

Freedonia Focus Reports  
Global Collection



# Global Adhesives & Sealants

January 2019



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>4</b>
<b>2. Global Overview &amp; Forecasts</b>	<b>6</b>
Demand by Product	6
Water-Based	7
Reactive	8
Hot Melts	9
Solvent-Based	10
Natural	10
Other Adhesives & Sealants	11
Demand by Market	12
Packaging	13
Construction	14
Tapes & Labels	15
Transportation	16
Consumer Goods	17
Textiles	18
Other Markets	18
<b>3. Regional Segmentation &amp; Forecasts</b>	<b>20</b>
Regional Demand Overview	20
North America	23
Western Europe	26
Asia/Pacific	29
Other Regions	33
Central & South America	34
Eastern Europe	34
Africa/Mideast	35
<b>4. Industry Structure</b>	<b>37</b>
Industry Characteristics	37
Market Share	38
Henkel	39
HB Fuller	40
Arkema	40

<b>5. About This Report</b>	<b>42</b>
Scope	42
Sources	43
Industry Codes	43
Freedonia Methodology	44
Resources	46

# List of Tables & Figures

---

Figure 1   Key Global Adhesives & Sealants Trends	5
Figure 2   Global Adhesives & Sealants Demand by Product, 2007 – 2022 (000 m tons)	6
Table 1   Global Adhesives & Sealants Demand by Product, 2007 – 2022 (000 m tons)	6
Figure 3   Global Adhesives & Sealants Demand by Market, 2007 – 2022 (000 m tons)	12
Table 2   Global Adhesives & Sealants Demand by Market, 2007 – 2022 (000 m tons)	12
Figure 4   Global Adhesives & Sealants Demand by Region, 2007 – 2022 (000 m tons)	20
Table 3   Global Adhesives & Sealants Demand by Region, 2007 – 2022 (000 m tons)	20
Figure 5   North America: Adhesives & Sealants Demand by Product, 2007 – 2022 (000 m tons)	23
Figure 6   North America: Adhesives & Sealants Demand by Market, 2007 – 2022 (000 m tons)	23
Table 4   North America: Adhesives & Sealants Demand by Product & Market, 2007 – 2022 (000 m tons)	25
Figure 7   Western Europe: Adhesives & Sealants Demand by Product, 2007 – 2022 (000 m tons)	26
Figure 8   Western Europe: Adhesives & Sealants Demand by Market, 2007 – 2022 (000 m tons)	26
Table 5   Western Europe: Adhesives & Sealants Demand by Product & Market, 2007 – 2022 (000 m tons)	28
Figure 9   Asia/Pacific: Adhesives & Sealants Demand by Product, 2007 – 2022 (000 m tons)	29
Figure 10   Asia/Pacific: Adhesives & Sealants Demand by Market, 2007 – 2022 (000 m tons)	29
Table 6   Asia/Pacific: Adhesives & Sealants Demand by Product & Market, 2007 – 2022 (000 m tons)	31
Figure 11   Other Regions: Adhesives & Sealants Demand by Region, 2007 – 2022 (000 m tons)	33
Figure 12   Other Regions: Adhesives & Sealants Demand by Product, 2007 – 2022 (000 m tons)	33
Table 7   Other Regions: Adhesives & Sealants Demand by Region & Product, 2007 – 2022 (000 m tons)	35
Figure 13   Global Adhesives & Sealants Market Share by Company, 2017 (%)	38
Table 8   Leading Suppliers to the Global Adhesives & Sealants Market	39
Table 9   HS Codes Related to Adhesives & Sealants	43
Table 10   NAICS & SIC Codes Related to Adhesives & Sealants	43
Table 11   NACE Codes Related to Adhesives & Sealants	44
Table 12   SITC Codes Related to Adhesives & Sealants	44

# About This Report

---

## Scope

This report forecasts to 2022 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
- natural
- other adhesives such as bituminous, sodium silicate, and polyvinyl butyral types

Reported markets encompass:

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

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 2007, 2012, and 2017.

This report quantifies trends in terms of compound annual growth rates (CAGRs), which, by definition, employ in their calculation only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the trend beginning in the base year and ending in the forecast year. Forecasts are developed via the identification and analysis of pertinent statistical relationships and other historical trends and events, as well as their expected impact over the forecast period. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

## About This Report

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

*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 secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and nongovernmental 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

## Industry Codes

Table 9 | 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 10 | 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 mfg	2819	Industrial inorganic chemicals, NEC
325199	All other basic organic chemical 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

## About This Report

**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

**Table 12 | SITC Codes Related to Adhesives & Sealants**

SITC Code	Definition
516	Other organic chemicals
524	Other inorganic chemicals
592	Starches; wheat gluten; albuminoid substances; glues
598	Miscellaneous chemical products, N.E.S.

Source: United Nations Statistics Division

## 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.

## About This Report

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 Hard-Surface Flooring*

*Global Housing*

*Global Hybrid & Electric Vehicles*

*Global Nonwovens*

*Global Silicones Market*

*Global Windows & Doors*

*Paint & Coatings: US Market Forecasts*

*Protective & Specialty Coatings Market in the US*

*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*

*Global Housing*

*Global Thermoplastic Elastomers*

*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**

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