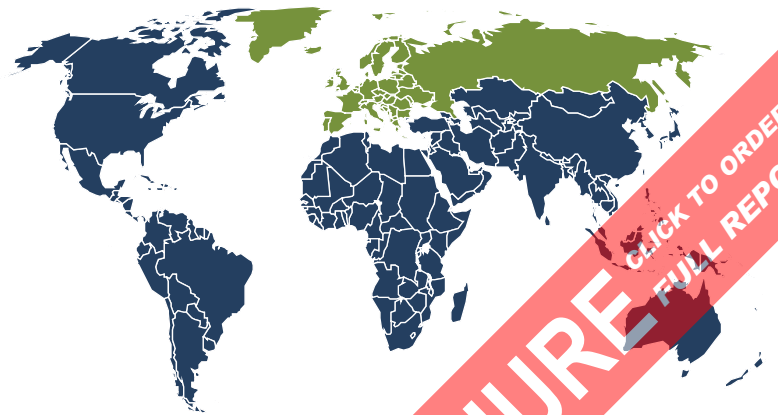




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Adhesives & Sealants: Europe

December 2021



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About This Report

Scope

This report forecasts to 2025 adhesive and sealant demand in metric tons in Europe. Total demand is segmented by product in terms of:

- water-based
- reactive
- hot melts
- solvent-based
- other products such as natural, bituminous, sodium silicate, and polyvinyl butyral

Total demand is also segmented by market as follows:

- construction
- packaging
- tapes and labels
- transportation equipment
- other markets such as consumer goods, textiles, and appliances

To illustrate historical trends, total demand is provided in annual series from 2010 to 2020; the various segments are reported at five-year intervals for 2010, 2015, and 2020.

Unmodified starch adhesives used in the production of corrugated board are excluded. In addition, binder resins used in the production of engineered wood products such as plywood and particleboard are not considered adhesives and are excluded from demand totals.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

Table 5 | Countries in Western Europe

Andorra	Germany*	Italy*	Portugal
Austria	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium	Greece	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands	United Kingdom*
France*	Isle of Man	Norway	Vatican City

*Major adhesive and sealant markets.

Source: The Freedonia Group

Table 6 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland	

*Major adhesive and sealant market.

Source: The Freedonia Group

Sources

Adhesives & Sealants: Europe (FE35088) is based on *Global Adhesives & Sealants*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | HS Codes Related to Adhesives & Sealants

HS Code	Definition
3506.10	Glues or adhesives; prepared, products suitable for use as glues or adhesives, put up for retail sale as glues
3506.91	Adhesives; prepared, based on polymers of heading 3901 to 3913 or on rubber
3506.99	Glues and other adhesives; prepared, n.e.c. in heading no. 3506, not exceeding a net weight of 1kg

Source: United Nations Statistics Division

Table 8 | NACE Codes Related to Adhesives & Sealants

NACE Code	Definition
20.13	Manufacture of other inorganic basic chemicals
20.14	Manufacture of other organic basic chemicals
20.59	Manufacture of other chemical products, n.e.c.

Source: European Commission

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Adhesives & Sealants

Freedonia Industry Studies

Adhesives & Sealants in the US

Global Asphalt (Bitumen)

Global Carpets & Rugs

Global Construction Chemicals

Global Flooring

Global Hard-Surface Flooring

Global Housing

Global Insulation

Global Paint & Coatings

Global Pressure Sensitive Tapes

Global Silicones

Global Thermoplastic Elastomers: Adhesives, Sealants, & Coatings

Global Windows & Doors

Moulding & Trim

Nonwovens

Roofing

Windows & Doors

Freedonia Focus Reports

Carpets & Rugs: Europe

Commercial Roofing: United States

Construction: United States

COVID-19 Market Impact Analysis

Hard Surface Flooring: Europe

Gaskets & Seals: United States

Motor Vehicles: Europe

Packaging: United States

Paint & Coatings: Europe

Polyethylene: United States

Pressure Sensitive Tapes: Europe

Silicones: Europe

Thermoplastic Elastomers: Europe

Transport Equipment: United States

Freedonia Custom Research

Trade Publications

Adhesives & Sealants Industry
Concrete Construction
The Concrete Producer
Construction Europe
Constructor Magazine
The Journal of Light Construction
TileLetter
WOOD Magazine

Agencies & Associations

The Adhesive and Sealant Council
British Adhesives and Sealants Association
Eurostat
FEICA (Association of the European Adhesive and Sealant Industry)
International Monetary Fund
Organisation for Economic Co-Operation and Development
United Nations Comtrade
World Bank