

EUROPEAN ADHESIVES AND SEALANTS — MARKET REPORT — 2025 - 2030

DESCRIPTION BROCHURE



Introduction

This report is the ninth edition of the market study programme entitled 'The European Adhesives and Sealants Market', prepared by Smithers on behalf of FEICA, the Association of the European Adhesive and Sealant Industry.

The first FEICA European market report was issued in 2005 and covered the period 2004-2007. In 2008, the second edition was released covering the period 2007-2010. This ninth edition covers the period 2025-2030. With much disruption and uncertainty in the marketplace today, having an accurate picture of the market remains to be more important than ever.

The aim of this programme is to provide market statistics from an independent source which are updated at regular intervals. The analysis is based on extensive desk and primary research. It consists of market knowledge obtained by direct interviews from the adhesives and sealants industry (formulators, raw material producers and equipment suppliers), analysed by Smithers experts, and expertise checked by industry experts. The geographic scope of the study encompasses Europe, including Western Europe, Central and Eastern Europe (CEE) and Turkey. The European region is split into 5 regional markets, which are analysed by market segment and product category.

The study follows the harmonised FEICA-ASC-CATIA Adhesives and Sealants Classification Manual. Furthermore, the 200+ page report is structured in such a way as to facilitate international comparisons between Europe, NAFTA and the Asia-Pacific region. The North American market is analysed in a separate companion report offered by the Adhesive and Sealant Council (ASC).

The market size is defined for the year 2024 and a demand forecast for the period 2025-2030 is also provided. The statistical data are reported in tonnes and euro currency.

The facts set out in this publication are obtained from sources which we believe to be reliable. However, we accept no legal liability of any kind for the publication contents, for any information contained therein or for conclusions drawn by any party.

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THIS DOCUMENT IS FOR REFERENCE ONLY AND IS INTENDED TO PROVIDE PROSPECTIVE BUYERS AN IDEA OF THE ACTUAL CONTENTS OF THE FEICA MARKET REPORT.

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Executive summary

Overview

The European adhesives and sealants (AES) market amounted to a combined volume of 4.64 million tonnes in 2023 with a value of €20.1 billion. Adhesives accounted for 82.1% share of the total volume in 2023 and 76.4% share of the value. The volume demand for adhesives and sealants will increase in 2024 to an estimated 4.77 million tonnes, with the market value increasing to €20.7 billion.

The combined demand for adhesives and sealants in Europe is forecast to increase by 1.7% CAGR in volume between 2023 and 2030 to 5.14 million tonnes by the end of this period. The value is forecast to grow by 3.1% CAGR over the reporting period to reach a market of €23.3 billion. Although sealants have a smaller share of the European AES market, their demand is forecast to grow at a slightly faster rate in volume than adhesives between 2023 and 2030.

FIGURE 6.1 Europe adhesives & sealants market in 2024 ('000 tonnes and € million)



Source: PricewaterhouseCoopers

Demand for adhesives and sealants has grown steadily since 2021 with markets starting to stabilize as energy prices and inflationary pressures gradually eased. Although the value has still grown at a faster pace than volume over the last two years, the rise of price increases has slowed. Customer shortages and inflationary costs were seen at the start of the pandemic recovery in 2021 and have affected global shipping capabilities in 2024. Trade flows remain unpredictable and transportation costs fluctuate for both shipping and carriers. Shipping costs have also been impacted by higher fuel prices and increased compliance costs from new environmental regulations, as well as problems on the far east sea routes through the Suez and Panama Canals which led to delays and/or additional expenses from having to divert to a longer route.

These regional problems and the freeze from US tariffs and heightened trade tensions in 2023 present some challenges for many businesses within the European adhesives and sealants industry. Some adhesives and sealant manufacturers are looking at options to source more materials from European suppliers, particularly ones in the same country, to cut down on shipping energy fuel costs but have been disappointed and most AES production has at least been regulated for the raw materials, one of which is primarily based in Europe. However, stopping the production of raw materials based in Europe presents several major challenges, including high energy costs and greater regulation than in most other parts of the world.

Adhesive trends

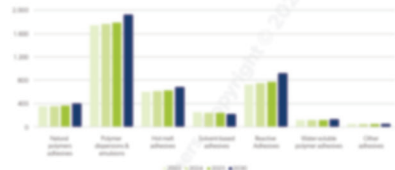
Adhesives based on carboxylic diisocyanates are the largest product group used in Europe with 45.4% share of volume demand in 2023. Reaction-curing adhesives accounted for 16.3% of volume demand in the same year and

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Reaction adhesives have a share of 10.8%. The use of solvent-based adhesives in Europe has been declining for some time and this trend is forecast to continue up to 2030 as end users switch to more environmentally friendly alternatives. The rate of change will, however, be slow since the demand for performance properties, especially many solvent-based adhesives still provide the best solution for certain applications over the next five years.

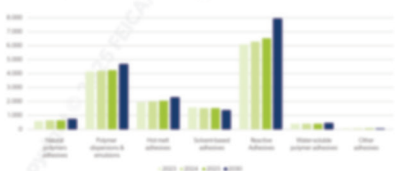
Reaction adhesives demand has seen strong growth since 2021 and they are forecast to sustain the fastest growth rate of all adhesives types in the five years up to 2030. This growth comes from an increased demand for high-performance applications, such as the growing use of adhesives in replace mechanical fastenings in the automotive industry and in industrial assembly operations. Adhesives based on isocyanate polymers are also forecast to grow faster than the average growth from 2023 to 2030 due to an increased demand for sustainable materials.

FIGURE 6.2 Europe adhesives demand by product category, 2023-2030 ('000 tonnes)



Source: PricewaterhouseCoopers

FIGURE 6.3 Europe adhesives demand by product category, 2023-2030 (€ million)

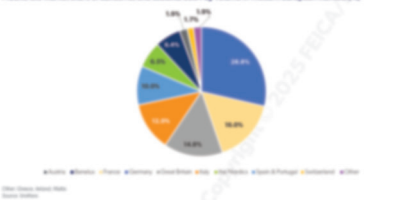


Source: PricewaterhouseCoopers

European overview - key market drivers and trends

Germany has the largest share of the European market for adhesives and sealants with a combined demand of €25.9 billion in 2024. France and Great Britain were the next two largest markets in Western Europe with demand of €10.1 billion tonnes and €10.0 billion tonnes respectively.

FIGURE 3.3 Market share of adhesives and sealants 2024 by volume in Western European markets (%)



Average per capita consumption for the CEE region is significantly lower than in Western Europe at 4.0 kg, with Russia having the lowest average consumption of all 49 countries in Europe. Table 3.2 shows the average per capita adhesive and sealant consumption for the markets in Central and Eastern Europe from 2020 to 2030, and for 2024.

TABLE 3.2 CEE demographic and macroeconomic data 2020-2030

Countries	Population	GDP	Per Capita GDP	GDP	Per Capita GDP	Adhesives & Sealant Demand	Per Capita Adhesives & Sealant Consumption
Unit	Millions	€ Billions	€ Billions	€ Billions	€ Billions	1000 T	kg
Central & Eastern Europe	152.3	485.0	3.2	485.0	3.2	10.0	6.6
Germany	83.0	437.0	5.3	437.0	5.3	21.9	2.6
France	68.0	340.0	5.0	340.0	5.0	20.0	2.9
Italy	60.0	280.0	4.7	280.0	4.7	19.0	3.2
Spain	46.0	180.0	3.9	180.0	3.9	15.0	3.3
UK	67.0	340.0	5.1	340.0	5.1	20.0	3.0
Other	80.0	100.0	1.3	100.0	1.3	3.0	3.8
Europe Average	200.0	1,000.0	5.0	1,000.0	5.0	17.0	8.5

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European adhesives and sealant market by product category

Adhesive sales in Europe in 2024 amounted to 1.88 million tonnes with a value of €17.5 billion. Over the five year period to 2030, the demand for adhesives in Europe is forecast to grow at 1.3% CAGR by volume, while the value will grow at 2.5% CAGR over the period. The sealant market is forecast to grow at 1.4% CAGR over the period with a value of €1.5 billion.

TABLE 3.3 Europe adhesives demand by product group, 2023-2030 ('000 tonnes & € million)

	2023	2024	2025	2026	2027	2028	2029	2030
Adhesives	1,880.0	1,900.0	1,920.0	1,940.0	1,960.0	1,980.0	2,000.0	2,020.0
Adhesives based on elastomers	1,880.0	1,900.0	1,920.0	1,940.0	1,960.0	1,980.0	2,000.0	2,020.0
Epoxies	1,880.0	1,900.0	1,920.0	1,940.0	1,960.0	1,980.0	2,000.0	2,020.0
Acrylics	1,880.0	1,900.0	1,920.0	1,940.0	1,960.0	1,980.0	2,000.0	2,020.0
Other adhesives	1,880.0	1,900.0	1,920.0	1,940.0	1,960.0	1,980.0	2,000.0	2,020.0
Sealants	1,880.0	1,900.0	1,920.0	1,940.0	1,960.0	1,980.0	2,000.0	2,020.0
Sealants based on elastomers	1,880.0	1,900.0	1,920.0	1,940.0	1,960.0	1,980.0	2,000.0	2,020.0
Other sealants	1,880.0	1,900.0	1,920.0	1,940.0	1,960.0	1,980.0	2,000.0	2,020.0
Total	3,760.0	3,800.0	3,840.0	3,880.0	3,920.0	3,960.0	4,000.0	4,040.0

Western Europe accounted for nearly 92.7% of total volume demand in 2024 with a market of 1.74 million tonnes. Demand in this sub-region is forecast to see only modest growth of 1.2% CAGR from 2023 to 2030 when it will reach 1.88 million tonnes. The Central and Eastern Europe region accounted for demand of 140 million tonnes in 2024 and is forecast to exhibit stronger growth than that in Western Europe over the next five years. A forecast growth in volume demand of 2.5% CAGR in CEE, plus 2024 will result in a market for 1.7 million tonnes.

TABLE 3.4 Western Europe adhesives demand by product group, 2023-2030 ('000 tonnes & € million)

	2023	2024	2025	2026	2027	2028	2029	2030
Adhesives	1,740.0	1,760.0	1,780.0	1,800.0	1,820.0	1,840.0	1,860.0	1,880.0
Adhesives based on elastomers	1,740.0	1,760.0	1,780.0	1,800.0	1,820.0	1,840.0	1,860.0	1,880.0
Epoxies	1,740.0	1,760.0	1,780.0	1,800.0	1,820.0	1,840.0	1,860.0	1,880.0
Acrylics	1,740.0	1,760.0	1,780.0	1,800.0	1,820.0	1,840.0	1,860.0	1,880.0
Other adhesives	1,740.0	1,760.0	1,780.0	1,800.0	1,820.0	1,840.0	1,860.0	1,880.0
Sealants	1,740.0	1,760.0	1,780.0	1,800.0	1,820.0	1,840.0	1,860.0	1,880.0
Sealants based on elastomers	1,740.0	1,760.0	1,780.0	1,800.0	1,820.0	1,840.0	1,860.0	1,880.0
Other sealants	1,740.0	1,760.0	1,780.0	1,800.0	1,820.0	1,840.0	1,860.0	1,880.0
Total	3,480.0	3,520.0	3,560.0	3,600.0	3,640.0	3,680.0	3,720.0	3,760.0

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