–2019 (KILOTON)

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13 APPENDIX

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13.3 AVAILABLE CUSTOMIZATIONS

13.4 RELATED REPORTS

13.5 AUTHOR DETAILS

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