

# **Eco-Friendly Adhesives Market Forecasts to 2034 – Global Analysis By Type (Water-Based Adhesives, Bio-Based (Plant-Based) Adhesives, Biodegradable Adhesives, Recyclable Adhesives, Repulpable Adhesives, Green / Low-VOC Adhesives, Solvent-Free Adhesives, and UV-Curable Eco Adhesives), Raw Material, Technology, Formulation, Performance, End-Use Industry, Distribution Channel, and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Eco-Friendly Adhesives Market is accounted for \$2.3 billion in 2026 and is expected to reach \$4.0 billion by 2034 growing at a CAGR of 7.3% during the forecast period. Eco-friendly adhesives are bonding agents formulated with sustainable, non-toxic, and low-emission ingredients that minimize environmental impact throughout their lifecycle, from raw material extraction to disposal. These adhesives serve as alternatives to traditional solvent-based products that release volatile organic compounds (VOCs) and rely on petrochemical feedstocks. The market encompasses water-based formulations, bio-derived polymers, biodegradable options, and recyclable bonding solutions across packaging, construction, woodworking, automotive, and consumer goods industries, driven by tightening environmental regulations and shifting corporate sustainability commitments worldwide.

Market Dynamics:

Driver:

Stringent environmental regulations on VOC emissions

Governments across North America and Europe have implemented rigorous limits on volatile organic compound emissions from industrial and consumer products, directly favoring eco-friendly adhesive adoption. Regulatory frameworks such as the Clean Air Act amendments and EU's Industrial Emissions Directive impose substantial penalties on non-compliant manufacturers while offering incentives for green chemistry adoption. These regulations have forced adhesive producers to reformulate traditional solvent-based products or face market exclusion. The construction and automotive sectors, historically heavy users of high-VOC adhesives, are now mandated to use low-emission alternatives in interior applications, creating sustained demand for water-based and solvent-free bonding solutions across multiple industrial verticals.

#### Restraint:

Higher production costs compared to conventional adhesives

Manufacturing eco-friendly adhesives typically requires specialized raw materials, advanced processing equipment, and rigorous quality control protocols that drive production expenses above traditional alternatives. Plant-based feedstocks, biodegradable polymers, and water-based formulations often carry premium costs compared to petroleum-derived precursors, particularly when supply chains for renewable materials remain less mature. These elevated costs translate into higher product pricing for end-users, creating adoption barriers in price-sensitive industries and developing economies. Manufacturers serving packaging or woodworking sectors with thin profit margins face difficult decisions between absorbing additional costs or losing market share to conventional adhesive producers operating with cheaper, VOC-laden formulations.

#### Opportunity:

Growing demand from sustainable packaging sector

The global shift away from single-use plastics and toward recyclable, compostable packaging has created exceptional growth opportunities for eco-friendly adhesive formulators. Brands across food, beverage, and e-commerce sectors are redesigning packaging to meet circular economy principles, requiring adhesives that do not contaminate recycling streams or inhibit biodegradation processes. Repulpable adhesives enabling paper recycling, biodegradable bonding for compostable mailers, and water-dispersible formulations for label removal represent rapidly expanding

product categories. As major consumer goods companies commit to 100% recyclable packaging by 2030, adhesive suppliers who develop compatible sustainable bonding solutions will capture substantial market share in this high-volume application segment.

#### Threat:

##### Performance limitations in extreme conditions

Eco-friendly adhesives have historically struggled to match the bonding strength, moisture resistance, and temperature tolerance of conventional solvent-based and epoxy formulations. Water-based and bio-derived products may exhibit reduced performance in high-humidity environments, outdoor exposures, or structural load-bearing applications where traditional adhesives excel. These limitations restrict green adhesive adoption in demanding industrial sectors including aerospace, marine, and heavy construction. While ongoing research continues to close performance gaps, end-users requiring mission-critical bonding reliability remain hesitant to substitute conventional products. This perception of compromised durability, whether fully justified or not, continues to slow market penetration in technically demanding applications.

#### Covid-19 Impact:

The COVID-19 pandemic generated mixed effects on the eco-friendly adhesives market, disrupting supply chains while accelerating certain demand drivers. Lockdowns temporarily halted construction projects and industrial manufacturing, reducing adhesive consumption across automotive and building sectors. However, the surge in e-commerce and packaged goods delivery dramatically increased demand for sustainable packaging, including eco-friendly bonding solutions for corrugated boxes and recyclable mailers. Healthcare-related packaging requirements for medical supplies also boosted consumption. The pandemic heightened awareness of indoor air quality as people spent more time in enclosed spaces, increasing preference for low-VOC and solvent-free adhesives in residential applications, a behavioral shift that continues supporting market growth post-pandemic.

The Water-Based Adhesives segment is expected to be the largest during the forecast period

The Water-Based Adhesives segment is expected to account for the largest market share during the forecast period, supported by their established manufacturing infrastructure, favorable regulatory standing, and broad industrial applicability. These

formulations use water as a carrier medium rather than organic solvent, dramatically reducing VOC emissions while providing reliable bonding for porous and semi-porous substrates. Applications across paper and packaging, woodworking, bookbinding, and tapes rely heavily on water-based technologies due to their safety profile and cost-effectiveness. The segment benefits from decades of formulation refinement, resulting in performance characteristics that often match or exceed conventional alternatives while maintaining compliance with stringent environmental regulations across major global markets.

The Bio-Based (Plant-Based) Adhesives segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Bio-Based (Plant-Based) Adhesives segment is predicted to witness the highest growth rate, reflecting accelerating corporate commitments to reduce fossil fuel dependency across supply chains. These adhesives derive their polymer structures from renewable feedstocks including corn, soy, cassava, and lignin, offering carbon footprint reductions compared to petroleum-based alternatives. Innovations in starch chemistry and protein modification have substantially improved bonding strength and moisture resistance, expanding application possibilities beyond paper and packaging into wood composites and even select automotive interior assemblies. As major consumer brands pursue bio-based content targets and governments offer tax incentives for renewable material utilization, plant-based adhesive adoption will accelerate rapidly throughout the forecast period.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, driven by stringent EPA regulations on VOC emissions and the region's advanced sustainable packaging infrastructure. Major adhesive manufacturers headquartered in the United States have invested heavily in eco-friendly product lines to serve demanding customers in food and beverage, healthcare, and e-commerce packaging sectors. The region's construction industry recovery, emphasizing green building certifications such as LEED, further boosts demand for low-emission bonding solutions in residential and commercial projects. Strong enforcement of environmental standards, combined with corporate sustainability leadership among Fortune 500 companies, ensures North America maintains its dominant market position throughout the forecast period.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapid industrialization and tightening environmental regulations in China, India, and Southeast Asian nations. These countries are transitioning from manufacturing-based economies toward higher-value production while simultaneously addressing severe air quality challenges, creating regulatory pressure for low-VOC and solvent-free adhesive adoption. The region's massive packaging industry, serving both domestic consumption and export markets, increasingly requires eco-friendly bonding solutions to meet international buyer specifications. Government subsidies for bio-based chemical production and growing consumer awareness of indoor air quality further accelerate the shift away from conventional solvent-based adhesives across Asia Pacific's manufacturing landscape.

#### Key players in the market

Some of the key players in Eco-Friendly Adhesives Market include Henkel AG & Co. KGaA, 3M Company, Sika AG, Arkema SA, H.B. Fuller Company, Dow Inc., Ashland Inc., Avery Dennison Corporation, Bostik SA, Permabond LLC, Wacker Chemie AG, Pidilite Industries Limited, Dymax Corporation, Momentive Performance Materials Inc., and Illinois Tool Works Inc.

#### Key Developments:

In March 2026, Arkema prepared to showcase its new ENCOR® bio-based waterborne dispersions at Techtextil 2026. These binders feature up to 30% bio-based content and offer a 40% reduction in carbon footprint compared to traditional textile resins.

In February 2026, Sika reached an agreement to acquire Akkim, a leading manufacturer of adhesives and sealants. This acquisition is a core component of Sika's Strategy 2028, aimed at expanding its global footprint in the high-growth green construction and distribution channels.

In January 2026, Under the '3M eXcellence' operating system, 3M confirmed it is on track to launch 1,000 new products by 2027, with a heavy emphasis on circular materials and the elimination of virgin fossil-based plastics in its industrial adhesive lines.

#### Types Covered:

Water-Based Adhesives

Bio-Based (Plant-Based) Adhesives

Biodegradable Adhesives

Recyclable Adhesives

Repulpable Adhesives

Green / Low-VOC Adhesives

Solvent-Free Adhesives

UV-Curable Eco Adhesives

#### Raw Materials Covered:

Water-Based Polymers

Plant-Based / Renewable Feedstocks

EVA-Based Adhesives

Acrylic-Based Adhesives

Polyurethane (Bio-based variants)

Natural Polymers

#### Technologies Covered:

Water-Based Technology

Hot-Melt Technology

Reactive & UV-Curable Technology

Pressure-Sensitive Adhesives

Solvent-Free Technology

Formulations Covered:

Liquid Adhesives

Solid Adhesives

Gel Adhesives

Film Adhesives

Performance Characteristics Covered:

High Strength Adhesives

Flexible Adhesives

Heat-Resistant Adhesives

Moisture-Resistant Adhesives

Fast-Curing Adhesives

End-Use Industries Covered:

Packaging Industry

Construction Industry

Automotive Industry

Consumer Goods Industry

Healthcare Industry

Electronics Industry

Industrial Manufacturing

Distribution Channels Covered:

Direct Sales (B2B)

Distributors & Wholesalers

Online Sales Channels

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

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