



Freedonia Focus Reports
US Collection

Adhesives & Sealants: United States

January 2019



CLICK TO ORDER
FULL REPORT **BROCHURE** FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	6
Technology	7
Competitive Materials & Technologies	8
Environmental & Regulatory Factors	9
North America Regional Outlook	10
3. Segmentation & Forecasts	11
Products	11
Water-Based	12
Reactive	13
Hot Melts	14
Solvent-Based	14
Natural	15
Other Products	15
Markets	17
Packaging	18
Construction	18
Tapes & Labels	19
Transportation Equipment	19
Other Markets	20
4. Industry Structure	22
Industry Characteristics	22
Market Leaders	23
Henkel	23
HB Fuller	24
DowDuPont	24
5. About This Report	26
Scope	26
Sources	26
Industry Codes	27
Freedonia Methodology	27
Resources	29

List of Tables & Figures

Figure 1 Key Trends in the US Adhesives & Sealants Market, 2017 – 2022	3
Figure 2 US Adhesives & Sealants Demand Trends, 2007 – 2017	4
Table 1 Key Indicators for US Adhesives & Sealants Demand, 2007 – 2022 (2009US\$ bil)	6
Figure 3 North America Adhesives & Sealants Demand by Country, 2017 (%)	10
Figure 4 US Adhesives & Sealants Demand by Product, 2007 – 2022 (000 m tons)	11
Table 2 US Adhesives & Sealants Demand by Product, 2007 – 2022 (000 m tons)	11
Figure 5 US Adhesives & Sealants Demand by Product, 2007 – 2022 (%)	16
Figure 6 US Adhesives & Sealants Demand by Market, 2007 – 2022 (000 m tons)	17
Table 3 US Adhesives & Sealants Demand by Market, 2007 – 2022 (000 m tons)	17
Figure 7 US Adhesives & Sealants Demand by Market, 2007 – 2022 (%)	21
Table 4 Selected Suppliers to the US Adhesives & Sealants Market	23
Table 5 NAICS & SIC Codes Related to Adhesives & Sealants	27

About This Report

Scope

This report forecasts to 2022 US adhesive and sealant demand in metric tons. Total demand is segmented by product in terms of:

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

Total demand is also segmented by market as follows:

- packaging
- construction
- 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 2007 to 2017; the various segments are reported at five-year intervals for 2007, 2012, and 2017.

Because of these material and functional similarities, adhesives and sealants are often considered together as a single industry and market, including for the purposes of this report. 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. Unmodified starch adhesives used in the production of corrugated board are also excluded.

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

Sources

Adhesives & Sealants: United States (FF35088) 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

About This Report

- 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 5 | NAICS & SIC Codes Related to Adhesives & Sealants

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
325188	All Other Basic Inorganic Chemical Manufacturing	2819	Industrial Inorganic Chemicals, NEC
325199	All Other Basic Organic Chemical Manufacturing	2869	Industrial Organic Chemicals, NEC
325510	Paint and Coating Manufacturing	2891	Adhesives and Sealants
325520	Adhesive Manufacturing	2899	Chemicals and Chemical Preparations, NEC
325998	All Other Miscellaneous Chemical Product and Preparation Manufacturing		

Source: US Census Bureau

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.

About This Report

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.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Global Adhesives & Sealants

Freedonia Industry Studies

Adhesives & Sealants in the US

Global Bulk Packaging

Global Flooring

Global Housing

Global Nonwovens

Global Silicones Market

Global Windows & Doors

Paint & Coatings: US Market Forecasts

Pressure Sensitive Tapes in the US

Residential Roofing

Silicones Market in the US

Wood Coatings Market in the US

Freedonia Focus Reports

Commercial Roofing: United States

Commercial Windows & Doors: United States

Construction: United States

Housing: United States

Labels: United States

Packaging: United States

Polyethylene: United States

Pressure Sensitive Tapes: United States

Thermoplastic Elastomers: United States

Transport Equipment: United States

Freedonia Custom Research

Trade Publications

Adhesives & Sealants Industry

Concrete Construction

The Concrete Producer

Constructor Magazine

The Journal of Light Construction

TileLetter

WOOD Magazine

Agencies & Associations

Adhesive and Sealant Council

American Coatings Association

American Concrete Institute

American Society of Civil Engineers

Occupational Safety and Health Administration

United States Census Bureau

United States Department of Transportation

United States Environmental Protection Agency

United States International Trade Commission