

Freedonia Focus Reports
US Collection



Hot Melt Adhesives & Sealants: United States

April 2018



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

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	6
Adhesives & Sealants Technology	7
Competitive Materials & Technologies	9
Environmental & Regulatory Factors	10
3. Segmentation & Forecasts	11
Products	11
Ethylene Vinyl Acetate	12
Polyethylene	13
Styrene Block Copolymers	13
Thermoplastic Polyurethane	14
Other Products	14
Markets	16
Packaging	17
Tapes & Labels	17
Nonwoven Disposables	18
Motor Vehicles	18
Other Markets	19
4. Industry Structure	22
Industry Characteristics	22
Market Leaders	23
Arkema	23
HB Fuller Company	24
Henkel	24
5. About This Report	26
Scope & Method	26
Sources	27
Industry Codes	27
Resources	28

List of Tables & Figures

Figure 1 Key Trends in the US Hot Melt Adhesive & Sealant Market, 2017 – 2022	3
Figure 2 US Hot Melt Adhesive & Sealant Demand Trends, 2007 – 2017	4
Table 1 Key Indicators for US Hot Melt Adhesive & Sealant Demand, 2007 – 2022 (2009US\$ bil)	6
Figure 3 US Hot Melt Adhesive & Sealant Demand by Product, 2007 – 2022 (mil lbs)	11
Table 2 US Hot Melt Adhesive & Sealant Demand by Product, 2007 – 2022 (mil lbs)	11
Figure 4 US Hot Melt Adhesive & Sealant Demand by Product, 2007 – 2022 (%)	15
Figure 5 US Hot Melt Adhesive & Sealant Demand by Market, 2007 – 2022 (mil lbs)	16
Table 3 US Hot Melt Adhesive & Sealant Demand by Market, 2007 – 2022 (mil lbs)	16
Figure 6 US Hot Melt Adhesive & Sealant Demand by Market, 2007 – 2022 (%)	20
Table 4 Select Suppliers to the US Hot Melt Adhesive & Sealant Market	23
Table 5 Industry Codes Related to Hot Melt Adhesives & Sealants	27

About This Report

Scope & Method

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

- ethylene vinyl acetate
- polyethylene
- styrene block copolymers
- thermoplastic polyurethane
- other products such as acrylic, polyvinyl chloride, and polypropylene

Total demand is also segmented by market as follows:

- packaging
- tapes and labels
- nonwoven disposables
- motor vehicles
- other markets such as furniture, electrical and electronic equipment, and machinery

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.

Phenolic and amino resin binders used in the production of engineering wood products are not considered adhesives for the purposes of this report and are excluded. Starch-based adhesives used to produce corrugated board are also excluded.

This report 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.

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

Hot Melt Adhesives & Sealants: United States (FF35093) is based on *Adhesives & Sealants in the US*, 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 including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international 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 | Industry Codes Related to Hot Melt Adhesives & Sealants

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
325188	All Other Basic Inorganic Chemical Mfg	2819	Industrial Inorganic Chemicals, NEC
325199	All Other Basic Organic Chemical Mfg	2821	Plastics Materials, Synthetic Resins, and Nonvulcanizable Elastomers
325211	Plastics Material and Resin Mfg	2869	Industrial Organic Chemicals, NEC
325510	Paint and Coating Mfg	2891	Adhesives and Sealants
325520	Adhesive Mfg	2899	Chemicals and Chemical Preparations, NEC
325998	All Other Miscellaneous Chemical Product and Preparation Mfg		

Source: US Census Bureau

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

Adhesives & Sealants in the US, April 2018

Freedonia Industry Studies

Construction Chemicals in the US, February 2018

Silicones Market in the US, February 2018

Insulation Market in the US, December 2017

Global Housing Outlook, October 2017

Global Hard-Surface Flooring, September 2017

Asphalt Market Forecasts, July 2017

Global Silicones Market, June 2017

Paving Asphalt Market in the US, June 2017

Wood Coatings Market in the US, March 2017

Paint & Coatings: US Market Forecasts, February 2017

Global Flooring Market, January 2017

Protective & Specialty Coatings Market in the US, December 2016

Cement & Concrete Additives, October 2016

World Insulation, July 2016

World Paint & Coatings, June 2016

Freedonia Focus Reports

Adhesives & Sealants: United States

Construction: United States

Housing: United States

Labels: United States

Manufacturing: United States

Motor Vehicles: United States

Nonwovens: United States

Packaging: United States

Silicones: 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 Energy

United States Department of Transportation

United States Environmental Protection Agency

United States Green Building Council

United States International Trade Commission