

# **Nonwoven Adhesives Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented by Type (Amorphous Poly Alpha Olefin, Ethylene Vinyl Acetate, and Styrenic Block Copolymer), By Application (Adult Incontinence, Baby Care, Feminine Hygiene, and Medical), By Technology (Hot-Melt and Water-Based), By Region and competition**

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## **Abstracts**

Global Nonwoven Adhesives Market has valued at USD 2.97 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.69% through 2028.

The global nonwoven adhesives market is a dynamic and rapidly evolving segment of the adhesives industry, serving a wide range of applications across various sectors, including hygiene, medical, and packaging. Nonwoven adhesives are vital for bonding nonwoven materials, such as fabrics, tissues, and films, in the production of products like disposable diapers, surgical drapes, and automotive interiors.

The global emphasis on hygiene and cleanliness has driven demand for disposable hygiene products, such as diapers, adult incontinence products, and feminine care items. Nonwoven adhesives are essential for constructing these products.

The healthcare industry relies on nonwoven adhesives for applications like wound dressings, surgical drapes, and medical disposables. Advances in medical technology and growing healthcare needs contribute to market growth.

As environmental concerns rise, there is a growing demand for sustainable and eco-friendly nonwoven adhesive solutions. Manufacturers are exploring greener alternatives to meet consumer preferences and regulatory requirements.

Achieving strong adhesion to various nonwoven materials with different properties can be challenging. Adhesive formulations need to be tailored to bond efficiently with specific substrates. Adhesives used in hygiene and medical applications must adhere to stringent safety and quality standards. Navigating complex regulations and ensuring compliance is critical for manufacturers.

The market is expected to witness a growing shift towards sustainable and eco-friendly nonwoven adhesive formulations. Adhesive manufacturers will continue to explore formulations that reduce the environmental impact of nonwoven products. Innovations in nonwoven adhesives are expected to lead to advanced hygiene products with improved comfort, absorbency, and breathability. Manufacturers will focus on enhancing the performance of diapers, sanitary pads, and adult incontinence products. The healthcare industry will increasingly integrate nonwoven adhesives into medical devices, wearable technologies, and wound care solutions, further expanding the market.

The global nonwoven adhesives market is an essential enabler of various industries, including hygiene, healthcare, and packaging. These specialized adhesives play a pivotal role in ensuring the quality, comfort, and performance of products such as diapers, medical disposables, and automotive interiors. To excel in this dynamic market, adhesive manufacturers should prioritize innovation, with a focus on sustainable formulations, advanced hygiene products, and compliance with stringent regulatory standards. As global hygiene awareness continues to rise, and industries evolve to meet changing consumer preferences, the role of nonwoven adhesives in facilitating the production of innovative and sustainable products is expected to remain pivotal in shaping the future of adhesive technology.

## Key Market Drivers

### Growing Demand for Disposable Hygiene Products is Major Factor for Nonwoven Adhesives Market Growth

The global nonwoven adhesives market is experiencing substantial growth, primarily driven by the growing demand for disposable hygiene products. Disposable hygiene products, including baby diapers, adult incontinence products, feminine hygiene

products, and disposable medical products, have gained significant popularity worldwide. These products offer convenience, hygiene, and ease of use.

Nonwoven adhesives are integral components of disposable hygiene products. They are used to bond different layers of nonwoven fabrics, elastics, and absorbent materials, ensuring the structural integrity and functionality of these products.

Effective adhesion is crucial in disposable hygiene products to prevent leakage, maintain comfort, and ensure product performance. Consumers expect secure and durable bonding in these products.

Nonwoven adhesives come in various formulations, including hot melt and pressure-sensitive adhesives. They are versatile and compatible with different types of nonwoven materials, offering flexibility in product design.

Ongoing research and development efforts in the nonwoven adhesive industry have led to advanced formulations with improved adhesion properties, breathability, and softness. These advancements contribute to product quality and user comfort.

The growing demand for disposable hygiene products is driving the need for specialized nonwoven adhesives. Manufacturers of disposable hygiene products seek adhesives that can meet specific performance requirements, such as absorbency, flexibility, and skin-friendliness.

Disposable hygiene products offer convenience and hygienic solutions for consumers. They are preferred in various age groups and demographics, including babies, adults, and healthcare facilities.

While disposable hygiene products provide convenience, there is a growing awareness of their environmental impact. This has led to developments in eco-friendly and biodegradable disposable products and adhesives.

The COVID-19 pandemic has increased the demand for disposable hygiene products, including face masks and personal protective equipment (PPE). Adhesives play a crucial role in the manufacturing of these products.

The global nonwoven adhesives market is experiencing robust growth, primarily propelled by the growing demand for disposable hygiene products. Nonwoven adhesives have become indispensable in ensuring the reliable adhesion and

functionality of these products, contributing to user comfort and hygiene. As the popularity of disposable hygiene products continues to rise, the market for nonwoven adhesives is expected to thrive. Manufacturers and suppliers in this market must remain at the forefront of technology and innovation to meet the evolving demands of product manufacturers, ensuring continued growth and improved hygiene outcomes worldwide, while addressing sustainability concerns.

### Growing Interest in Biodegradable and Compostable Nonwoven Adhesives Drives the Demand for Nonwoven Adhesives Market

The global nonwoven adhesives market is experiencing significant growth, primarily driven by the growing interest in biodegradable and compostable nonwoven adhesives. This research paper provides a comprehensive overview of how the increasing focus on sustainability and eco-friendly adhesive solutions is propelling the growth of the global nonwoven adhesives market.

There has been a global shift towards sustainability across various industries, including packaging, textiles, and personal care. Consumers and businesses are increasingly seeking environmentally friendly alternatives.

Nonwoven adhesives are crucial components in various applications, such as disposable hygiene products, packaging, and medical textiles. They are used for bonding nonwoven materials, elastics, and other substrates.

As environmental awareness grows, there is a rising demand for nonwoven adhesives that are biodegradable and compostable. These adhesives break down naturally, reducing their impact on landfills and ecosystems.

Biodegradable and compostable nonwoven adhesives offer versatility in applications. They can be used in disposable hygiene products, sustainable packaging, and agricultural textiles, among others.

Ongoing research and development efforts have led to advanced formulations of biodegradable and compostable nonwoven adhesives. These formulations provide improved adhesion properties while aligning with sustainability goals.

The growing interest in sustainable products and materials is driving the need for specialized nonwoven adhesives. Manufacturers and consumers are seeking eco-friendly adhesive solutions to reduce their carbon footprint.

Regulatory bodies and industry associations are promoting sustainable practices and encouraging the use of biodegradable and compostable materials. This further incentivizes the adoption of these adhesives.

Consumers are increasingly making choices based on sustainability. They prefer products that are biodegradable, compostable, and environmentally responsible, further boosting the demand for such nonwoven adhesives.

The global nonwoven adhesives market is experiencing robust growth, primarily fueled by the growing interest in biodegradable and compostable adhesive solutions. Nonwoven adhesives are essential in various industries, and their sustainability has become a top priority. As the emphasis on eco-friendly materials and practices continues to rise, the market for biodegradable and compostable nonwoven adhesives is expected to thrive. Manufacturers and suppliers in this market must remain committed to sustainability and innovation, meeting the evolving demands of businesses and consumers, while contributing to a greener and more environmentally responsible future.

#### Rising Popularity of Nonwoven Adhesives in Healthcare and Textile Manufacturing

The global Nonwoven Adhesives market is experiencing significant growth, primarily driven by the rising demand from the automotive industry. The automotive industry is marked by continuous innovation and transformation. Automakers are constantly seeking ways to improve vehicle performance, safety, fuel efficiency, and sustainability.

One of the foremost challenges facing the automotive industry is the need for weight reduction to enhance fuel efficiency and reduce emissions. Lightweight materials, including plastics, are crucial for achieving these goals.

Plastics play a pivotal role in the automotive sector, contributing to interior and exterior components, engine components, and various other parts. Plastics are favored for their low weight, durability, and versatility.

The production and assembly of plastic components in the automotive industry often requires efficient adhesive solutions to create strong bonds and ensure the integrity and safety of vehicles.

Nonwoven Adhesives offer versatility in bonding a wide range of plastic materials used

in automotive applications. These adhesives provide a strong and durable bond while maintaining the lightweight properties of plastic components.

Nonwoven Adhesives are used for structural bonding in the assembly of vehicle components such as body panels, interior elements, and composite parts. They contribute to enhanced structural integrity and crashworthiness.

Modern consumers expect a quiet and comfortable driving experience. Nonwoven Adhesives help dampen noise and reduce vibrations, contributing to overall ride comfort.

The automotive industry is increasingly focused on sustainability and improved fuel efficiency. Lightweight materials, including plastics bonded with Nonwoven Adhesives, contribute to reduced vehicle weight and better environmental performance.

Ongoing research and development efforts in the Nonwoven Adhesives industry have led to advanced formulations. These formulations offer improved adhesion strength, durability, resistance to environmental factors, and compliance with automotive safety standards.

The growing demand for lightweight, efficient, and sustainable vehicles in the automotive industry is driving the need for specialized adhesive solutions. Manufacturers seek Nonwoven Adhesives that can withstand the rigors of automotive applications and contribute to vehicle performance.

The global nonwoven adhesives market is experiencing robust growth, primarily driven by the increasing demand from the automotive industry. Nonwoven Adhesives have become integral to addressing the industry's needs for lightweighting, structural bonding, noise reduction, and fuel efficiency. As the automotive sector continues to evolve and embrace innovative solutions, the market for Nonwoven Adhesives is expected to thrive. Manufacturers and suppliers in this market must remain at the forefront of technology and innovation to meet the evolving demands of the automotive industry, ensuring continued growth and the delivery of efficient and sustainable vehicles for consumers around the world.

## Key Market Challenges

### Rising Raw Material Costs



Rising raw material costs represent a significant impediment to the growth of the global Nonwoven Adhesives market. Nonwoven adhesives are indispensable in various industries, including hygiene products like diapers and feminine care, medical supplies, and automotive interiors, due to their role in bonding nonwoven materials efficiently. However, these adhesives rely on raw materials like polymers, resins, and chemicals, which are subject to price fluctuations driven by factors such as supply chain disruptions and market dynamics.

The increasing costs of these essential ingredients can lead to elevated production expenses, ultimately impacting the prices of nonwoven adhesives. In a competitive market, price hikes can deter manufacturers and end-users, limiting market growth potential. Furthermore, the uncertainty surrounding raw material costs can disrupt supply chains and strain inventory management.

To mitigate the impact of rising raw material costs and stimulate growth in the global Nonwoven Adhesives market, companies must explore strategies such as diversifying raw material sources, optimizing production processes for cost efficiency, and researching alternative materials. These measures can help maintain product affordability, ensure supply chain stability, and facilitate market expansion.

### Toxic Effects

Toxic effects associated with certain adhesive components are a significant obstruction to the growth of the global Nonwoven Adhesives market. Nonwoven adhesives are widely used in industries like hygiene, healthcare, and construction, where safety and product quality are paramount. However, some adhesive formulations may include chemicals or compounds that can have adverse health effects, especially when they come into contact with the skin or are used in products intended for sensitive areas like baby diapers or wound dressings.

Growing awareness of the potential toxic effects of certain adhesive ingredients has led to increased scrutiny and stricter regulations. Manufacturers must navigate a complex landscape of safety standards and compliance, which can be time-consuming and costly.

To overcome this challenge and promote growth in the Nonwoven Adhesives market, companies are investing in research and development to formulate adhesives with safer, non-toxic alternatives. Additionally, they are working closely with regulatory bodies to ensure adherence to safety standards and to provide consumers with

confidence in the safety and quality of nonwoven adhesive-based products. These efforts are vital for the continued expansion of the market while prioritizing health and safety concerns.

## Key Market Trends

### New Technologies for Developing Non-Woven Adhesives

The development of new technologies for creating non-woven adhesives is a pivotal trend shaping the global nonwoven adhesives market. Nonwoven adhesives play a critical role in various industries, including hygiene products, medical devices, and automotive applications, by providing bonding solutions for nonwoven materials like fabrics and films.

Emerging technologies are revolutionizing the nonwoven adhesive manufacturing process, leading to improved product performance, efficiency, and sustainability. These innovations encompass advanced adhesive formulations, application methods, and equipment designed to meet the growing demand for nonwoven products in a wide range of applications.

Innovations in nonwoven adhesive technologies are focused on enhancing bonding strength, flexibility, and sustainability. For example, hot melt adhesives with lower application temperatures reduce energy consumption and enhance the eco-friendliness of the production process. Additionally, developments in the use of bio-based or recyclable materials align with the global shift toward more sustainable and environmentally conscious practices.

As industries continue to seek nonwoven adhesive solutions that meet evolving consumer preferences and regulatory standards, companies investing in these new technologies are poised to drive growth and innovation in the global nonwoven adhesives market.

### Growing Demand for Hygiene and Personal Care Product in Emerging Markets

The growing demand for hygiene and personal care products in emerging markets is a key trend propelling the global nonwoven adhesives market. As populations in emerging economies experience rising disposable incomes and improved living standards, there is an increasing emphasis on personal hygiene and well-being. This shift in consumer behavior is driving a substantial surge in the demand for nonwoven-based products,



such as diapers, sanitary napkins, and adult incontinence products.

Nonwoven adhesives play a critical role in the manufacturing of these hygiene and personal care items, providing secure and comfortable bonding between layers of nonwoven materials. The adhesive ensures product integrity, durability, and comfort during everyday use.

As emerging markets continue to witness a demographic shift and increased urbanization, the demand for hygiene and personal care products is expected to rise significantly. Manufacturers of nonwoven adhesives are well-positioned to cater to this escalating demand, making this trend a driving force behind the growth of the global nonwoven adhesives market.

## Segmental Insights

### Type Insights

Based on the Type, the Styrenic Block Copolymer segment emerged as the dominant player in the global market for Nonwoven Adhesives. Styrenic Block Copolymers (SBCs) offer versatile adhesion properties, making them suitable for bonding a wide range of nonwoven materials. This versatility allows them to cater to various industries and applications. SBC-based adhesives provide strong and durable bonds, ensuring that nonwoven materials remain securely attached. This is essential in applications where adhesion must withstand stress, such as in hygiene products or medical dressings.

SBCs exhibit excellent elasticity and flexibility, allowing bonded nonwoven materials to stretch and conform to different shapes without compromising the integrity of the bond. This is valuable in applications where flexibility is required, such as in diapers or wound dressings. SBC adhesives provide a soft and comfortable feel when applied to nonwoven products, which is crucial for applications involving direct skin contact, like disposable hygiene products or medical dressings.

SBC adhesives can be formulated to be either hydrophobic or hydrophilic, depending on the specific requirements of the application. This versatility allows them to cater to diverse markets, including both water-resistant and absorbent products.

### Application Insights

The Feminine Hygiene segments are projected to experience rapid growth during the forecast period. Feminine hygiene products, such as sanitary pads and tampons, are essential items for women's personal care. The consistent and widespread demand for these products contributes significantly to the dominance of the Feminine Hygiene segment in the nonwoven adhesive market. Women's intimate areas are particularly sensitive, and any irritation or discomfort can be a major concern. Nonwoven adhesives used in feminine hygiene products are formulated to be gentle on the skin, minimizing the risk of irritation, allergies, or other adverse reactions.

Nonwoven adhesives play a critical role in ensuring that feminine hygiene products stay securely in place during use. The adhesives provide a comfortable and discreet fit, enhancing the overall user experience. Effective bonding is essential to prevent leakage and maintain the absorbent core of feminine hygiene products. Nonwoven adhesives contribute to leak prevention and the overall effectiveness of these products.

### Regional Insights

The Asia-Pacific (APAC) region has emerged as the dominant player in the Non-Woven Adhesive Market, surpassing both Europe and North America. This growth is primarily attributed to the rapid development and expanding economies of countries such as China, India, Thailand, Taiwan, and Malaysia.

The robust economic growth in APAC nations has increased demand across various industries, including non-woven adhesives, as they are essential in manufacturing a wide range of products. In developed regions like Europe and North America, stringent regulations regarding the emission of Volatile Organic Compounds (VOCs) and the production of chemical-based products have opened opportunities for global players to invest in emerging economies where regulations are comparatively less stringent.

Europe has imposed strict policies and regulations that encourage the use and production of bio-based ingredients. This shift towards sustainability has created room for market expansion in regions with more relaxed regulations, such as APAC and the Middle East & Africa.

The less stringent regulatory environment in developing regions like APAC and the Middle East & Africa has made it attractive for adhesive manufacturers to establish manufacturing facilities, capitalizing on the lower operational constraints. The market for non-woven hygiene adhesives and related end-use products in APAC and South America is still evolving. With ongoing technological advancements, these regions offer

increasing opportunities for market growth and development.

In summary, the dominance of APAC in the Non-Woven Adhesive Market is driven by its rapid economic development, regulatory differences favoring investment, a shift towards sustainability, opportunities for manufacturing facilities, and ongoing technological progress. These factors collectively position APAC as a key player in the global non-woven adhesive market, with room for further expansion in emerging markets like South America.

### Key Market Players

Henkel AG

H.B. Fuller

Bostik SA

Beardow Adams Ltd.

Adtek Malaysia Sdn. Bhd.

Moresco Corporation

Dow Chemical Company

3M Corporation

Kraton Corporation

Evonik Industries AG

### Report Scope:

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

### Nonwoven Adhesives Market, By Type:

Amorphous Poly Alpha Olefin

Ethylene Vinyl Acetate

Styrenic Block Copolymer

Nonwoven Adhesives Market, By Application:

Adult Incontinence

Baby Care

Feminine Hygiene

Medical

Nonwoven Adhesives Market, By Technology:

Hot-Melt

Water-Based

Nonwoven Adhesives Market, By Region:

Asia-Pacific

China

India

Japan

Australia

South Korea

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

## Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Global Nonwoven Adhesives Market.

## Available Customizations:

Global Nonwoven 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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