



Freedonia Focus Reports  
US Collection

# Solvent-Based Adhesives & Sealants: United States

April 2018



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

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

# Table of Contents

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>4</b>
Historical Trends	4
Key Economic Indicators	6
Adhesives & Sealants Technology	7
Competitive Materials & Technologies	9
Environmental & Regulatory Factors	10
<b>3. Segmentation &amp; Forecasts</b>	<b>11</b>
Products	11
Elastomers	13
Polyvinyl Acetate	13
Vinyl Chloride Polymers	14
Other Products	14
Markets	16
Tapes & Labels	17
Construction	17
Packaging	18
Motor Vehicles	19
Other Markets	19
<b>4. Industry Structure</b>	<b>22</b>
Industry Characteristics	22
Market Leaders	23
HB Fuller	23
Henkel	24
RPM International	24
<b>5. About This Report</b>	<b>25</b>
Scope & Method	25
Sources	26
Industry Codes	26
Resources	27

# List of Tables & Figures

---

Figure 1   Key Trends in the US Solvent-Based Adhesive & Sealant Market, 2017 – 2022	3
Figure 2   US Solvent-Based Adhesive & Sealant Demand Trends, 2007 – 2017	4
Table 1   Key Indicators for US Solvent-Based Adhesive & Sealant Demand, 2007 – 2022 (2009US\$ bil)	6
Figure 3   US Solvent-Based Adhesive & Sealant Demand by Product, 2007 – 2022 (mil lbs)	11
Table 2   US Solvent-Based Adhesive & Sealant Demand by Product, 2007 – 2022 (mil lbs)	11
Figure 4   US Solvent-Based Adhesive & Sealant Demand by Product, 2007 – 2022 (%)	14
Figure 5   US Solvent-Based Adhesive & Sealant Demand by Market, 2007 – 2022 (mil lbs)	16
Table 3   US Solvent-Based Adhesive & Sealant Demand by Market, 2007 – 2022 (mil lbs)	16
Figure 6   US Solvent-Based Adhesive & Sealant Demand by Market, 2007 – 2022 (%)	21
Table 4   Select Suppliers to the US Solvent-Based Adhesive & Sealant Market	23
Table 5   Industry Codes Related to Solvent-Based Adhesives & Sealants	26

# About This Report

---

## Scope & Method

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

- elastomers
- polyvinyl acetate
- vinyl chloride polymers
- other products such as polyurethane and acrylic

Total demand is also segmented by market as follows:

- tapes and labels
- construction
- packaging
- motor vehicles
- other markets such as aerospace and other transportation equipment, machinery, and electrical and electronic equipment

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

*Solvent-Based Adhesives & Sealants: United States* (FF35094) is based on [Adhesives & Sealants in the US](#), 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 Solvent-Based 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*, January 2017

*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*

*Nonresidential Building Construction: United States*

*Packaging: United States*

*Roofing: United States*

*Silicones: United States*

*Transport Equipment: United States*

### Freedonia Custom Research

### Trade Publications

*Adhesives & Sealants Industry*

*Concrete Construction*

*The Concrete Producer*

*Constructor Magazine*

## About This Report

*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 Labor

United States Department of Transportation

United States Environmental Protection Agency

United States Green Building Council

United States International Trade Commission