

China Adhesives Market By Resin Type (Acrylic, Cyanoacrylate, Epoxy, Polyurethane, Silicone, VAE/EVA, Others), By Technology (Hot Melt, Reactive, Solvent-borne, UV Cured Adhesives, Water-borne), By End Use Industry (Aerospace, Automotive, Construction, Healthcare, Packaging, Others), By Region, Competition, Forecast and Opportunities, 2028

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Abstracts

In 2022, the China Adhesives Market reached a valuation of USD 14.56 billion, and it is expected to exhibit robust growth throughout the forecast period, with a Compound Annual Growth Rate (CAGR) of 4.43% projected through 2028 and is expected to reach at 18.69 billion by 2028.. Adhesives play a pivotal role in diverse sectors, including construction, automotive, and packaging. These adhesives are categorized based on polymer types, such as acrylics, vinyls, polyurethane, and rubber-based adhesives. Water-based adhesives, known for their eco-friendliness and zero Volatile Organic Compound (VOC) emissions, find applications in labels, packaging, woodworking, textiles, construction, high-pressure laminate bonding, and lightweight systems in the automobile industry.

The adhesive market in China is experiencing significant growth driven by booming infrastructure and construction activities, as well as the expansion of the automotive manufacturing sector. Concerns regarding harmful VOC emissions from solvent-based adhesives are propelling the shift towards bio-based alternatives. Furthermore, continuous advancements in adhesive technologies are expanding their capabilities, including improved bonding strength, faster curing, higher temperature resistance, and

enhanced flexibility, thereby widening the range of applications. Technological innovations continue to drive product development and customization to meet industry-specific requirements, fostering market growth. Adhesive manufacturers are also investing in research and development to introduce advanced products with enhanced performance, durability, and efficiency. Continuous innovation enables the development of adhesives that can bond to various substrates, withstand extreme environments, and offer specialized properties. R&D activities play a vital role in expanding application possibilities and enhancing overall product quality, thereby driving market growth.

Key Market Drivers:

1. Growing Demand for Adhesives in the Packaging Industry:

China's prominence as a global manufacturing hub has led to remarkable growth in its adhesives market, largely attributed to the rising demand for innovative packaging solutions. Packaging has evolved into a critical component of branding, product information conveyance, and convenience enhancement. Adhesives play a pivotal role in achieving these objectives by providing secure bonding, flexibility, and customization options. The global shift towards sustainable practices has significantly influenced the packaging industry. Adhesives facilitate the use of recyclable materials and reduce excessive packaging, enabling eco-friendly packaging creation. China's commitment to environmental conservation has further accelerated this trend, resulting in a growing demand for adhesives that support sustainable packaging solutions. Adhesives offer a wide range of design and functionality possibilities, from self-adhesive labels to resealable closures, enhancing both convenience and aesthetic appeal. The rapid growth of e-commerce has reshaped the packaging landscape, necessitating packaging that ensures product integrity and protection during shipping. Adhesives play a critical role in securing packages during transit, safeguarding the product, and enhancing the customer experience. Technological advancements in adhesives have resulted in products with enhanced bonding capabilities, resistance to temperature fluctuations, and improved durability, particularly valuable in packaging for food, electronics, and sensitive products. China's position as a manufacturing powerhouse positions it at the forefront of the packaging revolution.

2. Growing Demand for Adhesives in the Construction Industry:

China, as the largest global construction market, has witnessed a steady increase in the demand for adhesives due to their role in enhancing structural integrity, efficiency, and sustainability. Traditionally, construction relied on mechanical fastening methods like

nails, screws, and bolts, which introduced weaknesses such as potential corrosion and material stress concentrations. In contrast, adhesives offer seamless bonding that evenly distributes stresses, minimizing vulnerabilities. Adhesives are compatible with various substrates, including concrete, steel, glass, and composites, providing improved durability, reduced weight, and enhanced design flexibility. They are especially attractive for architects, engineers, and contractors. Adhesives enhance the structural integrity of buildings by evenly distributing loads and stresses, resulting in improved load-bearing capacity and performance, critical for high-rise buildings and structures subject to dynamic loads. Adhesive application is often faster and requires less labor than traditional methods, reducing construction timelines and costs. Additionally, adhesives enable innovative architectural designs previously unattainable. Modern adhesives withstand harsh environmental conditions, temperature fluctuations, and chemical exposure, resulting in longer-lasting and more resilient constructions. Adhesives also contribute to improved energy efficiency by eliminating thermal bridging and reducing energy consumption for heating and cooling. China's rapid urbanization and infrastructure development have generated unprecedented demand for new construction projects, further driving the adoption of innovative construction methods and adhesive use. Domestic adhesive manufacturers have invested significantly in research and development to produce products tailored to the construction sector's unique demands, offering a diverse range of adhesives, including high-strength structural adhesives and weather-resistant options ideal for external cladding.

3. Growing Demand for Adhesives in the Healthcare Industry:

The healthcare industry's pivotal role in providing medical care and treatments has led to a surge in the demand for adhesives, particularly in China, with its robust healthcare infrastructure and expanding population. Medical devices, including wound dressings, surgical tapes, and drug delivery systems, require durable and reliable adhesives to ensure effective adherence and patient comfort. Advancements in surgical techniques, such as minimally invasive procedures, have shifted the demand towards adhesives for secure attachment of medical devices within the body. Adhesive-based wound dressings have revolutionized wound care management, offering infection barriers, facilitating healing, and enhancing patient comfort. The rising prevalence of chronic wounds has spurred demand for advanced adhesive dressings in China. The growing aging population, susceptible to chronic wounds and mobility-related issues, further drives the demand for medical adhesives. Healthcare technological innovations, including wearable medical devices and advanced surgical procedures, rely on adhesives for successful implementation. China's focus on technological advancements in healthcare creates a favorable environment for the growth of the adhesive market.

Adhesive manufacturers in China are developing specialized adhesives that meet stringent healthcare sector requirements, ensuring biocompatibility, non-toxicity, and strong bonding properties while adhering to strict quality and safety standards imposed by regulatory authorities.

Challenges:

Volatility in Prices of Raw Materials:

The prices of key raw materials used in adhesive formulations, including resins, solvents, additives, and fillers, are subject to significant fluctuations due to supply disruptions, changes in global demand, currency fluctuations, and geopolitical events. These fluctuations directly impact production costs, which can squeeze profit margins and challenge competitive pricing. Volatility in raw material prices can disrupt the supply chain, leading to production delays and impacting customer orders. The unpredictability of raw material prices makes long-term planning and forecasting difficult, affecting decision-making processes, inventory management, and resource allocation. Adhesive manufacturers must continuously monitor market trends to mitigate the impact of price volatility on operations, making it challenging to balance profitability and market competitiveness.

Trends:

Growing Technological Advancements:

Technological advancements have been a significant driver of the adhesives market in China, particularly in the electronics sector. Adhesives for electronic devices require high-performance characteristics, including enhanced bonding strength, thermal conductivity, and protection against environmental factors. China's role as a major electronics manufacturing hub has created substantial demand for advanced electronic adhesives. The rollout of 5G technology has further driven technological advancements, necessitating adhesives capable of withstanding high-frequency vibrations and extreme temperatures. These technological innovations facilitate the seamless integration of 5G infrastructure. Additionally, China's focus on sustainability has led to the development of eco-friendly adhesives, aligning with environmental regulations and reducing the environmental impact of industrial processes.

Segmental Insights:

Resin Type Insights:

In 2022, polyurethane dominated the adhesive market and is projected to continue expanding. Polyurethane adhesives are versatile and suitable for various applications, offering strong and durable bonds across different materials, making them ideal for industries such as automotive, construction, electronics, and footwear.

End-Use Industry Insights:

The packaging segment dominated the adhesive market in 2022 and is expected to continue growing. China's economic growth, urbanization, and consumerism have led to increased demand for packaged goods, driving the use of adhesives in packaging applications. Sustainable packaging materials and adhesives are being developed to align with environmental regulations.

Regional Insights:

The South-Central region, encompassing provinces like Guangdong, Hunan, Hubei, and Jiangxi, leads the China Adhesives Market. This region's strong industrial base, including electronics, automotive, packaging, and construction industries, drives significant demand for various adhesives, establishing South-Central China's dominance in the market.

Key Market Players

Henkel (China) Investment Co. Ltd.

3M China Limited

Huntsman Corporation

Beijing Comens New Materials Co. Ltd.

Shanghai Kangda New Materials Co. Ltd.

Qingdao Winlong Chemical Industrial Co., Ltd.

Report Scope:

China Adhesives Market By Resin Type (Acrylic, Cyanoacrylate, Epoxy, Polyurethane, Silicone, VAE/EVA, Others),...

In this report, the China Adhesives Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

China Adhesives Market, By Resin Type:

Acrylic

Cyanoacrylate

Epoxy

Polyurethane

Silicone

VAE/EVA

Others

China Adhesives Market, By Technology:

Hot Melt

Reactive

Solvent-borne

UV Cured Adhesives

Water-borne

China Adhesives Market, By End Use Industry:

Aerospace

Automotive

Construction

Healthcare

Packaging

Others

China Adhesives Market, By Region:

East

North & North-East

Southwest

South-Central

Northwest

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the China Adhesives Market.

Available Customizations:

China Adhesives Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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