World Adhesives & Sealants

Industry Study with Forecasts for 2019 & 2024

Study #3377 | January 2016 | $6300 | 417 pages
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World Adhesives & Sealants
Industry Study with Forecasts for 2019 & 2024

Demand will be driven by strong growth in construction activity and manufacturing output, and increasing adoption of adhesive bonding technologies designed to replace or augment mechanical fasteners.

World demand to rise 4.5% annually through 2019

Global demand for adhesives and sealants is forecast to rise 4.5 percent per year through 2019 to 20.2 million metric tons, valued at $64 billion. Strong growth in construction activity will underpin advances, driven by increased urbanization and infrastructure improvements in developing countries, combined with rebounding construction spending in Western Europe and the US. Expanding manufacturing output is expected to fuel growth across a number of segments, boosting adhesives and sealants use in packaging, tapes and labels, motor vehicles, electronics, and footwear applications, among others. Increasing adoption of adhesive bonding technologies designed to replace or augment mechanical fasteners will provide additional growth opportunities, as will the availability of improved, high-performance products.

China to remain top market, India to grow the fastest

China’s global dominance in several adhesives-intensive industries -- including electronics, footwear, furniture, and machinery -- will bolster the country’s position as the top adhesives and sealants consumer through 2019. Construction spending will remain robust in China, fueling demand for silicone and epoxy sealants, flooring and wall covering adhesives, and other products. Suppliers of packaging adhesives will benefit from growing urban populations and improving disposable incomes, which will continue to boost demand for packaged consumer goods sold in supermarkets, online, and via other retail outlets.

India is expected to post the most rapid advances of any major market, fueled by robust increases in construction spending and motor vehicle output. In India’s automotive sector, rising motor vehicle sales are fueling output and capacity expansions by major OEMs, boosting sales of epoxies, polyurethanes, and other adhesive and sealant types. Similar trends will also spur demand growth in the auto industries of Thailand and other emerging economies.

Construction market to capture increased share

While packaging will remain the leading outlet for adhesives and sealants, the construction segment is expected to capture increased share, buoyed by rebounding spending in North America and Western Europe. These regions are also expected to see healthy gains in their respective transportation equipment markets, as manufacturers of automobiles and aerospace equipment increasingly adopt adhesive technologies to help reduce vehicle weight and meet fuel efficiency requirements. Growing use of lightweight aluminum components, which are typically bonded using adhesives, is also boosting product use per vehicle.

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Asia/Pacific

India: Adhesive & Sealant Markets

The market for adhesives and sealants in India is forecast to increase at a healthy pace through to 2019, with a particularly strong performance anticipated in the construction sector, among other major markets. The construction sector, which is forecast to increase at a double-digit pace through 2019, will benefit significantly as the country boosts output of adhesives-intensive durables such as motor vehicles and furniture.

The largest volume increases are anticipated for the construction market, which is expected to rise nearly 10 percent per year through 2019 to eclipse packaging as the leading outlet for adhesives and sealants. Rising public and private investment will fuel gains, which will come from government construction projects targeting infrastructure improvements and support for the domestic tourism industry. Infrastructure spending -- which will stimulate adhesives and sealants usage for roads, bridges, and other nonbuilding construction projects -- is a particularly important component of the country’s 12th Five Year Plan (which covers the years between 2012 and 2017). Robust advances in residential building construction spending will also fuel adhesives and sealants consumption. In the residential sector, improving household income levels and consumer spending are expected to support purchases of larger homes, as well as sales of adhesives and sealants used in their upkeep.

The transportation equipment segment is forecast to post the best performance through 2019, advancing at a double-digit pace as motor vehicle output accelerates. Rising motor vehicle sales within the country and in export markets are fueling output and supporting capacity additions by major automakers such as Ford and General Motors.

Table V-3

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<th>2019</th>
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<td>$ GDP/capita</td>
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<td>Population (million persons)</td>
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<td>Construction Expenditures (bil 2013$)</td>
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<td>Packaging Demand (bil $)</td>
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<td>$/kg</td>
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<td>3.42</td>
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<td>1840</td>
<td>2645</td>
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Source: The Freedonia Group, Inc.
Cyberbond is a producer of industrial adhesives. The privately held company markets its products worldwide via a network of sales subsidiaries and offices.

Cyberbond’s range of adhesives includes APOLLO cyanoacrylate, CYBERLITE ultraviolet (UV)-curing, CYBERPOXY epoxy, TITAN anaerobic, and CYBERCRYL methyl methacrylate types. Cyberbond’s APOLLO cyanoacrylate adhesives consist of solvent-free super glues that exhibit quick setting times. CYBERLITE UV-curing adhesives are designed for applications that require enhanced resistance to thermal cycling under vibration, shock stress, or environmental exposure. In general, the Company’s TITAN anaerobic adhesives are formulated to produce metal-to-metal bonds that display high resistance to shock and vibration. CYBERPOXY epoxy adhesives made by Cyberbond are used to bond most plastic, metal, ceramic, wood, and rubber materials in a variety of electronics and general product assembly applications; while the Company’s CYBERCRYL methyl methacrylate adhesives are engineered for the structural bonding of various combinations of thermosets, nylons, engineered thermoplastics, composites, electrophoretic-coated materials, and metals. Cyberbond also offers a range of
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- Water Treatment

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

Related Studies

**Paint & Coatings**

US demand for paint and coatings is forecast to grow 3.8 percent annually to 1.4 billion gallons in 2019. Architecture will remain the largest market and grow the fastest. Water-based formulations will remain dominant and continue to gain market share. New technologies such as nanostructured coatings will drive future growth. This study analyzes the 1.2 billion gallon US paint and coatings industry, with forecasts for 2019 and 2024 by market, formulation and substrate. The study also evaluates company market share and profiles industry players.

#3317 August 2015 $300

**Waxes**

US demand for waxes will rise 1.8 percent annually through 2019 to three billion pounds, with value demand reaching $3.2 billion. Petroleum and mineral waxes will remain the dominant types, while synthetic waxes will grow the fastest. The leading industrial market will provide the best opportunities, particularly in the production of coatings and inks, adhesives, and building boards. This study analyzes the $2.4 billion US wax industry, with forecasts for 2019 and 2024 by type and market. The study also evaluates company market share and profiles industry players.

#3271 May 2015 $5200

**World Dyes & Organic Pigments**

World dye and organic pigment demand will rise 6.0 percent yearly to $19.5 billion in 2019. The Asia/Pacific market will remain dominant and will grow the fastest. The smaller organic pigments segment will outpace dyes due to increased use of high performance pigments in paints and coatings and plastics applications. This study analyzes the $14.5 billion world dye and organic pigment industry, with forecasts for 2019 and 2024 by product, market, world region, and for 19 countries. The study also evaluates company market share and profiles industry players.

#3264 April 2015 $6300

**Adhesives & Sealants**

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. Reactive adhesives and sealants will be the fastest growing types. The construction market will lead gains, while the manufacturing and assembly market will remain the largest segment. This study analyzes the 5.6 billion pound US adhesives and sealants industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry players.

#3257 February 2015 $5400

**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.

#3239 January 2015 $5200

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