

Pressure Sensitive Adhesives Market by Chemistry (Acrylic, Rubber, Silicone), Technology (Water-Based, Solvent-Based, Hot-Melt), Application (Tapes, Labels, Graphics), End-Use Industry (Packaging, Automotive), and Region - Global Forecast to 2029

<https://marketpublishers.com/r/P742E7980D9EN.html>

Date: May 2024

Pages: 342

Price: US\$ 4,950.00 (Single User License)

ID: P742E7980D9EN

Abstracts

The global pressure sensitive adhesives market size is projected to grow from USD 13.8 billion in 2023 to USD 16.0 billion, at a CAGR of 3.0%.

Both the packaging and automotive industries significantly contribute to the growth of the PSA market. The packaging industry drives demand through its need for versatile, sustainable, and efficient adhesive solutions, while the automotive industry leverages the performance, durability, and lightweighting advantages of PSAs. The synergy between these industries and PSAs fosters innovation and market expansion, highlighting the importance of PSAs in modern manufacturing and consumer goods.

The tapes segment is expected to register one of the highest market share during the forecast period

Pressure-sensitive adhesive (PSA) tapes are versatile products made from materials such as cloth, paper, metal, or plastic, coated on one or both sides with a tacky adhesive that functions at room temperature. These tapes adhere to various surfaces with minimal pressure and maintain their adhesive properties without changing phases. PSA tapes come in several types based on technological advancements and application needs: single-coated, double-coated, reinforced, and unsupported. Single-coated PSA tapes have adhesive on only one side of the backing, making them ideal for electrical insulation, masking, and surface protection. Double-coated PSA tapes feature adhesive on both sides of a backing material, such as a 0.5 mil polyester film, and are used for

mounting, medical applications, and membrane switches. Reinforced PSA tapes include an additional layer of woven or knitted cloth or glass strands for enhanced strength, suitable for demanding applications requiring extra tensile strength. Unsupported PSA tapes consist solely of adhesives and release liners, offering high flexibility for applications like temporary mounting or splicing. The widespread use of PSA tapes across industries such as packaging, automotive, electronics, and healthcare highlights their adaptability and reliability in meeting various application requirements.

The packaging segment in substrate is expected to register one of the highest CAGR during the forecast period

The packaging industry is projected to grow rapidly, driven by urbanization, increased construction investments, and the expanding hygiene, healthcare, and cosmetic sectors. Economies like China, India, and Brazil are significant contributors to this growth due to their rising standards of living and increasing disposable incomes, which fuel the fast-moving consumer goods (FMCG) sector. The surge in online shopping has further amplified the demand for pressure-sensitive adhesive (PSA) tapes and labels, as they are essential for efficient packaging and labeling processes. This trend is a key factor in boosting the demand for PSAs within the packaging industry, which is vital for maintaining the pace of economic development and catering to the growing consumer base.

North American pressure sensitive adhesives market is estimated to capture one of the highest share in terms of volume during the forecast period

The North American food and beverage and packaging industries share a deeply interconnected relationship. As consumer preferences evolve, influenced by globalization, sustainability initiatives, and a push for innovative solutions, the demand for advanced packaging solutions rises accordingly. Packaging plays a pivotal role in the food and beverage sector by ensuring product preservation, enhancing branding efforts, and meeting stringent regulatory requirements. This symbiosis ultimately drives the success and growth of the food and beverage industry, as effective packaging not only protects and prolongs the shelf life of products but also appeals to consumers through attractive and functional designs. The continuous innovation in packaging materials and technologies thus directly impacts the overall performance and competitiveness of the food and beverage market.

The break-up of the profile of primary participants in the pressure sensitive adhesives

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%, Europe – 23%, Asia Pacific– 26%, Middle East & Africa – 10%, and South America – 4%

The key companies profiled in this report are Henkel AG & Co., KGaA (Germany), Dow (US), Avery Dennison Company (US), H.B. Fuller Company (US), 3M (US), Arkema S.A. (France), Sika AG (Switzerland), Scapa Group PLC (UK), Wacker Chemie AG (Germany), Illinois Tool Works (US), and others.

Research Coverage:

The pressure sensitive adhesives market is segmented by Chemistry (Acrylic, Rubber, Silicone, and Other Chemistry), Technology (Water-Based, Solvent-Based, Hot-Melt, and Radiation), Applications (Tapes, Labels, Graphics, and Other Application), End-Use Industry (Packaging, Automotive & Transportation, Medical & Healthcare, Building & Construction, Electrical, Electronics & Telecommunication, and Other End-Use Industry), and Region (North America, Europe, Asia Pacific, the Middle East & Africa, and South America). The study's coverage covers detailed information on the key factors influencing the growth of the pressure sensitive adhesives market, such as drivers, constraints, challenges, and opportunities. A thorough examination of the top industry players was carried out in order to provide insights into their company overview, solutions, and services; essential strategies; contracts, partnerships, and agreements. There includes coverage of new product and service launches, mergers and acquisitions, and ongoing developments in the pressure sensitive adhesives market. A competitive analysis of emerging companies in the pressure sensitive adhesives business ecosystem is included in this study. 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 pressure sensitive adhesives 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 pressure sensitive adhesives in emerging economies), restraints (volatility in raw material prices), opportunities (collaboration of distributors in untapped markets), and challenges (strict government regulations).

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

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

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

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Henkel AG & Co., KGaA (Germany), Dow (US), Avery Dennison Company (US), H.B. Fuller Company (US), 3M (US), Arkema S.A. (France), Sika AG (Switzerland), Scapa Group PLC (UK), Wacker Chemie AG (Germany), Illinois Tool Works (US). The report also helps stakeholders understand the pulse of the pressure sensitive adhesives market and provides them information on key market drivers, restraints, challenges, and opportunities.

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The report “Pressure Sensitive Adhesives Market by Technology Types (Water Based, Solvent Based, Hot Melt & Radiation), by Applications (Industrial Tapes, Specialty, Medical Tapes and Others), and by Region - Global Trends & Forecasts to 2020”, defines and segments the PSA market with analysis and forecasts of the market size.

The global pressure sensitive adhesives market in terms of volume is projected to reach \$8,501.06 Million by 2020.

Asia-Pacific is the major customer of PSA in the world. Henkel Adhesives Technologies India Pvt. Ltd. (India), H.B. Fuller Korea Ltd. (South Korea), Scapa Tapes India Ltd. (India), and 3M India Ltd. are the leading players in the Asia-Pacific market. Asia-Pacific countries are flexible regarding laws and regulations for VOC emissions, and as a result, solvent-based technologies are also growing in these markets. The demand for commodities and appliances in this region is huge and this is the key driving factor for PSA demand in applications such as tapes, labels, graphics, and so on. The automobile industry continues to grow highly in Asia-Pacific markets, such as China and India, which leverage the demand of tapes for automobile applications. China is the largest market for PSA due to strong governmental support for FDI, no political interference, and favorable economic conditions.

In the lights of ever-tightening governmental and environmental legislation and regulations to reduce VOC emissions, the PSA industry is rapidly changing from solvent-based to water-based technology for manufacturing adhesives. Water-based technology is a globally accepted technology and is much cheaper than solvent-based technology. A wide variety of materials such as acrylics, natural rubber, and styrene butadiene can be used with this technology effectively. Using water-based technology leads to a safer work place and there are lesser chances of hazards.

Among the various applications of PSA, labels represent the largest market for pressure sensitive adhesives. Labels find wide applications in medical, food packaging, commodities, general purpose products, pharmaceuticals, cosmetics, and so on.

Industrial tape is among the largest market for PSAs due to its applications in aerospace, automotive, construction, marine, and other sectors. Industrial tapes are further classified as cloth, masking, and packaging tapes.

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