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# Adhesives & Sealants

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US Industry Study with Forecasts for **2017 & 2022**

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Study #2982 | March 2013 | \$5300 | 318 pages

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*Gains will be driven by an improved outlook for major markets and by trends toward greater use of adhesive bonding compared to mechanical fasteners in product assembly applications.*

## US demand to rise 2.2% annually through 2017

US demand for adhesives and sealants will rise 2.2 percent per year to 9.8 billion pounds in 2017, valued at \$11.9 billion. Gains will be driven by an improved outlook for major adhesives and sealants markets such as paper packaging, motor vehicles, and building construction, following the recession-plagued 2007-2012 period. Demand will also benefit from trends toward greater use of adhesive bonding compared to alternative joining technologies, such as mechanical fasteners, in product assembly applications.

## Reactive and hot melt types to grow the fastest

Natural adhesives and sealants will remain the largest product type through 2017. However, natural products will also see the weakest gains going forward, as the bulk of demand consists of low value starch adhesives used in corrugated cardboard production, a highly mature and slow growing application. The most rapid advances are expected for reactive adhesives and sealants, fueled by the rebounding manufacturing market, as well as by product substitution trends toward higher value materials. Hot melts will also see healthy gains, as their amenability to fast processing speeds will promote opportunities in the packaging market, while their lack of volatile organic compound (VOC) emissions will continue to make hot melts an environmentally preferable option.

## US Adhesives & Sealants Demand (9.8 billion pounds, 2017)



## Solvent-based products to outpace water-based types

Despite decades of losing share to alternative formulations, solvent-based adhesives and sealants will see above average increases in demand, bolstered by a turnaround in the construction sector and product reformulation efforts to lower VOC emissions. More moderate gains for emulsion and dispersion adhesives and sealants will stem from market maturity and competition from hot melts in leading outlets such as case and carton sealing. However, ongoing development of better performing water-based formulations will allow emulsion adhesives and sealants to penetrate new markets going forward.

## Construction to be fastest growing market

Among adhesives and sealants markets, the fastest growth is forecast for construction, which will rebound strongly from the sharp declines of the 2007-2012 period. Construction is an important outlet for sealants, which are widely used in both building and nonbuilding applications. The dominant packaging market will post among the slowest gains, based on weakness in the key paper packaging segment. In the manufacturing and assembly market, the fastest growth is expected for tapes and labels, motor vehicles, and machinery, while nonwoven disposables, furniture, and other outlets will rise at a subpar rate.

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## Sample Text, Table & Chart

### MARKETS

**Tape & Label Industry Outlook --** Shipments of label pressure sensitive tapes are projected to increase at a rate of 1.5 percent per year through 2022, reaching 1.5 billion square meters (3.7 billion square feet) in 2022. The rate of growth for tapes and labels is projected to be 1.5 percent annual, in contrast to the 2.5 percent annual growth rate for the entire adhesive market during the 2002-2012 period. The rate of growth for tapes and labels is projected to rise at a faster rate than the overall adhesive market. For labels, advanced packaging is the primary driver of growth. Continued expansion in large food and beverage packaging, pharmaceutical packaging, and packaging of pharmaceuticals and toiletries. However, growth in label demand will be offset by the rising popularity of flexible packaging -- which commends direct printing rather than labels -- due to cost, performance, and reduction advantages over rigid containers.

The pressure sensitive segment of the label industry will continue to lead output and account for the majority of demand in 2017. As pressure sensitive labels will expand at a healthy rate, they will continue to face growing competition from alternative labeling methods such as stretch sleeve, heat-shrink, and in-mold labels. Among these, heat-shrink labels are projected to advance at the fastest rate, with gains attributable to their ability to form-fit contoured containers, providing 360-degree graphics and a broad promotional area which enable consumer products to stand out on crowded store shelves. Paper will remain by far the leading stock material in the label industry; however, it will continue to lose market share to plastic, which will gain popularity due to its aesthetic and performance advantages over paper.

Gains in production of pressure sensitive tapes through the rebound from the volume declines of the 2007-2012 period. Increased manufacturing output will boost demand for corrugated boxes (used in the food and beverage sector), which in turn will support demand for carton sealing tapes through the forecast period. The strongest growth is expected in the masking tape segment, reflecting healthy gains in the construction sector.

130

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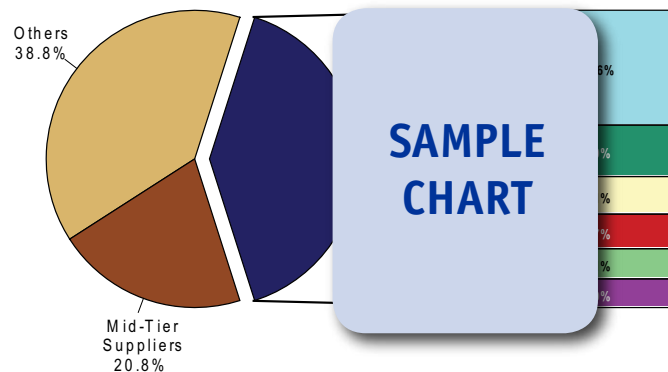
TABLE IV-9

TAPE & LABEL MARKET FOR ADHESIVES  
 BY SEGMENT & PRODUCT  
 (million pounds)

Item	2002	2007	2012	2017	2022
Tape & Label Shipments (mil sq meters lb adhesive/000 sq m tapes & labels)					
Tape & Label Adhesives					
By Segment:					
Tapes					
Labels					
By Product:					
Emulsion & Dispersion					
Acrylics					
Other Emulsions					
Solvent-Based					
Elastomeric					
Other Solvent-Based					
Hot Melt					
Other Adhesives					
% tapes & labels	32.0	31.0	30.0	29.0	28.0
Mfg & Assembly Adhesives/Sealants	2274	2505	2429	2795	3090

CHART V-1

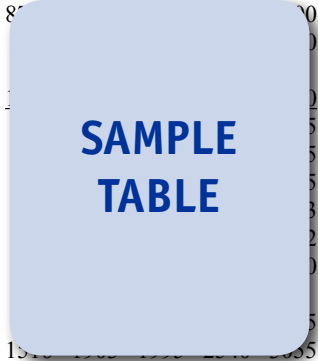
US ADHESIVES & SEALANTS MARKET SHARE BY COMPANY  
 (\$9.3 billion, 2012)



## Sample Profile, Table & Forecast

**TABLE III-6**  
**EMULSION & DISPERSION ADHESIVES & SEALANTS DEMAND**  
 (million pounds)

Item	2002	2007	2012	2017	2022
Adhesives & Sealants Demand	800	850	900	950	1000
% emulsions	80	80	80	80	80
Emulsion & Dispersion A&S Demand	640	680	720	760	800
Polyvinyl Acetate	150	150	150	150	150
Acrylics	150	150	150	150	150
Vinyl Acetate-Ethylene	150	150	150	150	150
Styrene-Butadiene Latex	150	150	150	150	150
Polyvinyl Alcohol	150	150	150	150	150
Other Emulsions	150	150	150	150	150
\$/lb	1.5	1.5	1.5	1.5	1.5
Emulsion & Dispersion A&S (mil \$)	960	1020	1080	1140	1200



**COMPANY PROFILES**

**Gardner-Gibson Incorporated**  
 4161 East 7th Avenue  
 Tampa, FL 33610  
 813-248-2101  
 http://www.gardner-gibson.com

**Annual Sales:**  
**Employment:**  
**Key Products:**

**SAMPLE PROFILE**

Gardner-Gibson, a member of the Gardner Industries Incorporated group (Tampa, Florida), is one of the largest US private producers of adhesives and sealants. The Company is privately held.

The Company is active in the US adhesives and sealants industry through the production of adhesives and sealants for wallcovering, driveway, and other construction applications. Wallcovering adhesives from Gardner-Gibson include products sold via the DYNAMITE series. Specifically, DYNAMITE adhesives include heavy duty clay types with strong hold for heavy and difficult-to-install wallcoverings, including vinyl, heavyweight fabric, flexible wood, and foil materials. These adhesives are designed to prevent seam spreading and curling. Furthermore, the Company offers GARDNER liquid bonding agent that creates strong adhesion between old and new plaster, stucco, stone, wood, concrete, glass, brick, and tile.

Gardner-Gibson produces such driveway sealing products as BLACK JACK, KRYSTAL BRILLIANCE, CRACKSTOPPER, and GARDNER sealants. BLACK JACK sealants are made from asphalt, sand, and other materials for filling in cracks and repairing other damage. These sealants are marketed under the DRIVE-MAXX, DRIVE-

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“Demand for acrylic emulsion adhesives and sealants will rise 4.0 percent per year to 590 million pounds in 2017, valued at \$915 million. Advances will be the fastest of all major emulsion product types, driven by a solid acceleration in the tape and label market. An expected rebound in building construction spending will also benefit demand for acrylic adhesives and sealants, as will a turnaround in machinery and motor vehicle production, where acrylics are used in product assembly applications. However, ...”  
 --Section III, pg. 50

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**OTHER STUDIES**

**Silicones**

US demand for silicones is forecast to climb 4.7 percent annually to \$4.3 billion in 2018, with volume rising 3.2 percent per year to 900 million pounds. Silicone elastomers will grow the fastest, overtaking fluids as the leading product type. The construction and medical markets will be the fastest growing segments, while the industrial market will remain dominant. This study analyzes the \$3.4 billion US silicones industry, with forecasts for 2018 and 2023 by product, market and application. It also evaluates company market share and profiles industry players.

#3138 ..... March 2014 ..... \$5100

**Industrial Fasteners**

US demand for industrial fasteners will rise 4.3 percent yearly to \$14.8 billion in 2017. Alternative joining methods such as adhesives, clinching and welding will prevent further gains. Externally threaded standard fasteners will remain the most common and will post the fastest gains, along with application-specific products. Construction will be the fastest growing market. This study analyzes the \$12 billion US industrial fastener industry, with forecasts for 2017 and 2022 by type and market. The study also evaluates company market share and profiles industry players.

#3095 ..... October 2013 ..... \$5100

**World Silicones**

World demand for silicones will rise 5.9 percent per year to \$18.9 billion in 2017. The Asia/Pacific region will remain the largest and fastest-growing market, but the rate of growth will slow. The construction segment will grow the fastest based on a recovery in the silicone-intensive construction sectors of the US and Western Europe. This study examines the \$14.2 billion world silicones industry, with forecasts for 2017 and 2022 by market, product, world region, and for 15 countries. The study also evaluates company market share and profiles industry participants.

#3022 ..... May 2013 ..... \$6100

**Natural Polymers**

US demand for natural polymers is forecast to expand 6.9 percent annually to \$4.6 billion in 2016. Cellulose ethers, led by methyl cellulose, will remain the largest product segment. Exudate and vegetable gums will enjoy the most rapid gains in demand. The oilfield market will grow the fastest, driven by rising demand for guar gum in hydraulic fracturing fluids. This study analyzes the \$3.3 billion US natural polymer industry, with forecasts for 2016 and 2021 by market and product. The study also evaluates company market share and profiles industry players.

#2963 ..... November 2012 ..... \$4900

**World Emulsion Polymers**

Global demand for emulsion polymers is forecast to rise 5.1 percent per year to 13.3 million metric tons (dry basis) in 2016. In developing nations such as China and India, demand will benefit from strong economic growth and increased penetration of waterborne technology in the coatings and adhesives industry. This study analyzes the \$26.1 billion world emulsion polymer industry, with forecasts for 2016 and 2021 by market, polymer, world region and for 15 major countries. The study also evaluates company market share and profiles industry participants.

#2929 ..... August 2012 ..... \$5900

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