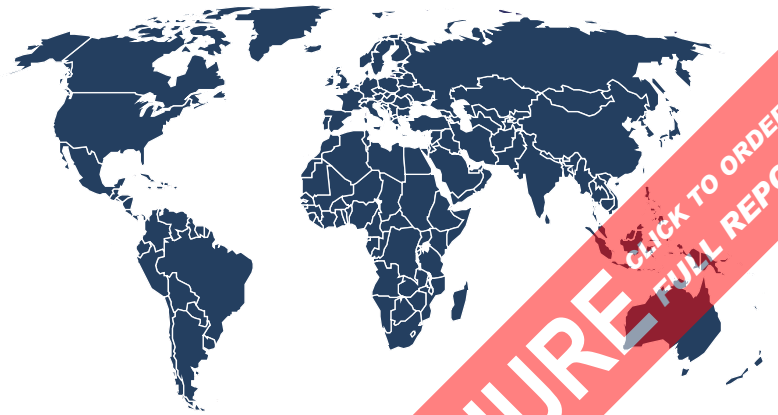


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Global Adhesives & Sealants

December 2021



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About This Report

Scope

This report forecasts to 2025 global demand for adhesives and sealants by product, market, and major world region in metric tons. Product segments include:

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

Reported markets encompass:

- construction
- packaging
- tapes and labels
- consumer goods
- other markets such as transportation equipment, textiles, and electrical and electronic product manufacturing

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, market, and regional demand (including product and market segments) are provided 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.

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.

Sources

Global Adhesives & Sealants (FW35088) is based on 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 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 9 | NAICS & SIC Codes Related to Adhesives & Sealants

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
325180	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

Table 10 | 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 11 | 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

Window & Doors

Freedonia Focus Reports

Adhesives & Sealants: Canada

Adhesives & Sealants: China

Adhesives & Sealants: United Kingdom

Commercial Roofing: United States

Gaskets & Seals: United States

Housing: Canada

Polyethylene: United States

Pressure Sensitive Tapes: United States

Thermoplastic Elastomers: Canada

Thermoplastic Elastomers: 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
American Coatings Association
American Concrete Institute
American Society of Civil Engineers
Asia Regional Adhesive Council
British Adhesives and Sealants Association
China Adhesives and Tape Industry Association
Eurostat
FEICA (Association of the European Adhesive and Sealant Industry)
Japanese Adhesive Industry Association
Korea Adhesive Industry Association
Statistics Canada
Taiwan Synthetic Resins and Adhesives Industrial Association
United Nations Comtrade
United States Census Bureau
United States International Trade Commission