

# Market Study: Adhesives



World Report (7<sup>th</sup> Edition)

# This brochure provides further information on the study “Adhesives – World (7<sup>th</sup> Edition)”

## Executive Summary

Vinyl is thriving! Although competition is becoming fiercer and adhesive technology is advancing rapidly, vinyl adhesives continue to lead the market in terms of demand. More than 14 million tonnes of adhesives are currently sold worldwide each year. Of this total, approximately 4.1 million tonnes are vinyl-based. Ceresana has now analyzed the global adhesives market for the seventh time: According to the market research institute, vinyl could see even further growth, particularly in packaging, consumer products, and simpler applications. However, the use of polyurethane, acrylic, and epoxy adhesives is currently growing even faster, at a rate of up to 3% per year.

### Opportunities and Challenges for Adhesives

The construction industry is the world’s largest consumer of adhesive materials. However, the “shoes, textiles, and leather” sector is seeing the strongest growth in demand for adhesives: Particularly in Asia and Africa, the shift of production to emerging markets and the growth of the middle class are driving up demand for reactive PU adhesives in the fashion and apparel industry. In the automotive industry, lightweight car bodies and batteries for electromobility are increasing the demand for adhesives. By region, the Asia-Pacific region accounts for approximately 43% of global adhesive sales, followed by North America and Western Europe. In addition to market data and forecasts, the global adhesives market report by Ceresana also contains background information on the regulatory framework in the EU as well as the general economic situation and the situation in the construction industry in the individual countries.

### Market Data on Innovative Adhesive Trends

How about “Debonding on Demand”? For recycling and repairs, adhesives that can be

removed precisely and without leaving any residue are practical. Nowadays, adhesives are tailor-made for a broad range of applications: There are already more than 250,000 different adhesive formulations, and the number is steadily increasing. Water-based adhesives account for around 46% of total demand. Hot-melt adhesives are particularly in demand in applications where solvent-free products and fast processing are essential, such as in the furniture industry or in timber construction. There are still opportunities for solvent-based adhesives in specialty and niche applications: Despite increasingly stringent regulations on volatile organic compounds, Ceresana expects growth of around 1.9% per year for these adhesive products.

### Current Market Study “Adhesives – World”:

Chapter 1 provides an overview and analysis of the global adhesives market, including forecasts up to 2034: The development of revenues, demand volumes, and production is analyzed for each region. In addition, 7 application areas, 6 products, and 5 technologies are examined. The study does not cover sealants, cement, mortar, phenolic and other formaldehyde condensates.

Chapter 2 analyzes the global market for adhesives in the 17 most important countries: Global demand for, export and import of, as well as revenues generated with adhesives are given. In addition, these countries are also analyzed in detail regarding application areas, products, and adhesives technologies.

Chapter 3 offers a useful directory of the 56 most important adhesive manufacturers, including 3M, ALTANA, Bolton, Saint-Gobain, DuPont, H.B. Fuller, Henkel, Nagase, Selena, and Sika.

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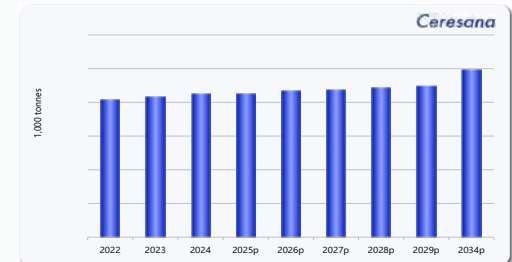
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##### 2.5.4.1 Demand and Revenues

The demand for adhesives amounted to around X tonnes in 2024. We forecast that total South Korean demand will rise by X% p.a. to approx. X tonnes in 2034.

The revenues that were generated with adhesives totaled about USD X billion in 2024. We forecast a sales volume of USD X billion for 2034.



Graph: Demand in South Korea from 2022 to 2034

Revenues	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2030p	2031p	2032p	2033p	2034p	2024-2034
Million USD	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Million EUR	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.

Table: Revenues generated in South Korea from 2022 to 2034, in million USD and million EUR

Million USD	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2030p	2031p	2032p	2033p	2034p	2024-2034
Paper and Packaging	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Construction	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Wood Processing	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Transportation	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Shoes, Textiles, Leather	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Consumer Goods	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Other	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>

Table: Revenues generated in South Korea from 2022 to 2034 – split by application

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2030p	2031p	2032p	2033p	2034p	2024-2034
Paper and Packaging	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Construction	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Wood Processing	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Transportation	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Shoes, Textiles, Leather	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Consumer Goods	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Other	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>

Table: Demand in South Korea from 2022 to 2034 – split by application

# Market Study: “Adhesives – World (7<sup>th</sup> edition)”

17 Countries, 56 Producers, 330 Pages, 92 Graphs, 239 Tables, 04/2026

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(For each country: revenues, import & export, production split by products, demand split by applications, technologies, and product types)

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in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
Vinyls	X	X	X	X	X	X	X	X	X	X% p.a.
Acrylics	X	X	X	X	X	X	X	X	X	X% p.a.
Polyurethane	X	X	X	X	X	X	X	X	X	X% p.a.
Elastomers	X	X	X	X	X	X	X	X	X	X% p.a.
Epoxy	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>

Table: Demand in South Korea from 2022 to 2034 – split by product

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
Water-Based	X	X	X	X	X	X	X	X	X	X% p.a.
Hot-Melt	X	X	X	X	X	X	X	X	X	X% p.a.
Solvent-Based	X	X	X	X	X	X	X	X	X	X% p.a.
Reactive	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>

Table: Demand in South Korea from 2022 to 2034 – split by technology

**General Economic Situation:**  
South Korea is one of the Asian “tiger states” that have made the leap from a poor agricultural country to an industrialized country in just a few decades. The country was almost completely destroyed in the Second World War, but above all in the war against communist North Korea (1950 to 1953). Today, it is one of the richest nations in the world: In 2025, South Korea ranked 14<sup>th</sup> behind Mexico in the list of the largest economies in terms...

**2.5.4.2 Production and Trade**  
About X tonnes of adhesives were produced in 2024. We forecast an increase of X% p.a. for the next 10 years. In 2034, the South Korean production volume will thus amount to X tonnes.

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
Production	X	X	X	X	X	X	X	X	X	X% p.a.
Import	X	X	X	X	X	X	X	X	X	X% p.a.
Export	X	X	X	X	X	X	X	X	X	X% p.a.
Demand	X	X	X	X	X	X	X	X	X	X% p.a.

Table: Production, import, export, and demand in South Korea from 2022 to 2034

Graph: Production in South Korea from 2022 to 2034

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
Vinyls	X	X	X	X	X	X	X	X	X	X% p.a.
Acrylics	X	X	X	X	X	X	X	X	X	X% p.a.
Polyurethane	X	X	X	X	X	X	X	X	X	X% p.a.
Elastomers	X	X	X	X	X	X	X	X	X	X% p.a.
Epoxy	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>

Table: Production in South Korea from 2022 to 2034 – split by product

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- Belgium (2 Producers)
- Finland (1)
- France (2)
- Germany (8)
- Italy (2)
- Sweden (1)
- Switzerland (4)
- The Netherlands (1)
- United Kingdom (1)

#### 3.2 Eastern Europe

- Estonia (1)
- Poland (1)
- Slovakia (1)
- Slovenia (1)
- Türkiye (1)

#### 3.3 North America

- USA (10)

#### 3.4 South America

- Brazil (1)

#### 3.5 Asia-Pacific

- China (5)
- India (1)
- Japan (9)
- Malaysia (1)
- South Korea (1)
- Taiwan (1)

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**Financial Key Data (in Billion CHF)**

Year	Net Sales (Billion CHF)	Net Income (Billion CHF)
2025	11.2	1.05
2024	11.8	1.25
2023	11.2	1.06
2022	10.5	1.16

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**General Information about the Company**

**Divisions, Product Range** The company operates in the following business fields:

- Construction solutions
- Industry solutions

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**Production Sites** The company operates more than 400 production sites worldwide.

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**Profile Summary** **General information:**

Sika AG was founded in 1910. The specialty chemical company engages mainly in the development and production of systems and products for adhesive bonding, sealing, steaming, reinforcing, and protecting for the construction and transportation industries. Sika is active worldwide, has subsidiaries in 102 countries and produces in over 400 factories. The group also operates 16 Global Technology Centers and more than 100 regional and local laboratories.

In 2025, the group employed about 33,700 people, 1,800 of which worked in R&D.

**Financial information:**

Sika is listed on the SIX Swiss Exchange.

The group's total assets amounted to CHF 15.1 billion in 2025. Furthermore, Sika's research and development expenses totaled CHF 281 million.

Split by region, 46% of net sales in 2025 were generated in the EMEA region, 34% in the Americas, and 20% in Asia-Pacific.

Split by product segment, 85% of net sales were generated with products for the construction industry and 15% with products for industrial manufacturing.

**Current news:**

In 2024, the group acquired Kwik Bond Polymers, LLC, USA, Vinaldom S.A.S., Dominican Republic, and Chema Group, Peru, reinforcing its product portfolio of bridge decks, concrete, and tile setting materials, respectively.

In 2025, Sika's acquisitions included Elmich Pte Ltd, Singapore, Cromar Building Products Limited, UK, Gulf Additive Factory LLC (GAF), Qatar, Marlon Tørmørtel A/S, Denmark, and Awazil AlKhaleej Industrial Company LLC ("Gulf Seal"), Saudi Arabia. Moreover, the group acquired the remaining 51% stake of HPS North America, Inc., a supplier of building finishing materials.

**ISO certifications:**

In 2025, 60% of Sika's sites were certified according to ISO 9001 and 32% according to ISO 45001. Many sites are also ISO 14001 certified.

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**Specific Information about Adhesives**

Sika AG and its subsidiaries manufacture a broad variety of adhesives, including elastic and rigid adhesives as well as adhesive sealants and foams that are based on different materials including epoxy, multipurpose methacrylate, STP, butyl, and polyurethane. They are used in various industrial and construction applications such as flooring, concrete structures, automotive, home appliances, renewable energies, and functional and technical textiles.

Sika's adhesive portfolio includes the following brands: Sikaflex, SikaBond, Sikadur, SikaFast, SikaForce, SikaMelt, Sika Power, SikaTack, and Sika AnchorFix...

\*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

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As one of the world's leading institutes for market research, we have been specializing in the areas of mobility, chemicals, plastics, packaging, industrial goods, and bio-economy for the past 22 years.

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**If you have any questions, please do not hesitate to contact us.**

## Reliable Data and Facts for Your Knowledge Advantage:

- Revenues, demand, production, import, and export until 2034
- Macroeconomic and sector-specific explanations per country
- Segmentation into applications, technologies, and products
- 7 world regions and up to 40 countries
- Profiles from manufacturers with capacities

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<b>Packaging</b>	<a href="#"><u>Plastic Films – Europe / – World</u></a>		

