

# **Automotive Adhesives Market Forecasts to 2034 – Global Analysis By Resin Type (Polyurethane (PU), Epoxy, Acrylic, Silicone, Polyvinyl Acetate (PVA), Cyanoacrylate, Rubber-Based Adhesives, Anaerobic Adhesives, and Other Resin Types), Technology, Vehicle Type, Substrate, Application, End Use, and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Automotive Adhesives Market is accounted for \$8.5 billion in 2026 and is expected to reach \$14.1 billion by 2034 growing at a CAGR of 6.5% during the forecast period. Automotive adhesives are specialized bonding materials used in vehicle assembly to join various substrates including metals, plastics, composites, and glass. These adhesives provide structural integrity, sealing, noise reduction, and corrosion protection while enabling lightweighting and design flexibility in modern vehicles. The market encompasses various technologies including water-based adhesives, solvent-based adhesives, hot melt adhesives, reactive adhesives, and pressure-sensitive adhesives, serving passenger cars, light commercial vehicles, heavy commercial vehicles, buses and coaches, and off-highway vehicles. Growing demand for lightweight vehicles, increasing use of mixed materials in automotive construction, rising emphasis on vehicle safety and crashworthiness, and expanding electric vehicle production are key drivers of market expansion across all regions.

Market Dynamics:

Driver:

Growing demand for lightweight vehicles and fuel efficiency

The increasing emphasis on vehicle lightweighting to improve fuel efficiency and reduce emissions is a primary driver for the automotive adhesives market. Adhesives enable the joining of dissimilar materials including aluminum, composites, and plastics, facilitating weight reduction without compromising structural integrity. Structural adhesives distribute stress more evenly than mechanical fasteners, enabling thinner, lighter material usage. Electric vehicles particularly benefit from lightweighting to extend range, creating additional adhesive demand. Regulatory pressure on emissions and fuel economy is accelerating lightweighting adoption. As automakers pursue weight reduction strategies, adhesive content per vehicle continues increasing, driving sustained market expansion.

#### Restraint:

##### High formulation costs and manufacturing complexity

The significant costs associated with advanced adhesive formulations and integration into manufacturing processes represent a major restraint for the market. High-performance structural adhesives require complex formulations with specialized chemical components, increasing material costs. Application and curing processes require specialized equipment and precise temperature control, adding manufacturing complexity and investment. Automakers must modify assembly processes and train personnel for adhesive application. Quality control requirements including bond strength testing and surface preparation add operational costs. These cost and manufacturing challenges may limit adhesive adoption in cost-sensitive vehicle segments.

#### Opportunity:

##### Growing adoption of electric vehicles and battery assembly

The rapid expansion of electric vehicle production presents significant opportunities for the automotive adhesives market. Electric vehicles require adhesives for battery pack assembly, including structural bonding of battery cells, thermal management materials, and encapsulation. Thermal interface materials and electrically conductive adhesives are essential for battery performance and safety. Adhesives enable lightweight battery enclosure design and crash protection. Growing EV production volumes and increasing battery complexity are driving demand for specialized adhesives. As EV adoption accelerates and battery technologies advance, automotive adhesives capture growing market share in this fast-growing segment.

#### Threat:

##### Competition from mechanical fastening technologies

Intense competition from established mechanical fastening methods including welding, riveting, and bolting poses significant threats to the automotive adhesives market. Mechanical fastening has long-established manufacturing infrastructure, workforce familiarity, and proven reliability. Adhesives may face skepticism regarding long-term durability and environmental resistance. Higher upfront costs compared to fasteners may limit adoption in cost-sensitive applications. Mechanical fastening remains preferred for serviceable components requiring disassembly. This competition may slow adhesive penetration, particularly in traditional vehicle segments where established methods dominate.

#### Covid-19 Impact:

The COVID-19 pandemic had a significant impact on the automotive adhesives market. Vehicle production shutdowns and supply chain disruptions temporarily affected adhesive demand. Semiconductor shortages further impacted production volumes. However, the pandemic accelerated focus on electric vehicles and lightweighting as part of automotive industry recovery and sustainability strategies. Recovery in vehicle production post-pandemic has supported adhesive demand growth. Automakers continue investing in lightweighting and mixed-material construction for electric vehicles and fuel efficiency, driving adhesive adoption.

The Reactive Adhesives segment is expected to be the largest during the forecast period

The Reactive Adhesives segment is expected to account for the largest market share during the forecast period, driven by their superior bonding strength, durability, and performance in structural applications. Reactive adhesives including epoxies, polyurethanes, and acrylics cure through chemical reactions, providing high strength and environmental resistance essential for structural bonding applications. The segment benefits from widespread adoption in automotive assembly for body structures, bonding of dissimilar materials, and structural reinforcement. Performance advantages justify premium pricing. As automakers seek lightweighting and mixed-material construction, reactive adhesives maintain the largest technology segment share.

The Passenger Cars segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Passenger Cars segment is predicted to witness the highest growth rate, fueled by the massive production volumes of passenger vehicles, increasing adhesive content per vehicle, and growing adoption of lightweighting strategies in passenger car manufacturing. Passenger cars represent the largest vehicle production segment globally, creating substantial adhesive demand. The segment benefits from continuous innovation in vehicle design and material usage. Growing electric vehicle production within the passenger car segment drives additional adhesive demand. Rising consumer expectations for comfort and noise reduction support adhesive adoption. As passenger car production grows and adhesive content increases, this vehicle type delivers the fastest segment growth.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share, supported by the world's largest vehicle production base, rapid electric vehicle adoption, and expanding automotive manufacturing. China leads global automotive production, creating substantial adhesive demand. Japan, South Korea, and India maintain strong manufacturing positions. The region's complete automotive supply chain and material suppliers provide competitive advantages. Government policies supporting EV adoption and lightweighting accelerate technology deployment. With the world's largest vehicle production and rapid electrification, Asia Pacific maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by continued vehicle production growth, rapid electrification, and increasing adoption of advanced automotive materials across China, India, and Southeast Asia. The region's large and growing automotive market creates substantial demand for advanced adhesive solutions. Rising middle-class populations and vehicle ownership expand the addressable market. Automaker investment in electric and lightweight vehicles supports adoption. Government policies promoting fuel efficiency and EV adoption are accelerating. As vehicle production and technology adoption continue expanding, Asia Pacific delivers the fastest automotive adhesives market growth globally.

## Key players in the market

Some of the key players in Automotive Adhesives Market include Henkel AG & Co. KGaA, 3M Company, H.B. Fuller Company, Sika AG, Arkema S.A. (Bostik), Dow Inc., Huntsman Corporation, Avery Dennison Corporation, Jowat SE, DELO Industrie Klebstoffe GmbH & Co. KGaA, Pidilite Industries Limited, Permabond LLC, Franklin International, ITW Performance Polymers, Ashland Inc., and Master Bond Inc.

## Key Developments:

In May 2026, H.B. Fuller submitted a strategic acquisition proposal for Advanced Medical Solutions Group plc while reaffirming its core portfolio growth in high-margin specialized industrial and automotive bonding markets.

In February 2026, Sika received the 2026 German Sustainability Award for its SikaBaffle AutoStack system, highlighting its cold-curing structural adhesives that enable modular vehicle body assembly without traditional welding energy costs.

In January 2026, Henkel signed a definitive agreement to acquire ATP Adhesive Systems, a Switzerland-based specialist in high-performance water-based specialty tapes serving automotive, electronics, and construction sectors, to expand its structural bonding capabilities beyond liquid adhesives.

## Resin Types Covered:

Polyurethane (PU)

Epoxy

Acrylic

Silicone

Polyvinyl Acetate (PVA)

Cyanoacrylate

Rubber-Based Adhesives

Anaerobic Adhesives

Other Resin Types

Technologies Covered:

Water-Based Adhesives

Solvent-Based Adhesives

Hot Melt Adhesives

Reactive Adhesives

Pressure-Sensitive Adhesives

Vehicle Types Covered:

Passenger Cars

Light Commercial Vehicles

Heavy Commercial Vehicles

Buses and Coaches

Off-Highway Vehicles

Substrates Covered:

Metals

Plastics

Composites

Glass

Rubber

Foam

Fabrics and Textiles

#### Applications Covered:

Body-in-White (Structural Bonding)

Exterior Assembly

Interior Assembly

Powertrain and Under-the-Hood

Glazing

Battery Systems

Electronics and Electrical Components

Seating and Trim Assembly

#### End Uses Covered:

Original Equipment Manufacturers (OEMs)

Automotive Aftermarket

#### Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

### **2 RESEARCH FRAMEWORK**

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
  - 2.4.1 Data Collection (Primary and Secondary)
  - 2.4.2 Data Modeling and Estimation Techniques
  - 2.4.3 Data Validation and Triangulation
  - 2.4.4 Analytical and Forecasting Approach

### **3 MARKET DYNAMICS AND TREND ANALYSIS**

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

### **4 COMPETITIVE AND STRATEGIC ASSESSMENT**

- 4.1 Porter's Five Forces Analysis
  - 4.1.1 Supplier Bargaining Power
  - 4.1.2 Buyer Bargaining Power
  - 4.1.3 Threat of Substitutes
  - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

## **5 GLOBAL AUTOMOTIVE ADHESIVES MARKET, BY RESIN TYPE**

- 5.1 Polyurethane (PU)
- 5.2 Epoxy
- 5.3 Acrylic
- 5.4 Silicone
- 5.5 Polyvinyl Acetate (PVA)
- 5.6 Cyanoacrylate
- 5.7 Rubber-Based Adhesives
- 5.8 Anaerobic Adhesives
- 5.9 Other Resin Types

## **6 GLOBAL AUTOMOTIVE ADHESIVES MARKET, BY TECHNOLOGY**

- 6.1 Water-Based Adhesives
- 6.2 Solvent-Based Adhesives
- 6.3 Hot Melt Adhesives
- 6.4 Reactive Adhesives
- 6.5 Pressure-Sensitive Adhesives

## **7 GLOBAL AUTOMOTIVE ADHESIVES MARKET, BY VEHICLE TYPE**

- 7.1 Passenger Cars
- 7.2 Light Commercial Vehicles
- 7.3 Heavy Commercial Vehicles
- 7.4 Buses and Coaches
- 7.5 Off-Highway Vehicles

## **8 GLOBAL AUTOMOTIVE ADHESIVES MARKET, BY SUBSTRATE**

- 8.1 Metals
- 8.2 Plastics
- 8.3 Composites
- 8.4 Glass
- 8.5 Rubber

8.6 Foam

8.7 Fabrics and Textiles

## **9 GLOBAL AUTOMOTIVE ADHESIVES MARKET, BY APPLICATION**

9.1 Body-in-White (Structural Bonding)

9.2 Exterior Assembly

9.3 Interior Assembly

9.4 Powertrain and Under-the-Hood

9.5 Glazing

9.6 Battery Systems

9.7 Electronics and Electrical Components

9.8 Seating and Trim Assembly

## **10 GLOBAL AUTOMOTIVE ADHESIVES MARKET, BY END USE**

10.1 Original Equipment Manufacturers (OEMs)

10.2 Automotive Aftermarket

## **11 GLOBAL AUTOMOTIVE ADHESIVES MARKET, BY GEOGRAPHY**

11.1 North America

11.1.1 United States

11.1.2 Canada

11.1.3 Mexico

11.2 Europe

11.2.1 United Kingdom

11.2.2 Germany

11.2.3 France

11.2.4 Italy

11.2.5 Spain

11.2.6 Netherlands

11.2.7 Belgium

11.2.8 Sweden

11.2.9 Switzerland

11.2.10 Poland

11.2.11 Rest of Europe

11.3 Asia Pacific

11.3.1 China

- 11.3.2 Japan
- 11.3.3 India
- 11.3.4 South Korea
- 11.3.5 Australia
- 11.3.6 Indonesia
- 11.3.7 Thailand
- 11.3.8 Malaysia
- 11.3.9 Singapore
- 11.3.10 Vietnam
- 11.3.11 Rest of Asia Pacific
- 11.4 South America
  - 11.4.1 Brazil
  - 11.4.2 Argentina
  - 11.4.3 Colombia
  - 11.4.4 Chile
  - 11.4.5 Peru
  - 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
  - 11.5.1 Middle East
    - 11.5.1.1 Saudi Arabia
    - 11.5.1.2 United Arab Emirates
    - 11.5.1.3 Qatar
    - 11.5.1.4 Israel
    - 11.5.1.5 Rest of Middle East
  - 11.5.2 Africa
    - 11.5.2.1 South Africa
    - 11.5.2.2 Egypt
    - 11.5.2.3 Morocco
    - 11.5.2.4 Rest of Africa

## **12 STRATEGIC MARKET INTELLIGENCE**

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping
- 12.3 Product Evolution and Market Life Cycle Analysis
- 12.4 Channel, Distributor, and Go-to-Market Assessment

## **13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES**

- 13.1 Mergers and Acquisitions
- 13.2 Partnerships, Alliances, and Joint Ventures
- 13.3 New Product Launches and Certifications
- 13.4 Capacity Expansion and Investments
- 13.5 Other Strategic Initiatives

## **14 COMPANY PROFILES**

- 14.1 Henkel AG & Co. KGaA
- 14.2 3M Company
- 14.3 H.B. Fuller Company
- 14.4 Sika AG
- 14.5 Arkema S.A. (Bostik)
- 14.6 Dow Inc.
- 14.7 Huntsman Corporation
- 14.8 Avery Dennison Corporation
- 14.9 Jowat SE
- 14.10 DELO Industrie Klebstoffe GmbH & Co. KGaA
- 14.11 Pidilite Industries Limited
- 14.12 Permabond LLC
- 14.13 Franklin International
- 14.14 ITW Performance Polymers
- 14.15 Ashland Inc.
- 14.16 Master Bond Inc.

## List Of Tables

### LIST OF TABLES

Table 1 Global Automotive Adhesives Market Outlook, By Region (2023–2034) (\$MN)

Table 2 Global Automotive Adhesives Market Outlook, By Resin Type (2023–2034) (\$MN)

Table 3 Global Automotive Adhesives Market Outlook, By Polyurethane (PU) (2023–2034) (\$MN)

Table 4 Global Automotive Adhesives Market Outlook, By Epoxy (2023–2034) (\$MN)

Table 5 Global Automotive Adhesives Market Outlook, By Acrylic (2023–2034) (\$MN)

Table 6 Global Automotive Adhesives Market Outlook, By Silicone (2023–2034) (\$MN)

Table 7 Global Automotive Adhesives Market Outlook, By Polyvinyl Acetate (PVA) (2023–2034) (\$MN)

Table 8 Global Automotive Adhesives Market Outlook, By Cyanoacrylate (2023–2034) (\$MN)

Table 9 Global Automotive Adhesives Market Outlook, By Rubber-Based Adhesives (2023–2034) (\$MN)

Table 10 Global Automotive Adhesives Market Outlook, By Anaerobic Adhesives (2023–2034) (\$MN)

Table 11 Global Automotive Adhesives Market Outlook, By Other Resin Types (2023–2034) (\$MN)

Table 12 Global Automotive Adhesives Market Outlook, By Technology (2023–2034) (\$MN)

Table 13 Global Automotive Adhesives Market Outlook, By Water-Based Adhesives (2023–2034) (\$MN)

Table 14 Global Automotive Adhesives Market Outlook, By Solvent-Based Adhesives (2023–2034) (\$MN)

Table 15 Global Automotive Adhesives Market Outlook, By Hot Melt Adhesives (2023–2034) (\$MN)

Table 16 Global Automotive Adhesives Market Outlook, By Reactive Adhesives (2023–2034) (\$MN)

Table 17 Global Automotive Adhesives Market Outlook, By Pressure-Sensitive Adhesives (2023–2034) (\$MN)

Table 18 Global Automotive Adhesives Market Outlook, By Vehicle Type (2023–2034) (\$MN)

Table 19 Global Automotive Adhesives Market Outlook, By Passenger Cars (2023–2034) (\$MN)

Table 20 Global Automotive Adhesives Market Outlook, By Light Commercial Vehicles

(2023–2034) (\$MN)

Table 21 Global Automotive Adhesives Market Outlook, By Heavy Commercial Vehicles (2023–2034) (\$MN)

Table 22 Global Automotive Adhesives Market Outlook, By Buses and Coaches (2023–2034) (\$MN)

Table 23 Global Automotive Adhesives Market Outlook, By Off-Highway Vehicles (2023–2034) (\$MN)

Table 24 Global Automotive Adhesives Market Outlook, By Substrate (2023–2034) (\$MN)

Table 25 Global Automotive Adhesives Market Outlook, By Metals (2023–2034) (\$MN)

Table 26 Global Automotive Adhesives Market Outlook, By Plastics (2023–2034) (\$MN)

Table 27 Global Automotive Adhesives Market Outlook, By Composites (2023–2034) (\$MN)

Table 28 Global Automotive Adhesives Market Outlook, By Glass (2023–2034) (\$MN)

Table 29 Global Automotive Adhesives Market Outlook, By Rubber (2023–2034) (\$MN)

Table 30 Global Automotive Adhesives Market Outlook, By Foam (2023–2034) (\$MN)

Table 31 Global Automotive Adhesives Market Outlook, By Fabrics and Textiles (2023–2034) (\$MN)

Table 32 Global Automotive Adhesives Market Outlook, By Application (2023–2034) (\$MN)

Table 33 Global Automotive Adhesives Market Outlook, By Body-in-White (Structural Bonding) (2023–2034) (\$MN)

Table 34 Global Automotive Adhesives Market Outlook, By Exterior Assembly (2023–2034) (\$MN)

Table 35 Global Automotive Adhesives Market Outlook, By Interior Assembly (2023–2034) (\$MN)

Table 36 Global Automotive Adhesives Market Outlook, By Powertrain and Under-the-Hood (2023–2034) (\$MN)

Table 37 Global Automotive Adhesives Market Outlook, By Glazing (2023–2034) (\$MN)

Table 38 Global Automotive Adhesives Market Outlook, By Battery Systems (2023–2034) (\$MN)

Table 39 Global Automotive Adhesives Market Outlook, By Electronics and Electrical Components (2023–2034) (\$MN)

Table 40 Global Automotive Adhesives Market Outlook, By Seating and Trim Assembly (2023–2034) (\$MN)

Table 41 Global Automotive Adhesives Market Outlook, By End Use (2023–2034) (\$MN)

Table 42 Global Automotive Adhesives Market Outlook, By Original Equipment Manufacturers (OEMs) (2023–2034) (\$MN)

Table 43 Global Automotive Adhesives Market Outlook, By Automotive Aftermarket  
(2023–2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World  
(RoW) Regions are also represented in the same manner as above.

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