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Adhesives & Sealants

US Industry Study with Forecasts for **2019 & 2024**

Study #3257 | February 2015 | \$5400 | 348 pages

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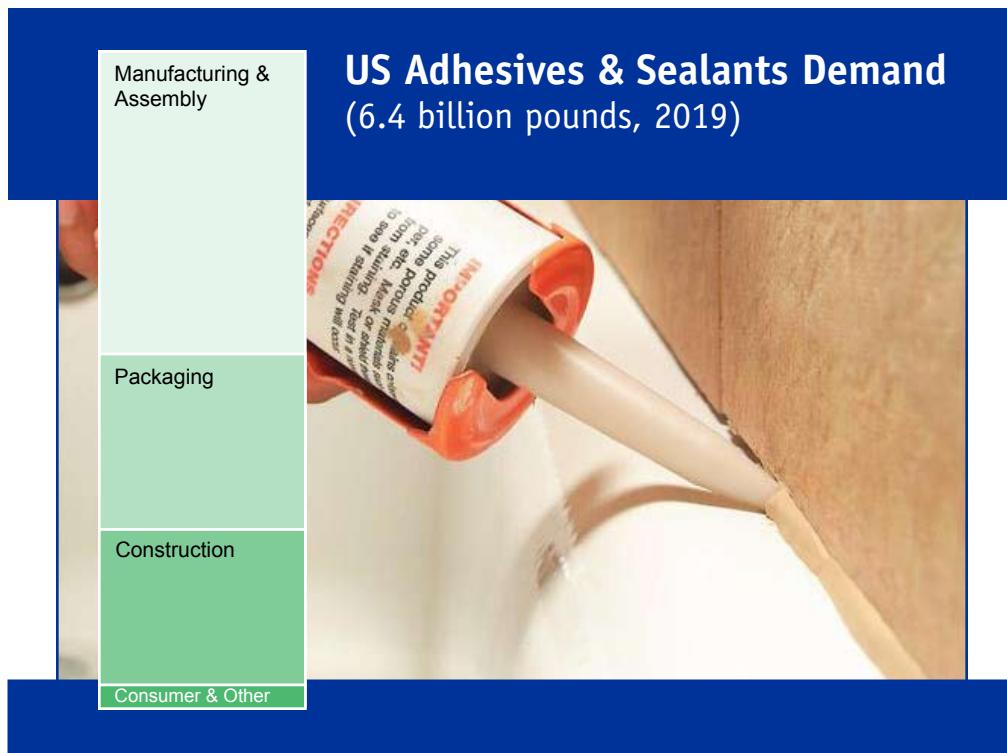
Gains will be supported by a turnaround in construction activity, combined with the expanding use of adhesives and sealants in manufacturing and assembly markets.

US demand to rise 2.8% annually through 2019

US demand for adhesives and sealants is forecast to increase 2.8 percent per year to 6.4 billion pounds in 2019, valued at \$12.8 billion. A turnaround in construction activity, combined with the expanding use of adhesives and sealants in manufacturing and assembly markets, will underpin demand gains. Adhesive bonding technologies are expected to make further inroads in applications historically dominated by mechanical fasteners and other alternative joining systems, especially as manufacturers continue to reduce the weight of products such as motor vehicles, aircraft, and electronics. However, advances will be limited by trends toward high solids formulations and lower application weights, which will reduce the volume of adhesives and sealants consumed.

Reactive adhesives & sealants to grow fastest

Emulsion and dispersion adhesives and sealants will remain the leading product type. The ongoing displacement of solvent-based products is expected to support increases as end users strive to meet emissions regulations through the adoption of water-based and higher solids formulations. Despite loss of market share, solvent-based products are expected to see near average demand increases, boosted by a rebounding construction sector and product reformulation efforts that improve their environmental profile.



The fastest annual growth through 2019 is expected for reactive adhesives and sealants, driven by rising demand in major markets (e.g., manufacturing and assembly, construction) and trends favoring higher value materials. Silicone and polyurethane adhesives and sealants will post the most rapid gains among reactive types, supported by their superior performance characteristics. Hot melt products will register near average advances, as their rapid cure rates continue to promote their use in markets such as packaging that require fast processing speeds. In addition, hot melt adhesives' lack of volatile organic compound (VOC) emissions will continue to benefit demand.

Construction to be fastest growing market

Among adhesives and sealants markets, the fastest annual gains are projected for construction, which will recover from the declines of the 2004-2014 period. Accelerated new building construction will fuel gains, as will increased improvement and repair activity and rising infrastructure spending. Faster gains will be prevented by the development of higher performance products with longer replacement cycles. The slowest annual gains are projected for the packaging market, which will be hampered by weakness in the paper and paperboard packaging segment.

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Sample Text, Table & Chart

PRODUCTS

Emulsions & Dispersions

Demand for emulsion and dispersion adhesives and sealants is projected to reach 2.5 billion pounds in 2014, up from 2.1 billion pounds in 2009. The market is dominated by solvent-based adhesives and sealants, but as end users strive for more environmentally friendly solutions of volatile organic compounds (VOC) content, emulsion and dispersion adhesives and sealants are gaining market share. Key performance characteristics including high strength and durability, good wettability, and resistance to solvents, heat, and creep. Water-based adhesives and sealants offer ease of application, low odor, paintability, and generally easy storage. However, further emulsion and dispersion demand will be limited by ongoing competition from hot melt formulations, which feature shorter setting times and zero VOC emissions. Market maturity in some applications such as box sealing and consumer glues will limit faster gains. Restraining factors related to the physical properties of emulsion adhesives and sealants include water's slow evaporation compared to other solvents, the need for surfactants to wet substrates such as plastics, and the products' relatively high price.

Emulsion and dispersion adhesives and sealants are those which use water as the primary carrier, although they often contain small amounts of organic solvents as well. Adhesive bonds are formed by physical hardening, through either the evaporation of water or the absorption of water into the substrate. Emulsion and dispersion adhesives include both wet bonding and contact types. In the wet bonding process, substrates are coated with an adhesive and joined before the water evaporates or absorbed (i.e., while it is still wet). In contrast, substrates coated with contact adhesives are brought together only after the water has evaporated, and the bond is formed via the application of pressure. Contact adhesives are generally favored over wet bonding types for the final strength as well as heat and creep resistance. Water-based

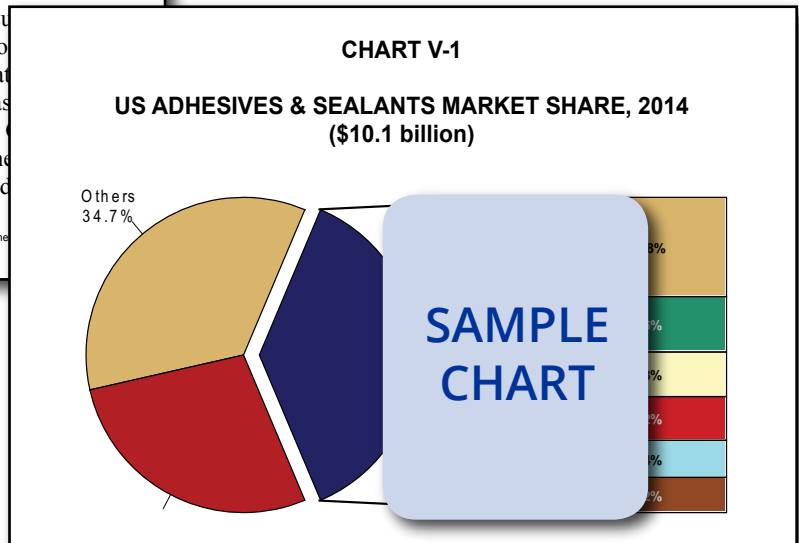
40

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TABLE IV-6
MOTOR VEHICLE MARKET FOR ADHESIVES & SEALANTS
BY SEGMENT & PRODUCT
(million pounds)

Item	2004	2009	2014	2019	2024
Motor Vehicles & Parts Shpts (bil 2009\$)	5.0	5.0	5.0	5.0	5.0
lb adhesive & sealant/000\$ MV shpts					
Motor Vehicle Adhesives & Sealants					
By Segment:					
OEM					
Aftermarket					
By Product:					
Emulsion & Dispersion					
Solvent-Based					
Hot Melt					
Reactive					
Other Adhesives & Sealants					
Polyvinyl Butyral					
All Other					
% motor vehicle					
Mfg & Assembly Adhesives & Sealants					

Source: The Freedonia Group, Inc.



Sample Profile & Table, & Study Coverage

TABLE III-11
POLYURETHANE REACTIVE ADHESIVES & SEALANTS
DEMAND BY MARKET
 (million pounds)

Item	2004	2009	2014	2019	2024
Reactive Adhesives & Sealants Demand % polyurethane					
Polyurethane Reactive A&S Demand					
Construction					
Aerospace & Other Transportation					
Packaging					
Motor Vehicles					
Other Markets					
\$/lb					
Polyurethane Reactive A&S Demand (mil \$)					

Source: The Freedonia Group, Inc.

SAMPLE PROFILE

SAMPLE TABLE

STUDY COVERAGE

This Freedonia study, *Adhesives & Sealants*, presents historical demand data (2004, 2009, 2014) and forecasts (2019, 2024) by product and market. The study also considers market environment factors, assesses industry structure, evaluates company market share and profiles 39 US industry competitors.

COMPANY PROFILES

Gardner-Gibson Incorporated
 4161 East 7th Avenue
 Tampa, FL 33605
 813-248-2101
<http://www.gardner-gibson.com>

Annual Sales:
 Employment:
 Key Products:

Gardner-Gibson Incorporated is one of the largest US private producers of adhesives and sealants. The Company is privately held.

The Company participates in the US adhesives and sealants industry through the manufacture of adhesives and sealants for wallcovering, driveway, and other construction applications. Wallcovering adhesives are available through the DYNAMITE series and include clay- and clear starch-based products. Clay-based adhesives are produced in heavy-duty strippable and non-strippable formulations, while clear starch-based adhesives include heavy-duty strippable, non-staining ultra-clear, and vinyl-over-vinyl types.

For driveway sealing applications, Gardner-Gibson manufactures sealants under the BLACK JACK, GARDNER, and GARDNER-GIBSON brand names. BLACK JACK sealants are intended for use on asphalt and blacktop driveways and include BLACK MAXX, SPEED-COAT, ULTRA-MAXX, DRIVE-KOTE, DRIVE-SEAL, and DRIVE-MAXX varieties. In addition, the BLACK JACK range includes SPEED-FILL elastic crack fillers, which are formulated for repairing and sealing cracks in asphalt pavement and masonry. Among Gardner-

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RELATED STUDIES

Waxes

This study analyzes the US wax industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., paraffin, microcrystalline waxes, polymer waxes, Fischer-Tropsch waxes, vegetable waxes, animal and insect waxes) and market (e.g., industrial, consumer and commercial). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.
 #3271April 2015 \$5200

Construction Chemicals

US demand for chemicals used in on-site construction will rise 8.2 percent annually through 2018 to \$12.1 billion. Sprayed polyurethane foam, cement and asphalt additives, and grouts and mortars will grow the fastest. Higher value formulations will continue to gain market share in response to environmental and performance concerns. This study analyzes the \$8.1 billion US construction chemical industry, with forecasts for 2018 and 2023 by product and application. The study also evaluates company market share and profiles industry players.
 #3239January 2015 \$5200

World Industrial Fasteners

World demand for industrial fasteners will climb 5.4 percent annually through 2018 to \$93.8 billion. Gains will be strong worldwide, but developing areas will outpace demand in developed countries. The key motor vehicle OEM market will post the largest value gains, while the smaller construction market will grow the fastest. This study analyzes the \$72 billion world industrial fastener industry, with forecasts for 2018 and 2023 by product, market, world region, and for 21 countries. The study also evaluates company market share and profiles industry participants.
 #3209 November 2014 \$6500

Gaskets & Seals

The US market for gaskets and seals is expected to expand 3.8 percent annually through 2018 to \$10.6 billion. Compression packings and molded seals and packings will be the fastest growing seals, while expanded graphite gaskets will be the most rapidly growing gasket products. The electrical and electronic products market will lead gains. This study analyzes the \$8.7 billion US gasket and seal industry, with forecasts for 2018 and 2023 by product and market. The study also evaluates company market share and profiles industry players.
 #3226October 2014 \$5100

World Paint & Coatings

Global demand for paint and coatings will rise 5.2 percent annually to 51.6 million metric tons in 2017, valued at \$186 billion. The Asia/Pacific region will remain the largest and fastest growing market and account for half of global demand by 2017. The key architectural segment will accelerate from the 2007-2012 period. This study analyzes the 40 million metric ton world paint and coatings industry, with forecasts for 2017 and 2022 by formulation, market, world region, and for 23 countries. The study also evaluates company market share and profiles industry players.
 #3135March 2014..... \$6200

About The Freedonia Group

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